RED HAT CONSULTING

OPERATIONAL EFFICIENCY PATHWAY WORKSHOP

PREPARATION GUIDE

TABLE OF CONTENTS

1 DOCUMENT INFORMATION

1.1 Originator

Red Hat Consulting

1.2 Owner

Red Hat Consulting – Confidential; Restricted Distribution

1.3 Distribution

Do not Forward or Copy without written permission.

1.4 Confidentiality

All information supplied to Customer for the purpose of this project is to be considered Red Hat confidential.

1.5 Disclaimer

This document is not a quote, and does not represent an official Statement of Work. If acceptable, a formal quote can be issued, which will include a contract with the scope of work, cost, and any customer requirements if necessary.

2 AIMS AND OBJECTIVES

2.1 Overview

As part of its Pathways program, Red Hat Consulting offers a 1-day Operational Efficiency Workshop as the first step to understanding the key issues faced by customers when managing and running expanding Linux and Open Source environments. The aim of the Pathway is to ensure that these are significantly more efficiency that legacy environments and that they provide a secure, stable platform and fast return on any investment required for set up.

The Operational Efficiency workshop can be part of an existing project to migrate to to Open Source / Linux or as part of a plan to develop and improve the existing Open Source / Linux estate, especially as part of the plan to virtualize or move to on premise or hybrid cloud environment. Also, implementing a Standard Operating Environment (SOE) is a prerequisite for cloud computing for the majority of organizations.

2.2 Key Activities

The workshop will cover three main areas :

- an assessment and review of the current situation with respect to Linux (and Unix) system management
- a functional and non-functional assessment of future requirements for the environment
- an initial forecast on how future requirements might be achieved, in terms of specific technology, process and schedule, based on best practice.

The findings in these 3 areas will then be included in a Workshop Report. This is a 12-15 page executive summary and highlights the key issues for IT Management on improving their operational efficiency for Linux and open source environments.

2.3 Running a Workshop

Normally Red Hat Consulting need a minimum of 4 weeks notice prior to running the workshop. Once the date is confirmed, a representative from Red Hat Consulting, usually the Regional Services Management or Engagement Manager, will arrange a call with the customer to confirm the details of the meeting, including the agenda and also the attendees.

The workshop takes 4-6 hours, should be held on one day as a contiguous session. The report from the workshop is usually produced within 5-7 working dates of the workshop and will be accompanied by a proposal or Statement of Work.

3 WORKSHOP STRUCTURE

3.1 Introduction

The workshop should be held on a single day and usually takes 4-6 hours, though this can vary depending on the scope. Red Hat Consulting use a predefined structure for this (see Table 1 : Operational Efficiency Workshop Structure) though this can be tailored.

The workshop is normally held in English, however depending on location and the staff available, some sessions maybe held in local language.

3.2 Agenda

3.2.1 Overview

This agenda is a recommended starting point for organizations considering working with Red Hat Consulting on this work, and it is possible to make changes and alterations to this. Usually this is done at least two weeks before the workshop during a conference call.

The workshop is modular and can be made up from all or some of the following sessions. Sessions 1 and 2 should be seen as essential, while other sessions are optional. Some sessions can be run concurrently for different audiences.

Running all of the sessions will be done over two days, though it is also possible to put together a one-day workshop also. We also can provide specific bespoke sessions around specific products and approaches if needed.

#	Session	Duration	Description	Attendance
1	Introduction	15-30 minutes	Individual introductions, including role and scope within the organization or specific project Confirmation on aims and objectives of the workshop	All
2	Customer Update	30 minutes	Presentation from customer on current situation, challenges, opportunities and primary goals for their system management and open source estate.	All
3	Maturity Assessment	60-90 minutes	Using the maturity matrix, an open discussion on current implementations for specific system management functions	All
4	Future Requirements	60-90 minutes	A workshop-style session that takes a long list of future functional and non-functional requirements and identifies the key priorities. These are then expanded to understand the process, technology and people involved.	All
5	Roadmap	60-90 minutes	Initial discussion on how getting from the existing situation, to the future requirements might be achieved, based on technology, current industry best practice and what might be suitable for the customer	All
6	Conclusions and Action Items	30 minutes	Summary of workshop and agreement on action items and content of the Executive Report	All

Table 1 : Operational Efficiency Workshop Structure

4 WHO SHOULD ATTEND

4.1 Organization Attendees

The following tables indicate the responsibilities which would be useful to have coverage of during the workshop along with typical job roles.

Description	Typical Attendee
Responsibility for setting goals and determining the measures of success for the project.	Project Sponsor
Business unit owner currently responsible for service provision.	Infrastructure, Platform or Software Owner(s)
Responsibility for key technology choices, platform design and scope.	Lead Architect/Unix Lead
Responsibility for service delivery currently.	System Administrator/Engineer
Build engineering responsibility.	Unix/Linux/Windows Engineering Team Architect
Responsibility for implementation of security policy and compliance.	Security Policy Engineer
Responsibility for network architecture design and implementation.	Network Administrator/Engineer

Table 2 : Suggested participants from the customer

Some of the workshop sessions will be relevant to all

4.2 Red Hat Participants

The usual participants from Red Hat are:

Title	Role
Architect	Senior member of Red Hat's consulting team with experience of running workshops and conducting assessments. There may be 1 or more Architects participating, depending on the scope of the workshop
Engagement Manager	Consulting lead in region and the main owner of the meeting, including responsibility for producing the executive report
Solution Architect (optional)	Regular technical contact for the customer.
Practice Specialist (optional)	Optional, a member of the global consulting practice with a specialism in this area

Table 3 : Red Hat workshop participants

Not all of the participants outline in Table 2 : Suggested participants from the customer are required for the whole workshop

5 HIGH LEVEL WORKSHOP GOALS

5.1 Introduction

The objective of the Operational Efficiency (OE) Workshop is to assess the current operational environment and processes for managing the IT estate and understand the longer term strategic goals of the business. The result of this workshop is a high level report and proposal detailing our recommendations and approach to an implementation. In particular, the objective of the OE Workshop is to:

- understand the business drivers behind the customer's choice to migrate to or expand their Open Source / Linux environment
- assess the current operational environment and processes for managing the customer's IT estate and understand the current level of service they expect from IT infrastructure,
- understand how the customer's requirements match existing open source project and Red Hat product capabilities,
- assess the type and scale of project that would satisfy the customer needs,
- and to understand the context for the project in terms of priorities, timescales, budget and scope.

The exact focus of the workshop will depend on the customer priorities, however some illustrative examples are;

Goal	Use Case	Function
Reduce System Management Overhead	Streamlined lifecycle management	System provisioning
		System updates
Vendor Flexibility	Hardware independence	Service migration
	Cloud independence	Multi-cloud management
Improved IT Governance	Platform standardisation	Role based system definitions
		IT System reporting and monitoring
Best Practice Security	Benchmark Compliance	Compliance enforcement
		Compliance reporting
	Centralised Security Responsibility	Host access control
		Security log monitoring

6 WORKSHOP METHODS

6.1 Introduction

As previously stated, the OE Workshop aims to understand the gap between the current customer IT technologies and processes and the desired goals of both the IT department and business in improvind operational efficiency of a data centre.

Based on the discussion and findings that take place during the workshop, Red Hat will use the following technology and methods to make some initial proposals in the Report.

6.2 Determining operational maturity

Figure 1 : Maturity assessment chart shows a chart that describes the different components used to assess the maturity of an existing environment. It's a familiar assessment tool and is used as a prompt for discussion during the first phase of the workshop.

Figure 1 : Maturity assessment chart

The chart is also a good reference for determining a roadmap on what key functionality needs to be developed for a future SOE.

6.3 Red Hat reference architecture

Red Hat reference architecture is one tool used to assess these gaps. This is a high level architecture which can be used to identify core functions and technologies for a Standard Operating Environment (SOE). Within SOE, it focuses on a modular, reusable, structure based around core builds and a unified management platform (see Figure 2 - SOE Structure and levels).

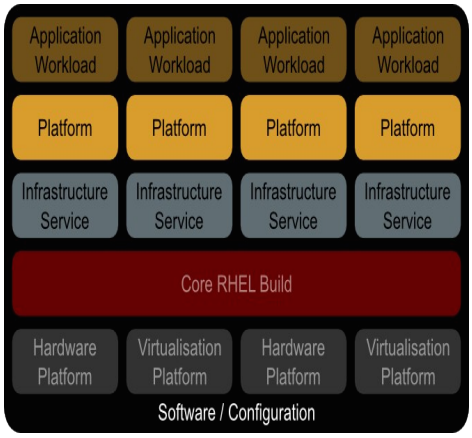

Figure 2 - SOE Structure and levels

By mapping in existing technologies and process against this architecture we can understand quickly the scope of the project, customer pain points and key areas of focus.

Some elements of the workshop will look to map existing processes and functions to Red Hat's tools, services, best practice and approaches to Operational Efficiency (see Figure 3 : SOE process, functions and tools)

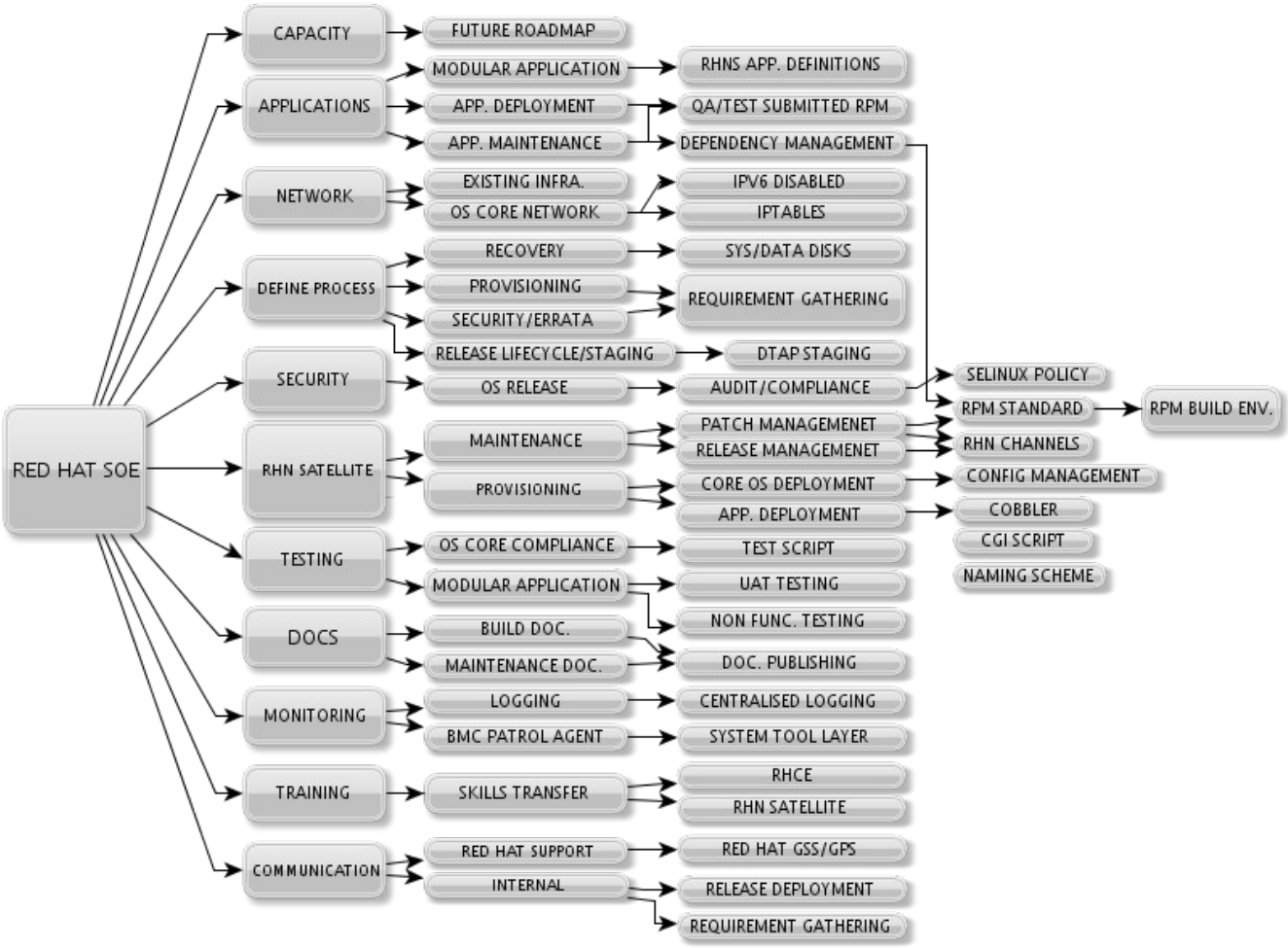

Figure 3 : SOE process, functions and tools

7 PRE-WORKSHOP PREPARATION

In order to make the most efficient use of the workshop it is helpful to have information to hand. With this in mind information about each of the following topics would be useful.

	Description
Systems Management	For systems management the following information is useful; • Existing platform definition process. • Existing provisioning, update and management processes. • Existing system management tools, hardware and virtualisation platforms.
Data Management	For data management the following information is useful; • Existing data management policies. • Current storage presentation (e.g. NAS, SAN, etc)
Security	For security management the following information is useful; • Existing/Planned security requirements (e.g. PCI DSS). • Auditing tools. • Information Security policies. • Security zones (e.g. core network, DMZs, web facing).
Availability	For availability the following information is useful; • Existing availability SLA provisions. • Existing disaster recovery solutions (e.g. Asynchronous SAN replications to back up datacenter). • DR and availability testing schedules & frameworks (e.g. when, who, how often etc).
Identity Management	For identity management the following information is useful; • Existing identify management policies. • Existing identity management software (e.g. LDAP Servers, AD Domains, etc).
Capacity Planning	For capacity planning the following information is useful; • Existing capacity planning processes (e.g. tools, key data points, thresholds, analysis, etc).
Standard and Certification	For standards and certification is the following information is useful; • Existing platform standardisation goals. • Existing processes designed to support platform standardisation. • Certification requirements for standard platforms.
Mentoring, Training and Knowledge Transfer	For mentoring, training and knowledge transfer the following information is useful; • Existing Red Hat certifications within teams. • Non-Red Hat certifications within teams. • Internal/External training plan.

7.1 Report

From the workshop, Red Hat Consulting will produce an executive report, as well as a business proposal for further work. The executive report will outline the current situation, future expectations and an indication of the process needed to achieve these expectations.

The report is an overview, primarily aimed at management, outlining the key aims and objectives.

The business proposal provides an outline schedule of work and cost-assessment for the next stages of development.

8 FURTHER INFORMATION

For further information on the workshop, please contact:

Malcolm Herbert
Director, Consulting Practice Europe
malcolm@redhat.com
+44 7720 079845