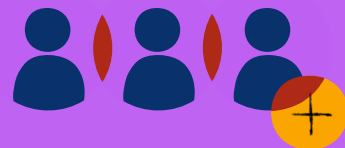




Service Collection



Aradhana Arora
Sr. Partner Solutions Strategist

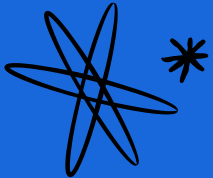


Agenda

Atlassian Platform & Teamwork Graph

**Service Collection Overview & Market
Potential**

Opportunity Mapping



Our Collective Opportunity

Software development

\$17B

SAM
growing **9%** annually

Service management

\$15B

SAM
growing **13%** annually
(**\$6B** ITSM + **\$9B** non-ITSM)

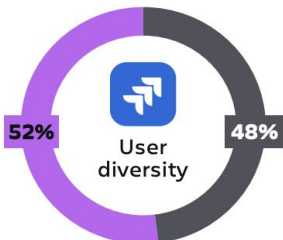
Work management

\$35B

SAM
growing **14%** annually

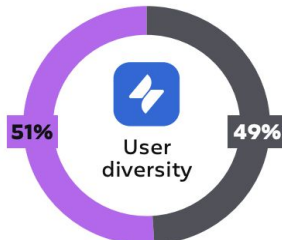
By the numbers

● Technical teams ● Business teams



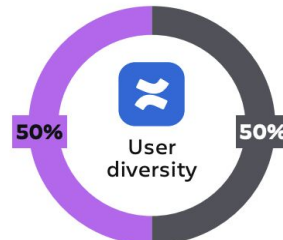
>125K

Jira customers



>65K

Jira Service Management customers



>100K

Confluence customers

NAMED A **Leader**
in the Gartner®
Magic Quadrant™
for DevOps Platforms¹

NAMED A **Leader**
in The Forrester Wave™:
Enterprise Service
Management, Q4 2025

NAMED A **Leader**
in the 2025 Gartner® Magic
Quadrant™ for Collaborative
Work Management²



Together, a **\$10B**
opportunity in a **\$67B**
market

Market Opportunity for Service Management



Service
management

\$15B SAM

growing **13%** annually
(\$6B ITSM + \$9B non-ITSM)



JSM expansion
potential

>350k

Atlassian accounts can
add **JSM** (65k+ already did)



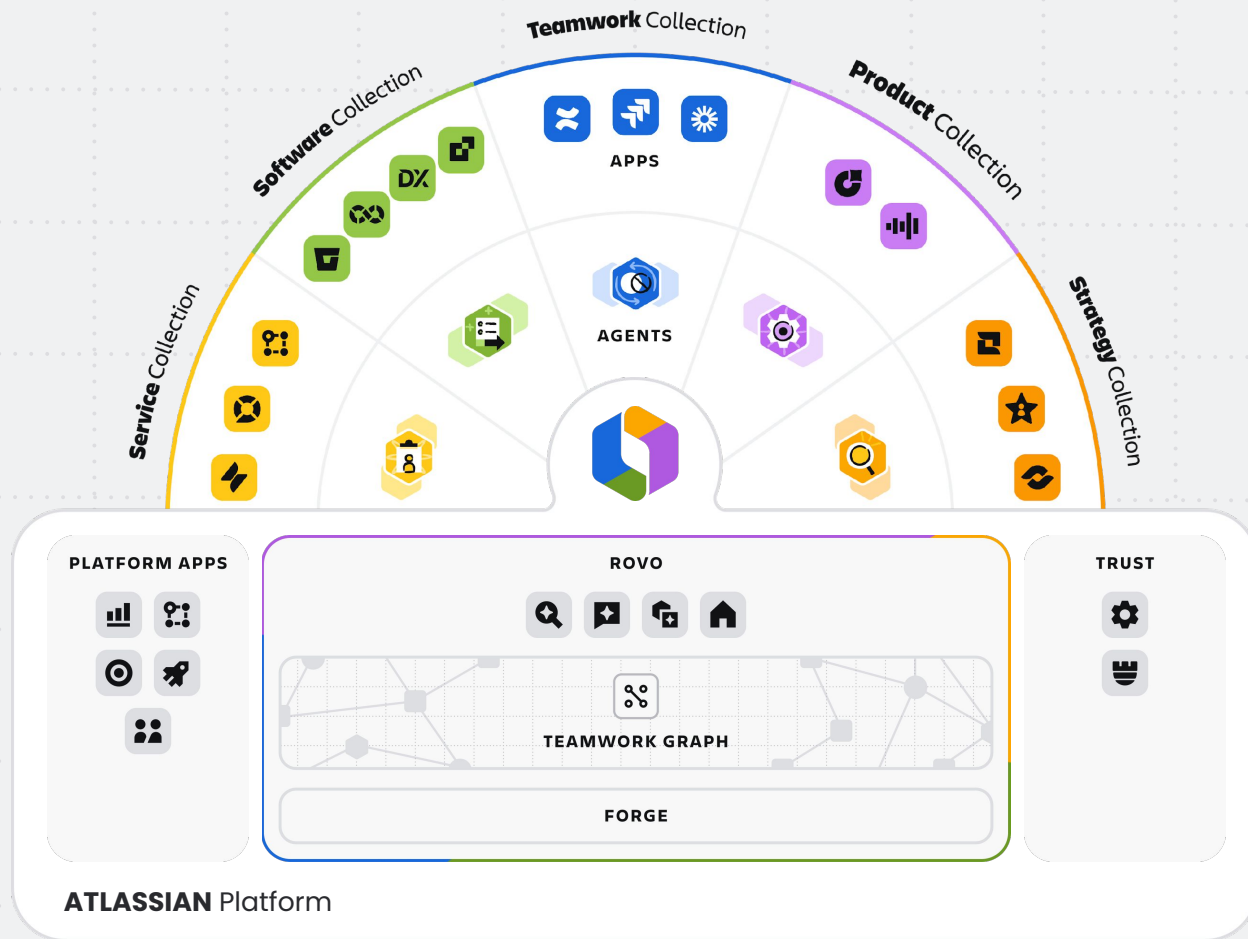
JSM sustained
growth

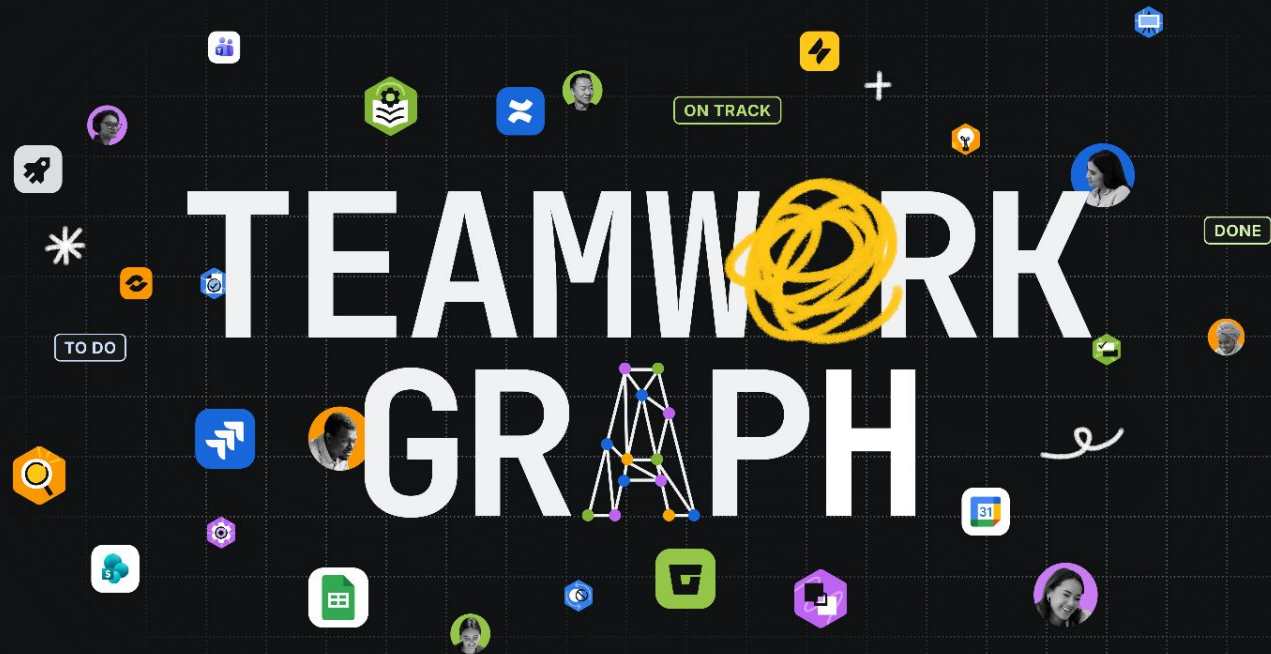
50% YOY

growth of **JSM Premium** &
Enterprise edition sales

Mid-Market represents majority of Atlassian accounts

The Integrated Ecosystem - Atlassian Platform





ATLASSIAN **Service** Collection

Apps



JIRA SERVICE
MANAGEMENT



CUSTOMER SERVICE
MANAGEMENT



ASSETS

Agents



ROVO SERVICE, OPS, &
CUSTOMER SERVICE

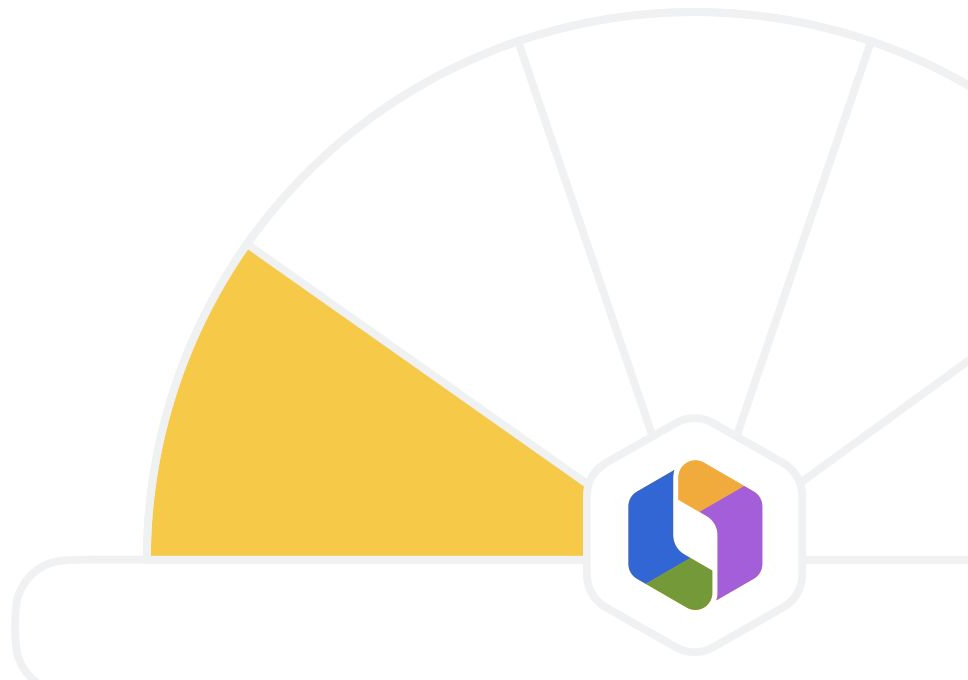


BUILD YOUR
OWN

Skills



* **Empower teams to deliver
exceptional experiences** *



ATLASSIAN

Service

Collection



Jira Service
Management



Assets



Customer Service
Management



Rovo Agents

Elevate Support for Everyone

Unlock teams to create AI workflows that deliver contextual, 24/7 support experiences to both employees and customers.

Accelerate Innovation

Ship faster. Stay running. Connect Dev, Ops and Support teams on a single platform to increase velocity and minimize downtime.

Deliver Value Fast

Get started fast and scale experiences as needed – without the cost and complexity of legacy platforms.

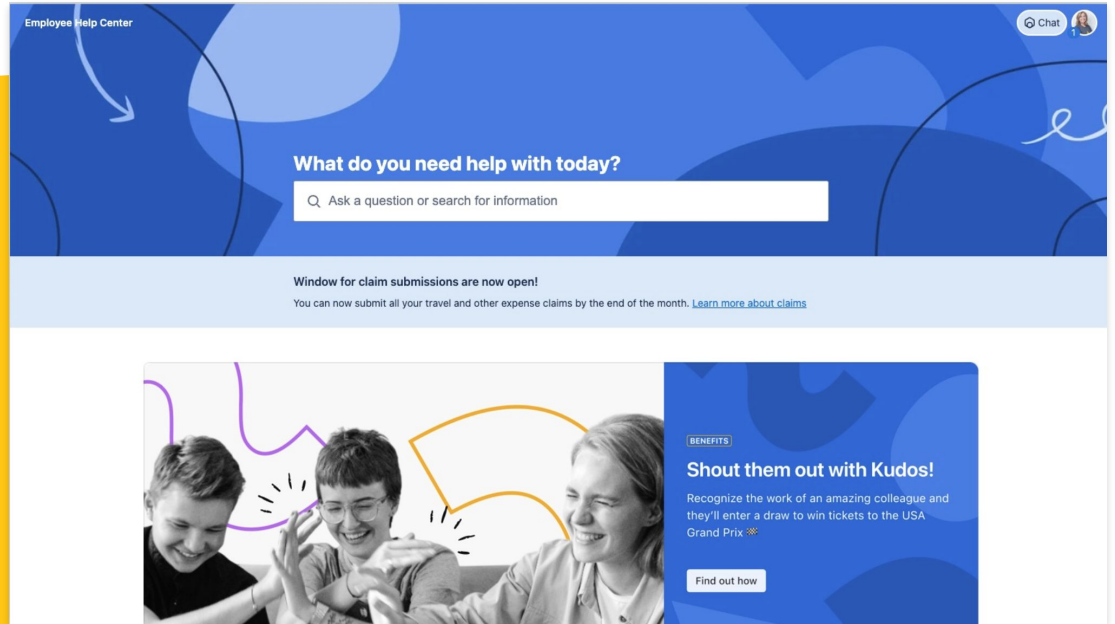
Elevate support for everyone

Empower all teams to deliver an intuitive service experience

Leverage AI to boost self-service, productivity, and knowledge

Improve ROI with fast set up and onboarding – without additional modules

30% of requests resolved with Rovo AI without needing a human agent

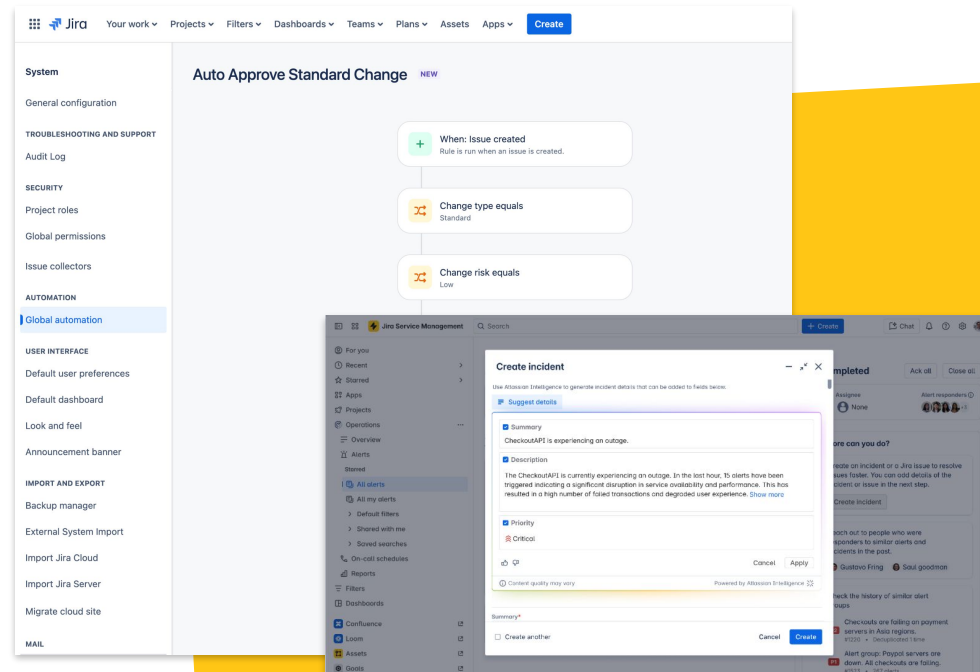


Unify Dev, Ops, and Support
on a single platform

Improve productivity, visibility,
and collaboration

Simplify change and prevent issues
with **Rovo AI**, while making root cause
easy to identify

55 minute reduction in MTTR with AI



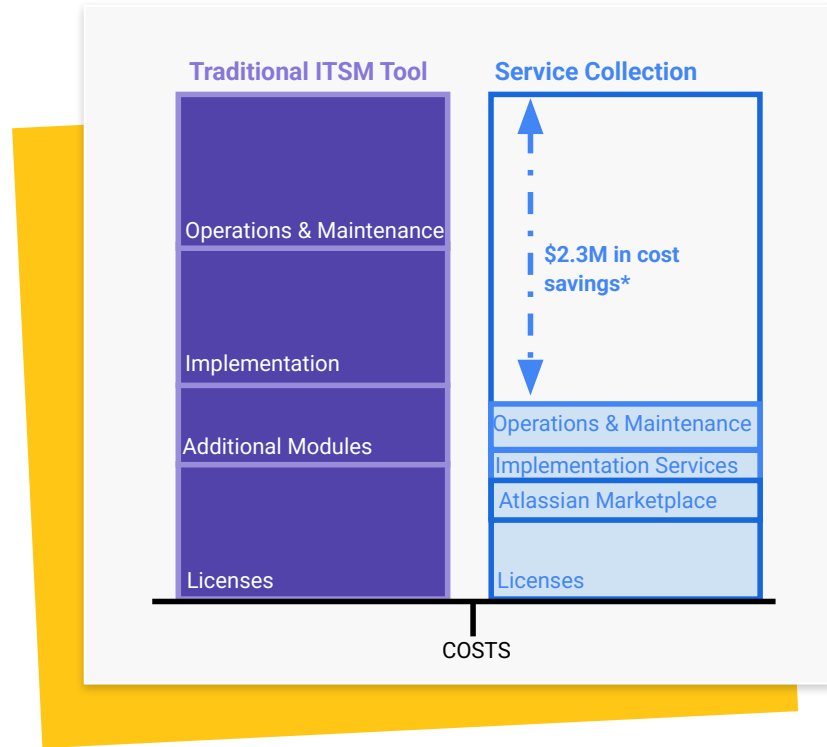
Deliver value fast

Optimize ROI with fewer resources to implement and manage the platform

Standardize and integrate tooling across the enterprise

Transparent pricing and sales process

275% return on investment





65,000

Jira Service Management customers



Competitive Landscape: Top 5 Market Share Lead

#	VENDOR	REVENUE	SHARE	YOY GROWTH
1.	ServiceNow	\$4,987M	31.8%	+14.66%
2.	BMC Helix	\$955M	6.1%	N/A
3.	Atlassian	\$909M	5.8%	+27%
4.	ManageEngine	\$768M	4.9%	+17.15%
5.	Flexera	\$473M	3.0%	+11.04%

Source: Gartner Market Share Analysis: IT Operations Management, 2025 (June 2026)

Gartner published the ITSM Platform Migration Playbook

Key Gartner Findings

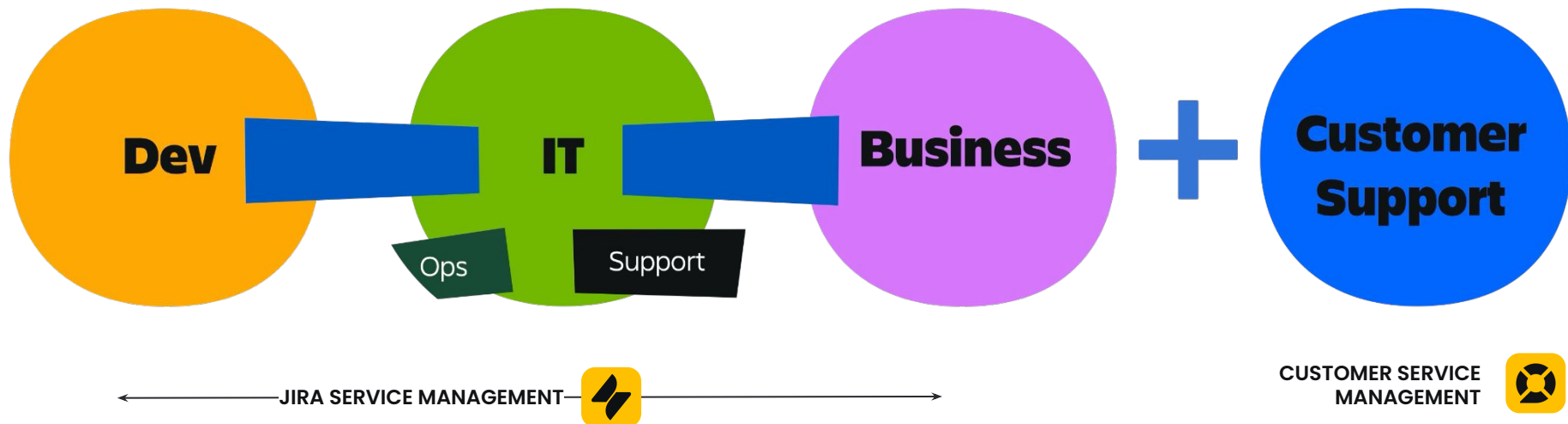
- Growing number of clients exploring alternatives to ServiceNow ITSM
- Primary drivers: **high licensing costs**, **licensing complexity** and administrative burden
- Clients do not fully leverage existing capabilities - over licensed and **underutilised**
- Enterprise tier exits need **15-24 months lead** time - urgency is now

What this means for Partners?

- Gartner is telling clients to plan their exit - the conversation is legitimized
- Customers need **migration partners** - this is a **services** opportunity
- **Renewal** windows are the trigger - align outreach to contract renewals

Source: Gartner, "The ITSM Platform Migration Playbook When Leaving ServiceNow"

Every Team is a Service Team!



40% of I&O leaders will be required to support an Enterprise Service Management program by 2026, up from 10% in 2023. **Gartner**

SERVICE MANAGEMENT TRANSFORMATION | Key Use Cases

Top reasons for replacing the current ITSM solution

- Lower the TCO for the current ITSM tool.
- Gartner research shows many enterprises overspend on ITSM tools.
- Modernize current solution (legacy tools)
- Bring IT, dev, customer support and business teams into a unified platform
- Seeking better ways of working (agile ITSM)

GTM Strategy

Displacement

SMB/ Mid-market: Customer is using:

- All competitors: BMC, Ivanti / Cherwell, Freshservice, Zendesk, ServiceNow
- Homegrown tool

Enterprise: Customer has

- Cost- complexity fatigue with existing tool
- Large Atlassian/Jira footprint
- Strong Atlassian Champion
- Existing footprint of JSM in pockets

Co-exist / Land & Expand

- Using ServiceNow (entrenched) OR
- Individual departments needing an ESM solution

Challenge: Stiff competition from entrenched ITSM incumbents with larger enterprise sales motions



Atlassian Marketplace app: **OnRamp**
from Onward
Competitor: ServiceNow

Atlassian transformed Zelis' HR and Onboarding

Zelis: Healthcare IT company that processes \$229B in payments and aims to modernize the financial experience for insurance companies.

Zelis needed a scalable solution that integrates with systems like **Workday**. Zelis chose JSM as part of a consolidation and business **transformation** initiative with the Atlassian Cloud platform.

JSM's **flexibility**, **ease of use**, and **automation** benefited both IT and HR. .

"Before Jira Service Management I got a complaint that it once took a new employee a month to get their laptop. After implementing JSM, I got another complaint: a laptop had arrived too soon, 10 days before the employee started. That's a complaint I can live with."

- Wendy Zacchio, CIO, Zelis



6

tools consolidated into
Jira Service Management

3800

stores across
12 markets supported by
Jira Service Management

**“We replaced 6 different solutions
with Jira Service Management
to support 3,800 stores across
12 markets.”**



Matthias Hansen, Chief Technology Officer
Domino's Pizza Enterprises Ltd.

67%

reduction in license costs



200

hours saved every month

100%

SLA compliance

“We were able to implement the Premium version of Jira Service Management and still save 67% on licensing costs in comparison to ServiceNow.”

Jose Luis Lizarraga Castro, Former It Support Engineer, Engie Mexico

14x

faster implementation than
previous ITSM tool

~25%

lower total cost of ownership



6

months to see ROI with Jira
Service Management

**“With Jira Service Management,
we’ve been able to scale so
our teams across the business
can access information,
collaborate, and work faster”**



Ankit Gupta, General Manager Of Group Technology
The Warehouse Group

Step 1: Gather Customer Context and Identify Champion

- **Land**: Why are they looking for a different solution? What are the pain points they are looking to address e.g. TCO reduction, cost-effective scale, platform standardisation
- **Land**: When does this existing ITSM contract renew?
- **Land**: Do they have a large Atlassian / JIRA footprint already? This is the strongest indicator for displacement success
- **Expand**: Which teams are using Jira Service Management? (e.g. development, IT support etc.)
- **Expand**: How is Jira Service Management adoption? *Drive services opportunity for optimisation, expansion, upgrade*
- **Expand**: How are other teams (e.g. non IT teams like HR, Facilities, Procurement etc providing service today? (e.g. manual tools like email; another vendor like ServiceNow, Zendesk, etc.)

Step 2: Map JSM Opportunities to Use Cases



Modern IT Operations

Empowering IT Ops with modern ways of working to accelerate service recovery and optimize operations

Modern Support

Empowering every team to deliver exceptional service experiences



Service Management for Developers

Empowering developers to streamline requests, automate approvals, and improve collaboration between Dev & IT Ops



Customer Service Management

Empowering customer service teams with unified workflows and shared data to improve resolution times, visibility, and customer experience



SERVICE MANAGEMENT
TRANSFORMATION



\$43 billion

CAGR @ 12%

Customer Service Management market



Source: Gartner Forecast Analysis: CRM Customer Service and Support Software, Worldwide, 2025

Why use Customer Service Management?



Jira Service Management

- **PURPOSE:** For managing services inside the company
- **END USER:** Employees
- **CAPABILITIES:** ITSM & ESM specific, such as requests, incident, change, problem and asset/configuration management
- **ACCESS:** Private to an organization, internal credentials required



Customer Service Management

- **PURPOSE:** For managing services for external customers
- **END USER:** Customers
- **CAPABILITIES:** CSM specific, such as customer context, customer hub, customer support AI agent, CRM integration
- **ACCESS:** Publicly available to external customers for support requests

Both share common service management technology

Queues, SLAs, channels, forms, reports, and more

Both are built on the Atlassian platform

Rovo, Teamwork Graph, Automation, Analytics, Security & Controls, Infrastructure and more

Service Collection Competition

Service Collection takes service management beyond IT, opening new opportunities across the entire organization. This expands our competitive landscape not just against traditional ITSM tools, but also platform-based solutions and customer service offerings. What sets us apart?



Jira Service Management

- Enterprise ITSM vendors
- Mid-market ITSM tools
- Legacy Service management Solutions



Customer Service Management

- Traditional CSM Vendors
- Platform Players
- AI Customer Service Tools

ivantí cherwell



servicenow



Microsoft Dynamics



INTERCOM



SIERRA

TOPdesk

freshworks



Zendesk



freshdesk



DECAGON



ada

Services Opportunity for Infosys

The Service Collection opens a major growth opportunity to extend ITSM success into new buying centers like Business Teams, Customer Support – **driving broader adoption, AI-powered transformation and integrated workflows across every service team.**

Land & Expand

Partner services opportunity includes discovery/assessment, POC, design & implementation, training, managed services, optimisation, org. change management

Lead with Rovo/ AI

Build and optimize custom agents through consulting services. Create long term service engagements around AI governance and transformation.

Differentiate

Deliver unique, industry / vertical solutions. Integrate workflows, data and context for end-to-end transformation.

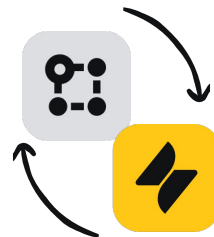
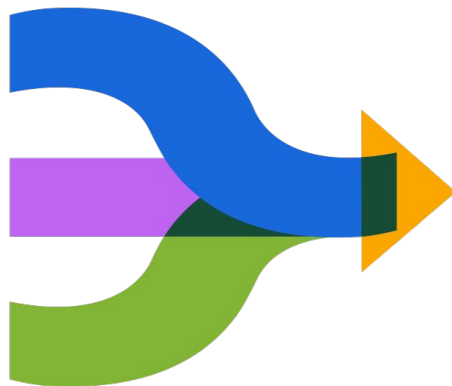
 **ATLASSIAN**

Confirmed Partner

Lansweeper

Pending Partner

flexera





AI-native experiences

Detect



Prevent



Resolve



Powered by Teamwork Graph

Impact of AI in Service Collection

75%

reduction in alert noise

55

mins saved per incident

6x

faster PIR creation

Average based on compression of tenants who have at least 5000 alerts in a month

The Total Economic Impact™ Of Atlassian Jira Service Management: A Forrester Total Economic Impact™ Study Commissioned By Atlassian, December 2024

AI in Jira Service Management has reduced the average amount of time spent drafting a PIR from 40 minutes to 6 minutes.

Vodeno's success story

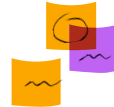
Vodeno, now part of the **UniCredit Group**, is a leading cloud-native Banking-as-a-Service provider. Under UniCredit's umbrella, it aims to drive European expansion, targeting **2.5 million new clients** in three years with scalable embedded finance solutions.

BEFORE

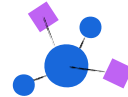
1 week to resolve an incident



Drowning in alert noise



Manual triaging and allocation



Brute force analysis



Continuous firefighting

AFTER

<1 day to resolve an incident



Quicker detection
with alert grouping & smart incident creation



Smarter resolution
with Rovo suggestions



Proactive prevention
with automation & change management

JIRA SERVICE MANAGEMENT | ALERT GROUPING WITH ROVO

[+ Create](#)

Ask Rovo

Operations / Alerts

All alerts

My alerts

Sort by ▾

List view

Detail view

Basic

Advanced

Responders ▾

Priority ▾

More +

Reset

Save Search

JIRA SERVICE MANAGEMENT | SMARTER INCIDENT CREATION

+

Create

Ask Rovo

Operations / Alerts

All alerts

My alerts

Sort by ▾

List view

Detail view

...

Basic

Advanced

Responders ▾

Priority ▾

More +

Reset

Save Search

1-10 of 15

<

1

2

>

Show all alerts in this group

☐ > #G3478

167

P3

Alert group: Core Banking Connector Failures (Poland R...

OPEN

SIGNAL

paym... servic... +4

Oct 07, 2025 14:59

+2

JIRA SERVICE MANAGEMENT | SMARTER RESOLUTION WITH ROVO

Jira Service Management

Q Search

+ Create

Ask Rovo

Spaces / ... / PA-355

SEPA Instant Payments Latency – EU West

Investigate

Link work items

Bradley Evans raised this request via Jira service management

View in Portal

Description

SEPA instant payments are experiencing latency spikes and timeout rates across the EU West region, severely impacting real-time processing. Queue backlogs in the payments orchestrator are contributing to the degradation, further delaying settlement flows. Rovo has grouped 15 related alerts under the Core Banking Connector – EU West.

Show more

Affected services

core-banking-connector-service

Urgency

High

Related resources

Incidents, knowledge articles, PIRs, and work items related to this incident.

Playbooks

Guides that help resolve issues by consolidating relevant data, actions, and documents.

In-progress

SLAs

Suggestions

Details

Assignee

Julie Hadwor

Request Type

Incident

Priority

Critical

Major incident

Responders

None

Severity

Sev-01

Stakeholders

Status pages

Payment health

Send update

JIRA SERVICE MANAGEMENT | SMARTER RESOLUTION WITH ASSETS

 Jira Service Management

Search

Create

Ask Rovo

Notifications

Help

Settings

User Profile

Spaces / ... /  PA-355

SEPA Instant Payments Latency – EU West

 Investigate  Link work items  

 Bradley Evans raised this request via Jira service management [View in Portal](#) 

Description

SEPA instant payments are experiencing latency spikes and timeout rates across the EU West region, severely impacting real-time processing. Queue backlogs in the payments orchestrator are contributing to the degradation, further delaying settlement flows. Rovo has grouped 15 related alerts under the Core Banking Connector – EU West.

[Show more](#)

Affected services 

 core-banking-connector-service   

Urgency High

Changes on affected services and Assets objects [Give feedback](#) 

Older than 6 months

 CO-624 Update tax tables for FY25 V.2	2 services	2 Assets objects	
 CO-608 Update tax tables for FY25	2 services	2 Assets objects	
 ITSM-16851 Testing change management	2 services	3 Assets objects	

[Show more](#)

In-progress 

SLAs 

Suggestions 

Details 

Assignee  Julie Hadwor

Request Type  Incident

Priority  Critical

Major incident 

Responders None

Severity Sev-01

Stakeholders 

Status pages  Payment health

[Send update](#)



JIRA SERVICE MANAGEMENT | PROACTIVE PREVENTION WITH PIR

Projects /  ITOps Alert Groups /  IAQ-156

Memory threshold exceeded on notification-engine WebServer in prod-apse4

 Create subtask  Investigate  Find resources  Link work item  Add form  Add PIR  Create ...

 Anonymous raised this request via Jira
[View request in portal](#)

Hide details

Description

Location or Region of Issue: Asia Pacific (Sydney)

Service Affected: notification-engine

Environment: prod-apse4

Issue Details: The alerts indicate that the memory usage on the WebServer resource for the notification-engine service has exceeded the threshold of 90% for a duration of 5 minutes. This issue has been consistently reported across multiple instances, suggesting a persistent memory utilization problem.

Conclusion: The incident involves repeated memory threshold breaches on the WebServer resource of the notification-engine service in the production environment. Although marked as low urgency (P4), the recurring nature of these alerts suggests a need for further investigation to prevent potential service degradation.

Affected services 

 AWS EC2  

Responders	4 Responders
Urgency	None
Impact	None
Priority	 Critical

 Accelerate incident resolution with Ops Guide NEW

Gain comprehensive insights on past incidents, past responders and related resources to analyze your incident and resolve it faster. [Read more about Ops Guide](#)

Chat with Ops Guide 

Changes on affected services and Assets objects

Give feedback

Related resources

Completed  Fixed 

SLAs

Today 02:01 PM 

Time to close after resolution within 24h

Sep 24 01:52 PM 

Time to first response within 2h

Sep 24 02:01 PM 

Time to resolution within 12h

Suggestions

Details

Reporter  Anonymous

Request Type  Report a system problem

Knowledge base  No related articles

Major incident  

Severity  Sev2

Affected hardware None

Linked alerts  View

Slack  Open #iaq-156 

Microsoft Teams [Contact Jira admin](#)

Zoom [Authorize](#)

Stakeholders None

Assignee  Bimal Jayadev

More fields

Labels None

Request None

⚡ JIRA SERVICE MANAGEMENT | PROACTIVE PREVENTION WITH CHANGE MANAGEMENT

⚡ Jira Service Management

Q Search

+ Create

Ask Rovo

Back / PIT-47

Update retry policy to improve partner API resilience

Create subtask

Link work items

Schedule change

Add form

Create

...

Planned end

None

Risk summary

Changes

Incidents 2

Failures

⚠ Aggressive retry intervals may overload partner bank APIs under failure conditions.

⚠ There are 2 ongoing incidents

✅ We couldn't find any rejected changes in the last 30 days.

✅ We couldn't find any failed deployments in the last 30 days.

✅ The work item reporter [@Veronica Rodriguez](#) had no changes rejected in the last 30 days.

Similar requests

Playbooks

Check step-by-step guidance and automated rules to resolve this work item faster.

Attached form

Risk Questionnaire

Form by @Veronica

Review

Automation

Details

Assignee

Unassigned

[Assign to me](#) [Suggest assignee](#)

Reporter

Veronica Rodriguez

Request Type

Request a change

Priority

Critical

Knowledge base

No related articles

More fields

Labels

High

Request participants

None

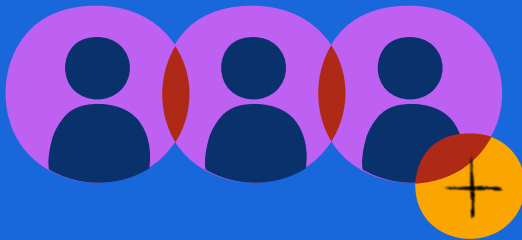
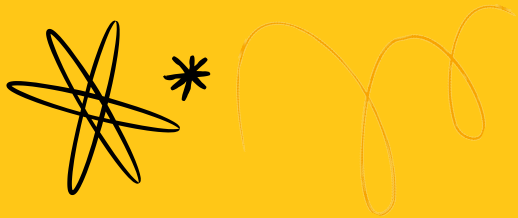
Time tracking

None

Approvers

None

Thank You!



Quiz: 1

Which teams are the *core* target users for Service Collection?

- A. IT teams
- B. HR, Facilities, Legal, Finance, and IT service teams
- C. Development teams
- D. Customer support teams
- E. All of the above

☒ E) All of the above



Quiz: 2

A customer says: “HR, Finance, and Facilities all use different tools and nobody can see end-to-end resolution time.” How should you position Service Collection?

- A. As a helpdesk for IT only
- B. As a unified platform that standardizes request intake, workflows, and reporting across all these teams
- C. As a replacement for their ERP
- D. As a monitoring tool

☒ B) As a unified platform that standardizes request intake, workflows, and reporting



Quiz: 3

In a multi-team rollout, what is a recommended approach?

- A. Start all service teams at once, with custom workflows
- B. Start with 1–2 anchor teams, use templates and best practices, then scale to others
- C. Start with development teams
- D. Let each business team design its own tool and process independently

☒ B) Start with 1–2 anchor teams, use templates and best practices, then scale to others



Quiz: 4

For a sales opportunity, when is Service Collection most relevant?

- A. When a customer wants cheap ITSM platform
- B. When a customer wants to standardise how all service teams work and report value
- C. When a customer is only interested in agile planning and execution for software teams
- D. When a customer wants a CRM system

☒ B. When a customer wants to standardise how all service teams work and report value



Quiz: 5

In a competitive deal, how should you differentiate Service Collection from a single-function ITSM-only competitor?

- A. Emphasise that Atlassian doesn't support non-IT teams
- B. Focus on how Service Collection supports multiple service teams on one platform and connects to work in Jira
- C. Explain that it's only about cost savings and faster time to set up and maintain the platform

☒ B. Focus on how Service Collection supports multiple service teams on one platform and connects to work in Jira Software/Confluence

