HashiCorp

Vault Onboarding Program

Kickoff and Architectural Quickstart

COBRA Team | HashiCorp Customer Success

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Agenda

- Welcome
- Customer Success
- Customer Support
- Next Steps
- Architectural Quickstart

Code of Conduct

HashiCorp is dedicated to providing a harassment-free Vault Enterprise onboarding 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.

HashiCorp Customer Success

HashiCorp Customers

FINANCIAL SERVICES

Santander
BNP PARIBAS
KeyBank
CREDICORP
SoftBank
nab
RBC
ABN·AMRO
wepay
a CHASE company
Nationwide
Building Society
Blackstone
STANDARD &POOR'S
Lincoln Financial Group
ADB

ENTERTAINMENT & TELCO

COMCAST
vodafone
NBCUniversal
2K
UBISOFT
sky
RED VENTURES
DAZN
VINGROUP
ROBLOX

MANUFACTURING & LOGISTICS

gm
Lufthansa
BHP
OLD DOMINION FREIGHT LINE
AIRBUS
AirPlus INTERNATIONAL
WARE2GO
KPMG

SOFTWARE & TECHNOLOGY

Booking.com
Grab
priceline.com
cielo
shopify
SEAT GEEK
H&R BLOCK
ADT
Shipt
Q2

INSURANCE & HEALTH

PROGRESSIVE
co-operators
gsk
AXA
AstraZeneca
Kansas City
ellume
athenahealth
GoodRx
surescripts

How We Engage

Customer Success Managers

Strategic Relationship Management

Engagement to ensure product & operational success including risk mitigation towards business outcomes

Customer Journey Delivery

Focus on solution value realization, driving organizational adoption and providing HashiCorp Best Practices

Trusted Advisor & Advocate

Proactive advisory services and program coordination across all functional areas within HashiCorp (Sales, Engineering, Support, Product, and more)

Customer Success Architects

Product Experts

Subject matter expert on HashiCorp products as well as integration points with third-party platforms and tools.

Prescriptive Guide

High-value, prescriptive guidance on how to adopt HashiCorp products and consultation on the unique integration requirements of each customer.

Technical Advisors

Ongoing advisor on HashiCorp products and the integration with complimentary technologies. As customers evolve, providing highly relevant guidance based on the specific customer needs and value-based outcomes.

Keys to Success

Partnering to Drive Value Realization

Training Consumption

Ensure team members consume training resources in a timely fashion.

Use Case Guidance

Provide timely information on use case designs.

Project Team Participation

Inclusive of any stakeholder required for successful completion of onboarding.

Single Point of Contact

Main contact for decision making.

Escalation Process

Understanding of escalation process.

Change Control Process

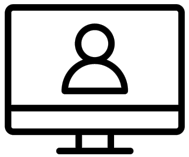
Understanding of change control process.

Customer-Centric Communications

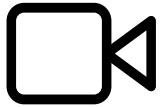
Making Communications Easy

Support

Email

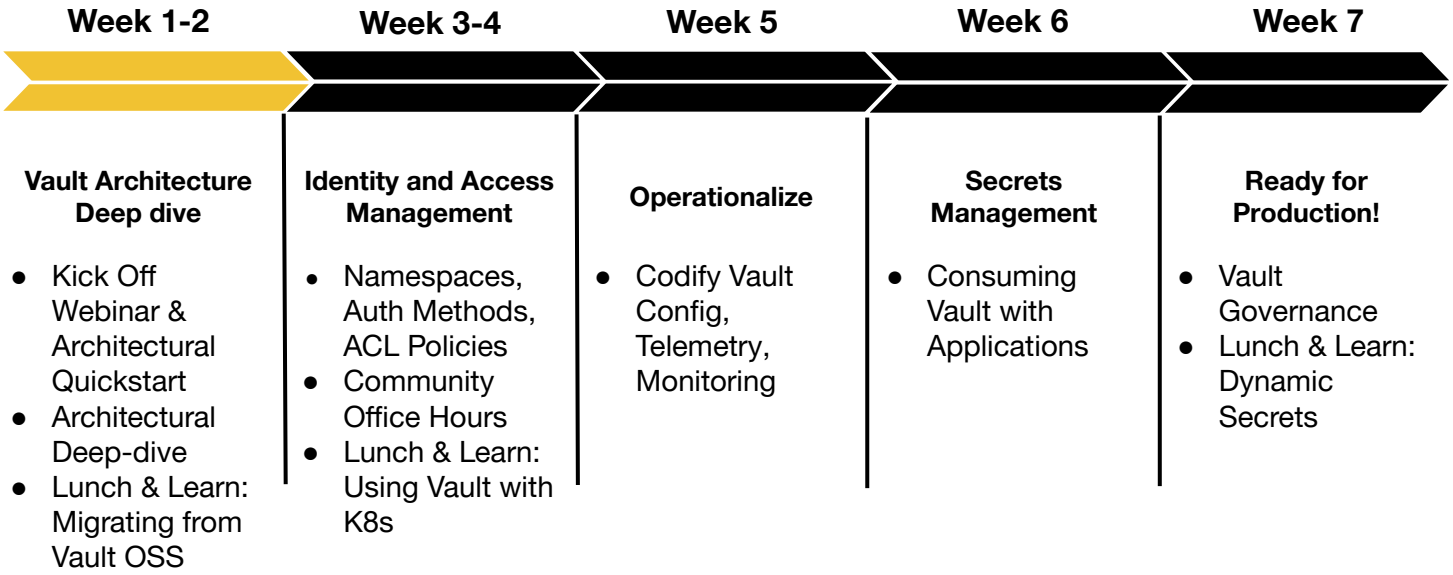


Webinars



Phone/Video

Vault Enterprise Path to Production



Onboarding Checklist

Our objective is to make you successful with our products and see value within 90 days

Vault Installed

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

Vault Operational

- Getting the 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 - Webinar - Architectural Deep Dive

  Lunch & Learn - Migrating from Vault OSS to Enterprise
- Week 3 - Webinar - Auth Methods, Namespaces, Policies
- Week 4 - Community Office Hours

  Lunch & Learn - Using Vault with Kubernetes
- Week 5 - Webinar - Vault Operations Basics & Best Practices
- Week 6 - Webinar - Consuming Vault with your applications
- Week 7 - Webinar - Vault Governance

  Lunch & Learn - Dynamic Secrets

Customer Support

SLA, Contact Methods, Services, etc.

Contacting Support

There are two ways to contact our support team

1) **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.
2) **Email Support:** Send an email to support@hashicorp.com
    - All emailed support tickets default to “normal” priority - and cannot be changed.

HashiCorp Support SLA

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

		BRONZE	SILVER	GOLD
Hours of availability		N/A	9-5, Monday - Friday US LOCAL TIME EUROPEAN CENTRAL TIME AUSTRALIA EASTERN 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
Technical contacts allowed		2	3	4

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.

This info can also be accessed at the bottom of our Support SLA Page

Next Steps

Next Steps

Next: Architectural Quickstart

Explore project use-case and jumpstart guidelines

Webinar: Architectural Deep Dive with Q&A

Vault architectural deep-dive with Q&A

Authorized users for Support

Please email customer.success@hashicorp.com with Support Contacts

Q & A

A Q&A will be held after this session

HashiCorp Vault

Vault Installation Planning & Architecture

Agenda

- Vault Installation Planning
- Vault Architecture
- Preparing for Success

Vault Installation

What do we need to decide?

1

Cluster Storage Technology

Vault Enterprise supports two storage backends.

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

If using non-supported storage backends with a Vault OSS cluster then migration to supported storage should be included in project planning

2

Installation Location

Where will Vault be installed:

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

Vault supports installation in:

- **Physical and Virtual Machines**
- **Containers**
- **Kubernetes**

Cluster Storage

Integrated Storage vs. Consul

- Integrated storage eliminates the need for external storage; Vault is the only software you need to stand up a cluster.
- Basic differences:
  - Consul - everything in memory (in memory database)
  - Integrated Storage - everything on disk

Consul - Reference Architecture

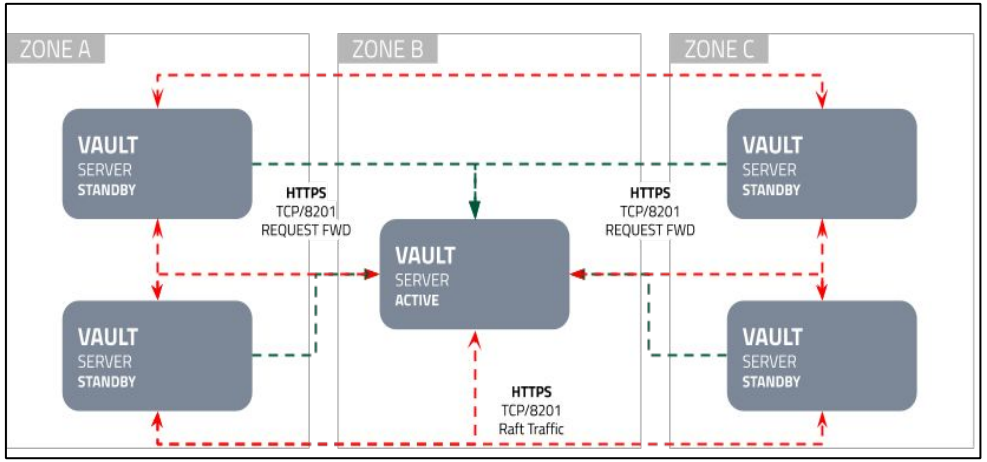
Integrated Storage - Reference Architecture

Recommended Solution - Integrated Storage

5 Vault Nodes

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

Reference Architecture - Integrated Storage



Installation Location

Physical or Virtual Machine

This is the recommended installation pattern for the vast majority of customers. The **Vault security model** is prescriptive around creating a robust system to prevent attempts to bypass it's access controls.

Instance sizing recommendations are listed in the **reference architecture**.

The Terraform Registry has published **starter code packs** for the AWS, Azure, and GCP to kickstart installation.

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.

The **Vault Enterprise image** on Docker Hub is available if using a container deployment pattern.

Kubernetes

HashiCorp has an officially supported **Helm Chart for Vault** which is the recommended way to install Vault on Kubernetes.

Kubernetes installation should be considered only if all workloads and applications that will access Vault are installed exclusively in Kubernetes. If any applications or workloads reside elsewhere the VM installation is the preferred deployment pattern for Vault.

HashiCorp Learn - Vault & Kubernetes

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?

Auth Methods

Human & Machine implementations for authenticating to Vault.

AppRole	Kerberos
AliCloud	Kubernetes
AWS	LDAP
Azure	Oracle Cloud
Cloud Foundry	Okta
Github	RADIUS
Google Cloud	TLS Certificates
OIDC	Username & Password

+ Custom Plugins

Secret Engines

Custom logic for handling secrets

Active Directory	Key/Value
AliCloud	Nomad
AWS KMS	OpenLDAP
Azure Key Vault	PKI
K8S CSI Provider	SSH
Consul	Terraform Cloud
Cubbyhole	TLS Certificates
Databases	TOTP
Secrets Manager for GCP	Transform
Key Management	Transit
KMIP	Venafi

+ Custom Plugins

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?

COBRA  Vault Onboarding Journey 

Up Next…

- Lunch & Learn - Migrating from Vault OSS to Enterprise

- Webinar - Architectural Deep Dive

Thank You

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