



CASE STUDY



Atlassian Jira and Confluence Hosting



About Intelliflo

Industry: Financial services software

Intelliflo provides a range of cutting-edge solutions that support over 30,000 financial professionals worldwide.

Bringing together leading businesses in the financial services sector, its technology cuts costs and saves time.

Intelliflo is dedicated to powering the entire advisory lifecycle through a range of open architecture solutions, as the global leader in financial advice technology.

The challenge

Intelliflo was running Jira internally and wanted to start running Confluence as well. Experts decided to outsource the implementation of these tools to Clearvision in order to reduce the dependency on internal resources.

Clearvision's work began when Intelliflo's teams found that managing the Atlassian Stack internally was distracting from tasks.

Alex Madden from Intelliflo said, "We ran a supplier pitch and the fact that Clearvision is a UK-based Platinum Atlassian Expert and could host in the UK, was a big advantage. The biggest benefit to Intelliflo is that we get the peace of mind of knowing that the Atlassian tool chain is going to be upgraded for us, by people who know what they are doing, and we'll always be running on the most up to date system."



The biggest thing for us is that upgrades have gone from being something we needed to maintain, to a set of capabilities we don't need to worry about because Clearvision has our back."

- Alex Madden from Intelliflo



The solution

Intelliflo purchased [Confluence](#), Atlassian's collaborative wiki tool, along with a support period of 12 months.

Confluence is a communication and collaboration platform that allows for transparency across various departments, vastly improving the communication within teams. Now that its teams are using this tool, Intelliflo can connect its entire business in one place online to easily collaborate and capture knowledge, ideas, documents, minutes, and projects.

For Intelliflo, Jira allows transparency between all departments, so each team knows what is happening across the business and all are on the same page working toward unified business goals.

Intelliflo were already users of [Jira](#) but wanted to move to a hosted version. Jira is an issue and project tracking tool, which allows users to track units of work (be it an issue, bug, story, project task, etc.) through a predefined workflow. With this system of ticket tracking in place, users can gather tasks in the backlog and give tasks value-driven prioritisation.

Additionally, Intelliflo decided to host its [Jira and Confluence tools](#) for:

- Daily dedicated backups.
- Lights on support.
- Basic system support (to ensure the system is running).
- Basic application support (to ensure the application is running).
- Basic application install.
- Upgrades (up to two upgrades per application, per year).
- Patches (emergency and regular security patches).
- Operating system patching.



The implementation was absolutely flawless, with literally no issues, it all just started working on the day they said it would. Since then we've done an upgrade, which again was done with no issues."

- Alex Madden, Operations Architect



Moreover, Intelliflo requested to migrate its Jira instance to Clearvision's hosted version. The entire migration took just two consecutive days:

Day 1 Identifying Intelliflo's current Jira configuration, as well as the potential challenges with the migration, and mapping out a detailed migration path.

Day 2 Focusing on the backup, UAT, and handover.

Now and in the future

Intelliflo adopted [Jira Service Desk](#) (now Jira Service Management) for 10 users:

Jira Service Desk (JSD) will make it easier for Intelliflo to serve its internal customers and for those customers to ask for help with smart, automated knowledge base suggestions. It provides a support portal for both internal and external customers, where they can quickly and simply raise support tickets. With JSD, agents have visibility over how much time has elapsed on tickets raised, and automations can also be set up, allowing agents to focus on solving the important jobs and helping to lighten the workload.

Moreover, Intelliflo is considering adopting a third-party tool to connect Salesforce.com and Confluence. As well as this, Intelliflo is looking to adopt the Scheduler for Jira add-on, which allows for the scheduling of issues in Jira and enables everyone to quickly set up recurring tasks.

Alex said, "Our Atlassian tools are critical productivity tools used across the business; it's really important they are always working – so it helps us focus on our core business to know that we've got someone else dealing with this stuff for us."



We had a call with the people at Clearvision, which left me with the clear impression they knew what they were talking about. They came with a really good price, which was competitive with US-based suppliers.”

- Alex Madden, Operations Architect

The breakdown

Confluence

A wiki solution that offered Intelliflo better knowledge sharing and collaboration across teams.

Jira Software

Intelliflo’s issue tracker for software development, IT Support, and BAU activities.

Jira Service Management

Intelliflo’s internal helpdesk portal with smart, automated knowledge base suggestions.



Their entire Atlassian Stack was supported and maintained.



Ready to stop worrying about your tools?

Let the experts migrate your data to minimise the risk of data loss and benefit from a hosted **Cloud** environment with **support** hours included.