



CASE STUDY



**simplyhealth**

---

Atlassian Tool Implementation



# Clearvision

CASE STUDY



**Industry:** Health and Dental Insurance

## About Simplyhealth

[Simplyhealth](#) has been helping people for over 140 years and has 3.5 million customers. Its roots are in the hospital funds set up in the Victorian era to help working people save for their medical care. Simplyhealth believes in helping others whether it's caring for the elderly or supporting people with their mental health.

It is the UK's leading provider of health cash plans, dental payments, and pet health plans. Its retail division, The Unlimited Company, offers a range of premium daily living aids and mobility products.

## The Challenge

Simplyhealth's previous IT service desk was dated and provided no visibility to internal customers on issues and requests. The team had to spend a lot of time updating colleagues and internal customers on the status of calls.

Visibility was limited to those working on the same project. A centralised and manageable place for knowledge sharing and 'how to' documentation that could be updated was required.

# The solution

Once the suitable Atlassian tools had been identified, Simplyhealth sought consulting services to further define workflows and processes for Jira Service Desk (Jira Service Management), Jira Agile, and Confluence.

Clearvision worked on-site with Simplyhealth for three working days, reviewing tooling, processes, workflow setup, and environments. Key members of the team were interviewed to define goals.

[Jira Service Management](#) (JSM) made it easier for Simplyhealth to serve its internal customers and for those customers to ask for help.

With JSD, agents gained visibility over the time spent on tickets raised. Automations were also set up for agents to focus on solving and lightening the workload. The aim was to drive collaboration and knowledge sharing to protect the innovation and project teams to deliver more value.

**“ Replacement of our IT service desk solution led us to Jira Service Desk and therefore Clearvision. We have seen some impressive results; resolution in the 1st line team jumped from 42% to 77%.”**

- Chris Dale, Head of Testing at Simplyhealth

Simplyhealth used Jira Agile to plan and adopt agile practices. Teams can now create and estimate stories, build a sprint backlog, visualise activity, measure team velocity, and report on progress.

Additionally, Clearvision provided Simplyhealth with [Confluence](#), a communication and collaboration platform for transparency within various departments, vastly improving the communication within and across teams.

With these tools, Simplyhealth has better visibility over work and can manage time more efficiently.



To boost the adoption of new tools, Simplyhealth required training and selected [Clearvision's Jira Basics course](#) to be delivered to 20 users in its Andover office. This provided Simplyhealth with an understanding of basic Jira concepts, including working with issues, searching, and reporting. At the end of the course, users were able to use Jira to work with issues and provide tracking and control for software development projects. Simplyhealth also underwent [Jira Advanced training](#), providing teams with a deeper understanding of the various ways it can be tailored to meet specific custom project and process requirements.

The training included lab exercises, which gave users a practical working area to engage in, enabling them to benefit from seeing Jira in action with real-world settings and examples, translating the theory from the course into practical knowledge. Clearvision additionally provided two days of mentoring designed primarily for identified Atlassian Admin users and senior IT Management. This involved one on one training with Clearvision consultants around Simplyhealth's system tools.



## Now and in the future

Simplyhealth is increasing collaboration and visibility across teams with Confluence.

Moreover, Simplyhealth plans on integrating Jira with Bitbucket Server, which will enable users to:

- See the related branch, commit, and pull request information in a Jira issue.
- Create Git branches from within Jira and Jira Agile.
- Transition Jira issues from within Bitbucket Server.
- Use Jira issue keys in Bitbucket Server markdown.
- See the details of Jira issues in Bitbucket Server.
- See, in Bitbucket Server, Jira issues relating to Bitbucket Server commits and pull requests.
- See development information in Jira, such as Branches and Commits from Bitbucket.



**Training was provided to a group of people who we identified as superusers to allow as much empowerment of the end-user as possible and to reduce the systems administration."**

- Chris Dale, Head of Testing at Simplyhealth

With the help of Jira Software, all activities around an asset can now be stored in one place. Users can build an effective history on every asset and know who is responsible for what thanks to the assignee field, and Jira keeps a rich audit trail, so it's easy to know the story behind each asset. When it comes to release management, teams have further visibility with Bitbucket and can view commits history against Jira issues. Workflow processes from Jira, help teams master release management since it adds structure and provides additional reporting capabilities.

Overall, the company will see huge cost savings by effectively mastering the discipline of asset management.



Clearvision provided the opportunity and facilitation to accurately draw out the requirements, ensuring that we had a clear understanding of how we were going to implement the solution. Their initial expertise really helped us focus on the vision and turn this into quick wins so that we could realise the ROI in the short term."

- Chris Dale, Head of Testing at Simplyhealth

## The breakdown

Find out more about the services our [Consultants](#) offer.

### Confluence

A wiki solution that offered Simplyhealth better visibility across teams and their work.

### Jira Software

Issue tracker used for Simplyhealth's IT Change, support project, and BAU activities.

### Jira Service Management

Simplyhealth's customer support portal with smart, automated knowledge base suggestions.

### Jira training and mentoring

For real-world examples and learning-by-doing training, with Simplyhealth's own system and use cases.

### System and tools review

A discovery phase to start the project, assess tool usage, pain points, and bespoke requirements.



**Choose Clearvision for clarity on the tools used by your teams.**

[Speak to us now](#)