

Improving Your Journey to the Cloud

10 Best Practices for Ensuring a Successful Migration





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Executive Summary

Atlassian's 2024 end-of-life for the server-based versions of Jira and Confluence are forcing companies around the world to migrate mission-critical business software and processes to Atlassian's cloud-based versions. But migrating Jira and Confluence to Atlassian Cloud is not as easy as just liftingand-shifting your data.

For many companies that have customized the server-based version with third-party applications and plugins, it also involves migrating specialized workflows or software which may not be available in Atlassian Cloud. The result is a migration in which one misstep can break critical processes for product development, software engineering, customer service, and more. This whitepaper will help you avoid the most common pitfalls with ten best practices for moving your server-based Jira and Confluence to the cloud and demonstrate why you should work with a migration partner rather than doing it yourself.



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Introduction

When Atlassian announced they were ending support for the enterprise server version, it put every Jira and Confluence user on notice. As companies have expanded their use of Atlassian products for more mission critical activities, such as customer service and support, and creating new workflows for other business groups like marketing, this announcement has generated a considerable amount of anxiety. Not because companies are reticent about moving mission-critical systems to the cloud, but because the migration from server to cloud requires more than just a lift-and-shift.

More advanced Jira and Confluence users have invested considerable time and expense into tailoring the server version to their specific needs: **customizations, specialized middleware, proprietary apps to connect to other enterprise systems**; many of which can't make the transition to cloud. This migration will require companies to not only plan a migration to the cloud for their data, but also rethink how they are using Jira and Confluence in their everyday business. But you aren't reading this whitepaper to decide on migration. That's already been decided for you. The question you have now is,

should I do this by myself or work with a partner?

Do You Have a Complete Picture of Your Current Implementation?

For companies already migrating other cloud-based software and processes for mission-critical applications, this forced migration just accelerates their timeline. But for others, it will be a major challenge. Regardless, the migration must begin with the basics: an understanding of the current state of Jira and Confluence implementation (which includes configurations, usage, and additional software) and what the ideal future state looks like. For example,

Will you expand usage to other departments and workflows that are not yet using Jira or Confluence?

How will Jira and Confluence integrate with other cloud systems to provide for more efficient workflows?

We'll cover this in Best Practice #1, but we can't emphasize enough that the success of your migration begins and ends with a solid plan.



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The Elements of an Atlassian Migration

Before we answer that question, it's important to lay out everything which goes into a migration.

Let's say we all agree that you'll need to move your Jira and/or Confluence data from your server version to the cloud version. That's pretty obvious. But what else might you need to migrate and what is the risk those elements have to the business if something goes wrong with the migration or it takes longer than it should? The table below calls out many of the migration elements you will need to account for...and the impact they play in your business.



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Will Your Custom Atlassian Applications Make the Migration?

Many Jira and Confluence server users have probably spent years customizing their implementations through both third-party applications and custom integrations. And although customizations like that extend Atlassian functionality, they also create problems for a migration to an environment which is outside a company's control.

In most cases, customized software will not move to the cloud. That's because there isn't a place to install it. Unlike the server version, Atlassian cloud is a multi-tenant environment. If someone installed an application there which caused the environment to fail, it would affect more than just their own Atlassian instances. Of course, there may be similar software available.

For example, let's say a company built a custom application to automate processes and workflows in Jira: an action is taken in Jira which automatically triggers other processes in other applications. Although the exact software the company built won't be migrated, there might be native automation capabilities in Atlassian Cloud allowing the company to gain similar, if not identical, functionality.







Of course, not every migration goes as planned. There can be elements which aren't accounted for in the initial planning stages which can complicate a migration and extend the time and effort to accomplish it. Understanding the impact that such "gotchas" might have can help in understanding the need to take a thoughtful, well-planned approach...and the need to have the expertise which can ensure there are no surprises.

¹You cannot migrate custom software to the Atlassian Cloud as it is a multi-tenant environment without the capabilities to install software. You will need to look for alternative solutions in the Atlassian Cloud Marketplace. If there is no solution, you will need to evaluate the processes and workflows in which that software is used to identify a means by which to restructure the processes without that software.

²Note that some third-party applications may not be able to be moved. If the application does not exist in the Atlassian Cloud Marketplace, you will need to look for an alternative.



Assessing the Impact if Things Go Wrong

Of course, migrating any mission-critical system like Jira and Confluence from server- to a cloud-based version will have an impact on the business if it's not done correctly or on time. But some aspects of a migration may have more of an impact than others. For example, not integrating single-sign on (SSO) won't prevent a company's employees from using the cloud-based versions of Jira or Confluence, but having errors in the migration of the data could result in being unable to address existing customer support tickets. Fill out the self-assessment below to get a better understanding of the financial impact to your business when different elements of the migration go awry.

Jira or Confluence Element to Migrate	Risk	Financial Impact	Estimated Cost per Month
Core Data	High	High	
User Settings	Medium	Low	
Security Settings	High	High	
Custom Software	High	High	
Third-Party Applications	High	High	

Why You Need a Partner

Regardless of whether your Jira and Confluence implementation is simple or complex, there are several reasons why you should consider using a partner like **ServiceRocket**.

For companies that have a very limited Jira or Confluence implementation, moving to Atlassian Cloud shouldn't be a big problem. But for companies that have used Jira and Confluence for years, they have probably customized it heavily and developed very specific workflows which may involve multiple departments, and systems, throughout the business. There are several reasons why working with an experienced partner is the right way to go when migrating Jira or Confluence to Atlassian Cloud:

Resources	The people you would have working on the migration are already tasked with enough. You just don't have the available people.
Time	Even if some resources had extra cycles to tackle a migration, it would be work competing with their other obligations extending the migration time out.
Expertise	Let's say you have available resources and the time. But are those resources the right resources? Do they have experience migrating Jira and Confluence: the data, the configurations, the third-party apps and plugins?

When you work with an experienced migration partner, they provide expert resources to help you plan for and navigate the unexpected, and keep the migration on time and on budget.



Improve the Chances of <u>a Successful</u> Migration

A successful migration doesn't just happen. It's a result of careful planning and expertise. Whether or not you elect to work with a partner or migrate yourself, these ten best practices we've assembled will help improve the chances your migration will succeed:

- 1. Take Inventory
- 2. Identify the Stakeholders and Get Buy-In
- 3. Treat the Migration Like a Modern Software Product Launch
- 4. Migrate, Test, Improve, Repeat
- 5. Start With Security...Don't Finish With It
- 6. Embrace Parallel, Avoid Linear
- 7. Start Early
- 8. Build in a Buffer (AKA, No Surprises)
- 9. Plan to Get It Done the First Time
- 10. Communicate, Communicate, and then Communicate Some More



1. Take Inventory

The Best Practice

Document everything that needs to be migrated. This includes not only configuration settings and data, but process, plug-ins, third-party apps, and workflows.

The Problem

Without a clear understanding of all the pieces which need to be migrated, it's impossible to create a realistic plan. Your migration can end up costing more and taking more time as unwanted surprises (i.e., things you didn't account for) crop up throughout the migration.

What Happens When You Don't Address It

Trying to run a migration without a complete plan is sure to bring unwanted surprises which ultimately result in higher-than-expected costs and a longer time-to-market. Gartner has identified 6 ways cloud migration costs can "go off the rails"³. Taking a complete inventory of what needs to be migrated, from data to plugins to third-party apps to configuration settings, will help ensure everything is accounted for to create an accurate cost and time estimate for the migration.



How This Best Practice Addresses the Problem

Creating a comprehensive inventory, which includes customizations, configuration settings, users and data, ensures the migration plan addresses everything which needs to be moved over to the cloud.

Question to Answer for This Best Practice

Do you have the experience with Jira and Confluence migrations to identify all the pieces?

How a Partner Can Help

When you work with a partner experienced in migrating Jira and Confluence to the Atlassian Cloud, you minimize the risk of unwanted surprises and increasing costs. As the old saying goes, *"you don't know what you don't know."*



Are You Fit4Cloud?

Moving a mission-critical system like Jira or Confluence to the cloud shouldn't be taken lightly. Although there are significant ROI and other benefits of moving to the cloud, it may not be for your company just yet. But knowing whether or not you are ready can be a difficult assessment.

With no cost to you, our ServiceRocket consultants can help you identify if the cloud is the right move. But what can you do if you aren't ready for the cloud or you are subject to regulatory requirements about your data and can't have it in the cloud? The problem is that you still need to migrate. Thankfully, Atlassian is still offering and supporting their Data Center version.



2. Identify the Stakeholders, Build a Migration Team, Get Buy-In

The Best Practice

Create a cross-functional team to manage the migration. This can include obvious roles, like IT and PM, but also non-obvious, like corporate communications, to help with other tasks such as ensuring users are kept informed about the progress.

The Problem

Migration projects can mean different things to people throughout the organization. C-level executives, managers, and actual users can have very different expectations of how a migration is going to be executed and what the end result will be. Failing to get everyone on the same page can cause interruptions during the migration as people demand that their concerns be addressed before switching over.

What Happens When You Don't Address It

When expectations don't align about a migration project, not only can it delay project completion but it can also jeopardize adoption. And although



network repatriation (having to go back to the server version) is not an option for your Jira and Confluence instances, failing to have buy-in from stakeholders across the organization can lead to ad-hoc workarounds which can be inefficient and potentially costly.



The **#2 Reason** for Cloud Migration Failure

According to CIODIVE⁵, failing to achieve consensus and buy-in from stakeholders is the number two reason why cloud migration projects fail.

Questions to Answer for This Best Practice

- Who should be on the migration team?
- Has everyone agreed on the scope of the migration?
- Does everyone agree on when the project will be completed?
- Is there agreement on how the new system will be introduced to users?

⁵ https://www.ciodive.com/spons/why-do-cloud-migrations-fail/600946/



How a Partner Can Help

An experienced partner can't help convince people in your organization, but they can ensure that there is clear communication throughout the project so that stakeholders, such as executives and end-users, not only know what's happening but have a clear process and means by which to have input into the project.

Who Are the Key Stakeholders

Although there is no definitive list, as roles differ between organizations, here are some general roles that should be part of the larger "migration" team:

Tech Lead/PM

Confluence/Jira/BB Technical Consultants



3. Treat the Migration Like a Modern Software Product Launch

The Best Practice

Run the migration as a series of components (using an agile methodology), rather than one long milestone (typical waterfall methodology).

The Problem

When technology projects, like a migration of an onpremises application to a cloud-based version, are executed within a cloak of mystery, the end-result may not be what was expected. This can result in users either finding it unusable or harder to use than the original version.

What Happens When You Don't Address It

Information technology projects which utilize a waterfall approach, rather than an agile approach, are twice as more likely to fail⁶. That's because with waterfall, the project is mainly tested at the end while with agile, testing happens regularly through the whole process.



In an agile project, users can periodically check that what's being developed or migrated is what they envisioned.

Question to Answer for This Best Practice

Do you have the in-house expertise to run an agile-based project?

How a Partner Can Help

A partner experienced with agile-development methods and how they apply to cloud migrations can help ensure your plan for getting Jira and Confluence into Atlassian Cloud involves frequent input from end users and other stakeholders.



4. Migrate, Test, Improve, Repeat

The Best Practice

Migrate components continually throughout the project. Allow users to interact with the new cloud environment so they can provide feedback regarding expected behavior and functionality.

The Problem

You may have a lot of customization in your Jira and Confluence instances. That could include plugins, thirdparty applications and even custom code. You can't migrate that directly. You'll need to find analogous versions within the Atlassian Marketplace. But if you make decisions about how to map functionality from custom code to what's available in the cloud without consulting users, or have to change what was planned, and then simply expose them to the finished instance all at once, there may be a lot of unhappy users.

What Happens When You Don't Address It

When you treat your migration like a modern software product launch **(see #3)**, you can operate



in a very definable cycle: migrate, test, and improve. This allows you to treat each component within the migration as a migration itself. Doing so ensures users have a say in how each part of the migration meets their expectations, not just the entire migration, and allows them to provide input so that the end result is more properly aligned to their needs.

Question to Answer for This Best Practice

Do you know how all of your Jira and Confluence software customizations will be migrated?

How a Partner Can Help

A partner experienced with Jira and Confluence migrations to Atlassian Cloud will have a better sense of how to map functionality from customizations in your server-based versions to what's available in the cloud. This will not only save time and money (by getting it right the first time) but also ensure a more successful migration.



5. Start With Security... Don't Finish With It

The Best Practice

Start with a high-level security plan which addresses the overall configuration. Then address how each functional component which needs to be migrated, such as plugins from the Atlassian Marketplace to replace existing third-party apps and plugins, must be secured individually and within the larger environment.

The Problem

When a mission-critical application is no longer behind the corporate firewall, security can become a major issue. Not because the cloud lacks good security controls, but more so because corporate IT professionals may not know how best to configure it. Trying to ensure proper cloud security implementation and configuration after the migration is like trying to design a building to withstand an earthquake after you've already built it.

What Can a Lack of Cloud Security Cost You?

According to Checkpoint, "the average cost of a data breach in today's world amounts to



(or \$148 per compromised record)...and the average cost in the United States is closer to \$7.9 million."





What Happens When You Don't Address It

When security is considered at every step of the migration process, you can be assured that the final instance of the cloud-application will reflect the security requirements of your business.

Question to Answer for This Best Practice

Do you have the in-house knowledge to ensure proper configuration of cloud-security features?

What's the **#2** And **#3** Cloud Security Risks?

According to the 2019 Cloud Security Spotlight report⁷,

the #2 risk is cloud migration.

35% of respondents indicated that setting security policies on the cloud version of their migrated software was a major concern.

The #3 risk? Misconfigured cloud.

of respondents said that misconfiguration of cloud platforms was a major risk.

How a Partner Can Help

An experienced cloud migration partner already knows how to configure Jira and Confluence in the Atlassian Cloud to be as secure as possible. But they also know how to address security for all of your customizations, which include configuration of third-party addons available in the Atlassian Marketplace.





6. Embrace Parallel, Avoid Linear

The Best Practice

Run the server-version and the cloud-version in parallel to allow time to ensure the cloud-version operates as intended without compromising your users' ability to accomplish their jobs. This also gives you time to fix and optimize, to meet user needs, before cutting over entirely.

The Problem

When you have everything migrated and the cloud instance is ready to go, you might think you're ready to switch over. But doing so would be a mistake without doing a post-migration run through which entails checking off that each workflow, process, and functionality meets intended expectations.

The Result

When your timeline accounts for a post-migration comparison, users can actively begin testing workflows



and processes in the new version while ensuring that they can still accomplish their jobs in the existing system. Then, once the cloud-based version meets everyone's needs, data can be migrated one more time in a final cut-over.

How a Partner Can Help

A partner experienced with Jira and Confluence migrations to Atlassian Cloud can help manage the cut-over, document user concerns and suggest ways to optimize and improve the cloud-based version.



7. Start Early

The Best Practice

Don't wait until the last minute to start planning and executing your migration. Give yourself plenty of time for post-migration evaluation **(see Best Practice #6)**.

The Problem

When you don't start early, there's an increasing chance of rushing through critical decisions. What's more, you'll have less agility to handle surprises (if any happen to crop up) or deal with end-user requests to improve how processes or workflows have been implemented.

The Real Story Behind Cloud Migrations

According to a 2017 report from Velostrata and Dimensional Research⁸, 62% of respondents said their cloud migration projects were harder than expected and 56% noted that **"both competing IT projects changing priorities and a lack of expertise"** contributed to the increased time.



The Result

Starting early enough creates more peace-of-mind for the organization, in migrating a mission-critical application like Jira or Confluence, as well as for users. There is nothing which creates more anxiety in a business than a forced IT project that happens too quickly for users to get comfortable with the change.

Question to Answer for This Best Practice

Do you know how long it will take to migrate your
 Jira and/or Confluence to the cloud?

How a Partner Can Help

A good cloud-migration partner has experience measuring the time it takes to migrate Jira and Confluence to the cloud based on the complexity of the instances. That means a far less chance of going over time or budget and the knowledge to build in buffers **(see #8)** to account for testing and optimization.



8. Build in a Buffer (AKA, No Surprises)

The Best Practice

Ensure you have plenty of extra time built into your migration plan. This will allow you to address user feedback (when they test elements which have been deployed into the cloud instance) as well as handle unexpected changes to priorities or requirements.

What Happens When You Don't Address It

When your migration plan doesn't have any buffer, there's an increased likelihood unexpected issues will cascade, extending the planned time of the migration. This will most likely result in increased costs as well.

The Result

When you build in buffers to each part of your migration, it may extend the project out longer than you want but it will be a much more realistic timeline.



Questions To Answer for This Best Practice

- Do you have a good sense of the time needed to accomplish each component of the migration?
- Have you built migration plans before to understand where buffers might be needed?

How A Partner Can Help

When you have a partner who is experienced with all the aspects of migrating Jira and Confluence to the cloud, you can be assured that the migration plan timeline will include needed buffers to account for potential issues.



9. Plan to Get It Done the First Time

The Best Practice

With proper planning and buy-in from stakeholders, including a realistic timeline with buffers to address unexpected issues, you'll ensure your migration efforts go smoothly, and correctly, the first time.

What Happens When You Don't Address It

When your plan isn't comprehensive enough, doesn't include buffers, or relies on staff who don't have the needed skills, there's an increased likelihood of cascading time and cost overruns.

An Assumption That Leads to Cloud Migration Failure

Of the many reasons the Cloud Academy has identified for the failure of cloud migration projects, one sticks out in particular: assuming staff already have the skills⁹. No matter how good the plan or how much buy-in you have amongst management, if the resources you are counting on don't have the needed skills, the migration will fail.



The Result

Ensuring you have the required resources to plan and execute, those resources have the available bandwidth and there is consensus amongst management and users, you'll have a much better chance of a successful migration the first time.

Questions to Answer for This Best Practice

- Do you have the in-house expertise to plan and perform a migration (or do you just think you do)?
- Do you have resources with enough bandwidth to execute the migration?
- Do you have bad experiences using partners for IT projects (such as cloud migrations)?

How a Partner Can Help

A reputable Atlassian partner always has an experienced staff which it can dedicate to your project. Not only do they have the expertise to help create your inventory, build your plan, and work with you to communicate it to staff, their engineers have the skills needed to execute.



10. Communicate, Communicate, and Then Communicate Some More

The Best Practice

Create a communication strategy which keeps users and management informed about the expectations for the migration, when the cloud-version will be available and how to test and get involved.

What Happens When You Don't Address It

Without an effective communications plan, the migration will be in a black box. Users and management won't be aware of timelines, expected launches, or other needed information. As a result, adoption may falter resulting in increased timelines to declaring a successful project.

The Result

With a successful communications strategy which clearly identifies what to communicate and when, you'll keep the entire organization abreast of the project. This can help promote buy-in and excitement for the cutover.



Question to Answer for This Best Practice

Do you know what needs to be communicated and when?

How a Partner Can Help

An experienced partner who has been through dozens of Jira and Confluence migrations to Atlassian Cloud knows exactly what needs to be communicated throughout the migration process. Without the guesswork of when to communicate, your comms resources can focus on crafting the appropriate messages to resonate with your staff.



Move Beyond Migration to Transformation

The best practices we've laid out in this whitepaper focus on one thing: migrating Atlassian Jira and Confluence from server to cloud. But what we didn't talk about is the process of exploration and analysis you will go through as you take inventory and plan your migration. This process will enable you to look at how you are using Atlassian software, the workflows you have in place, and how you might improve your use by moving Jira and Confluence to the cloud.

Improve Processes

If you have been making heavy use of Atlassian software in your business, you will probably have built custom integrations and code or used thirdparty apps in your server installation. Unfortunately, your use of integrations and code is severely limited in the cloud. In fact, you can't install anything of your own. You can only make use of the native integrations which Atlassian provides through their marketplace. This means that you are going to have to translate your custom workflows and processes you've been using to new versions that work in the cloud.

Connect to Other Services

Once your Atlassian instance is in the cloud, though, you'll have an opportunity to connect it to other cloud-based services to create powerful new workflows and processes which make your company more effective and efficient.



Change Management Process

Let's face it: any server-based software, although totally in your control, is a pain to manage. Configuration changes and updates can sometimes involve heavy lifting (new virtual machines or boxes, remote hands, etc.). But with Atlassian Cloud, you'll have all that covered. Built-in configuration management processes will help you scale as your users, issues, projects, or spaces increase over time.

Improve Security

From SSO to managed DDoS protection, moving to a cloud-based service like Atlassian can actually provide you more security than running the server version behind your network. Think about what's required to enable remote employees to access Jira or Confluence behind your firewall: VPN equipment and configuration, client support requests, and more. But with Atlassian Cloud, there is a team of security experts working tirelessly to keep the cloud secured so there is never an interruption in your mission-critical applications.

How Native Integrations Benefit Your Business

What's a native integration? It's when the service provider of a cloud platform, like Atlassian, provides access to add-ons which have already been integrated. These add-ons are tested to operate correctly. They are provided by approved developers. How do they differ from integrations you may have built yourself in the server-based version?

The first difference is that they are proven to work. They are scalable, resilient, and supported. The second difference is that they are continually improved by their owner, not only in functionality, but in reliability.

As the platform improves, add-on developers must adjust their software to continue to work with the newest version of the platform. Ultimately, native integrations allow companies using platforms to enhance their service with just a couple of clicks. There is no programming required, nothing to test, nothing to run through a software development life cycle; and, most importantly, nothing to **manage. Native integrations provide proven enhancements without any worry.**

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When You Have More Important Things to Do

(Or Why You Need a Migration Partner)

It's probably safe to say that migrating Jira and Confluence to the Atlassian Cloud isn't your core business. In fact, it's probably safe to also say that you have more important things to deal with. But there's no getting around the fact that you have to migrate because running mission-critical software without support is just asking for a disaster.

So what does it look like when you work with an experienced Atlassian migration partner like **ServiceRocket?**

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Migration Activity	Who Handles it?	The Bussines Impact
Taking an inventory of your Jira and Confluence instance	Partner	Experienced resources, who know whatto look for, catalog your instance while you focus on your day-to-day business.
Establishing a migration team	You	Making sure you have the right people involved at the beginning ensures buy-in across the organization
Documenting scope and objectives	You	There is a clear plan for what is expected at the end of the project making it easier to measure success or failure
Creating a migration plan and timeline	Partner	A partner who has had considerable experience with migration timelines works against your plan to ensure a realistic project
Setting up the cloud instance	Partner	Your partner knows the ins-and-outs of configuring the new cloud instance so that you don't have to fumble through options and settings to ensure the instance is as you need it
Migrating Jira and Confluence data	Partner	With an experienced partner, getting everything physically migrated is handled, checked, and double-checked so you are assured everything is moved correctly.



Migration Activity	Who Handles it?	The Bussines Impact
Communicating availability of components as they are migrated	You	Throughout the migration, you'll need to keep employees and stakeholders up-to-speed on progress and availability
Optimizing the cloud configuration based on userinput	Partner	With a deep understanding of Atlassian Cloud, your partner can tweak and optimize until the instance is exactly as you need it even while you continue to carry on business-as-usual.

As you can see in the table, a migration partner like **ServiceRocket** handles a number of different elements throughout the migration, allowing you to focus more on your day-to-day business.



Conclusion

Migrating your Jira and Confluence off the server and into the cloud may not have been on this (or even next) year's to-do list. But it has to be done. There's a drop-dead date at which time this mission critical software will no longer be supported by Atlassian. To avert that potential disaster, you'll need to start now: take stock of what needs to be migrated, build the plan, and get the migration happening with an adequate buffer to give you enough time to address any "gotchas" which arise during migration.

But there's a silver lining to this forced migration: you'll get to evaluate your business's use of Jira and Confluence to improve processes and workflows, to transform your business by making it more efficient and effective. Expanding how you use Jira and Confluence, and evaluating how to make new custom workflows in the cloud can improve your business. And this migration is the time to do it.

Going it alone, though, probably isn't the best decision. You need to focus on your business, not on a migration. So identifying the right partner to work with is critical. You need a partner that has deep expertise not only with Jira and Confluence, but with migration as well.

Certainty.

You'll know that you are working with the most knowledgeable and experienced Atlassian partner. Not only have we seen all the "gotchas" in migrations, but we've helped overcome them as well.

Expertise.

We know Jira and Confluence. We know the cloud. We know what it takes to migrate. Work with us on an initial, free assessment and we'll show you how quickly we can know your business as well.

Success.

Maybe the most important built-in assurance: we get it done right the first time. You won't need another partner or another engagement. We will get you migrated under budget and on-time.

> So what are you waiting for? Oh yeah, that's **Best Practice #7**. But you already knew that.