



okta

# Basic Services Offering

## Objectives

The Customer Identity Cloud (CIC) Basic Services offering is designed to provide Okta customers with a simple, pragmatic, and cost-effective approach to architecting, implementing, and using the Okta CIC Platform in their environment in the most effective way in the shortest period of time.

The Basic Services offering includes 5 days of consulting services delivered remotely with a 90-day expiration term. 1 day of consulting services may be used towards training upon Customer request.

## Approach and Activities

The following activities are included in the scope of the Basic Services Offering:

### Consulting (5 Days – Remote Sessions)

#### Initial consulting engagement

An Okta Solutions Architect (SA) will deliver one 5-day remote consulting engagement upon mutual agreement that the prerequisites 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 a two-hour long session delivered prior to the longer engagement. Okta Solutions Architect will meet with Customer Executive Stakeholders 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 the 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 session 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 a remote consulting engagement, typically including the following, as time allows:

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

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

- Architecture Discovery and Planning Sessions 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 CIC platform
- At least one Okta 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 Prerequisites and Assumptions listed below are met:

- Perform deployment review before go-live. This includes activities like
  - Review Application configurations and API configurations
  - Review extensibility code and their completeness and consistency
  - Review tenant configuration, including Password Policy, Attack protection features, and other security-related requirements, as needed
  - Review regulatory and compliance requirements as needed
  - Review third-party services as needed
- Identity solution implemented for the majority of target applications and is deployed to the 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 are available to users within their organization for self-study
- All users are trained on deploying and configuring the CIC 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 Prerequisites and Assumptions listed below are met:

- Business goals agreed upon with the 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 toward Project Management.

## Training (as necessary)

At Customer request, 1 day of consulting services may be replaced with 1 Private Virtual Class for up to 8 students. This Private Virtual Class is delivered over 6 hours, remotely. The SA will assist with scheduling training.

## Prerequisites and Assumptions

- Customer will have a Pre-Production environment replicating Production, with the ability to generate a 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 the consulting time (4 hours) may be utilized towards Project Management with this Services Offering. Additional consulting hours may be utilized towards project management, as needed.
- Remote Activities will be delivered using Zoom
- Days not used within ninety days following the date of the full execution of the ordering document with which this services offering description is associated will expire without the right of refund.