# Salesforce-Jira Project Management Process Template

**Jitterbit**

## Introduction

When it comes to servicing the needs of both customers and employees, time is of the essence. Customers expect fast resolutions to their issues, or they walk away and find somewhere else to spend their money. Likewise, if a new or veteran employee has an issue that needs to be addressed by service teams, they expect that issue to be resolved with lightning speed to preserve productivity and morale. Development and support teams must work together to fulfill these needs in an accurate and accelerated manner. Unfortunately, both the teams have their own unique tools they use to operate with, which makes it difficult for them to be in unison. The use of multiple tools may lead to time delays, manual errors, quality issues, and unsatisfactory customer experiences.

Jitterbit's Salesforce-Jira Project Management process template improves collaboration by harmonizing data between Salesforce and Jira. Both development and support are able to work closely together, eliminating manual reconciliation of service tickets, and enabling them to be fast, efficient, and accurate in resolving issues. The template automates the creation of new issues in Jira from cases in Salesforce when related to product defects or enhancements. Finally, the Jitterbit Salesforce-Jira Project Management Template automates the updating of cases in Salesforce from defect or enhancement issue updates in Jira to the point of resolution or closure.

Jitterbit's Salesforce-Jira Project Management Template is a pre-packaged solution for integrating critical service management data that creates harmony between development and support teams, enabling them to quickly resolve service tickets and provides better process visibility. The template helps boost efficiency and productivity while streamlining cross-team collaboration and improves the overall customer experience.

**salesforce** — **Jitterbit** — **Jira**

| Cases | → | Issues |

Automate the creation of new issues in Jira from cases in Salesforce when related to product defects or enhancements.

| Cases | ← | Issues |

Automate updating of cases in Salesforce from defect or enhancement issue updates in Jira to the point of resolution or closure.
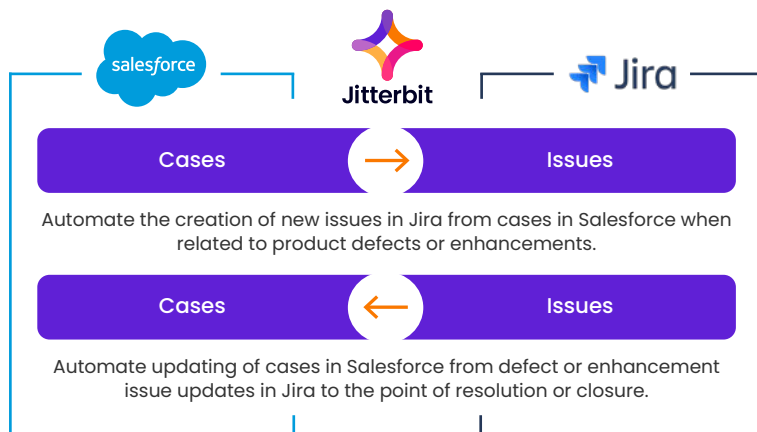
### BUSINESS PROBLEMS SOLVED:

- Automate the creation of new issues in Jira from cases in Salesforce when related to product defects or enhancements
- Automate updating of cases in Salesforce from defect or enhancement issue updates in Jira to the point of resolution or closure

### PROCESS TEMPLATE PACKAGE:

- Two endpoints: Salesforce, Jira
- Two pre-built integrations
- Implementation and post-implementation delivery services (optional)

### VALUE TO CUSTOMERS:

1. Packaged solution enables speedy service ticket resolution
2. Pre-built integrations accelerate deployment time by 50-80%, lowering costs
3. Remove siloes between development and support teams and improve cross-team collaboration
4. Shorten issue resolution timeframes and decrease human errors attributed to manual data entry
5. Enhance customer experience

### BUSINESS BENEFITS:

- Harmonization of data between Salesforce and Jira
- Elimination of manual reconciliation with automation
- Acceleration of service ticket resolution
- Better visibility into ticket queue and status

# The *API Lifecycle* of Service



SX 360

SERVICE DELIVERY
CUSTOMER SUPPORT
IT SERVICE MANAGEMENT
IT BUSINESS MANAGEMENT
ASSET MANAGEMENT
SECURITY OPS
CASES / TICKETS

The number of applications used by corporations to manage and improve the customer and employee experience is growing exponentially. Unfortunately, managing them has become a resource-intensive balancing act involving the coordination of multiple sets of employee and service data located in many different applications. To stay competitive, Jitterbit Harmony connects data, people and devices together to streamline service management business processes and enable a seamless Service API360 experience.