



Vault Enterprise Onboarding Program

HashiCorp Customer Success



Agenda

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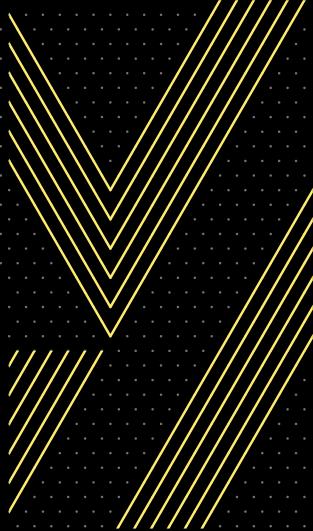
Code of Conduct

HashiCorp is dedicated to providing a harassment-free experience for everyone, regardless of gender, gender identity, sexual orientation, disability, physical appearance, body size, race, national origin, or religion. We value your attendance and do not wish anyone to feel uncomfortable or threatened at any time.

The bottom line is that we do not tolerate harassment of conference participants in any form. Harassment includes but is not limited to offensive verbal comments related to gender, gender identity, sexual orientation, disability, physical appearance, body size, race, national origin, religion; sexual or inappropriate images in public spaces; deliberate intimidation; stalking; trolling; sustained disruption of talks or other events; and unwelcome sexual attention. Participants asked to stop any harassing behavior are expected to comply immediately. If you are being harassed, notice that someone else is being harassed, or have any other concerns, please let the HashiCorp event representative know immediately or email customer.success@hashicorp.com.



01



Customer Success

HashiCorp Customers

FINANCIAL SERVICES	ENTERTAINMENT & TELCO	MANUFACTURING & LOGISTICS	SOFTWARE & TECHNOLOGY	INSURANCE & HEALTH	
 Santander  KeyBank   SoftBank  RBC  wepay a CHASE company  Blackstone  Lincoln Financial Group®	 BNP PARIBAS  CREDICORP   ABN AMRO  Nationwide Building Society  STANDARD & POOR'S  ADB	 COMCAST  vodafone  NBCUniversal  UBISOFT  sky  RED VENTURES  DAZN  VINGROUP  ROBLOX	 gm  Lufthansa  BHP  OLD DOMINION FREIGHT LINE  AIRBUS  AirPlus INTERNATIONAL  WARE2GO  KPMG	 Booking.com  Grab  priceline.com®  cielo  shopify  SEAT GEEK  H&R BLOCK  ADT  Shipt  Q2	 PROGRESSIVE  co-operators  gsk  AXA  AstraZeneca  ellume Kansas City  athenahealth  GoodRx  surescripts



What You Can Expect from CS

Customer Success Manager (CSM)

Account & Success Management

- Providing a community-based onboarding program designed to get you up and running quickly
- Facilitating sessions to keep your team current with HashiCorp technology
- Joint discovery of objectives and success criteria
- Your customer advocate within HashiCorp

Solution Architecture Specialist (SA)

Technical Success & Advisory

- Technical resource for the onboarding process
- Providing product reference architecture information for better decision-making
- Thought leadership on best practices of product architecture and use-case patterns
- Timely education and enablement from a technical perspective



Other resources available to you

Our customer success pillars

So much goes into making you successful. Three core pillars are inform how we work to serve you.



Enablement

We educate, guide, and enable your teams to deploy and operate products according to proven best practices.



Adoption

We help you deliver against your top use cases, and ensure products are used properly to drive rapid ROI.



Value attainment

We connect product usage to business need and value-based outcomes to ensure you achieve measurable value.

Further information located at <http://hashicorp.com/customer-success>

Customer-Centric Communications

Making Communications Easy



Support



Email



Webinars



Phone/Video

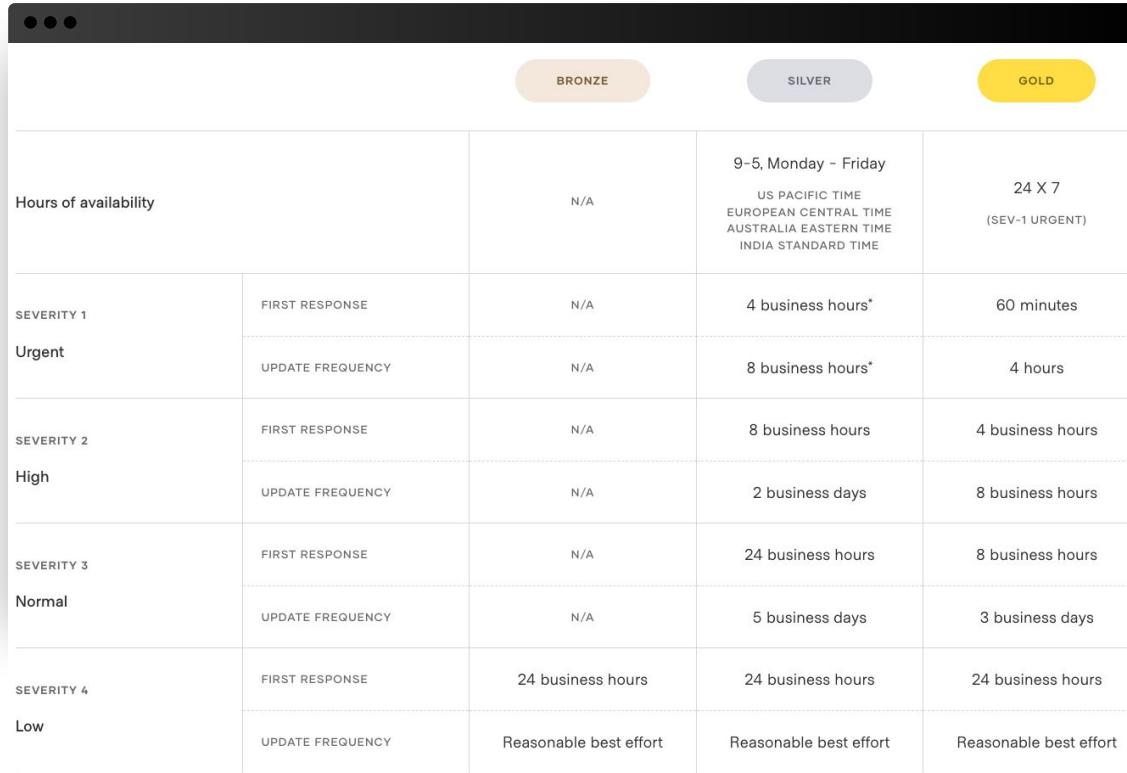
02



Customer Support

Support Levels

This info can also be accessed from our [Support SLA Page](#)



The screenshot shows a mobile application interface with a dark header bar containing three dots on the left. Below the header are three tabs: 'BRONZE' (grey), 'SILVER' (light grey), and 'GOLD' (yellow). The main content area displays a table comparing support levels across four severity levels (Urgent, High, Normal, Low) for three service levels (Bronze, Silver, Gold).

Hours of availability		N/A	9-5, Monday - Friday US PACIFIC TIME EUROPEAN CENTRAL TIME AUSTRALIA EASTERN TIME INDIA STANDARD TIME	24 X 7 (SEV-1 URGENT)
SEVERITY 1 Urgent	FIRST RESPONSE	N/A	4 business hours*	60 minutes
	UPDATE FREQUENCY	N/A	8 business hours*	4 hours
SEVERITY 2 High	FIRST RESPONSE	N/A	8 business hours	4 business hours
	UPDATE FREQUENCY	N/A	2 business days	8 business hours
SEVERITY 3 Normal	FIRST RESPONSE	N/A	24 business hours	8 business hours
	UPDATE FREQUENCY	N/A	5 business days	3 business days
SEVERITY 4 Low	FIRST RESPONSE	24 business hours	24 business hours	24 business hours
	UPDATE FREQUENCY	Reasonable best effort	Reasonable best effort	Reasonable best effort

Severity Definitions

Sev-1 (Urgent)	A Sev-1 incident is an operational outage as defined below: Any error reported by customer where majority of the users for a particular part of the software are affected, the error has high visibility, there is no workaround , and it affects the customer's ability to perform its business .
Sev-2 (High)	Any error reported by customer where the majority of the users for a particular part of the software are affected, the error has high visibility, a workaround is available ; however, performance may be degraded or functions limited and it is affecting revenue .
Sev-3 (Normal)	Any error reported by customer where the majority of the users for a particular part of the software are affected, the error has high visibility, a workaround is available; however, performance may be degraded or functions limited and it is NOT affecting revenue.
Sev-4 (Low)	Any error reported by customer where a single user is severely affected or completely inoperable or a small percentage of users are moderately affected or partially inoperable and the error has limited business impact.

For reference only - Subject to Change
Current information available on the [Support SLA Page](#)



Contacting Support

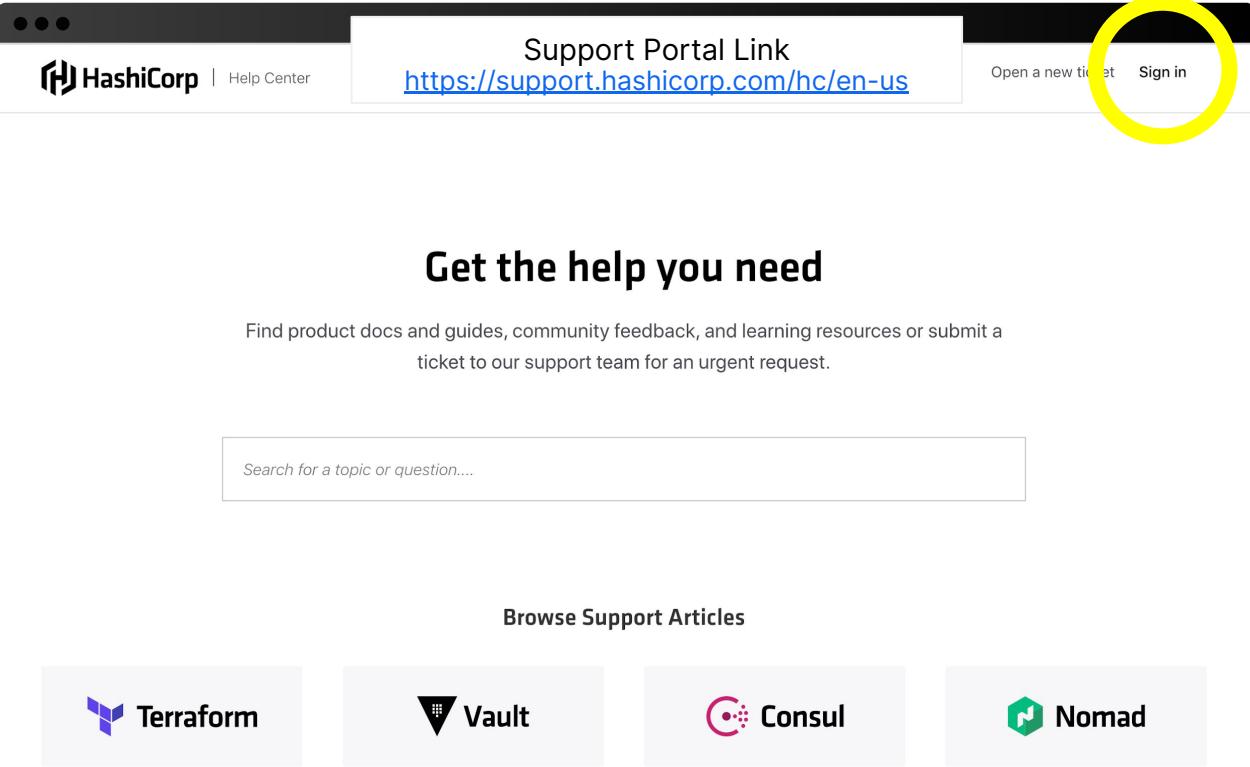
There are two ways to contact our support team:

- **Support Portal:** Open a ticket through [our support portal](#)
 - Once customer access is setup, authorized users can submit a ticket using the email address they provided us
 - The portal provides faster routing via product and sub-product selection, the ability to send encrypted attachments, and set ticket priority
- **Email Support:** Send an email to support@hashicorp.com
 - All emailed support tickets default to “normal” priority - and cannot be changed
 - Don’t raise a SEV-1 over email, please use the support portal



Support Portal

Authorized technical contacts can log in through the “Sign in” button



The screenshot shows the HashiCorp Support Portal homepage. At the top, there's a navigation bar with the HashiCorp logo and a "Help Center" link. Below the navigation bar, the text "Support Portal Link" is displayed along with a blue hyperlink: <https://support.hashicorp.com/hc/en-us>. To the right of the link are two buttons: "Open a new ticket" and "Sign in". The "Sign in" button is circled in yellow. The main content area features the heading "Get the help you need" and a subtext: "Find product docs and guides, community feedback, and learning resources or submit a ticket to our support team for an urgent request." Below this is a search bar with the placeholder text "Search for a topic or question....". Further down, there's a "Browse Support Articles" section and four cards representing different products: Terraform, Vault, Consul, and Nomad, each with its respective logo and name.

Support Portal Link
<https://support.hashicorp.com/hc/en-us>

Open a new ticket Sign in

Get the help you need

Find product docs and guides, community feedback, and learning resources or submit a ticket to our support team for an urgent request.

Search for a topic or question....

Browse Support Articles

Terraform

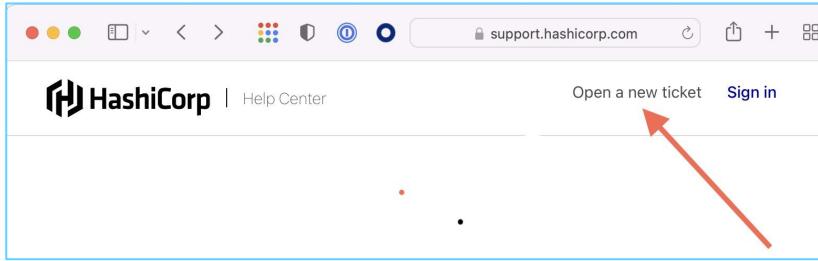
Vault

Consul

Nomad



Support Portal

A screenshot of the 'Submit a request' form on the HashiCorp Help Center. It includes fields for 'Your email address' (with 'person@company.com' entered), 'Product' (set to 'HashiCorp Cloud Platform'), and 'HCP Category' (set to 'HCP Vault'). There is also a 'Search' bar and a link to 'HashiCorp Help Center / Submit a request'.

Helpful Hints

- Our ticketing system uses the email domain to associate with a company
- Select Vault and the Sub-product
- Always include reproduction steps and log files!

03



Vault Enterprise Onboarding Program

Customer Responsibilities

Partnering to achieve onboarding success



Training Consumption

Ensure team members attend workshops, training, office hours



Use Case Guidance

Provide timely information on your intended use cases during our success planning



Project Team Participation

Inclusive of any stakeholder required for successful completion of your onboarding



Single Point of Contact

Main contact for decision making



Escalation Process

Understanding of escalation process



Surveys Responses

Provide timely responses to surveys

Onboarding Checklist



Vault Installed

- Vault Enterprise installed in your environment
- Basic configuration completed
- Telemetry and Monitoring in place
- Disaster Recovery replication in place



Vault Operational

- First use case (application) onboarded and consuming secrets stored in Vault
- A roadmap created for onboarding additional use cases



Completed within 90 days

COBRA Vault Onboarding Journey



- Week 1 - Kickoff - Program Intro & Architectural Quickstart
- Week 2 - * Lunch & Learn - Migrating from Vault OSS to Enterprise *
 - Webinar - Architectural Deep Dive
- Week 3 - * Lunch & Learn - Using Vault with Kubernetes *
 - Webinar - Auth Methods, Namespaces, Policies
- Week 4 - Community Office Hours
- Week 5 - Webinar - Vault Operations Basics & Best Practices
- Week 6 - Webinar - Consuming Vault with your applications
- Week 7 - * Lunch & Learn - Dynamic Secrets *
 - Webinar - Vault Governance



04



Vault Enterprise Installation Planning

Vault Installation

What do we need to decide?

1

Cluster Storage

Vault Enterprise supports:

- **Consul Storage**
- **Integrated Storage**

Migration to supported storage needs to be included in project planning if using other storage

2

Installation Location

Where will Vault be installed?

- **On-Premise Data Center**
- **Cloud Provider**

3

Vault Runtime

Vault supports installation in:

- **Physical & Virtual Machines**
- **Containers**
- **Kubernetes**



Cluster Storage

Integrated Storage vs. Consul

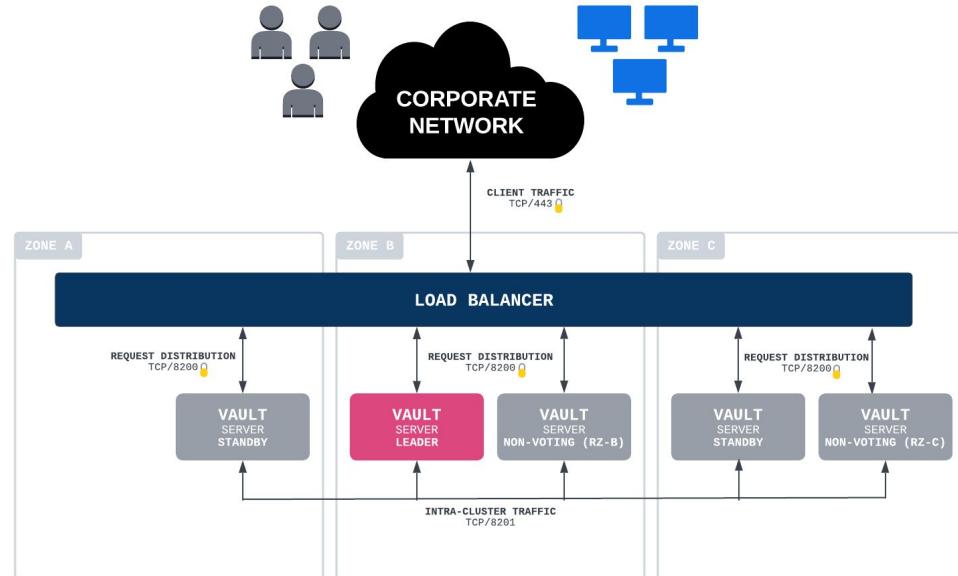
- Integrated storage eliminates the need for external storage;
Vault is the only software needed to stand up a cluster
- Basic differences:
 - Consul - everything in memory (in memory database)
 - Integrated Storage - everything on disk
- Reference Architecture
 - [Consul Storage](#)
 - [Integrated Storage](#)



Integrated Storage

5 Vault Nodes

- Fault tolerant and scalable across multiple workloads
- N-2 resiliency Vault node level
- N-1 resiliency Availability Zone level



Installation Location & Runtime

- **Cloud Provider**

Terraform [starter code packs](#) for [AWS](#), [Azure](#), and [GCP](#) to kickstart installation

- **On-Premise Data Center**

- **Physical or Virtual Machine**

Recommended installation pattern for most deployments

- **Container**

[Vault Enterprise](#) on Docker Hub

- **Kubernetes**

[Helm Chart](#) is the recommended deployment pattern

Vault Runtime

Physical Hardware or Virtual Machine

- Recommended installation pattern
- The [Vault security model](#) is prescriptive around creating a robust system to prevent attempts to bypass its access controls
- Instance sizing recommendations listed in [reference architecture](#)

Container

- Vault can be installed into a container that has persistent storage and provisioned IOPS
- Instance sizing recommendations are the same as when installing on VMs

Kubernetes

- Kubernetes installation should be considered only if all workloads and applications that will access Vault are installed in Kubernetes
- VM installation is the preferred if any applications reside outside Kubernetes
- [HashiCorp Developer - Vault & Kubernetes](#)



05



Preparing for Success

Use Cases

- Vault will be used for Secrets Management
 - How is this solved for currently?
 - What is the key driver for the change?
- How will Vault be accessed/interacted with?
 - Sporadic access? Continuous access?
 - API? CLI? UI?
- What is the rollout plan?
 - What is the first use case that will be brought onboard?
 - Is a managed service being created?

Architecture

- Where will Vault be deployed?
- Where will the users be accessing this Vault from?
- What are the target Disaster Recovery RPO and RTO?
- Are there any noteworthy regulatory constraints in the environment that need to be considered?

Success Metrics

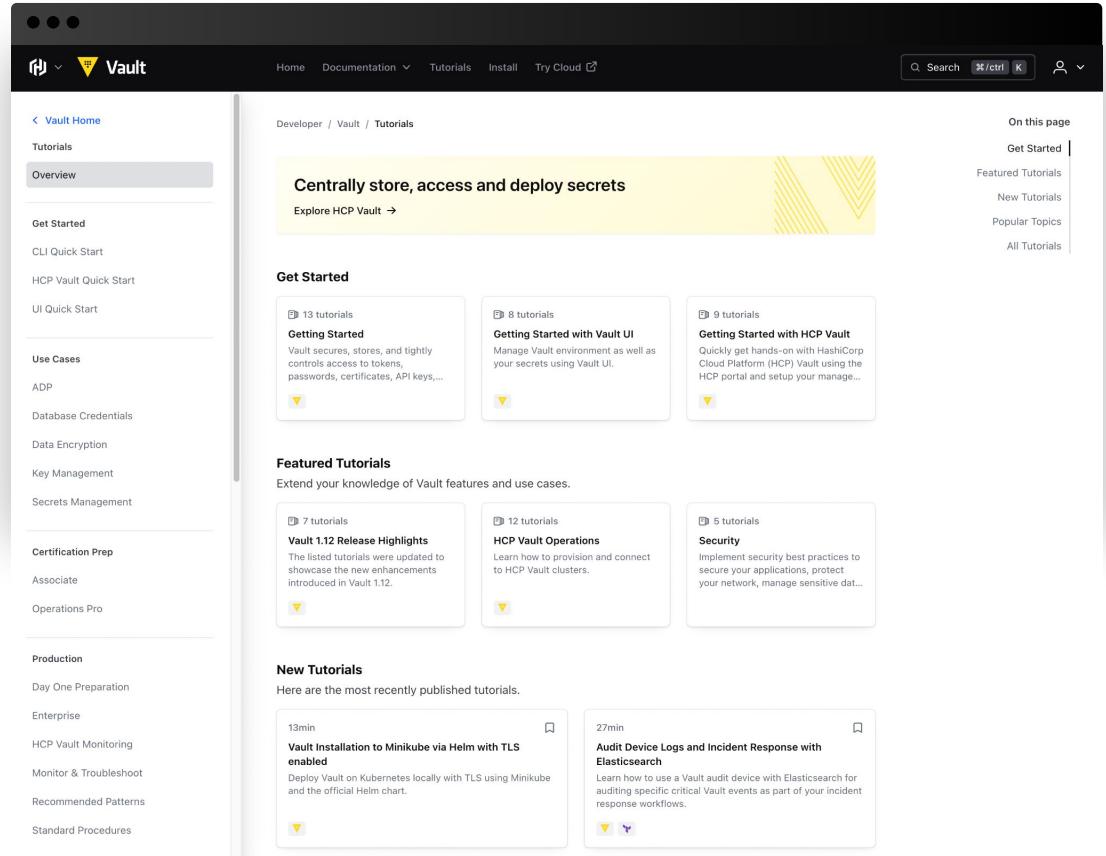
- What are the short term goals for the rollout of Vault?
 - What are the must-haves?
 - What metrics are being used to gauge the success of this project?
- What are the longer term goals for the rollout of Vault?
 - Are there particular features that are planned to be adopted?
 - Are there particular business problems that Vault is going to solve?

Next Steps



Tutorials

Step-by-step guides to accelerate deployment of Vault



The screenshot shows the HashiCorp Vault Tutorials page. At the top, there's a navigation bar with links for Home, Documentation, Tutorials, Install, Try Cloud, and a search bar. On the left, a sidebar lists various tutorial categories: Overview, Get Started, CLI Quick Start, HCP Vault Quick Start, UI Quick Start, Use Cases (ADP, Database Credentials, Data Encryption, Key Management, Secrets Management), Certification Prep (Associate, Operations Pro), Production (Day One Preparation, Enterprise, HCP Vault Monitoring, Monitor & Troubleshoot, Recommended Patterns, Standard Procedures). The main content area features a yellow banner with the text "Centrally store, access and deploy secrets" and a link to "Explore HCP Vault". Below this, there are three sections: "Get Started" (with 13 tutorials), "Featured Tutorials" (with 7, 12, and 5 tutorials for Vault 1.12 Release Highlights, HCP Vault Operations, and Security), and "New Tutorials" (with two examples: "Vault Installation to Minikube via Helm with TLS enabled" and "Audit Device Logs and Incident Response with Elasticsearch"). A sidebar on the right titled "On this page" includes links for Get Started, Featured Tutorials, New Tutorials, Popular Topics, and All Tutorials.

<https://developer.hashicorp.com/vault/tutorials>

Need Additional Help?

Customer Success

Contact our Customer Success Management team with any questions. We will help coordinate the right resources for you to get your questions answered

customer.success@hashicorp.com

Technical Support

Something not working quite right? Engage with HashiCorp Technical Support by opening a ticket for your issue at

support.hashicorp.com

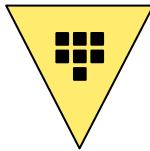
Discuss

Engage with the HashiCorp Cloud community including HashiCorp Architects and Engineers

discuss.hashicorp.com

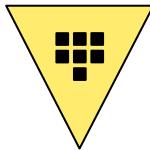


Upcoming Webinars



Migrating from Vault OSS to Enterprise

This Lunch & Learn (separate link) covers the best methods for upgrading an existing Vault OSS Cluster to Vault Enterprise



Architectural Deep Dive

Take a deep dive into best practices for architecting and deploying your Vault clusters including Enterprise DR and Replication best practices.



Using Vault with Kubernetes

This Lunch & Learn (separate link) covers the best practices for integrating Vault Enterprise with Kubernetes and

Action Items



Vault Enterprise

- Identify your use case(s) and define your goals and project milestones with Vault Enterprise
- Share to customer.success@hashicorp.com
 - Authorized technical contacts for support
 - Stakeholders contact information (name and email addresses)
- Gather requirements and complete 3 critical decisions:
 - Cluster storage
 - Installation location
 - Cluster runtime

Q&A





Thank you

customer.success@hashicorp.com

www.hashicorp.com/customer-success