Puppet Health Check & Code Review Service Description

Get the most out of your investment in Puppet Enterprise with an expert review of where you are and recommendations for where to go next.

Overview

This engagement combines the Puppet Health Check and Code Review. These services focus on reviewing the existing Puppet Enterprise infrastructure and Puppet code base, respectively.

The goal of this engagement 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 and code inspection, and automated data gathering tools to provide the Customer with a report on their use of Puppet Enterprise and the quality of their Puppet code. This report will cover the state of their Puppet Enterprise installation, conformance with best practices, workflow assessment, and features they are not taking advantage of, along with other 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 and Puppet code base
- Customers wanting an expert recommendation on next steps based on their configuration management goals, automation, processes, code, and areas of opportunity

Consulting services description

Puppet will provide the following services related to assessing Customer use of Puppet Enterprise and reviewing Puppet code:

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. Puppet Consultant access to Puppet Enterprise infrastructure, Puppet code base, and any other systems to be reviewed
        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 related to Puppet code

  iii. Customer's goals for this Puppet Health Check & Code Review

   1. Systems/processes to investigate

   2. Puppet code to review

   3. Other specifics that Customer would like reviewed

  iv. Future plans for the infrastructure

  v. Other background information to make the engagement most useful

3. Initial automated discovery and code review

 a. Use automated tools to collect baseline data for use in Health Check findings report, such as:

  i. Infrastructure details

  ii. Node counts, Platform breakdown

  iii. Capacity

  iv. Performance

  v. Feature usage

  vi. Other relevant information

 b. Run automated code review tooling to check things such as:

  i. Lint warnings

  ii. Parser validation

  iii. Other automated code checks

 c. Generate initial leave-behind reports, 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 current Puppet usage and areas of challenge and opportunity. These stakeholders may include:

  i. Puppet practitioners/developers

  ii. Puppet users

  iii. Managers or others with a view of group-specific and broader business goals

  iv. Members of other teams that may or may not use Puppet Enterprise, such as:

   1. Security

   2. Development

   3. Infrastructure

   4. Other teams selected by Customer

b. Briefly discuss problem areas, potential workarounds, and newer features that may help, if applicable

c. Note relevant items in leave-behind reports

5. **Manual discovery and 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. **Manual review of Customer's Puppet code**

   a. Review Customer's current and planned usage of Puppet Enterprise, with a focus on technical and non-technical topics related to Puppet code, such as:

      i. Workflows

      ii. Module development and testing

      iii. Security

      iv. Classification and data

      v. Upgrade path

      vi. Other areas determined during engagement

   b. Review representative samples of modules, as time allows, for Puppet code style, quality, and practices

   c. Note findings in leave-behind report

7. **Findings review**

   a. Recap meeting(s) to review the draft report findings, reinforce concepts covered, and close out the engagement

      i. Depending on team structure, it will likely be more effective to have separate findings review meetings for the Health Check and the Code Review, as they may have different audiences

   b. Areas of greatest interest from this meeting will impact the areas of emphasis in the final reports

8. **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. Expert review of Puppet code base
3. Post-engagement documentation, including:
    a. Health Check report
        i. Summary of findings and recommendations
        ii. Detailed report of findings and recommendations
        iii. Appendices of additional data gathered
    b. Code Review report
        i. Summary of findings and recommendations
        ii. Detailed report of findings and recommendations
        iii. 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 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.

Phase 1: Engagement kickoff, automated discovery, & code review

The Puppet Consultant collaborates with the Customer to understand their technical and business goals. The consultant runs the puppet-adviser tool that gathers various 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/review

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 explain 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

Puppet Health Check

Phases 1-4 of the Puppet Health Check (as outlined in this service description) require 4 days (32 hours). The findings review meeting can be delivered in either the first (Health Check) or second (Code Review) week, depending on Customer preference and availability.

Puppet Code Review

Phases 1-4 of the Puppet Code Review (as outlined in this service description) require 4 days (32 hours). 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	Health Check					Code Review					Post-engagement
		M	T	W	TH	F	M	T	W	TH	F	
Preparation	▓											
Kickoff, automated discovery, & code review		▓					▓					
Interviewing		▓	▓				▓	▓				
Manual discovery & code review			▓	▓	▓			▓	▓	▓		
Findings review					?					▓		
Documentation						▓					▓	▓

Fees

Product description	Hours	Cost
Puppet Health Check & Code Review	Up to 80	$23,995.00

The fees for this project will be a fixed price for a maximum of 80 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.

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 & Code Review 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 the discovery tool) from the Puppet Enterprise infrastructure to the Puppet Consultant's computer 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

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
Preparation				
Review and verify pre-engagement requirements are met via email		✓	?	?
Pre-engagement preparation	✓	✓	✓	?
Pre-engagement kickoff call	✓	✓	✓	?
Pre-engagement discovery call(s)	✓	✓		?
Kickoff and automated discovery				
Kickoff/discovery meeting	✓	✓	✓	✓
Finalize project plan	✓	✓	✓	

Run automated discovery tooling against Puppet Enterprise infrastructure	✓	?		
Run automated code review tooling against Puppet code base	✓	?		12
Interviewing				
Interview 3-5 Customer Subject Matter Experts	✓	?		?
Manual discovery and code review				
Manually inspect Puppet Enterprise infrastructure	✓	?		
Review other related systems	✓	✓		?
Review related goals, processes, workflows	✓	✓		?
Manually inspect Puppet code	✓	?		?
Other review areas TBD during engagement	✓	✓		?
Findings review				
Findings review meeting(s)	✓	✓	✓	?
Documentation				
Create final documentation	✓			
Review and check-in final documentation to version control		✓	?	

? = May be needed

✓ = Required