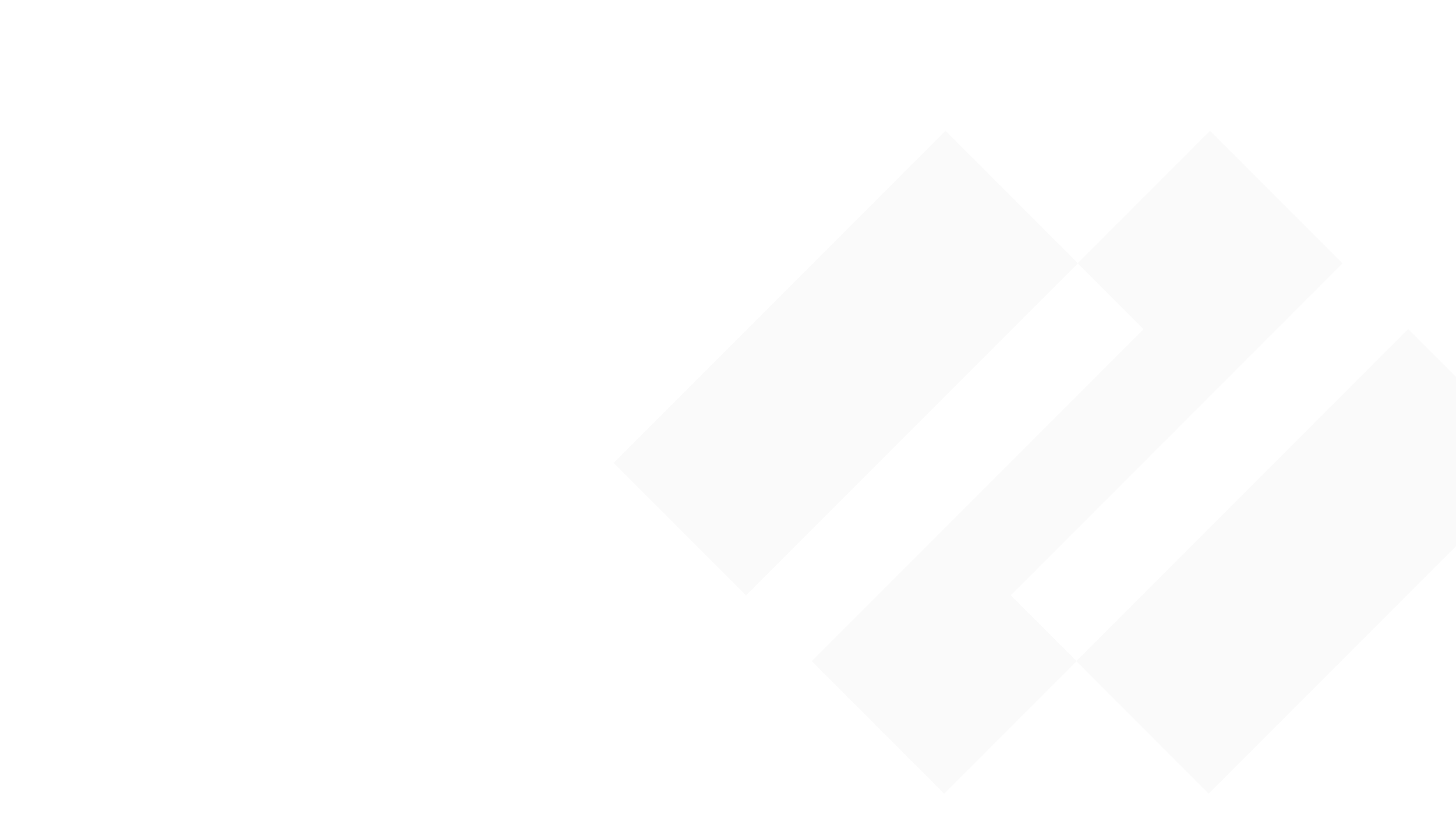
Extended Expertise Consultant Runbook   
Prisma Cloud - Professional Services

Last Revised: November 2022



**Major Revisions:**

| **Version** | **Updated by** | **Date** | **Change Description** | **Next Audit Date** |
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|  | Jerry Hache | June 2019 | Original |  |
| 1.0 | Brandon Bartels, Katy Edwards, Marti Mondragon, Bora Okay | June 2022 | Merged RE Runbook with EE Runbook, added/updated links, updated content | November 2022 |
| 1.1 | Fereshta Hamidzada  Jonathan Calloway  Nidhi Choudhary | July 2022 | Modified Runbook for Prisma Cloud EE specific team | August 2022 |
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| 1.3 | Fereshta Hamidzada  Jonathan Calloway  Nidhi Choudhary | November 2022 | Final version | April 2022 |
| 1.4 |  |  |  |  |

#### 

#### Runbook Table of Contents

[Runbook Table of Contents](#_38t71oxj65hx) 3

[**Runbook Overview**](#_dmb1iwe2h7p5) **5**

[Extended Expertise Consultant (EEC)](#_7aale1tj5jfo) 5

[EE Consultant Different SOWs/SKUs](#_2w8426w7zlh5) 5

[Extended Expertise Credits](#_f03xbfta992) 6

[Specialties](#_1bdfmg1jhrdp) 7

[Pre-Engagement with Customer](#_9bfq7bfpiv6n) **9**

[Internal Kickoff](#_55f4s05n94n1) 9

[Intro to Account Team (Optional)](#_2s8eyo1) 9

[**Post-Sales (Engagement with the Customer)**](#_odetgocitlxv) **9**

[**Kickoff**](#_9qc84h98o5l7) **9**

[Introductions / Kickoff Deck Template](#_1ksv4uv) 9

[Engagement Plan](#_iqyq4xe4qi63) 9

[Define Key Stakeholders](#_z337ya) 10

[Communication Plan](#_3j2qqm3) 10

[Activate Clarizen Project](#_i8kaqtkf7mt8) 11

[CSAT Surveys](#_qsjl7qpi6yrs) 11

[**EE Responsibilities**](#_8yf5otoelk2v) **13**

[**Operational Responsibilities**](#_s9vyo5mc7xly) **13**

[Trusted Advisor and Soft Skills](#_s77cv4rk5ptw) 13

[EEC Initial Activities](#_23ckvvd) 14

[Discovery & Baseline Evaluation (CBDR Health Check/Adoption Advisor)](#_ile5u9y1zr95) 15

[Set Up Clarizen Tasks](#_37m2jsg) 15

[Send First Weekly Status Report From Clarizen and Set Up Recurring](#_1mrcu09) 16

[Project Plan/Timeline/CBDR](#_rwbyl56rl7yu) 16

[CBDR Material](#_jqdc23sjzik7) 16

[Code/Build](#_p60np03vu5bg) 16

[Deploy](#_nsindp9f1cg4) 17

[Run](#_4n8rul8wv2ea) 17

[First Month](#_5zr3swoewmid) 18

[Customer Quarterly Service Review (QSR)](#_3v14qyaxxscd) 19

[EE Escalation Process](#_qv56gz7bosaj) 20

[**General Administration**](#_5wp0bpfgcpro) **21**

[EEC Dashboard in Clarizen](#_3q5sasy) 21

[Case Management](#_kr11pewuypnj) 22

[Time Off](#_2w5ecyt) 23

[Internal:](#_54jkivbw64io) 23

[Customer Facing:](#_fjjvyxuq4f1a) 23

[Time Off For Contractors (Contingent Workers):](#_1baon6m) 23

[Career Journey and Growth:](#_78mep48uqmsi) 24

[Weekly Time Submissions & Weekly Status Reports](#_rpuzzxo0mk7l) 25

[Product Information and Materials](#_yr1s5e6k6916) 25

[Cloud Security Posture Management (CSPM)](#_1opuj5n) 25

[Cloud Workload Protection (CWP)](#_2pv3xxm6w6wh) 26

[Reference Material](#_384ydnkd8yx0) 26

[**Continuous Learning**](#_1gf8i83) **26**

# 

# Runbook Overview

The Extended Expertise Consultant (EEC) Runbook is a guide outlining a consistent and repeatable process for new EEC Engagements. While every customer has unique requirements and business needs, this document should provide the tools & resources necessary for an EEC and EEC Manager to ensure a successful engagement from Pre-sales to completion.

Extended Expertise is the evolution and Palo Alto Networks term based on the Resident Engineer (RE) role. RE terminology is industry standard and will likely remain interchangeable for the foreseeable future.

## Extended Expertise Consultant (EEC)

### [Prisma Cloud Extended Expertise Service Description](https://www.paloaltonetworks.com/resources/datasheets/ps-extended-expertise-prisma-cloud) (Half-Time)

* [Prisma Cloud **Dedicated** Extended Expertise Service Description](https://www.paloaltonetworks.com/resources/datasheets/ps-dedicated-expertise-prisma-cloud) (Full-Time)

For an update on EEC SKUs [Global Customer Services Cheat Sheet](https://docs.google.com/presentation/d/12i6ne1jgOglkJZVyt5MxfvYenuh0yRyOoR43QtICko4/edit#slide=id.g537179d543_12_0) starting on slide 25.

## 

## EE Consultant Different SOWs/SKUs

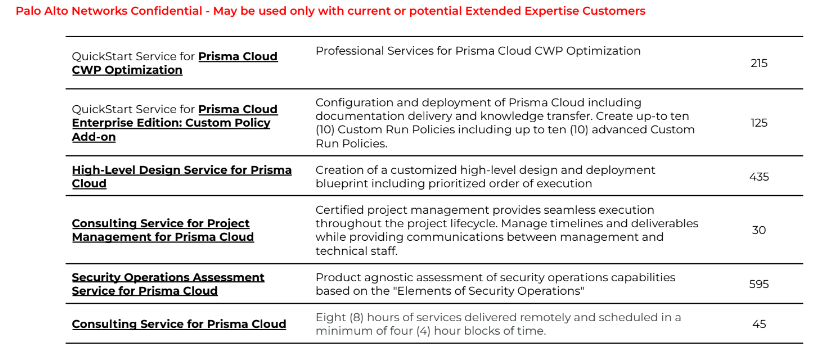
| **SKU** | **Description** |
| --- | --- |
| PAN-CONSULT-EE-PC | Extended Expertise - Half-Time (Dedicated to a customer one-week on, one-week off) |
| PAN-CONSULT-EE-PLUS-PC | Extended Expertise Plus - Half-Time with Service Credits (500 credits) |
| PAN-CONSULT-EE-DD-PC | Extended Expertise Dedicated - Full-Time (Dedicated to a customer 40 hours/week) |
| PAN-CONSULT-EE-DD-PLUS-PC | Extended Expertise Dedicated Plus - Full-Time with Service Credits (500 credits) |
| PAN-CONSULT-EE-1MO-EXT-PC | Extended Expertise - 1 month extension (for EE and EE Plus) (Prisma Cloud)  (Part-Time) |
| PAN-CONSULT-EE-DD-1MO-EXT-PC | Extended Expertise - 1 month extension (for EE Dedicated and EE Dedicated Plus) (Prisma Cloud)  (Full-Time) |
| PAN-CONSULT-EE-ADDON-CLRNC-PC | Extended Expertise add-on for Security Clearance (Prisma Cloud) |
| PAN-CONSULT-EE-ADDON-CREDITS-PC | Extended Expertise add-on for 1 additional PS credit (Prisma Cloud) |
|  |  |

For additional information on SKUs and Pricing, visit the [PANW Global Price List](https://docs.google.com/spreadsheets/d/1ne4ayM4HR9g0tU6HUFDfkeHZQHvIa1r9AM0xAX4fNW0/view#gid=358248760)

## Extended Expertise Credits

Details on EE Service Credit specifics and how to consume credits can be found in the [Professional Services Extended Expertise Credits Menu](https://drive.google.com/drive/folders/1WmUYUt4kJwHLX0FIoQH4bb38nVdjqTJ0).

## 



## \*Screen captures are from the Credits Menu (Last updated 09/2022)

## Specialties

As of this writing, there are nine (9) technologies in which an EEC can be sold. Each of these technologies has different skills requirements which the resource manager will use to determine the correct resource and training to fill the position and what technologies the consultant will use during the customer engagement. The designated or dedicated EEC for customers in this guide will be under the “Prisma Cloud” area of focus. It is important to note that there might be more than one EE, for example, one for Cortex XDR and another for Prisma Access. There are nine areas of focus for EEs. It is beneficial to understand if there are other EEs assigned to this customer as you may collaborate with them for certain work, for example, integrations of Prisma Cloud and Cortex XDR/XSOAR.

The nine areas of focus are:

* **Prisma Cloud (CSPM/CWP/CCS)**
* PA Series(Hardware NGFW and Panorama)
* VM-Series (will choose between the following)
  + Public Cloud
  + Private Cloud
* Prisma Access
* Prisma SD-WAN
* Cortex XSOAR
* Cortex XDR
* Xpanse
* XSIAM

# 

# Pre-Engagement with Customer

## Internal Kickoff

The EE Manager arranges an internal kickoff call to introduce the EE, discuss the engagement and provide background on the customer:

* Key stakeholders involved with customer (Account Team, Sales Specialist, SDL, CS, PM, PS Consultants)
* Challenges faced by customer
* Review customers business objectives
* Review customer access required for EE (VDI or Laptop issued)
* Start modifying [Kickoff Deck](https://docs.google.com/presentation/d/110II2KbRuRzd-p_tU0kdm6iTY3J-pMRT3lj7dRQwFFo/edit) for customer kickoff

## Intro to Account Team (Optional)

The account team often wants to meet the EE prior to the engagement. It’s important that the EE Manager set the correct expectations. This should be more of an introduction to the customer and an opportunity to talk about the customers objectives and goals. It’s important to prepare the EE in advance to build confidence prior to introduction.

# Post-Sales (Engagement with the Customer)

# Kickoff

## Introductions / Kickoff Deck Template

Use the [Extended Expertise Kickoff Deck template](https://docs.google.com/presentation/d/110II2KbRuRzd-p_tU0kdm6iTY3J-pMRT3lj7dRQwFFo/edit#slide=id.g13a43cf10ca_0_24) as a reference.

Internal Administrative Tasks

* Introduce EE and EE Engagement to Account Team
* Add new hire to GCS workspace and Slack
* Ensure IT has sent laptop/fill laptop form
* Add EE to IT setup call for Okta and laptop setup
* Add EE to HR onboarding and initial new hire calls/meetings
* Share [EEC New Hire Onboarding](https://paloaltonetworks.exceedlms.com/student/collection/1096725-claisec-professional-services-prisma-cloud-eec-new-hire-onboarding) with new hire EE

## Engagement Plan

* Use [Engagement Plan Template](https://docs.google.com/document/d/1FyXRL0490OqfsXeiiEmkZcC1oEfaSHLxsakDTvA8xyw/edit)
* Define the priorities and objectives for the EE during the period of performance (subject to change during the lifetime of the engagement)
* Review the Engagement Plan with the customer.
* Identify the various teams and point(s) of contact at the customer that the EE will work with directly.
* EE to work on obtaining a computer asset from the customer. This can either be a laptop or a Virtual Desktop (VDI).
  + Benefits of having access to customer’s environment:
    - EE can directly view and replicate any issues raised by the customer from customer’s Prisma Cloud environment
    - Having access to customer’s just gives more visibility and convenience to the EE while working with the customer and gives the EEs more ability to better help the customer
    - It also gives the EEs a safe and secure and dedicated environment to work with their customers
* EE to work on gaining access to customer infrastructure/resources (i.e. Prisma Cloud console access)
  + The EE should have access to the customer’s SaaS tenant.
  + The EE should have access to any consoles for self-hosted CWP instances
  + The EE should have view-only access (at a minimum) to a customer’s CSP (Cloud Service Provider). Note: While this is not absolutely necessary, it is often very convenient.
  + The EE should have access to a customer’s communication platforms, such as Microsoft Outlook or Microsoft Teams.
  + The EE should have access to the customer’s compliance information via an intranet site or GRC (Governance Risk and Compliance) Platform

## Define Key Stakeholders

Outline the critical stakeholders for the engagement communication plan to provide leadership alignment. This is essentially an escalation matrix and includes general communications such as weekly reports and QSR invites. Key stakeholders include but are not limited to:

* PANW Account team
* Customer's management team
* Engineers
* SAM / DE (Service Account Manager)
* PS Managers
* Other EECs
* Solution Architects/Engineers

Read the [CS/PS Collaboration Guide](https://docs.google.com/document/d/1frvl7IGH5PzqWcP0C1GvD6NEvqYr0AsNh1rxzUydubw/edit) for additional information on key stakeholders and relationships.

## Communication Plan

* Establish 1:1 cadence calls between EE & Customer POC/Manager
* Establish Target Dates for QSR and Attendees
  + - This is mostly handled by Service Delivery Leaders (SDLs), Account Managers (Strategic/Major), and Customer Success
    - It is imperative that the EE is involved in the process and presentation, as well as the EE Manager
    - See [Quarterly Service Review (QSR) section](#_3v14qyaxxscd) for details.
* If remote EE, establish and document on-site travel dates (if applicable)
* Final Review of EE Engagement Plan
  + - See [Engagement Plan section](#_44sinio) for details.

## Activate Clarizen Project

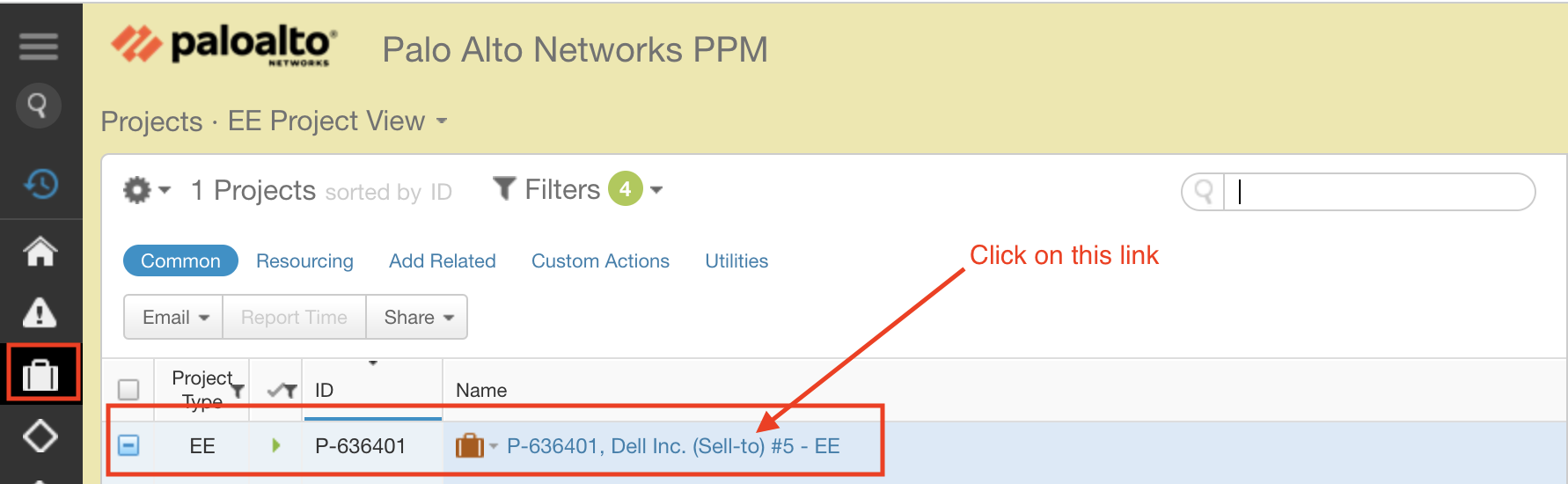
The EE Manager is responsible for activating the project in Clarizen. If the project is not active and showing in your timesheet, reach out to your manager.

* Project Description
* Renewal Y/N
* Contact Name for Survey
* EE Manager to send Engagement Start Letter sent from Clarizen

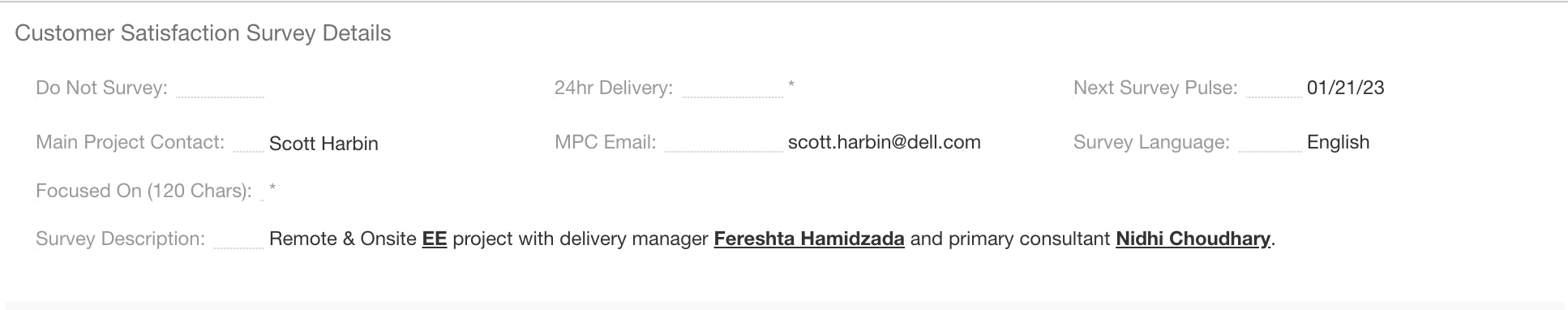
## CSAT Surveys

A CSAT survey is “Customer Satisfaction” survey which is used to get feedback about the EEC’s engagement and overall satisfaction about the EEC and the Prisma Cloud product from the EEC customer manager/main project point of contact

* CSAT surveys are a good way to gauge the customer’s overall experience with us as EEC and overall engagement and delivery experience.
* CSAT surveys are sent from Clarizen on a quarterly basis. Only the EEC delivery manager has the ability to change/modify any details for the CSAT survey (e.g if the main customer project contact needs to be updated etc.)
* If there are any changes required for the CSAT survey (e.g if the main project contact from the customer side needs to be updated), then please reach out to your delivery manager with the details to be updated and they can help with the same.
* You can find the CSAT survey section, main point of contact for your project, next pulse survey date on which the survey would be sent to your customer and all those details within Clarizen.
* You can access the CSAT details by navigating to your project within Clarizen as shown below:



* Once you click on your project link you will now see a section at the bottom which says “Customer Satisfaction Survey Details” as shown below:



* Please note that the 24 hr Delivery means that your customer will receive a survey within 24 to 48 hours after it is clicked. Also, if there is a next pulse survey date set for your customer, please note that it won’t send out the survey if it is within 30 days of when you sent out a CSAT survey manually .
* Next Survey Pulse date is the date on which the survey would be automatically sent out to the customer (main project contact) from Clarizen.
* If there is no survey pulse date set for your customer project or there is no main project contact name or email address configured for your customer then please reach out to your manager to get it fixed in Clarizen.
* It is recommended that you as an EEC reach out to your Main project contact with a note as a reminder about the CSAT survey close to the Next survey pulse date so that they are notified and aware about it and to draw their attention.
* If you see “Do not survey “ toggle on for your customer then please reach out to your SDL (Services delivery lead) or your Account manager to check why that option is enabled for your customer and how that could be fixed.

# 

# EE Responsibilities

# Operational Responsibilities

| **Task** | **Description** |
| --- | --- |
| [Weekly Status Report](https://docs.google.com/document/d/10SvE1Gn-oasTqebs_dF6mshrr8OhlpxnMzUExf61sW4/edit) | Sent by the EE to both internal stakeholders and customer team to update on accomplishments, action items/next steps, limitations, etc. This is sent by Clarizen utilizing the customer project. |
| Weekly Time Cards | Time cards should be submitted on a weekly basis, by Friday mornings, to be approved on time. It is imperative that they are submitted regularly as this affects time card compliance metrics. |
| Project Plan/Timeline | Focused on the long-term execution of EE engagement with the customer, looking at high level goals and their timelines |
| Engagement Plan | Definition of customer team, internal members, KPIs/Goals, logistical details of EE engagement |
| Internal Meetings | Customer Surround Team will have internal regular meetings |
| Customer Cadences | Customer cadences should be established by EE or CS/SDL collaborating so that the Prisma Cloud journey is in sync |
| Collaboration with CS | CS’ goals include guidance and best practices, EE and CS should be working in tandem. EE will be the hands-on configuration piece to those best practices/optimization |
| Implementation of Best Practices/ Operationalization (CBDR) | CBDR methodology is a more prescriptive approach to the long-term customer journey leading to operationalization, providing a road map. Prisma Cloud credit licensing correlates to best practices and the EE will monitor it quarterly to ensure increase in usage and adoption. |
| QBR/QSR Involvement | Done on quarterly basis by SDL/CS/Account team and EE should be involved for quarterly achievements, metrics of adoption, look ahead, and reflections |

## Trusted Advisor and Soft Skills

An Extended Expertise Consultant is beyond just a Resident Engineer (RE). RE may be the term used in the industry but at PANW, the difference lies in the “Consultant” aspect of the title. You become that “trusted advisor” for a customer, where you’re not performing just technical work that the customer asks of you, but understanding the customer’s environment, cloud security gaps, business needs, limitations/restraints, change control policies, teams, and more. Taking all of these factors into account allows you to provide expert technical solutions based on their specific needs. You can create project plans and roadmaps, facilitating communication to the various team members and stakeholders involved. Soft skills are extremely important for EECs.

Managers meet with the team and ensure proper consulting skills are applied with customer engagements.

Proper Trusted Advisor and Soft Skill support and training will decrease the likelihood of customer escalations. It allows you to anticipate future problems and get ahead of them before they become too difficult. For additional support and guidance, reach out to your Manager and/or Mentor. Reference the Mentoring Guide that your mentor will share with you.

* [Professional Services Strategic Consulting Framework Training](https://paloaltonetworks.exceedlms.com/student/path/1025692-professional-services-strategic-consulting-framework) (Included in Week 1 EEC New Hire Onboarding Training)
* Consulting Skills - Utilize Udemy for additional courses
* Understand what it means to be a “Trusted Advisor”
* Planning and Proactiveness

## EEC Initial Activities

* Meet & Greet - Introduce yourself to the various *customer* teams:
  + Cloud Security/Cloud Architecture
  + DevOps/DevSecOps
  + Compliance
  + Information Security
  + SOC
  + Network
  + Architect
  + Security
  + PMO
  + Leadership
* On-boarding logistics from the customer side
* Learn and understand the customer change management processes
* Request internal PANW JIRA and Salesforce access by opening IT ticket
  + Important for viewing customer related TAC cases and account information
* SalesForce
  + Add self to the case notifications in SalesForce
  + Follow instructions on [PS Employee Handbook](https://docs.google.com/document/u/0/d/1KvHQAflwngpHEqWHkN4qYja57SYqv2N-CzaTbxuI83g/edit)
* Work with SE to be added to Customer Support Portal
* Establish cadence calls with communication team
  + Internal bi-weekly call with the established communication team (SDL, SAM/DE, AM/ SE, etc)
    - If Focused Services is engaged in account, coordinate customer stakeholder meetings with SAM.
  + Join or establish customer calls
    - Set up 1:1 call with Manager to review (or as otherwise established during kickoff)
    - Set up first month check-in and QSR schedule with client and account team
    - Conduct Prisma Cloud Security Posture Assessment / Review of Adoption Advisor
  + Define minimum agenda
    - Output: provide follow up notes
  + Establish Document Management Drive
  + If Focused Services is engaged in account, coordinate internal distribution with SAM.
  + If no Focused Services, use the [Customer Surround Communication Guidelines](https://drive.google.com/open?id=1PQ-9voUz2H-f3uB8518sF1qgCeWQ8VRcElwqy_ZjDoU)
    - Follow instructions in section “**Communications Tools”**
    - The customer surround model includes the following members, for detailed description of each of these roles, please refer the Customer Surround Communication Guidelines document linked above:
      * Service Delivery Leader (SDL)
      * Focused Service Teams
      * Customer Success Manager (CSM)
      * Customer Experience Team (CSE)
      * Consulting Engineer
      * Product Management
      * Project Management
      * Solutions Architect (SA)
* Establish Internal Team Distribution List
  + If focused Services is engaged in account, coordinate internal distribution with SAM.
  + If no Focused Services, use the [Customer Surround Communication Guidelines](https://drive.google.com/open?id=1PQ-9voUz2H-f3uB8518sF1qgCeWQ8VRcElwqy_ZjDoU)
    - Follow instructions in section “**Communications Tools”**
* Find out if the customer has an EE with Service Credits (found in the SKUs)
  + If yes, it might be beneficial to involve Professional Services for custom tasks such as automation or other skill sets
  + Reach out to your EE Manager for additional guidance

## Discovery & Baseline Evaluation (CBDR Health Check/Adoption Advisor)

* Assess the state of the client environment against stated objectives
* Document findings against the outlined Engagement Plan:
  + Best Practices: Assesses if the configurations are adhering to best practices and provides recommendations to address the security gaps
  + Trending: Measurable indicator to track the adoption & transformation progress over time
  + Review with customer
  + Develop or adjust plan using findings
* **Prisma Cloud Code/Build, Deploy, Run (CBDR) Framework**
  + Utilize the [Adoption Guide](https://docs.google.com/document/d/1Pz2nAqdWzgF3dBIWpfOyyRNpV6nL2in5OTkDCjRSxAI/edit) that assists with the work/steps needed within the stages of CBDR
  + [CBDR Progression Template](https://docs.google.com/document/d/10wE5CH1LOjGdjjmYxuh-9pGvoYD8mt44LbnmPtqXY2c/edit) to track activities

## Set Up Clarizen Tasks

Manager will create the original task for billing time against the customer as an EE. EEs can request their own tasks (Configuration, QSRs, etc.). Use the PS Employee Handbook for instructions on [how to set up tasks in Clarizen](#_147n2zr). Reach out to your manager for additional guidance.

Tasks should include:

* CBDR tasks
* Tentative QSR dates (see [Quarterly Services Review section](#_3v14qyaxxscd))
  + For new projects, QSR tasks will automatically be added with default dates set at 90 days apart
  + EEs are responsible for updating the QSR Status and dates.
* Assigned activities aligned with [Engagement Plan](#_44sinio)
  + Do not use generic activities.

## Send First Weekly Status Report From Clarizen and Set Up Recurring

Use the PS Employee Handbook for details on [how to send the weekly status report directly from Clarizen](https://docs.google.com/document/d/1KvHQAflwngpHEqWHkN4qYja57SYqv2N-CzaTbxuI83g/edit#heading=h.3o7alnk) (Note: there is a 2000 character limit). Alternatively, an EE may use another method such as weekly status emails or a shared document (i.e. Excel, Powerpoint Deck).

Alternatively, you can send Weekly Status Reports using this [template](https://docs.google.com/document/d/10SvE1Gn-oasTqebs_dF6mshrr8OhlpxnMzUExf61sW4/edit).

Note: The availability slots and availability disclaimer at the bottom is geared more towards PS Consultants, not EEs, but the rest is relevant.

## Project Plan/Timeline/VPP

[Template Document for Project Plan, Ticket Tracking, Status Updates](https://docs.google.com/spreadsheets/d/1u4ZV-8cNJV_9qyqDAmnO8YlnJE3g6Mmx9CHqcuElY5A/edit#gid=2073314290)

## VPP Material

[Customer Journey Process (Documentation)](https://docs.google.com/document/d/1a3L337cdkQGZ4tcQpFoG8bypKKFKq_R9/edit)

[Adoption Guide (Customer Facing)](https://www.paloaltonetworks.com/resources/guides/prisma-cloud-adoption-guide)

[Field Guide (Github Customer Facing)](https://github.com/PaloAltoNetworks/prisma-cloud-best-practices)

[Visibility, Control, Prevention, and Protection](https://docs.google.com/presentation/d/1RwAvP08xdfQBojCVaDPex55Z9xyBTvq5I_rbuJdYV2E/edit#slide=id.g2bd4d17ce03_0_2399)

Project Plan (Smartsheet)

Customer Success CBDR Health Score

CBDR Progression

## Code/Build

|  | Outcome | Foundational | Intermediate | Advanced |
| --- | --- | --- | --- | --- |
| **Onboarding** | [Onboard Repositories](https://docs.paloaltonetworks.com/prisma/prisma-cloud/22-06/prisma-cloud-compute-edition-admin/vulnerability_management/code_repo_scanning) (CWP) | ✔ |  |  |
| [Add CI/CD Integration](https://docs.paloaltonetworks.com/prisma/prisma-cloud/22-06/prisma-cloud-compute-edition-admin/continuous_integration/jenkins_pipeline_project) (CWP) | ✔ |  |  |
| [Add IDE Integration](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-code-security/get-started/connect-your-repositories) (CCS) | ✔ |  |  |
| **Drift Detection** | [Enable Drift Detection](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-code-security/scan-monitor/drift-detection) (CCS) | ✔ |  |  |
| **Remediation** | [Monitor and Fix Scan Results](https://docs.paloaltonetworks.com/prisma/prisma-cloud/22-06/prisma-cloud-compute-edition-admin/vulnerability_management/vuln_explorer) (CWP) |  | ✔ |  |
| **Policies** | [Create Custom Policies for Build-Time Checks](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-code-security/scan-monitor/custom-build-policies) (CCS) |  | ✔ |  |
| **Tagging** | [Add Tagging Rule](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-code-security/scan-monitor/iac-tag-and-trace)(CCS) |  |  | ✔ |
| **Notifications** | [Add Notifications](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-code-security/scan-monitor/finetune-configuration-settings#_fine_tune_your_configuration_settings__enable-notifications:~:text=request%20bot%20comments.-,Enable%20Notifications,-Enable%20Prisma%20Cloud)(CCS) |  |  | ✔ |
| [Add Alerts](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/alerts) (CWP) |  | ✔ |  |
| **CI Scanning** | [Set Up Image Analysis Sandbox](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/runtime_defense/image_analysis_sandbox) (CWP) | ✔ |  |  |
| [Scan CI Pipelines](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/continuous_integration/code_repo_scanning) (CWP) | ✔ |  |  |

## Deploy

|  | Outcome | Foundational | Intermediate | Advanced |
| --- | --- | --- | --- | --- |
| **Workload Scanning** | [Scan Registries](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/vulnerability_management/registry_scanning0) (CWP) | ✔ |  |  |
| [Scan VM Images](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/vulnerability_management/vm_image_scanning) (CWP) | ✔ |  |  |
| **Policy Setup** | [Add Trusted Images](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/compliance/trusted_images) (CWP) |  | ✔ |  |
| **Access Control** | [Enable Admission Control](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/access_control/open_policy_agent) (CWP) |  |  | ✔ |

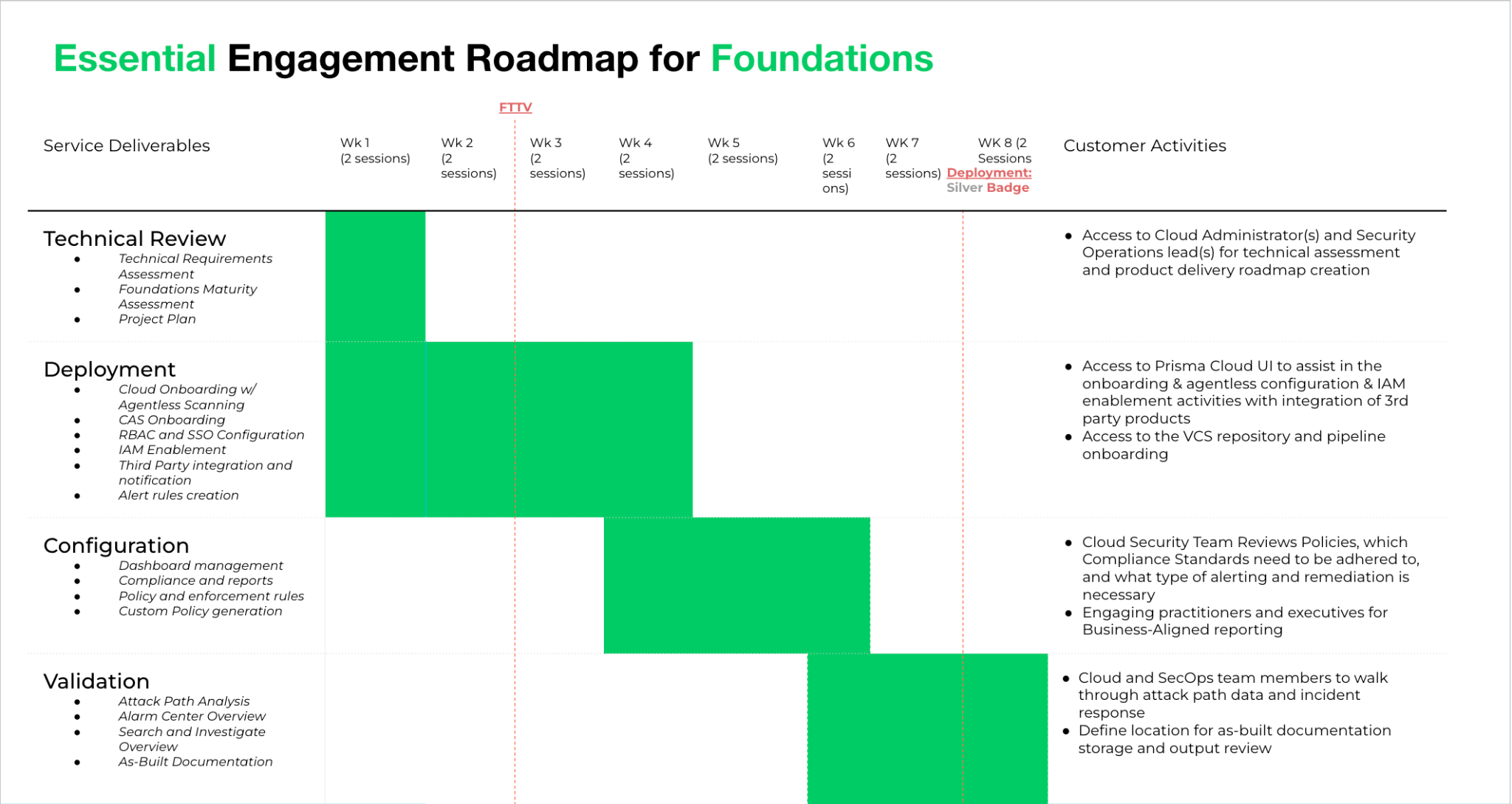
## 

## Run

|  | Outcome | Foundational | Intermediate | Advanced |
| --- | --- | --- | --- | --- |
| **Cloud Asset Inventory** | [Onboard Cloud Accounts](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/authentication/cloud_accounts) (CWP) | ✔ |  |  |
| **User Management** | [Set Up Multiple Roles](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/authentication/user_roles) (CWP) | ✔ |  |  |
| **Compliance** | [Schedule Compliance Reports](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/compliance/compliance_explorer) (CWP) | ✔ |  |  |
| **Governance** | [Create Config Policies](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/prisma-cloud-policies/create-a-policy) (CSPM) | ✔ |  |  |
| Define Alert Rules (CWP) | ✔ |  |  |
| [Add Integrations](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/configure-external-integrations-on-prisma-cloud) (CSPM) | ✔ |  |  |
| [**Threat Detection**](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/prisma-cloud-policies/prisma-cloud-threat-detection) | Enable Audit Logs (CSPM) |  | ✔ |  |
| Enable Flow Logs (CSPM) |  | ✔ |  |
| Create Network Policies (CSPM) |  | ✔ |  |
| Create Audit Policies (CSPM) |  | ✔ |  |
| Enable Threats Detection Policies (CSPM) |  | ✔ |  |
| [**Response**](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/investigate-incidents-on-prisma-cloud) | [Create Access Key](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/authentication/access_keys) (CWP) |  |  | ✔ |
| Resolve Config Burndown (CSPM) |  |  | ✔ |
| Resolve Network Burndown (CSPM) |  |  | ✔ |
| Resolve Audit Burndown (CSPM) |  |  | ✔ |
| Resolve Anomaly Burndown (CSPM) |  |  | ✔ |
| Enable Auto-remediation (CSPM) |  |  | ✔ |
| **Discovery** | [Enable Cloud Discovery](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/compliance/cloud_discovery_saas) (CWP) |  | ✔ |  |
| [Enable Serverless Discovery](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/compliance/cloud_discovery_saas) (CWP) |  | ✔ |  |
| **Workload Scanning** | [Enable Agentless Scanning](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/vulnerability_management/agentless_scanning) (CWP) |  | ✔ |  |
| [Scan Serverless Functions](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/vulnerability_management/serverless_functions) (CWP) |  | ✔ |  |
| **Deployment** | [Deploy Defenders](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/install/install_defender) (CWP) |  |  | ✔ |
| **Policy Setup** | [Create Vulnerability Policies](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/vulnerability_management/vuln_management_rules) (CWP) |  |  | ✔ |
| [Create Compliance Policies](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/compliance/custom_compliance_checks) (CWP) |  |  | ✔ |
| [Create Runtime Policies](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/runtime_defense/custom_runtime_rules) (CWP) |  |  | ✔ |
| [Create Auto-Defend Policies](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/install/install_defender/auto_defend_host) (CWP) |  |  | ✔ |
| **Reporting** | [Add Collection](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/configure/collections)(CWP) |  | ✔ |  |
| Add Alert Providers (CWP) |  | ✔ |  |
| [**IAM Security**](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/prisma-cloud-iam-security) | Define IAM Query (CSPM) |  | ✔ |  |
| Enable IAM Policies (CSPM) |  | ✔ |  |
| Custom IAM Policy (CSPM) |  |  | ✔ |
| [**Data Security**](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/prisma-cloud-data-security) | Configure Data Security (CSPM) |  | ✔ |  |
| Configure Scan Settings (CSPM) |  | ✔ |  |
| Enable Permissions (CSPM) |  | ✔ |  |
| Define Alert Rule with Data Policies (CSPM) |  |  | ✔ |
| **Miscellaneous** | [Asset Inventory](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/prisma-cloud-dashboards/asset-inventory) (CSPM) | ✔ |  |  |
| [Auto-Remediation Alerts](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/manage-prisma-cloud-alerts/configure-prisma-cloud-to-automatically-remediate-alerts)(CSPM) |  |  | ✔ |
| [Review ATT&CK Explorer](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/runtime_defense/attack)(CWP) | ✔ |  |  |
| **WAAS** | [Deploy WAAS](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/waas/deploy_waas) (CWP) |  | ✔ |  |
| [API Protection](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/waas/waas_api_protection) (CWP) |  |  | ✔ |
| [DOS Protection](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/waas/waas_dos_protection) (CWP) |  |  | ✔ |
| [BOT Protection](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/waas/waas_bot_protection) (CWP) |  |  | ✔ |
| [Define Access Controls](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/waas/waas_access_control) (CWP) |  |  | ✔ |
| [Custom WAAS Policies](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/waas/waas_custom_rules) (CWP) |  |  | ✔ |

## First Month

* Check-in with Manager and account team on priorities and on-going activities
* Create CBDR Project Plan and review with customer
* Review [Engagement Plan](#_44sinio) against initial findings
* Adjust goals & objectives if necessary
* Seek feedback on progress
* Establish monthly cadence with EE Manager to provide status updates on CBDR progress/journey (this is in addition to your 1:1s with your EE Manager)



*Example VPP Adoption Timeline*

Forecast skills needed to support future customer projects

* + Reference CBDR Roadmap/Project Plan
  + EE should work with their Manager to forecast needed skills for future projects.
  + EE should discuss specific tools/technologies used specifically by your customer so that you can get approved for those trainings/coaching to be taken to help enable the skills required for your customer

## Customer Quarterly Service Review (QSR)

The Customer QSR is a chance for the services team (SDL, SAM, DE, EE) members that are assigned to the account to present to the client what has occurred over the previous quarter and what is planned in the upcoming quarter. This is an occasion to share successes and “boast” about the value the service team and Palo Alto Networks brings to the client.

* At least 2 weeks prior to [QSR](https://docs.google.com/document/u/0/d/1-u91UIkZVGl8GoIBCXhh9THY9IQnOSirqbuvlarHSwI/edit), begin work with the account team, SDL/SAM (if assigned), CS, Manager and client to establish QSR date and logistics. If SDL/SAM is assigned, defer responsibility for logistics to SDL/SAM on invitations, deck consolidation, etc.
  + As soon as the QSR is scheduled, [update the QSR Status in Clarizen](https://docs.google.com/document/d/1-u91UIkZVGl8GoIBCXhh9THY9IQnOSirqbuvlarHSwI/edit#heading=h.vi6tk2wuozqu) for that task to ‘Scheduled’ with the date and audience (customer facing or internal).
  + Determine customer attendees
* Ensure CBDR Process and Journey are referenced during QSR. CS Team will present CBDR Health Score (if applicable).
* Walk through high-level objectives and agenda items using the [QSR Template](https://docs.google.com/presentation/d/1aAEfb7ugY9yYqiHsH7X4WcY0uJsOLBR4tuOZNshWcKY/edit?ts=6022d088#slide=id.p1)
* Identify additional presenters if account team desires
* Create QSR content for the Professional Services Delivery Review and Resident Engineer Delivery Review sections of the QSR deck using the [QSR Template](https://docs.google.com/presentation/d/1aAEfb7ugY9yYqiHsH7X4WcY0uJsOLBR4tuOZNshWcKY/edit?ts=6022d088#slide=id.p1)
  + This [QSR Training](https://docs.google.com/presentation/d/1s7jT1R4RBg_PKiE2Xrei_zpaKIb_kYdwaBqwDX0vHz4/edit#slide=id.gf3f474e221_1_19) deck gives an overview of how to create and present the content for an RE
* Set up internal review of presentation at least one week prior to QSR
  + include Manager, account team, SSM, SDL, SAM, DE
* Present QSR to customer in conjunction with Customer Success/SDL/Account Team
  + if customer is not interested in participating in a QSR, an internal review should take place with the EE manager and account team
  + Once QSR is completed, update [QSR Status in Clarizen](https://docs.google.com/document/d/1-u91UIkZVGl8GoIBCXhh9THY9IQnOSirqbuvlarHSwI/edit#heading=h.fixnvx1ovi95) for that QSR task to ‘Completed’ and upload the complete deck that was presented to the customer to the task.
* [FlexLearn PS QSR Training](https://paloaltonetworks.exceedlms.com/student/path/1163697-professional-services-qsr-training)

## [EE Escalation Process](https://docs.google.com/presentation/d/1TS8ErNp9YalKqW_oROGD7tqzqcQWjZX2gD1GFXMJQ-0/edit#slide=id.g1443c519737_2_0)

**Current Escalation Process:** Escalations are handled on an ad hoc basis. Escalations are initiated from a variety of channels:

**Escalation Types:**

* Product and licensing issues (i.e. bugs, limitations, etc.)
* Security breach
* Delivery quality/concerns (skillset, performance)
* Timeline pressure
* Others

If there is a need to escalate a customer issue, the first level of communication would be to reach out to myself for support and involving a PSC/PM if applicable. There should already be a JIRA ticket submitted for the issue. If there isn't one, create it first.

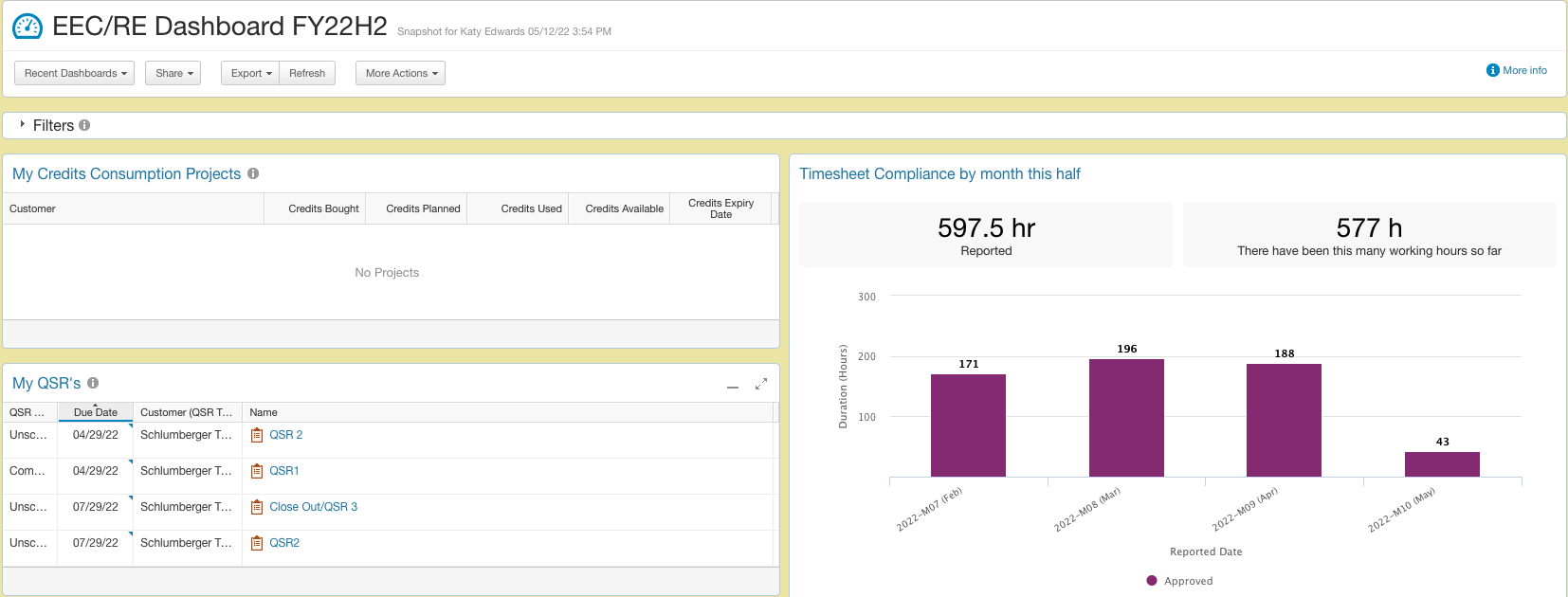
# 

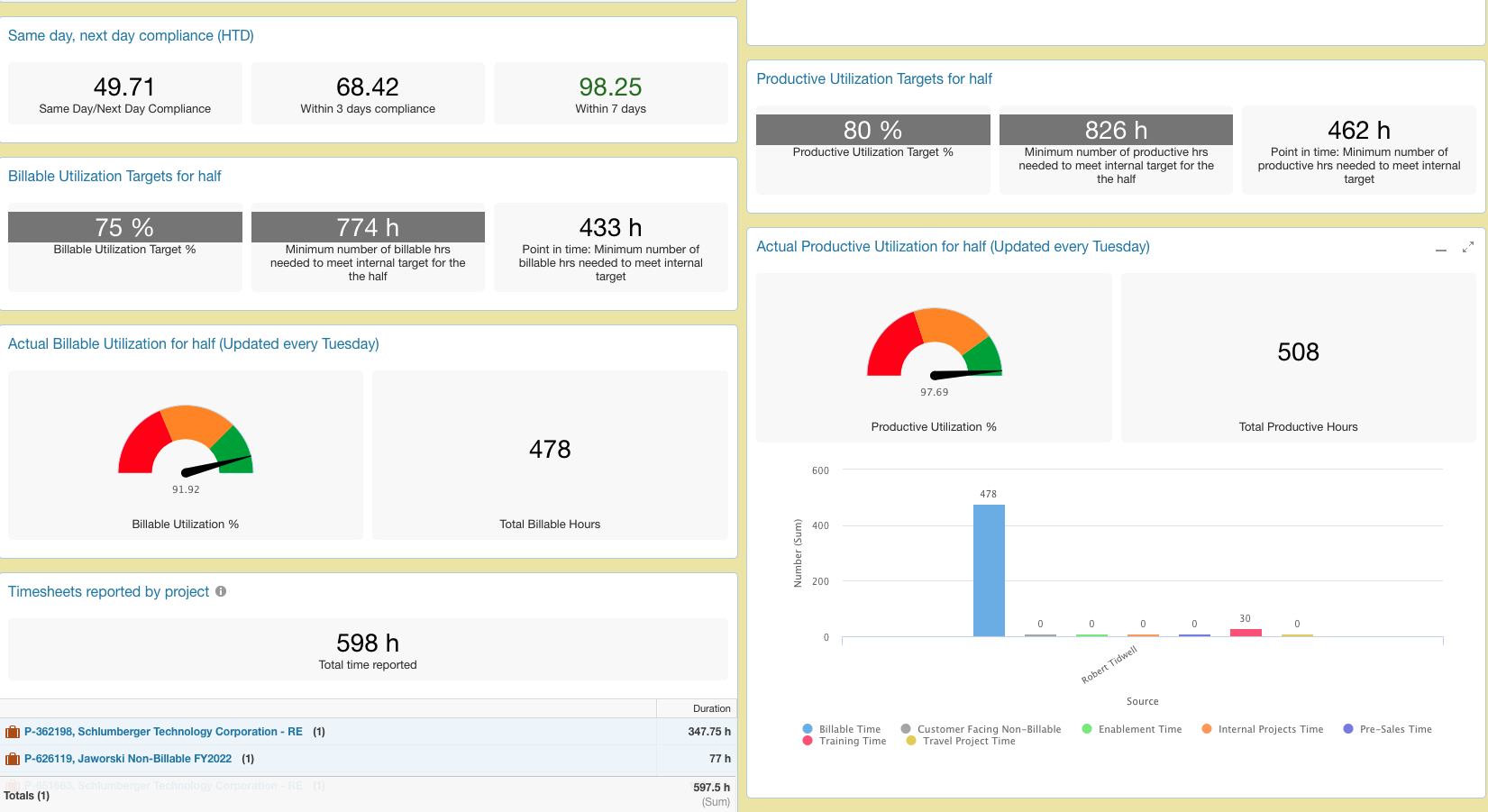
# General Administration

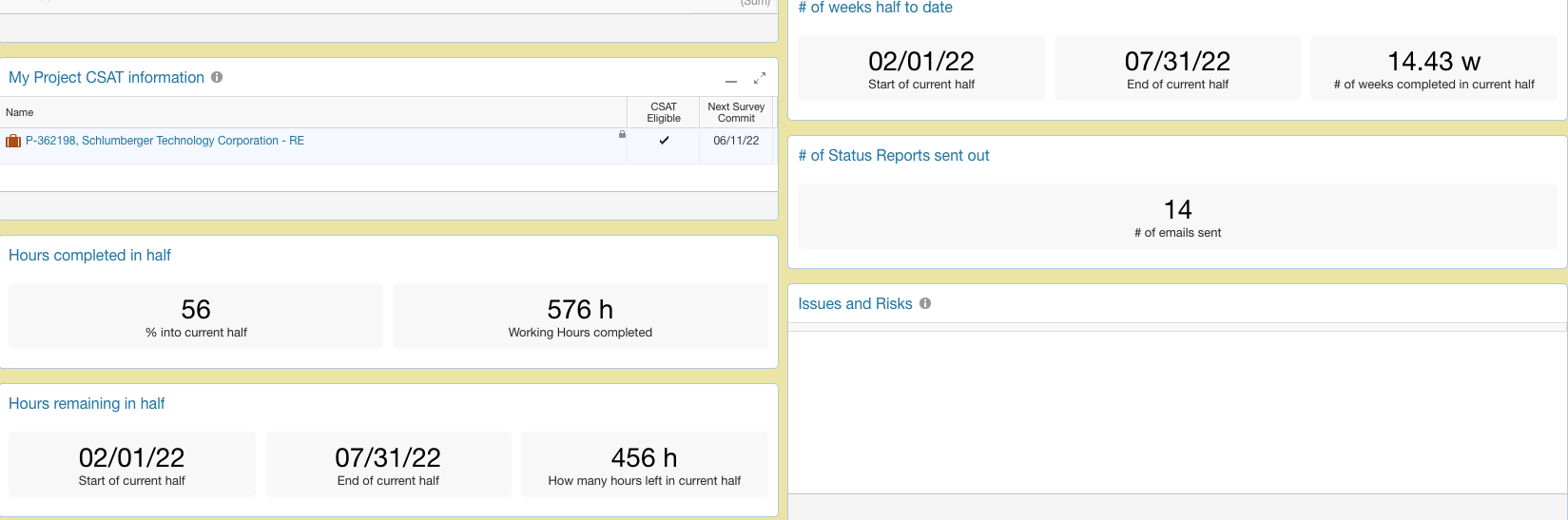
## EEC Dashboard in Clarizen

All EEC should have the Dashboards module and be able to access it from the main navigation bar on the left hand side. By default, Clarizen will bring up the last Dashboard that the user accessed. They can then click Recent Dashboards>EEC/RE Dashboard FYxxHy (ie FY22H2).

The EEC/RE Dashboard gives a single (and actionable where possible) view into key performance metrics that they should be focusing on on a regular basis. You can view a [webinar video on the EEC/RE Dashboard here](https://drive.google.com/file/d/1KPXI-ri7fPy2zIbMyOEIW1WxQiHT7XqX/view?usp=sharing).







## Case Management

* Establish roles with customer on Case Management
  + Link: [paloaltonetworks.support.com](https://support.paloaltonetworks.com/Support/Index)
  + The general best practice for case creation on an issue should be that the customer creates a case via the support portal if they run into an issue or bug etc. An EE and the account team or CSM should already communicate this process to the customer during the initial engagements to keep things clear. The reason why this should be done by the customer or the key project owners/users is:
    - Because they will be able to provide all the relevant information about the issue along with screencaps etc to the case.
    - Because any response from TAC can be directly seen and replied to by the customer themself and this will minimize back and forth between RE to customer and then to TAC case owner.
  + If for any reason, the customer is hesitant in creating a case, the EE should be the point of contact and help the customer in creating a case since EE is basically seen as a customer in house resource.
  + If in any case the TAC engineers finds that the issue reported by the customer is a bug or needs more context clarification from the engineering team then the TAC engineer creates a PCSUP ( basically a Jira ticket) for the engineering team to review and provide feedback.
  + A PCSUP is basically an escalation ticket which TAC creates if they see that the issue reported by customer is reproducible in their lab/test env and they find that as a bug etc. EE should not have to create a PCSUP.
  + EE should only be following the PCSUP for any updates/progress/workarounds.
  + If there is any escalation that is required for a particular PCSUP for your customer then the CSE/CSM should be the one leading the escalation of PCSUP and not the EE.
  + If the issue reported in the PCSUP is legit and is a bug confirmed by TAC and engineering team then an automatic PCC ticket gets created within Jira for the engineering team to fix. EEs can follow both the PCSUP and PCC ticket for comments and progress from the engineering team.
* Enact communication plan established with client
* Follow defined process for opening case to get routed to Tier 2
* EE mobile number must be in SFDC
* Case needs to be opened through the customer portal
* After case is opened, EE must call into TAC from EE Mobile number (in SFDC)
* EE should inform the TAC engineer that they are an EE
* If needed, follow the escalation process established in the [Professional Services Employee Handbook](https://docs.google.com/document/u/0/d/1KvHQAflwngpHEqWHkN4qYja57SYqv2N-CzaTbxuI83g/edit).
* Four types of escalation
  + Update Required
  + Regular
  + Hot Escalation
  + At Risk

## Time Off

Schedule Planned FTO with Customer At Least 15 Days in Advance (per SOW/Service Description)

### Internal:

Time Off Requests should also be updated in a few places for visibility to internal team as well as customer team:

1. Workday (FTE only)
2. On Google calendar (in shared as well as personal calendar)
3. Clarizen (internal)

Any time off should be brought up and notified to project managers as well during the PS resourcing calls (internally).

### Customer Facing:

If you have a customer email address and access to outlook etc., make sure you notify the customer and key stakeholders in advance about your FTO and also add it to your external (customer facing) calendar, if applicable.

Notify your SDL/CSM/CSE/SA and core team about your FTO in advance so that they can cover for you during your absence.

## Time Off For Contractors (Contingent Workers):

Time off for Contractors or Contingent Workers (CWs) vary from FTEs. They follow their Contracting company holiday schedule. It is important to note a few items:

1. 14 day in advance approval from customer
2. Approval from contracting company
3. Communicate to EE manager
4. Include OOO block in Google calendar, Slack, and vacation automation responder if applicable
5. If time off is longer than a few days, you should work with your manager to provide support to the customer in the event that they need it while you are out of the office
6. Cross-reference Engagement Letter and Service Brief for FTO/Holiday allocation

If you have any questions, please reach out to your manager.

## Career Journey and Growth:

As an EEC, you do have multiple options for your career path and growth/development. You may always communicate to your manager regarding your career goals, progress, tasks to excel. Some examples of career options are progressing into a Senior EEC, Lead/Principal EEC, Team Lead, and Architect EEC.

For additional information, please reference the [ClaiSec Extended Expertise Career Journey](https://docs.google.com/document/d/1IyOGVs14IBO5irQrsbYVFjEGNvK_jWZ8z3vonrwpsrc/edit?usp=sharing).

## Weekly Time Submissions & Weekly Status Reports

Time cards are critical for our Finance team to recognize revenue. For auditing purposes, revenue is not to be recognized until completion of work and time cards are a record of that work. With that said, time cards must be submitted **weekly (at minimum)** and the last **day of the month**. After the month closes, time cards cannot be modified.

[Check EE Responsibilities at the beginning of section](#_8yf5otoelk2v)

## Product Information and Materials

### Cloud Security Posture Management (CSPM)

* + Release Notes: Tech Docs for CSPM provides [release notes](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-release-notes/prisma-cloud-release-information/features-introduced-in-2022#idb33e29f3-3daa-4b17-bdcd-3fb8aaa81918) for minor releases as well as major releases on a regular basis. These release notes should be reviewed regularly with your customer. Consider the following:
    - New and updated policies that apply to your customer’s specific Cloud Service Provider (CSP)
    - New policies, updates policies, focusing especially on the “Impact” section, as this gives important information regarding impacts to alerts.
    - New Features and Changes to Existing behavior as from time to time the User Interface (UI) will change which will be important for your customer’s awareness.
    - API Integration - as new services are constantly being added and their APIs ingested. Note that new APIs also come with the additional responsibilities of adding additional permissions within a CSP.
    - New Compliance Standards - as these may impact your customer depending on the regulations they may be legally or contractually obligated to follow.
    - New CSP Supported - as support for particular features are always added and new CSPs are added regularly.
    - New Rest APIs
  + Look Ahead - The Tech Docs also features a “[Look Ahead](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-release-notes/prisma-cloud-release-information/look-ahead-planned-updates-prisma-cloud)” for CSPM that gives an overview of what to expect in the next release. This includes, but is not limited to:
    - Changes to Existing Behavior
    - New Policies
    - Policy Updates
    - API Ingestion
    - Deprecation Notices - The most important area of the Look Ahead, this allows you to prepare customers for features that will be removed in the next version of CSPM.
* [Tech Docs](https://docs.paloaltonetworks.com) provide the official documentation for all Palo Alto Networks products. The Tech Doc for the [Prisma Cloud Administrator's Guide](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin/get-started-with-prisma-cloud) provides technical guidance on everything from onboarding cloud accounts to implementing Prisma Cloud Network Security.

### Cloud Workload Protection (CWP)

* + Tech Docs for Cloud Workload Protection (CWP) provide [release notes](https://docs.paloaltonetworks.com/prisma/prisma-cloud/22-06/prisma-cloud-compute-edition-release-notes) for CWP. These include:
    - New Features and descriptions of those features with screenshots.
    - Changes to existing features including screenshots.
    - Changes to the APIs and how this will impact usage.
    - Changes to existing behaviors in the product.
    - Deprecated features within the product.
    - Known Issues.
    - Backwards compatibility within the product.
  + Tech Docs provides the official documentation for CWP. This includes the [Prisma Cloud Workload Protection Administrator’s Guide](https://docs.paloaltonetworks.com/prisma/prisma-cloud/prisma-cloud-admin-compute/welcome). This guide provides technical details for everything from installing a defender to implementing WAAS.
  + Latest updates for CWP and Code Security at the following link [Prisma Cloud Limited PM Series Recordings Launch: CWP and CCS Release Updates](https://live.paloaltonetworks.com/t5/prisma-cloud-articles/prisma-cloud-limited-pm-series-recordings-launch-cwp-and-ccs/ta-p/505935)

### 

### Reference Material

# Continuous Learning

| **Reference Material Name** | **Description** |
| --- | --- |
| [FlexLearn](https://paloaltonetworks.exceedlms.com/) | Internal Learning Management System designed to provide interactive training courses for a variety of topics. In addition to the links below, other courses on Information Security related topics as well as other products can be found on FlexLearn.   * + [CSPM New Hire Onboarding](https://paloaltonetworks.exceedlms.com/authentication/saml_login)   + [CWP New Hire Onboarding](https://paloaltonetworks.exceedlms.com/student/collection/971365-professional-services-prisma-cloud-new-hire-onboarding-cwp-track)   + [EEC New Hire Onboarding](https://paloaltonetworks.exceedlms.com/student/collection/1096725-claisec-professional-services-prisma-cloud-eec-new-hire-onboarding) |
| [Udemy for Business](https://paloaltonetworks.udemy.com/organization/home/) | Learning Site (Agnostic)  Only Full Time Employees (FTE) have access |
| [A Cloud Guru (ACG)](https://learn.acloud.guru/dashboard) | Cloud Specific Learning Site (Agnostic)  Only Full Time Employees (FTE) have access |
| [EE Enablement series](https://docs.google.com/presentation/d/1vYwx698USAbKG9yn8oAkrq1ju1pLKWJ2t2XacU6AclA/edit#slide=id.g6e2f5365d4_0_159) | This series was conducted by experienced members of the Professional Services organization. It is a useful enhancement to training, as teammates related stories of their experiences working with customers. Recordings can be found in [this Google Drive folder](https://drive.google.com/drive/folders/1QwWRn07XEiD5lrMknxxNUQd_YRsgz748?usp=sharing). |
| [Panopto](https://paloaltonetworks.hosted.panopto.com/Panopto/Pages/Home.aspx?utm_source=marketo&utm_medium=email&utm_campaign=Global-NL-EN-19-08-30-XX-P4-Network-ASC_August_2019_Newsletter-2019-08-30%2012:00:41&mkt_tok=eyJpIjoiWTJRMlpEQTBZamd5TjJNMCIsInQiOiJaZE9rUUxTWW9CejVWa1RpU2g4MXdRbXVVVmR2dVlYRWdKMTFVUkpXMWJPOEZBM3p3d0dsZjZqTkpIVXVNbm80cFRBcDB1dUFNb2Z3eVZZWk4wMFhCWDRwVkRoOXpzVkwxM25RMjNpK2lLWTBqdENaenhHOWJlcHBGNDhPOE9RUCJ9) | Internal video hosting site that contains recorded content related to a variety of topics. Here, videos can be found covering anything from how to onboard a cloud account into Prisma Cloud, to how to eat healthy. |
| [CWP Best Practices](https://www.google.com/url?q=https://drive.google.com/drive/folders/15CqnavcPdFgybwz1Kw0jaxCSnmsdgkd_&sa=D&source=docs&ust=1662481002715188&usg=AOvVaw3F9PVGMLN9s5VMgtSm9ipK) | Internal only document |
| Prisma Cloud Tuesdays [Weekly Calendar](https://docs.google.com/document/d/1a1PONbJ1Zvg66yIpv7xBtIEVs7cAWJxcWzL7qopOwaI/edit) | Prisma Cloud Tuesdays is a weekly meeting in which various teams present compelling content related to Prisma Cloud and all of its modules. Presentations are recorded, and the decks as well as the recordings are available after the meeting has concluded. Announcements are made in the Slack channel which is where requests to add the meeting to calendars can be made.  Reach out to Nawaz Ali and join the #prismacloudtuesdays Slack channel. |
| [Brown Bag Enablement Series](https://theloop.paloaltonetworks.com/loop/coe-enablement-pc-training-events) | A weekly “lunch and learn” style meeting in which various team members from across the company present on everything from products and tooling to general topics such as productivity tips. These meetings are recorded, and the recordings and session materials are made available after the meetings are complete. |
| Prisma Cloud Release Demos | Weekly meeting showcasing new features that are coming in future releases.   * + Reach out to Kasi Annamalai ([kannamalai@paloaltonetworks.com](mailto:kannamalai@paloaltonetworks.com)) to be added to the call if it does not show in your calendar.   + [Shared Drive](https://drive.google.com/drive/u/0/folders/15z2OYArsJnx4J-tccBKmrEYqVFadgsBE) |
| [GCSD Training LOOP page](https://theloop.paloaltonetworks.com/loop/ls/community/gcs-training/dashboard) | Training announcements |
| [NetSec - PS Training / PS Academy LOOP Page](https://theloop.paloaltonetworks.com/loop/global-customer-services/professional-services/professional-services-academy-ps-training-calendar) | Not relevant to Prisma Cloud, however, it is beneficial for Network Security knowledge. |