



# Puppet Health Check Service Description

**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 2015.2 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 a 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 Puppet Enterprise:

- 1. Pre-engagement planning and preparation**
  - a. Discovery call
  - b. Identify 3-5 Puppet-related stakeholders/subject matter experts (SMEs) to interview during engagement and confirm their availability
  - c. Other preparation items as needed (systems access, logistics, etc.)
    - i. Access to Puppet code base
    - ii. Prepare Puppet Enterprise installation to gather performance data
  - d. To be completed by the Customer prior to the start of the engagement:
    - i. Confirm that at least one technical contact has committed to be available for the duration of the engagement
    - ii. Confirm systems access will be ready for engagement
    - iii. Turn on profiling for performance data

## 2. Engagement kickoff

- a. Review goals of engagement and project plan
- b. Provide high-level overview of Puppet concepts if needed
- c. Discuss current usage of Puppet
  - i. History of usage
  - ii. What is/isn't working
  - iii. Customer's specific goals for this Puppet Health Check
  - iv. Customer's future plans for the infrastructure
  - v. Other useful background to make the engagement most helpful

## 3. Initial automated discovery

- a. Use automated puppet-adviser tool to collect baseline data, such as:
  - i. Infrastructure details
  - ii. Node counts, Platform breakdown
  - iii. Capacity
  - iv. Performance
  - v. Feature usage
  - vi. Other relevant information
- b. Generate initial leave-behind report, to be further edited throughout remainder of engagement

## 4. Interview identified stakeholders/SMEs

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

## 5. Manual discovery/discussion of processes, workflows, and infrastructure

- a. Review Customer's current and planned use of Puppet Enterprise, 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 engagement
- b. Note findings in leave-behind report

## 6. 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

## 7. 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 findings 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 some 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 4 hours 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, and creation and review of an initial project plan using Trello.

### 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 areas of focus for the upcoming discovery phase.

### 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 discovery activities and discuss options for addressing them. 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 spend four (4) hours completing engagement documentation. The final documentation deliverable will be provided to Customer within five (5) business days of the end of the engagement, and will consist of the following:

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

## Timeline

Phases 1-4 of the Puppet Health Check (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. The chart below reflects the expected project timeline.

Phase	Pre-engagement	Day 1	Day 2	Day 3	Day 4	Post-engagement
Preparation						
Kickoff & automated discovery						
Interviewing						
Manual discovery						
Findings review						
Documentation						

## Fees

Product description	Hours	Cost
Puppet Health Check	Up to 40	\$11,995.00

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. This project will be deemed completed if the maximum number of hours is reached.

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. A travel and expense estimate will be provided on the quote and billed at actuals not to exceed the estimate, unless otherwise specified in the quote that travel and expenses will be invoiced in full at the time of purchase. Any quote that does not include a travel and expense estimate will be performed remotely.

## 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 Thursday, 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 in order 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 Enterprise solution, such as version control systems, repository management, packaging, and other software that is not part of the Puppet Enterprise stack.

## 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 in order to run the automated discovery tool
- 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, if analysis of puppet code and development workflows is desired
- Access to any other systems, documents, workflows, etc. which Customer would like reviewed as part of this engagement



## Appendix 2 - Summary of roles & responsibilities

- Puppet Consultant:** This refers to the Puppet Consultant who will be responsible for the delivery of the engagement. They will be involved in most if not all aspects of the engagement.
- Puppet Practitioner:** The Puppet Practitioner is the Customer’s technical point of contact who is primarily responsible for the Puppet Enterprise implementation and is assumed to be championing the continued expansion of the usage of Puppet Enterprise post-engagement. They bear the majority of the responsibility for working with Puppet during the engagement and are expected to be present for ~75% of the engagement. Their schedule should be adjusted to ensure they are able to give the engagement the focus necessary.
- Manager/Director:** This is most often the buyer or project sponsor at the Customer. Their role is to be aware of what is happening as part of the engagement and act as a point of contact/escalation should any assistance be needed from other groups, or if work is blocked at a level that the Practitioner cannot resolve.
- Stakeholders/Subject Matter Experts:** Subject Matter Experts are the technical specialists in non-Puppet systems/software who are aware of but may not be heavily involved in the use of Puppet Enterprise. This may include networking, provisioning, database, application, and development teams, or any other group that might be valuable to speak with as part of this engagement.

**Note:** Any group that has the potential to block progress during the engagement should be informed that the engagement is taking place so they are equipped to respond to any urgent requests.

Responsibilities (? = may need to be involved)	Puppet Consultant	Puppet Practitioner	Manager/ Director	SME
<b>Preparation</b>				
Review and verify pre-engagement requirements are met via email		✓	?	?
Pre-engagement preparation	✓	✓	✓	?
Pre-engagement kickoff call	✓	✓	✓	?
Pre-engagement discovery call(s)	✓	✓		?
<b>Kickoff and automated discovery</b>				
Kickoff/discovery meeting	✓	✓	✓	✓
Finalize project plan	✓	✓	✓	

Run automated discovery tooling against PE infrastructure	✓	?		
<b>Interviewing</b>				
Interview 3-5 Customer Subject Matter Experts	✓	?		?
<b>Manual discovery</b>				
Manually inspect Puppet Enterprise infrastructure	✓	?		
Review other related systems	✓	✓		?
Review related goals, processes, workflows	✓	✓		?
Other discovery TBD during engagement	✓	✓		?
<b>Findings review</b>				
Findings review meeting	✓	✓	✓	?
<b>Documentation</b>				
Create final documentation	✓			
Review and check-in final documentation to version control		✓	?	

? = May be needed

✓ = Required