Bridging Strategy and Tactics with Jira Align

by Filip Petrescu

Agenda

What is the agenda for today?

- Introduction
- Useful links
- Strategy vs Tactics
- Key challenges
- What is Jira Align?
- How does it work?
- Benefits of using Jira Align?
- Best Practices
- Demo

Introduction

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Useful Links

Need help?

www.envorso.com

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Free 60 min session with me or one of our Solutions Engineers.

Atlassian assessment: a 5 days engagement to provide a roadmap of ways to improve your setup.

Proof of Concept in 2 weeks. Let us build you a PoC to help explore future opportunities.

Try Jira Align: https://www.atlassian.com/software/jira/align

Strategy vs Tactics

Question #1

Why is essential for Strategy to be connected to the Tactics ?

Strategy: Vision, Goals, and Value delivery through Objective Key Results (OKR)
Answers to: WHAT and WHY

Tactics: Deliverables, specific actions to achieve objectives (OKR), measurable through Key Performance Indicators (KPI)
Answers to: HOW

Bridging the Two

- Bridging strategy and tactics is **making sure your actions are aligned with your vision and goals**.

Why It Matters:
If there's no bridge between strategy and tactics, the organization might waste time and resources on things that don't actually help reach its big goals. Digital transformation acts as the bridge that allows organizations to scale effectively by aligning their long-term strategy with actionable tactics therefore solving some of the key organizational challenges.

Key organizational challenges

Question #2

What are some of the key organizational challenges?

Key challenges in organizational transformation often include:

- **Vision is missing.**
- **Scaling efficiently** without sacrificing quality.
- **Ensuring transparency** fostering clarity and trust.
- **Aligning roles and teams** to drive cohesive efforts.
- **Managing dependencies** to avoid bottlenecks and delays.
- **Making informed decisions** based on factual data.
- **Navigating terminology confusion** that leads to miscommunication.

These challenges can slow the progress but its crucial address them for a successful transformation and Jira Align is a tool that can support you.

What is Jira Align?

Question #3

What is Jira Align?

- **Jira Align is an Enterprise Agile Planning Software** that helps large organizations plan, track, and manage agile work, aligning strategy with execution.
- **Data-Driven Decisions**: Provides leaders with a clear, data-backed view of progress for informed decision-making.
- **Connects Strategy to Delivery**: Links dynamic strategies with deliverables, enabling quick adaptation.
- **Centralized Platform**: Serves as a single source of truth for all work across the organization.
- **Capacity Insights**: Offers visibility into team capacity, helping predict deliverables and allocate resources effectively.
- **Scaling Agile**: Supports scaling agile across teams and portfolios with built-in framework support.
- **Managing OKRs**: Aligns work with OKRs at all levels, reducing manual reporting and improving planning.

*OKR = Objective Key Result

Jira Align vs Jira

Question #4

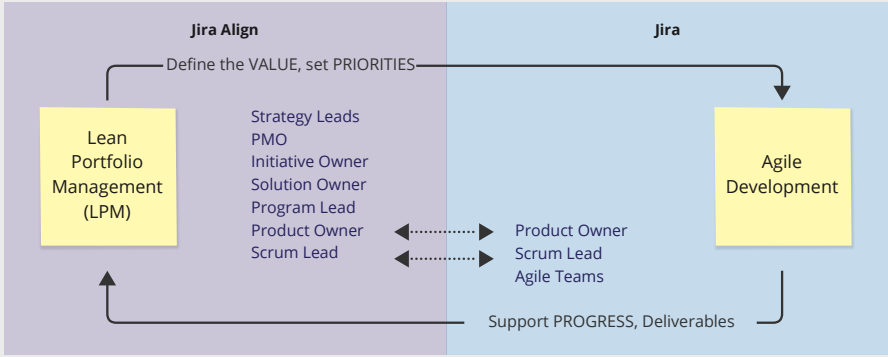
What is the difference between Jira Align and Jira?

Question #5

Which personas are using Jira Align and Jira?

There are 2 independent applications that complements each other:

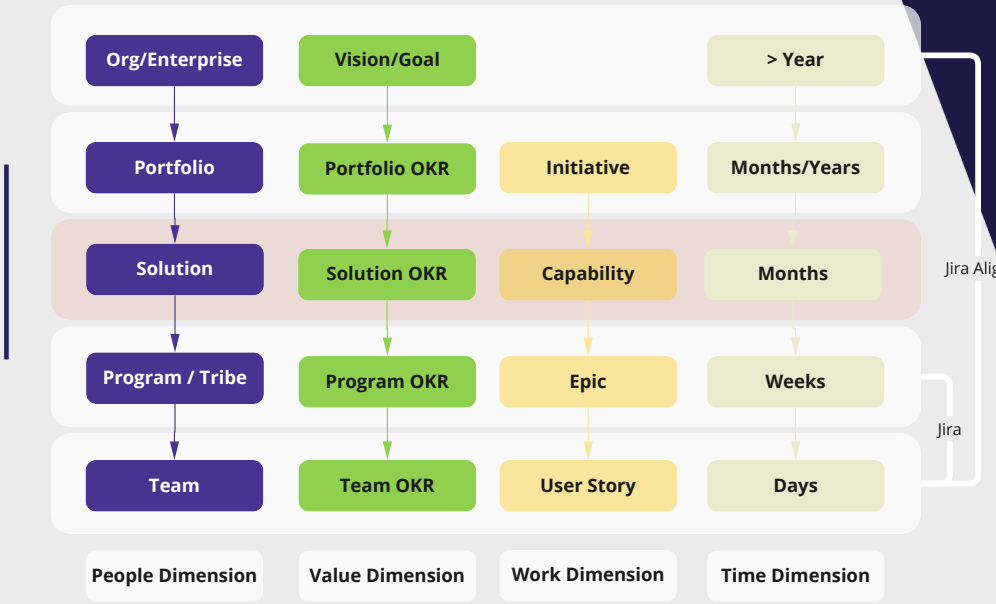
- **Jira Align** is focused on VALUE and provides the helicopter view for everything we deliver to our customers. Is focused on strategy and planning
- **Jira** is focused more on deliverables, day-to-day activities and it's used by development teams.



How does it work?

Question #6

How does it work?



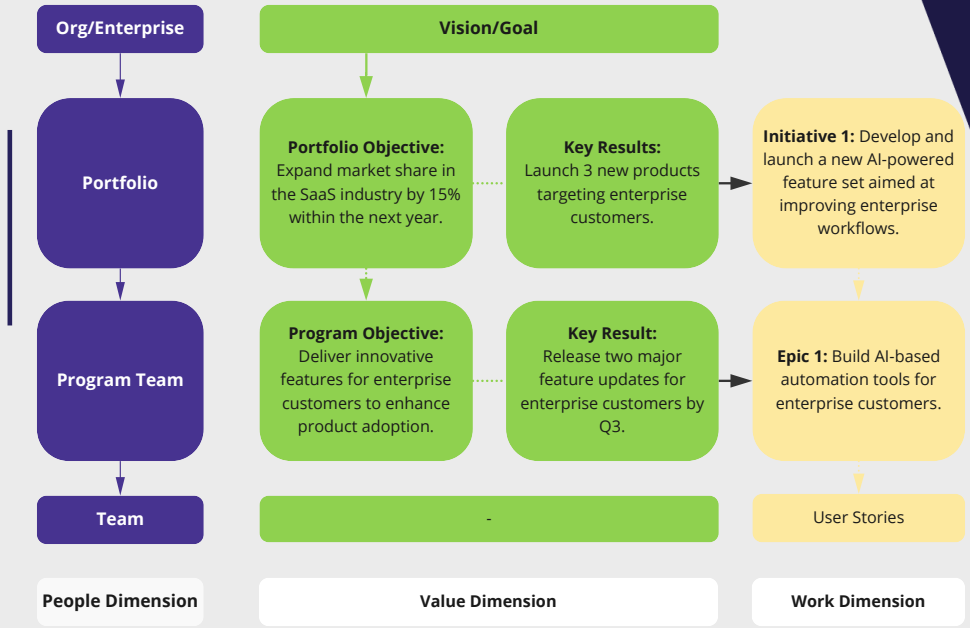
*OKR = Objective Key Result

How does it work? (Example)

Question #6.1

How does it work?

Practical Example



Benefits of using Jira Align?

Question #7

Why use Jira Align?

If you have asked yourself one of these questions, then Jira Align might be for you:

- Why are we developing certain features, and how do they impact our customers?
- Can we manage expectations during Program Increment (PI) by aligning teams with priorities?
- Do we have enough capacity at the Program/Solution/Portfolio level to meet our priorities?
- Do we have full insight into our team's dependencies?
- Are we tracking cycle time, blocked items, and mitigation plans effectively?
- Are you tired of sharing progress in multiple formats for different stakeholders?
- What's the overall progress on key items that support the business?
- Why is it so difficult to consolidate plans for a full view of products/platforms?
- Can you see all work happening across the enterprise?
- Do leaders want to see how all teams' work connects to strategy and vision?

Demo

Best practices

Best Practices

Jira Align works if the organization is mature in working agile.

Jira Align should not be used without Jira.

Customize, But Don’t Overdo It.

Atlassian recommends to use JA when you have more than 500 users.

Since Jira Align is not a BI solution, pair it with a dedicated app: Atlassian Analytics, PowerBI, Tableau, etc.

Establish Governance and Roles.

Pricing - Starting from ~80k $, therefore R&R must be well defined.
https://www.atlassian.com/software/jira/align/pricing

Thank you