xpand it

medicineone

The integration between innovation and support with Atlassian Cloud

medicineone

MedicineOne is a technological company of Portuguese origin and worldwide vocation, dedicated to developing software for the health market. The EHR solution it provides is at the same time one of the oldest, most innovative and complete in the world. It is one of the best software solutions for managing small and large health units, whether they are public or private institutions.

The company started in Portugal over 30 years ago, but its ambition continues to take it far. It carries innovation, engineering, excellence and passion with it, and follows a world in constant evolution, creating solutions for a dynamic, changing healthcare market.

Its great mission is to help health professionals reach their full potential in the provision of care and to support people in improving their quality of life, always putting them at the centre of all processes.

**Improving customer
support**

The challenge

MedicineOne challenged Xpand IT to present a solution to support their product offerings to their end customers and their organisations. This solution needed to facilitate the management of service requests and resolutions, through an easy interface, using MedicineOne imagery.

When opening requests, it was essential to ensure that the right details could be gathered from customers, providing support teams with the critical information to resolve each case.

The solution had to allow members of every organisation to share requests with each other and facilitate support tracking from request initiation to resolution.

For the support teams, we wanted a solution that would be easy to adopt, considering the process already in place, and respecting the internal support structure distributed over several levels.

It was essential to separate the work between teams and ensure that requests would be assigned to the right team, depending on the type of customer and product chosen.

In addition, the solution would have to be able to differentiate between the different response and resolution times agreed with each of the end customers and guarantee the migration of the history to the new solution.

The solution

After analysing the support process, the requirements and difficulties shared by MedicineOne, Xpand IT decided that the solution would involve implementing Jira Service Management, centralising service requests and improvements in the same project.

We implemented a portal for end customers, enabling them to graphically browse the catalogue for a range of products, and share information amongst themselves, according to the requirements of the support team, as well as having an overview of completed orders.

For the support agents, work queues were created, organising the work by team and product, and allowing every user to choose the best option to view their work in progress.

To help with the execution of repetitive tasks, we used Automation for Jira to create automatic execution rules, enabling partial automation of the sorting and distribution of requests by teams, depending on the organisation or customer.

A priority matrix was created, based on impact and urgency, which allows calculated based on its severity and impact.

Due to the sensitivity of the data worked on by MedicineOne, various levels of security were created for internal teams, ensuring that information reached the teams without compromising the privacy of the data shared by the end client.

Using Jira's advanced search, information can be visualised in reports and dashboards or made available through Jira's native Excel integration.

Technology

⚡ Jira Service Management

Whether aimed at customers inside or outside the business, Jira Service Management is a unique, highly flexible, customisable order management solution that makes it possible for any team to receive and resolve orders in an efficient, organised manner.

Jira Service Management can map and monitor the performance of any process, and powers real-time collaboration through up-to-date warning systems and reporting. With native ability to measure Service Level Agreements (SLA), Jira Service Management benefits the productivity of support and customer service teams, and its ease of use enables the onboarding of new teams or agents quickly.

⚡ Jira

As a native Jira Cloud tool, Automation allows you to create customised rules for all sorts of situations, whether user actions or schedules. Delegating tasks to Automation allows you to optimise repetitive manual processes, increase response speeds and improve data quality and accuracy.

Rule creation through visual blocks allows users of all technical levels to schedule tasks and manipulate data. At the same time, Automation's integration with other Atlassian products - Jira Software, Confluence, OpsGenie, Assets - or external solutions makes it an indispensable tool for any team using Jira.

Benefits

Development of a centralised platform for opening and resolving support requests for all MedicineOne products, which provides reporting with resolution metrics and allocation of work by team.

Definition of response and resolution SLA for the product, customer and priority, in order to improve the quality of support to whom MedicineOne provides services.

Validation of the information, when opening and resolving requests, to guarantee the completion and quality of the data, as well as the automatic prioritisation of requests.

Replacement of manual cataloguing and sorting of requests by automation rules, focusing teams on request resolution.

Creation of alarms for internal controls regarding critical requests, customer hourly allowances and all types of information.

The challenge

In addition to the support team, other teams work on MedicineOne products: the product team, responsible for planning and designing the solutions; the development team, responsible for creating and implementing changes; and the quality team, responsible for the tests that ensure the quality of the solutions.

Initially, the process and management of these teams happened outside the Atlassian ecosystem, and communication between support teams in Jira Service Management and other teams in another tool would be done through integration add-ons.

MedicineOne wanted to streamline the process by escalating issues and customers to the development team.

Considering that products and product versions developed by MedicineOne number in their hundreds, it would be complicated to track and manage communication between teams in two different ecosystems.

It was also necessary to centralise all the documentation and information created with each release, and the teams needed a common knowledge repository.

The solution

The solution was to implement Jira Software and development projects organised by product, where teams could work in parallel.

Based on the three teams operational processes, project templates were designed with the aim of standardising the development processes between the various products and allowing the teams access to detailed information in a structured way.

To monitor the work, boards were created for each of the teams to quickly visualise their work.

The native integration between Jira Service Management and Jira Software facilitated the creation of flows in which defects and incidents forwarded by support teams could easily be escalated to the development teams.

For all documentation needs, Confluence was implemented, enabling teams to document and structure all the information on their work.

In addition to team documentation, Confluence also allowed each user to have their own personal space, managed as a repository of their own knowledge.

Technology

◆ Jira Software

Jira Software is a project management and task tracking tool. With this tool, teams and users of several types can assign tasks, control execution times and collaborate in real time.

Jira is a flexible solution that can be adapted to all kinds of structures and processes, allowing teams to transpose their work methodologies, whether Waterfall or Agile (Kanban, Scrum), etc. It also provides advanced reports and analyses that allow you to easily visualise the status of projects and identify points for improvement.

✖ Confluence

Confluence is a collaboration and documentation platform, where it is possible to create and share documents, requirements, manuals, knowledge bases and much more. Given its ease of use and security, it is accessible to users with different technical levels.

Confluence offers advanced search and organisation features, making it easy to find information at any time.

The ability to import and display information from Jira, without the need to manually update documents, makes it an indispensable partner for all teams.

Benefits

Jira Software

- Customised process mapping and the ability to adapt to various methodologies, as well as the alignment of processes between the various teams and products;

- Data validation to ensure data quality;

- Native integration with Jira Service Management, for scaling and information sharing between support and development.

Confluence

- Documentation creation in a simple and easy to use environment.

- Automatic versioning and change history of each document.

- Content macros to help with page formatting and manipulation.

- Documentation sharing with the client via "Knowledge Base" and integration with Jira Service Management, to speed up self-help and reduce requests.

Product backlog improvement and cross-project follow-up

The challenge

Following the adoption of Jira Service Management and Jira Software, the MedicineOne product team wanted to improve the way requests from the various internal areas (commercial, legal and support) came through.

The process of evaluating new development requests needed to be improved, for a clearer view of priorities and long-term challenges.

In this way, both the product team and MedicineOne's customers would have a better idea of the effort required for each request and when it would be executed.

Despite the project visibility that Jira Software provides, MedicineOne needed a centralised solution to monitor all products and their projects in a global multi-project view, considering resources, future versions and planned dependencies.

The product team also wanted to adopt Agile methodologies, specifically Scrum, for the implementation of roles, ceremonies and estimation processes within the team, as well as managing work in sprints.

The solution

Jira Software com Advanced Roadmaps / Automation for Jira

The solution was to propose to MedicineOne the implementation of Atlassian's Advanced Roadmaps. This solution, based on the project roadmaps with which they were already familiar, allows them to work with information from several projects simultaneously.

In addition to the ability to create different plans and customise them with fields and task information, Advanced Roadmaps serves the distinct roles of the team in diverse ways: Project Managers have access to an overview, from the top, and the analysis team can focus on day-to-day tasks.

For a more in-depth analysis of development requests, the solution was Automation for Jira, through the calculation of a Scorecard. During the initial analysis of the request, the team scores a number of factors, from which the priority of the development is calculated.

To ensure quick access to information, in a planning context or presentation meeting to stakeholders outside the team, dashboards were created showing the most important KPIs.

To ensure the organic growth of the solution, Advanced Roadmaps allows you to expand the task hierarchy in Jira, above Epic level. In this way, planning scalability is guaranteed.

Technology

Advanced Roadmaps para Jira Software

Advanced Roadmaps is an extension to Jira Software that allows teams to create long-term plans, and visualise resource allocation and dependencies between planned work, with information from multiple projects.

These plans and scenarios can consider all the information in Jira, without project or hierarchy limitations, making it easier to track objectives and targets at all levels.

Integration with Jira allows teams to track the status of activities in real time, carry out adjustments and make informed decisions to keep projects in line with established goals.

Benefits

Simulation of possible scenarios and results;

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Better communication between the various stakeholders;

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Greater visibility and control over the work of various projects and the creation of views with information from the data available in Jira;

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Ability to integrate with other Atlassian products, namely Confluence, via which the roadmap can be shared.

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When developing this project to implement management tools for software development and customer support processes, **we found in Xpand IT the necessary support to find solutions to our biggest challenges:** improving communication between the involved departments and organising information in order to collect relevant data for process management and identification of the main problems in order to channel efforts to solve them and thus improve customer satisfaction.

Carlos Graça
Administrador, MedicineOne

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