



# Puppet 8 Readiness Check Service Description

## Overview

The goal of the Puppet 8 Readiness Check is to help Customers determine if their Puppet code is ready for the transition to Puppet 8.

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. This report will cover the state of their Puppet code, use of deprecated conventions, Hiera use and preparedness, and module compatibility.

## Recommended for

- Customers using Puppet 6 or later
  - Suitable for both Puppet Enterprise and Open Source Puppet installations
- Customers who are actively using Puppet to manage system configurations for 6+ months
- Customers needing an external review of their existing code base
- Customers wishing to migrate to Puppet Enterprise 2023.4 to take advantage of performance improvements

## Consulting services description

This is a one-week services engagement. Professional Services will meet remotely with the customer for four days (32 hours), and spend the last day of the engagement (8 hours) preparing a custom recommendations document. Depending on customer needs, the recommendations may include additional services to be scoped, work for the customer to perform on their own, or a combination of the two.

## Delivery approach

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 logs for analysis
  - 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
- 2. Engagement kickoff**

- a. Review goals of engagement and project plan
  - b. Discuss current usage of Puppet
    - i. History of usage
    - ii. What is/isn't working
    - iii. Customer's specific goals for adopting Puppet 8
    - iv. Customer's future plans for the infrastructure
    - v. Other useful background to make the engagement most helpful
- 3. 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
- 4. 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 usage
    - iv. Data separation with Hiera
    - v. Classification and data
    - vi. Upgrade path
    - vii. Integrations
    - viii. Current and future platforms (OS, network, cloud)
    - ix. Other areas determined during engagement
- 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 your Puppet code base and infrastructure.
2. Post-engagement documentation, including:
  - a. Summary of findings and recommendations
  - b. Detailed report of findings and recommendations
  - c. Proposed plan for addressing any code or infrastructure issues needed to adopt Puppet 8.

## 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						
Interviewing						
Manual Discovery						
Findings Review						
Documentation						

## Fees

Product description	Hours per Week	Cost
Puppet 8 Readiness 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 8 Readiness Check requires the following:

- Root access to the Puppet Enterprise infrastructure in order to review relevant Puppet service logs OR a full support bundle transferred to Puppet support for PS analysis.
- The ability to review the Puppet code in use and run through a test and validation environment for Puppet 8