



Advanced Services Offering

Objectives

The Auth0 Platform Advanced Services offering is designed to provide Okta customers with a simple, pragmatic, and cost-effective approach to architecting, implementing and using the Auth0 Platform in their environment in the most effective way in the shortest period of time.

The Advanced Services offering includes 25 days of consulting services delivered onsite and remotely. The actual delivery logistics will be agreed upon with the Customer and will depend upon Okta and Customer resources availability and time frame. Up to 4 days of consulting services may be used towards training, upon Customer request.

Approach and Activities

The following activities are included in the scope of the Advanced Services offering:

Consulting (25 Days – Five 4-Day Sessions Onsite and 5 Remote Days)

Initial onsite consulting engagement

An Okta Solutions Architect (SA) will deliver five 4-day onsite consulting engagements upon mutual agreement that the pre-requisites for project initiation have been met.

Activities typically include some of the following, as time allows:

Architecture Discovery and Planning Session

This discovery and planning session is typically delivered remotely prior to the onsite engagement. Okta Solutions Architect will meet with Customer Executive Stakeholder to

- Validate Customer Business Objectives with respect to Identity and Access Management. Okta Solutions Architect will further meet with Customer Application Owner, Customer Application Architect and Customer Security Architect to
 - Gather information about Customer environment, as well as Customer security and identity requirements (Discovery Checklist will be provided ahead of time)
 - Plan architecture design, deployment and configuration roll-out
 - Determine key architectural design decisions that may affect other implementation details
 - Plan adoption phases and milestones, including post-implementation Healthcheck sessions
 - Plan training sessions delivery.

Architecture Design and Implementation Assistance

Once the Architecture Discovery and Planning Session is completed and upon mutual agreement that the pre-requisites for the implementation phase have been met, an Okta Solutions Architect will deliver five 4-day onsite consulting engagements, typically including the following, as time allows:

- Provide identity management scenario guidance
- Provide a pair programming session to initiate the identity implementation solution
- Assist with the implementation solution as needed
- Provide a list of recommendations to take Auth0 Platform deployment to the next level
- Provide knowledge transfer on
 - Security Principles and Practices
 - Identity and Access Management
 - Architecture and Design Best Practices
 - Automation and Controls
- Provide knowledge transfer on all aspects of product deployment, configuration, and usage
- Provide knowledge transfer on organizational alignment best practices.

Five 1-day remote Healthcheck consulting engagements

Additionally, the Solutions Architect will deliver five 1-day Healthcheck engagements approximately every two months after the completion of the activities listed above, for one or more Application teams. The Healthcheck activities typically include some of the following:

- Review the progress of deployment and configuration roll-out
- Review the adoption phases and milestones achieved
- Review Application configurations and API configurations
- Review Rules and their completeness and consistency
- Review performance of the managed applications
- Review the Dashboard and reports, as needed
- Review Password Policy, Anomaly Detection and other security-related requirements, as needed
- Review regulatory and compliance requirements, as needed
- Review third-party services, as needed
- Provide a list of recommendations to take Auth0 Platform deployment to the next level
- Provide knowledge transfer on all aspects of product deployment, configuration, and usage.

At the end of 30 days from the beginning of the engagement, the following outcomes are expected to be achieved, provided that all Pre-requisites and Assumptions listed below are met:

- Architecture Discovery and Planning Session were completed
- Identity solution is implemented for the primary target applications and is deployed to Pre- Production environment
- Basic Rules are defined
- Product training has been attended by Customer teams involved in the implementation and maintenance of the Auth0 Platform
- At least one Auth0 Platform Subject Matter Expert (SME) has been trained and enabled to own relevant Identity and Access Management design decisions for the Customer
- Training materials have been made available to all users at a Customer organization.

At the end of 60 days from the beginning of the engagement, the following outcomes are expected to be achieved, provided that all Pre-requisites and Assumptions listed below are met:

- Identity solution implemented for the majority of target applications and is deployed to Production environment
- Basic and advanced Rules meeting Customer Identity and Access requirements are defined
- Configuration of Dashboards is completed
- Customer made recordings of the Okta training session available to users within their organization for self-study
- All users are trained on deploying and configuring the Auth0 Platform to solve Customer Identity and Access requirements.

At the end of 90 days from the beginning of the engagement, the following outcomes are expected to be achieved, provided that all Pre-requisites and Assumptions listed below are met:

- Business goals agreed upon with Customer's executive stakeholders during the Architecture Discovery and Planning Session are achieved.

Project Management is included with this Services Offering. Up to 10% of consulting time may be used towards Project Management.

Training (as necessary)

At Customer request, up to 4 days of consulting services may be replaced with 4 Private Virtual Class for up to 8 students. Each Private Virtual Class is delivered over 6 hours, remotely. The SA will assist with scheduling training. The description of Virtual Classes is available upon request.

Pre-requisites and Assumptions

- Customer will have Pre-Production environment replicating Production, with the ability to generate load representative of the load in Production.
- Customer agrees to commit Application Architects and Application Security Architects responsible for the Applications to be managed to work with Okta Solutions Architect for the duration of the engagement.
- Customer agrees to commit the appropriate technical resources for the duration of the delivery engagement, including the technical resources with login access to all servers and systems to be configured.
- Customer agrees to assign a Technical Project Manager to be the point person to work with Okta Solutions Architect and help coordinate the delivery of Activities.
- Customer agrees to attend regular status review meetings with Okta Solutions Architect, as needed.
- Up to 10% of consulting time (20 hours) may be utilized towards Project Management with this Services Offering. Additional consulting hours may be utilized towards project management, as needed.
- Travel and expenses for onsite Activities are included in the price of this offering and will not be billed separately. Remote Activities will be delivered using Zoom.
- The recommendation regarding onsite vs remote services delivery comes from best practices in the field and is of advisory nature only. The actual delivery logistics will be agreed upon with the customer and will depend upon Okta and customer resources availability.
- The engagement must be scheduled at least twenty one (21) days in advance.

- Days not used within one hundred and eighty days following the date of the full execution of the ordering document with which this services offering description is associated will expire without right of refund.

Pricing

- The Advanced Services Offering is priced at \$65,000 USD.