The Pilot Evaluation

Try it before you buy it.

The penultimate assessment of the utility of a monitoring initiative is to try out the tools in your own environment. I believe that everyone appreciates this simple concept. My concern is that it is very easy to define a pilot evaluation that completely fails to address the potential for the organization to correctly adopt the technology being considered. When this potential is zero, it can be a tremendous barrier to success in both applying the technology and in helping the organization mature its monitoring capabilities.

What compromises the usefulness of a pilot evaluation is that they are more often focused on features than the actual utility of the technology. As introduced in Chapter 1, many organizations are blindsided by the increased responsibility and collaboration across the application life cycle that APM introduces. So you should not be surprised that you need to move the definition of the pilot from the narrow focus of the sponsoring end-users of the technology to a broader set of roles and activities. Simply put, most evaluation teams only have their own concerns as priorities and do not have sufficient perspective to assess the utility of the technology across multiple stakeholders. You need to ensure that the proper perspective is explored.

These considerations will not make the pilot evaluation more complex. They will make it more realistic and, ultimately, more collaborative. Otherwise, you end up with multiple tool sets overlapping in capabilities and reserved for a chosen few practitioners. Thus, it’s no surprise that management continues to invest in APM tools, yet has nothing to show for the investment in terms of more effective triage, fewer incidents, or better software quality. It’s often a problem of poor pilot scope.
In this chapter, I will introduce the elements of a broader APM pilot scope to be completed within a five day period. You will evaluate a sample application under load and make a first attempt at delivering an audit of the application. An application audit, which is detailed in Chapter 14, fully exercises use cases for QA, pre-production, and production. You will want to coordinate with those stakeholders for the wrap-up meeting. You’ll also want to give them an opportunity to drive the tools, in their chosen roles, for the scenarios in which APM will be employed.

Participation

There should be at least two people participating during the pilot, exclusive of the vendor staffing. They should be available at least 50% of the time and both should be present for critical activities. As much as possible, you should be doing the “work” under the direction of the vendor. Just like team programming, you drive while the vendor helps you navigate. You may make adjustments in what activities you participate in but the more you do, the more information you get out of the pilot evaluation.

As you already know that different roles are leveraged by APM across the application life cycle, you should involve the appropriate stakeholders. Developers will appreciate the customization and integration details. Testing folks will appreciate the reporting and dashboards. Operations and support folks will appreciate navigating among the metrics, reporting topics, and alert integration.

And if you had an existing monitoring team doing the evaluation, it would be perfect! That’s just not very often the case. I find that pilot sponsors are evenly divided as application owners or operations. It is rare that I actually work with an established monitoring team during a pilot evaluation.

Finally, take screen shots of everything you are doing. You only have the technology in place temporarily. Make sure you visually document everything of interest. This will make it a lot easier to compare how different tools approach different activities. It is also a way to demo your pilot experience to other interested parties later on, when you don’t have the whole environment set up.

Goals

The typical pilot goal—and biggest mistake—is to get the software installed in your environment and confirm that it “works.” This is why many folks refer to this activity as a POC (Proof of Concept). The APM marketplace is over 10 years old, so I find the use of the term POC a bit of an embarrassment. You are not working with a startup and assessing if they have an installable product; you are working with a mature technology. I redefine and elevate these activities to “pilot” and really focus on how to use the technology in your environment, not simply see if it is compatible.

I prefer to write a goal that establishes if the technology will actually help you do something meaningful and if your organization can leverage the tool and achieve