



# Implementation HealthCheck Services Offering

## Objectives

The Auth0 Platform Implementation HealthCheck Services offering is designed to provide Okta customers with a health check assessment of the design and implementation of the Auth0 Platform in their environment.

The Implementation HealthCheck Services offering includes 1 or more days of consulting services delivered onsite or remotely. The actual delivery logistics will be agreed upon with the Customer and will depend upon Okta and Customer resources availability and time frame.

We recommend that this package is bought annually to ensure that the Auth0 Platform environment is optimized for usage and performance.

## Approach and Activities

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

### Consulting (1 or More Days – Remote or Onsite Sessions)

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

In the beginning of the engagement, the SA will work remotely performing discovery, evaluating the customer environment, gathering data, running tests and preparing for the interactive part of the HealthCheck engagement. Following that, the Solutions Architect will conduct a series of discussions with Customer stakeholders either remotely or onsite for up to two days.

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

- Kickoff and Discovery meeting (delivered remotely during day one)
- Review implementation for optimal usage and performance

- Review the progress of deployment and configuration roll-out
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**Never Compromise  
on Identity.**

- Review for anti-patterns and deviations from best practices
  - Review Application, API, Connection, and SSO configurations
  - Review Rules and Hooks for their completeness and consistency
  - Review Universal Login and login page integrations for best practices
  - Review Multi-factor Auth, Email, and Anomaly Detection settings
  - Review User and Role configurations, settings, and integrations
  - Review performance of the managed applications
  - Review the Dashboard and reports, as needed
  - Review the **Auth0 Platform integration code** for optimal performance
  - Review third-party integrations and extensions
- Review implementation for meeting Customer business objectives
    - Review the adoption phases and milestones achieved
    - Review the **Auth0 Platform API** utilization to identify possible optimizations
    - Review Password Policy, Anomaly Detection and other security-related requirements
      - Review additional functionality not being leveraged by the Customer, e.g. MFA, Anomaly Detection, etc
    - Review additional third-party integrations and extensions that should be implemented
    - Review license usage to realize maximum value from the Auth0 Platform investment
- Review implementation for standards and compliance
    - Review of OAuth 2.0 and OIDC compliance, as needed
    - Review of other regulatory and compliance requirements, 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.

## 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 provide architecture diagrams and test accounts for all applications within the scope of this engagement.
- 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.
- In the case of a multi-day engagement, the one-day remote session time shall be consumed in advance of the onsite session (does not carry over), and it includes both the online activities (such as the Kickoff and Discovery meeting) and offline activities (such as evaluating the customer environment, gathering data, and running tests).

- Travel and expenses for onsite Activities are included in the price of this offering and will not be billed separately.
- 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 90 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.