



Automation in Jira Makes Customer Ticket Resolution Times 83% Faster for a Healthcare Finance Company



From automatic ticket creation to fewer errors, native features within Atlassian Jira are a gamechanger for companies that exploit them, driving better output and employee experience. Trundl, a Platinum Enterprise Atlassian Solution Partner, helped make it happen.

Despite being one of the leading financial communications and payment solution companies in North America, this Trundl customer was missing out on automation opportunities they didn't even know existed.

This healthcare finance company is a leading player in revenue cycle management and accounts receivables management for companies seeking to maximize their financial results through dynamic and personalized print, online, phone, email and text communications, as well as self-service payment options.

The Challenge

The organization was using a cumbersome and complex combination of emails, multiple tools, and manual intervention in its operations for providing root cause analysis (RCA) / root cause investigation (RCI) to customers. Working manually meant more errors and less time left for strengthening core business practices. Alternating between multiple tools to fetch data created a chaotic work experience. Turn-around times took longer than expected, and work requests were often missed by technicians constantly struggling with an overwhelming workload.



Industry

Healthcare Finance



Location

Detroit, Michigan



Atlassian User Base

800



Atlassian Products (Cloud)

Jira Software, Jira Service Management, Confluence, Statuspage, Access



Atlassian Marketplace Add-Ons

Timesheet Reports & Gadgets, Jira Misc Workflow Extensions, Zephyr Squad Test Management, External Data for Jira Fields

The company wanted a system that would complement their ability to rapidly respond and resolve – designed in a manner that allows them to change or update new features or processes in hours, not weeks.

Choosing Suitable Tools

Choosing an automated solution that offers a unified view of work through an open, collaborative platform was critical for achieving the above objectives. Our in-depth analysis of the company's business procedures, policies and tasks revealed that the following tools would be key for success.

- > Jira Service Management
- > Jira Software
- > Confluence
- > Statuspage
- > Opsgenie
- > Celigo
- > Scriptrunner
- > EazyBI
- > JMWE

Opportunities for Impactful Automation in Jira Cloud

Trundl's objective was to streamline as many processes as possible using native automations for Jira. Having the teams work on a unified instance to fetch everything on a single ticket using third-party integration tools was the goal. Mapping Salesforce IDs to Jira tickets was the biggest target. Trundl designed the solution in such a way that, as soon as one opportunity is closed in Salesforce, it automatically creates an Epic in Jira (with all relevant details there).

The work involved the challenging processes of mapping field data from Celigo (a third-party tool which integrates Jira with other tools) to Jira fields to create a single source of truth within the ticket. Trundl collaborated heavily with the customer to ensure the data was fetched accurately through changing field types.

Approach to Change

Trundl participated in weekly stand-up meetings and evaluated the progress iteratively, together with the customer. Smoke tests were conducted before proceeding with different stages of the project, and gaps between requirements and outcomes were bridged with necessary modifications. Improvements were made to the system during the project as needed.

As the company was new to Jira, Trundl's technical team walked them through everything and even helped them from time to time with administrative tasks.



Key Automations Introduced

- | Webhook to fetch Salesforce customer information into all tickets created by the customer
- | Print Assignment Logic based on Reporter Salesforce Account
- | Fetching Salesforce account attributes upon RCA & RCI issue create/edit
- | Fetching the Salesforce value from linked issues in RCS Project
- | Fetching the key word from issue summary and routing the ticket to correct group based on summary

Post Implementation Outcomes

Maximizing automations between Jira and Salesforce dramatically improved velocity. Prior to the enhancements, the company's customer support team had to pause and check details in Salesforce every time they received a support ticket. **The average ticket took 4 hours for resolution. Post enhancements, that was reduced to 40 minutes on average (83% less).**



Other Communicated Benefits:



Higher employee satisfaction and productivity by eliminating repetitive tasks



More time to focus on strategic initiatives and innovation



Reliable and consistent work with fewer errors



Significant potential cost savings across impacted processes



Enhanced visibility, transparency and accountability