Service Delivery Life Cycle Guide

Prisma Cloud Automation Services

Version 1.0

Nov 1, 2024

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# Phase Expectations, Customer, and Consultant Guidance

The [Automation SDLC](https://docs.google.com/presentation/u/0/d/15jbqcaZoE3ZFZRZI4ij2TGlJI5kj3jR43_-mZ7MlSBg/edit) Guide provides a comprehensive outline of the expectations and processes for successfully delivering automation services within Prisma Cloud Professional Services. The guide breaks down the process into several phases, detailing customer and consultant expectations, project management practices, and deliverables for each stage.

# 1. Level of Effort (LoE)

Objective: Establish a clear understanding of the customer's automation needs and document the level of effort required.

## Tasks

* Conduct discovery calls with the customer to identify their automation requirements.
* Create a Level of Effort (LoE) document based on the discovery call findings.
* Ensure the LoE document is uploaded to [Google Drive](https://drive.google.com/drive/folders/1RnBT_u59P8OuyXJnEOjkA0yIy4wui4IE) and provided to the delivery team for all engagements that proceed to project kickoff.

## Customer Expectations

* Availability for discovery calls.
* Clear communication of automation needs.

## Automation Manager Expectations

* Accurate documentation of automation requirements.
* Timely upload of the LoE document.

# 2. Project Kickoff

Objective: Officially start the project, establish engagement steps, and clarify environment requirements.

## Tasks

* Hold a kickoff call to outline the engagement steps and environment prerequisites.
* Project Managers (PMs) to upload the kickoff deck to Clarizen or Google Drive.
* Depending on the scope, use the [Automation Kickoff Deck](https://docs.google.com/presentation/u/0/d/1J0J4YsOCXA_E_pR5narCuGalbpxZbwNjuHr6u72MgFo/edit) or a broader kickoff deck incorporating relevant slides from the Automation Kickoff Deck as needed.

## Customer Expectations

* Participation in the kickoff call.
* Provide information on environment requirements.

## Project Manager Expectations

* Prepare and present kickoff materials.
* Introduce the Automation Engineer
* Clarify the project scope and engagement steps.

## Automation Engineer Expectations

* Participation in the kickoff meeting

# 3. Discovery

Objective: Design a structured and detailed solution based on the initial LoE and customer requirements.

**NOTE:** Discovery phase may need to be done before Project Kickoff if the customer requires a deeper dive into the Solutions design before kicking off the project.

## Tasks

* Review the LoE with the customer, ask clarifying questions, and understand the problem.
* Populate the overview and high-level information of the [Solutions Design](https://docs.google.com/document/d/15vCjnS0_HF5z4tCDCpp6h8_1oLP6n8saa2wP6ahQ47c/edit?tab=t.0) Document during the meeting.
* Research, design, and document the proposed technical solution in the Solutions Design Document.
* Review the Solution Design Document with the customer
* Obtain customer sign-off on the Solutions Design Document to mitigate scope creep and set clear expectations before proceeding with the development of the automation

## Customer Expectations

* Provide detailed input during the design review.
* Sign off on the Solutions Design Document.

## Consultant Expectations

* Thorough documentation and research.
* Clear and consistent communication with the customer.

## Project Manager Expectations

* Build project management timeline based on Solutions Design document

# 4. Implementation & Testing

Objective: Develop and configure the proposed automation solution for the customer's environment.

## Tasks

* Implement the Prisma Cloud automation as per the approved design.
* Maintain the source code in Automation GitHub repository.

## Customer Expectations

* Participate in working sessions and updates during the development phase.

## Project Manager Expectations

* Participate in updates during the development phase and provide regular communication on updates to larger project team
* Track timesheets in Clarizen to ensure the automation is delivered on time
* Proactively notify Automation Manager if project timeline needs to be extended for any reason

## Consultant Expectations

* Adherence to the documented design.
* Thorough and accurate code maintenance.
* Testing of the automation
* Working Sessions as needed with the customer
* Gather routine feedback from the customer to help ensure the project is on track
* Regular updates on the progress to the Project Managers and the customer

# 5. Configuration & Testing

Objective: Deploy and configure the developed automation within the customer's environment.

## Tasks

* Deploy the solution.
* Perform necessary configurations to ensure proper functionality within the customer environment.

## Customer Expectations

* Coordination for deployment scheduling.
* Prepare the environment as required.

## Consultant Expectations

* Validate deployment against the documented design.
* Ensure all configurations are completed.
* Thoroughly test the deployment with the customer to ensure the automation meets the customer’s expectations

# 6. Validation & Documentation

Objective: Conduct knowledge transfer, provide documentation, and finalize project delivery.

## Tasks

* Conduct Knowledge Transfer Sessions with the customer.
* Create an As-Built Document detailing the automation and supporting documentation.
* Upload the As-Built document to Google Drive
* Deliver code and As-Built Document to customer

## Customer Expectations

* Engage in Knowledge Transfer Sessions.
* Review and sign off on the final delivery.

## Consultant Expectations

* Provide comprehensive and clear documentation.
* Ensure smooth knowledge transfer and customer satisfaction.

# Status Reports and Weekly Touch-ins

Throughout each phase, it is imperative to maintain regular communication and documentation:

* Weekly Status Reports: Sent out via Clarizen and/or Asana by Project Managers to keep all stakeholders informed of progress.
* Timesheet Logging: Accurate logging of hours in Clarizen by engineers.
* Weekly Touch-ins: Regular touchpoint meetings with the customer to address any concerns and update on progress.
* Weekly Team Meetings: Provide updates to the team, ask clarifying questions or guidance from the team

This structured approach ensures clarity, reduces scope creep, and aligns expectations between the customer and consultants, leading to successful project delivery.

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# Revision History

| **Version** | **Date** | **Editor Name** | **Reason For Change** |
| --- | --- | --- | --- |
| 1 | Nov 1, 2024 | [Mark Clayton](mailto:mclayton@paloaltonetworks.com) | Initial Version |
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