Open Source Puppet Assessment Service Description

What you are doing with Puppet today, how will Puppet Enterprise benefit you, and what will it take to get migrated.

Overview

The goal of the Open Source Puppet Assessment is to give the Customer a firm understanding of where they are in their use of open source Puppet, what benefits they will see from moving to Puppet Enterprise, what it will take to get migrated, and how Puppet Inc. can help.

Puppet Consultants will use a combination of meetings, interviews, and system inspection to provide the Customer with a report on their use of open source Puppet. This report will cover the state of their open source Puppet installation, any custom integrations being used, a rough sampling/testing of puppet code to determine function on Puppet Enterprise and with the Puppet 4 parser. It will also include expected benefits of switching to Puppet Enterprise based upon the information gathered such as features that address difficulties or goals mentioned during interviews. Lastly the report will provide an overview of the steps and estimated effort required to migrate to Puppet Enterprise so that the Customer can make an informed cost benefit analysis.

Recommended For

- Customers using open source Puppet that are considering Puppet Enterprise
- Customers wanting an expert review of their existing open source Puppet installation
- Customers wanting an expert assessment of the benefit and effort required to migrate to Puppet Enterprise
- Customers with relatively standard open source Puppet implementations having
  - 3 or less puppet masters
  - 20 or less custom/customized modules
  - Customers outside of these parameter should have a brief discussion with the Puppet Professional Services scoper to determine if this offering will work for them or if additional time or a custom scope is necessary

Consulting Services Description

Puppet will provide the following services related to assessing the existing implementation of Puppet and providing information on benefits and effort to migrate to Puppet Enterprise:

1. **Pre-engagement planning and preparation**
   a. Remote discovery call

b. Identify 2-3 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
d. <u>To be completed by the Customer prior to the start of the engagement:</u>
   i. Confirm availability of at least one technical contact has been committed for the duration of the engagement
   ii. Confirm systems access will be ready for engagement

2. **Kick-off**
   a. Meet stakeholders
   b. Overview goals of engagement and review project plan
   c. Discuss Customer technical environment, change processes, business considerations, and other non-puppet specific areas that will provide context around Customer configuration management needs

3. **Discovery Activities**
   a. In-depth discussions with Customer stakeholders to understand use of Puppet and areas of risk or opportunity
      i. What is Puppet doing today?
      ii. What else would you like it to do?
      iii. What is and isn't working with Puppet today?
   b. Review existing Puppet open source implementation in the following areas:
      i. Current Puppet infrastructure
         1. Version and Architecture
         2. Customizations (ENCs, Hiera backends, etc)
         3. Nodes under management (number, OS mix, etc)
      ii. Classification method(s) in use
      iii. Code management workflow
      iv. Puppet code: Spend up to four (4) hours reviewing Customer puppet module code to get a sense of code quality and Puppet 4.x compatibility
   c. Review other related areas
      i. Customer knowledge of Puppet
      ii. Provisioning process
      iii. Cloud usage
      iv. Areas not under Puppet management

4. **Review Discovery Findings and Recommendations**
    a. Review infrastructure upgrade options as appropriate and define upgrade approach. Topics to be considered include:
        i. (If not on Puppet 4.x parser) Usage of temporary Puppet Enterprise 3.8 master and puppet-preview process for Puppet code evaluation
        ii. Overview of PE architecture and scale out process
        iii. (If not on Puppet 4.x parser)Overview of 3.x->4.x upgrade process
        iv. Migration items
            1. CA migration
            2. Classification migration
            3. Database migration
            4. Code management/version control workflow
            5. Other migration areas (custom integrations, etc)
    b. Review findings and recommendations in other areas
        i. Additional operating systems that are available in PE
        ii. Modules (Forge supported, approved, PE only)
        iii. Other gains from switching to PE
        iv. Customer knowledge of Puppet and potential training offerings
        v. Customer availability for code update and migration work as well as potential service offerings to assist

5. **Create assessment report documenting the findings and recommendations detailed above**
    a. Areas of most 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 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 includes manual collection of data about the Customer's Puppet installation as well as in depth interviews of multiple stakeholders to understand the technical and business goals and problems being faced. This approach allows both very specific recommendations for some technical issues and also a high level perspective for non-technical items.

Phase 0: Kick-Off Call, Prep, & Initial Discovery

The Puppet Consultant will spend up to four (4) hours performing preparation and discovery work before 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: Kick-Off Meeting

The Puppet Consultant meets with the Customer stakeholders to understand their technical and business goals, review and adjust the project plan, and discuss other areas pertinent to the project.

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 configuration, workflows, processes, code and any other areas pertinent to the use of Puppet in the Customer environment.

Phase 4: Findings Review Meeting

The Puppet Consultant reviews their findings from the discovery activities and discusses these findings with the Customer team to explain the options for addressing them and how Puppet Enterprise would help. 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 in order to complete 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

The Open Source Puppet Assessment requires 4 days (32 hours) delivered over one week to complete. In addition to this, 8 hours are set aside for remote preparation and documentation. The chart below reflects the expected project timeline.

Phase	Pre-engagement	Day 1	Day 2	Day 3	Day 4	Post-engagement
Prep	▒					
Kick-off Meeting		▓				
Interviewing		▓	▓			
Manual Discovery		▓	▓	▓	▓	
Findings Review					▓	
Documentation						▒

Fees

Services Description	Hours	Amount
Open Source Puppet Assessment	Up to 40	$11,995.00

The fees for this project will be a fixed price for up to 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.

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% time during 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 routes, computer and storage resources available prior to the start of the engagement as detailed in Appendix 1 of this service description.

8.

Appendix 1 – Engagement Technical Requirements

A successful consulting engagement requires preparation ahead of time. 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 and any that are not met should be reporting 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 issues during the engagement.

The Open Source Puppet Assessment requires the following:
- Root access to the Puppet infrastructure in order to inspect the system
- The ability to transfer data such as findings from system inspection from the Puppet 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 desires be 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 aspects of the engagement.

Puppet Practitioner: The Puppet Practitioner is the Customer's technical point of contact who is primarily responsible for the Puppet implementation and is assumed to be championing the continued expansion of the usage of Puppet 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 on 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. Examples include networking, provisioning, database, application, and development teams – basically any group that might be valuable to speak with as part of this engagement.

NOTE: Any group that could be a blocker of progress during the engagement should be informed that the engagement is happening so they are not surprised by any urgent needs.

Responsibilities (? = may need to be involved)	Puppet Consultant	Customer		
		Puppet Practitioner	Manager/ Director	SME
Review and verify pre-engagement requirements are met via email		✓	?	?
Pre-engagement preparation	✓	✓	✓	?
Pre-engagement kickoff call	✓	✓	✓	?
Pre-engagement discovery call(s)	✓	✓		?
Kick-Off Meeting				
Kickoff/discovery meeting	✓	✓	✓	✓
Finalize project plan	✓	✓	✓	
Interviewing				
Interview 2-4 Customer Subject Matter Experts	✓	?		?
Manual Discovery				
Manually inspect Puppet infrastructure	✓	?		
Review other related systems	✓	✓		?
Review related goals, processes, workflows	✓	✓		?
Other discovery TBD during engagement	✓	✓		?
Findings Review				
Findings review meeting	✓	✓	✓	?
Documentation				
Create final documentation	✓			
Review and check-in final documentation to version control		✓	?	

? = May be needed, ✓ = Required