

SERVICE DESCRIPTION

Puppet Health Check

In-depth review of your Puppet Enterprise usage and recommendations for getting the most out of your investment.

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Overview

The goal of the Puppet Health Check is to give the Customer a firm understanding of where they are in their use of Puppet Enterprise, what opportunities exist for getting more value from it, and other recommendations for improving their configuration management experience.

Puppet Consultants will use a combination of stakeholder interviews, system inspection, and automated data gathering to provide the Customer with a report on their use of Puppet Enterprise. This report will cover the state of their Puppet Enterprise installation, conformance with best practice, workflow assessment, features they are not taking advantage of, and many other areas of Puppet Enterprise-related information and recommendations.

Recommended for

- Customers on Puppet Enterprise version 2014.2 or higher
 - Customers on PE 3.x should instead purchase the Puppet Upgrade Assessment or ask about scoping an upgrade engagement
- Customers using Puppet Enterprise for 6+ months
- Customers wanting an expert review of their existing Puppet Enterprise installation
- Customers wanting an expert recommendation on next steps based on review of their configuration management goals, automation, processes and areas of opportunity

Consulting Services Description

Puppet will provide the following services related to the implementation of a Health Check:

1. Pre-engagement planning and preparation

- Discovery call(s)
- Identify 3-5 Puppet-related stakeholders/subject matter experts (SMEs) to interview during engagement and confirm their availability
- Other preparation items as needed (research, testing, etc.)
 - Access to Puppet code base
 - Prepare Puppet Enterprise installation to gather performance data
- To be completed by the Customer prior to the start of the engagement:
 - Confirm full-time availability of at least one technical contact for the duration of the engagement
 - Confirm systems and version control access will be ready for engagement
 - Turn on profiling for performance data

2. Engagement kickoff

- Review goals of engagement and project plan
- Provide high-level overview of Puppet concepts if needed
- Discuss current usage of Puppet
 - History of usage
 - What is/isn't working related to Puppet code
 - Customer's specific goals for this Puppet Health Check
 - Customer's future plans for the infrastructure

- v. Other background information to make the engagement most useful

3. Interview identified stakeholders/SMEs

- a. Interview the stakeholders/SMEs identified in the pre-engagement or kickoff meeting to learn about current Puppet usage and areas of challenge and opportunity
- b. Briefly discuss problem areas, potential workarounds, and newer features that may help, if applicable
- c. Note relevant items in leave-behind report

4. Manual discovery/discussion of processes, workflows and infrastructure

- a. Review Customer's current and planned use of Puppet, with a focus on high-level topics such as:
 - i. Infrastructure and future growth
 - ii. Workflows
 - iii. Module development and testing
 - iv. Security
 - v. Backups and disaster recovery
 - vi. Classification and data
 - vii. Upgrade path
 - viii. Integrations
 - ix. Current and future platforms (OS, network, cloud)
 - x. Other areas determined during the engagement
- b. Note findings in leave-behind report

5. Findings review

- a. Recap meeting to review the draft report findings, reinforce concepts covered, and close out the engagement
- b. Areas of greatest interest from this meeting will impact the areas of emphasis in the final report

6. Final report revisions and engagement close-out

- a. Complete the final version of the report and send to Customer within 5 business days of the end of the engagement

Deliverables

- 1. Expert review of Puppet Enterprise-related goals, systems, processes, workflows
- 2. Post-engagement documentation, including:
 - a. Summary of finding and recommendations
 - b. Detailed report of findings and recommendations
 - c. Appendices of additional data gathered

Delivery Approach

Our delivery approach combines automated and manual collection of data about the Customer's Puppet Enterprise installation as well as in-depth interviews of multiple stakeholders to understand the technical and business goals and problems being faced. This approach allows for a high level of detail to be gathered in a short amount of time, enabling both very specific recommendations for technical issues and also a high-level perspective for non-technical items.

Phase 0: Kickoff call, prep, & initial discovery

The Puppet Consultant will spend up to half a day performing preparation and discovery work prior to the engagement. This includes pre-engagement call(s) with the Customer to discuss logistics and begin the discovery phase, project planning and preparation.

Phase 1: Engagement kickoff and automated discovery

The Puppet Consultant collaborates with the Customer to understand their technical and business goals. The consultant runs the puppet-adviser tool that gathers various detailed technical information and creates an initial report that will be added to as the engagement progresses.

Phase 2: Interviewing

The Puppet Consultant and Customer stakeholders have in-depth discussions on technical and business struggles and successes that impact configuration management efforts. These interviews provide the Puppet Consultant with the detail needed to tailor the focus of the manual discovery.

Phase 3: Manual Discovery

The Puppet Consultant reviews the Puppet Enterprise configuration, workflows, processes, and any other areas pertinent to the use of Puppet Enterprise in the Customer environment.

Phase 4: Findings review meeting

The Puppet Consultant meets with the Customer team to review the findings from manual and automated code review activities. The areas of Customer interest and focus from this meeting will impact the areas of emphasis in the final report.

Phase 5: Documentation

The Puppet Consultant will provide engagement documentation within five (5) business days of the end of the engagement, and will consist of the following:

- Summary of finding and recommendations
- Detailed report of findings and recommendations
- Appendices of additional data gathered

Timeline

Phases 1-4 of the Puppet Code Review (as outlined in this service description) require 4 days (32 hours), delivered over one week, to complete. In addition, 8 hours are set aside for preparation and documentation, with each requiring approximately 4 hours.

Fees

The fees for this project will be a fixed price for a maximum of 40 hours. Puppet will use best efforts to complete the Services within this timeframe, but this project will be deemed completed if the maximum number of hours is reached.

Key Assumptions

The following assumptions are reflected in the services, timeline, and estimated effort outlined in this service description:

1. Phases 1-4 of the engagement (as outlined in this service description) will be performed in one week during normal business hours (Monday through Friday, 8:00 a.m. - 5:00 p.m. local time) unless otherwise agreed to in writing by the parties.
2. Customer will provide prompt feedback on all deliverables.
3. Customer will provide prompt access to all systems and resources that Puppet will need to complete the work.
4. Customer must provide a single point of contact that will be available at least 75% of the time throughout the duration of the engagement.
5. Customer will provide Puppet with documentation and access to subject matter experts for non-Puppet systems/ software within the scope of the engagement.
6. Customer will have identified key personnel prior to the beginning of the engagement.
7. Customer will have all necessary security exceptions, firewall rules, network routers, computer and storage resources available prior to the start of the engagement, as detailed in Appendix 1 of this service description.
8. Puppet does not provide support for third-party software that is implemented as part of a Puppet solution, such as version control systems, repository management, packaging, and other software that is not part of the Puppet stack.
9. Services for this engagement will be provided remotely, unless Customer and Puppet mutually agree the Services will be performed on-site. In addition to the fees above, Customer will be responsible for travel and expenses for on-site Services.

Appendix 1 - Engagement Technical Requirements

A successful consulting engagement requires advance preparation. Failure to meet these pre-engagement requirements will have a direct impact on the completion of all the goals of the engagement.

The Customer is expected to review all requirements. Any requirements that are not met should be reported during the pre- engagement call or earlier. Puppet and the Customer will discuss the issues and determine whether to delay the engagement or attempt to work around the issue during the engagement.

The Puppet Health Check requires the following:

- Root access to the Puppet Enterprise infrastructure to facilitate data gathering
- The ability to transfer data (such as the JSON output of this discovery tool) from the Puppet Enterprise infrastructure to the Puppet Consultant's laptop for use in report creation
- Access to the version control system used to store Puppet Code
- Access to any other systems, documents, workflows, etc. which Customer would like reviewed as part of this engagement