Jira Workflows for Business Teams
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Project

You’ll design and build a custom workflow based on a description of a business team’s process. Use the procedure in the “Custom Workflow Process” lesson, and the provided template and narrative, to document all the workflow statuses, transitions, and transition behaviors.

Then, build the workflow in Jira and compare it to the instructor’s version. Export the workflow to share your solution with your peers. (Optional)

Materials:

* Business team process description (see below)
* Custom workflow template (.pptx format)
* Solution details (see .pptx)

Instructions

Step 1: Review the business process narrative below.

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| **Email Communication Process Narrative***Mary is on a Marketing team and manages customer email communications for products. She receives requests to modify or create new message templates. She reviews the requests to determine the next steps. If the request is quick and easy, she can assign it to a team member immediately. If the request is complex, it often requires a follow-up discussion with the requestor. Sometimes support is needed from other teams. For example: IT needs to create landing page or the pricing team needs to create a coupon code. After the initial work is complete, the message template is shown to the product and sales teams for approval. If all is well, the request is done. Sometimes Mary receives requests the team can’t act on yet. Those are put on hold to work on later.* |

Step 2: Download the Custom Workflow Template at: [jirastrategy.com/business-workflows-materials](https://www.jirastrategy.com/business-workflows-materials). Fill in the needed workflow statuses, transitions, and transition behaviors.

Step 3: Build the workflow in Jira.

Step 4: Compare your workflow to the sample solution in the Custom Workflow Template. NOTE: There are many possible solutions! Do what’s best for your teams without cluttering up your Jira instance.

Step 5: Export your workflow in .xml, .jwb, or screenshot format to share with others. (Optional)

Need help cleaning-up or maintaining your Jira instance? Learn more at: [jirastrategy.com](https://www.jirastrategy.com)