Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI Specialization

Program guide, audit checklist, and FAQ

V1.4 Checklist
Valid August 12, 2024 – June 30, 2025

Microsoft

Program updates and announcements

Module B – Dec 2, 2024
No changes have been made to Module B

Module B - August 12, 2024
V1.4 Hybrid Cloud Infra With Microsoft Azure Stack HCI Specialization is now required. No changes have been made to the checklist.

Module A – July 12, 2024, new Module A checklist required
The new Module A checklist is required August 12, 2024. These are the changes made to the Module A controls:

- Control 1.1 Cloud Adoption Business Strategy now refers to FinOps rather than Economics and has provided an updated template link for a FinOps Assessment
- Control 2.1 Cloud Adoption Plan has provided updated evidence clarification
- Control 3.1 Repeatable Deployment has provided updated control clarification and provided updated links to templates mentioned
- Control 3.1 Repeatable Deployment – A special Evidence Note for Analytics on Azure specialization deployments and Data Warehouse Migration to Azure specialization deployments only. If no Identity or Networking components are deployed in the Azure Landing Zone, a documented focus on Resource organization attributes is sufficient to pass this control
- Control 4.1 Governance Tooling has provided an updated link to current Governance tools
- Control 5.1 Operations Management Tooling for Analytics on Azure specialization deployments and Data Warehouse Migration to Azure specialization deployments only: If no Operations Management Tooling is deployed, this control may be skipped

July 1, 2024
Please note the price list update

Module B – Dec 1, 2023
No changes to the V1.3 checklist have been made. This checklist is active until June 30, 2024

Module A – Oct 1, 2023
Azure Active Directory has been renamed Microsoft Entra ID

August 28, 2023
The Microsoft Cloud Partner Program has changed its name to the Microsoft AI Cloud Partner Program effective immediately

Module B - July 5, 2023
V1.3 Hybrid Cloud Infrastructure with Microsoft Azure Specialization checklist is published. This checklist version is required for audits during July 5, 2023- Jan 2, 2024. No control changes have been made in V1.3 from the V1.2 checklist

Module B - Jan 2, 2023
V1.2 Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI Specialization audit checklist is published. This checklist version is required Jan 2, 2023- July 5, 2023

Module B - Dec 5, 2022
The PREVIEW for 1.2 Hybrid Cloud Infrastructure with Microsoft Azure Specialization was made available for partners. This checklist version is required Jan 2, 2023

- There are no new Module A or B Control updates
- FAQ clarification that a "No Pass" results when a partner fails or withdraws from the audit. This status resets from "Audit Failed" within one week to "Not Enrolled," allowing partners to reapply

Module B - Oct 3, 2022
Microsoft retired Gold Cloud partner competency, Solutions partner designation required. Gold & Silver competencies are retired and replaced with [Solutions Partner](#) designations. Azure Specialization requirements are associated with your achievement of a required Solutions Partner designation. For this specialization, your organization must have an active Solutions Partner for Digital & App Innovation (Azure) or Data & AI (Azure) designation

Module A - July 1, 2022
Checklist updates published May 2, 2022, in preview for the Module A audit checklist are now required. In Control 2.2, a new required Skilling Plan has been added to the checklist

Module B - May 2, 2022
- Guidance for the definition of Proof of Concept and Pilots was added to the FAQ
- Preview updates to Module A were made available, these are required July 1, 2022
- No changes to the Module B checklist were made

Module B - Jan 1, 2022
Guidance and FAQ Updates

Contents

Microsoft

Hybrid Cloud Infrastructure w/ MSFT Azure Stack HCI Specialization Program Overview

This document defines the requirements to earn the Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI specialization. It also provides further requirements, guidelines, and the audit checklists for the associated audits required to earn this Azure specialization.

The Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI specialization is designed for partners to demonstrate their deep knowledge, extensive experience, and proven success in planning and deploying Azure Stack HCI. Partners working with Azure Stack HCI can be called upon to drive Proof of Concept (PoC) for the customer, help deployment once a customer has chosen Azure Stack HCI, and help the customer assess physical, virtual workloads and migration. Partners can also manage Azure subscriptions and the ongoing management of the Azure Stack HCI clusters.

Such partners empower their customers to use Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI to drive data center modernization and digital transformation. They can further demonstrate their expertise in migrating production workloads from other hyperconverged platforms to Azure Stack HCI.

The Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI specialization allows partners with an active [Solutions Partner](#) designation to further differentiate their organizations, demonstrate their capabilities, and build stronger connections with customers. For this specialization, an active Solutions Partner for Digital & App Innovation (Azure), Data & AI (Azure), or Infrastructure (Azure) designation is required.

Partners will receive a Pass or No Pass result upon completion of the audit process. A Pass result satisfies the audit requirement for this Azure specialization for two (2) years. See the [Partner FAQ](#) for renewal information.

Partners who meet the comprehensive requirements to earn an Azure specialization, receive a customer-facing label they can display and a prioritized business profile in [Microsoft AppSource partner gallery](#). See the FAQ for more benefit information.

How to apply

Partners with the appropriate role and access permissions can apply. Only a Microsoft AI Cloud Partner Program Account Administrator or a Global Administrator of an organization's Microsoft partner account can submit an application for the Azure specialization on behalf of the organization.

To do so, they [sign into their Partner Center account.](#) On the left pane, select Azure under the **Specialization section**. Toggle to the specialization that you wish to apply for by using the drop-down menu at the top of the page.

NDAs for the audit

Auditors comply with requests from partners to sign a direct NDA. All ISSI auditors are under a nondisclosure agreement (NDA) with Microsoft. If a partner would like an NDA to be signed directly between ISSI and the partner organization for purposes of the audit, one can be provided by the partner during the audit scheduling process to ISSI. ISSI will sign and return it.

Payment terms and conditions

Pricing schedule

Module B Audit: $2,000 USD

Module A+B Audits: $3,000 USD

A Gap Review Meeting is included with each Module audit.

Payment terms

The cost of the audit is payable in full to the audit company and must be settled before the audit begins. Failure to pay will result in cancellation of the audit.

Program status term

When a partner meets all prerequisite requirements shown in Partner Center and Microsoft receives a valid Pass Report from the third-party audit company, the partner will be awarded the Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI specialization for one (1) calendar year.

The status and the Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI specialization label can be used only by the organization (determined by Partner Center MPN PGA ID account) and any associated locations (determined by MPN PLA ID) that met all requirements and passed the audit. Any subsidiary or affiliated organizations represented by separate Partner Center accounts (MPN PGA ID) may not advertise the status or display the associated label.

Audit blueprint

Audits are evidence-based. During the audit, partners will be expected to present evidence they have met the specific requirements on the checklist. This involves providing the auditor with access to live demonstrations, documents, and SME personnel to demonstrate compliance with checklist requirements.

The audit checklist will be updated to stay current with technology and market changes, and the audit is conducted by an independent, third-party auditor. The following is included in the audit blueprint:

1. Audit Roles
2. Audit Process: High level overview
3. Audit Process: Details
4. Audit Best practices and resources

Audit roles

Role of the auditor

The auditor reviews submitted evidence and objectively assesses whether the evidence provided by the partner satisfies the audit checklist requirements.

The auditor selects and evaluates evidence, based on samples of the information available from live systems. The appropriate use of such sampling is closely related to the confidence that can be placed in the audit conclusions. All ISSI auditors are under a non-disclosure agreement (NDA) with Microsoft. Auditors will also comply with requests from partners to sign a direct NDA.

Role of the partner

The partner must provide objective evidence that satisfies the auditor for all checklist items. It is the responsibility of the partner to have reviewed all check-list items prior to the audit, to have collated all necessary documentation and evidence, and to have ensured that the right subject matter experts are available to discuss and show systems, as appropriate. All audit evidence must be reproducible and verifiable.

Role of the Microsoft Partner Development Manager

For partners that have an assigned Microsoft Partner Development Manager (PDM), the PDM is responsible for ensuring that the partner fully understands the requirements prior to applying for the audit. The PDM may attend the optional consulting engagements that ISSI offers, but the PDM and other Microsoft FTEs may not attend the audit.

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Audit Process: High-level overview

Step	Action	Responsibility
1	**Review:** specialization requirements in Partner Center. Review audit checklist in the specialization and begin to prepare needed evidence with personnel for an evidence-based audit. <u>Recommended</u>: Before you apply, review the specific audit checklist thoroughly and confirm SME personnel.	Partner
2	**Meet the prerequisites and apply for the audit:** In the initial application phase, applications are submitted in two (2) stages: 1. Prerequisite requirements (see Partner Center for details) 2. Audit <u>Do not start the application process unless you are ready to undertake the audit.</u> Assess your firm's ability to complete the audit, including considerations for readiness, employee availability, and holidays.	Partner
3	**Validate**: The partner meets all requirements prior to audit.	Microsoft
4	**Confirmed by Microsoft**: Microsoft confirms to the third-party audit company that the partner is eligible for audit.	Microsoft
5	**Schedule with partner:** The auditor will schedule within two (2) business days.	Auditor (with partner)
6	**Conduct the audit**: Within thirty (30) calendar days of the approval for audit.	Auditor
7	**Provide a Gap Report:** If applicable, to the partner within two (2) business days of the completed audit, listing any Open Action Items. *	Auditor
8	**acknowledge Gap Report receipt and schedule meeting:** Within two (2) business days of receiving the Gap Report, the partner acknowledges receipt of the report and schedules a Gap Review Meeting. Partners can begin immediate remediation of open items.	Partner
9	**Complete the meeting:** Within fifteen (15) calendar days of receiving the Gap Report, the partner schedules and completes the Gap Review Meeting with the auditor to provide evidence and address any Open Action Items. *	Auditor (with partner)
10	**Issue Final Report:** To the partner within five (5) business days. Notify Microsoft of audit Pass or No Pass result.	Auditor
11	**Notify partner:** About program status within two (2) business days.	Microsoft

These steps will be skipped if the partner has no Open Action Items after the audit.

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Audit Process: Details

Microsoft uses an independent, third-party audit company, Information Security Systems International, LLC (ISSI), to schedule and conduct Azure specialization audits. After the audit date has been confirmed, ISSI will provide an agenda to the partner. The duration of an audit is four (4) hours for

Module B workloads and eight (8) hours for Module A+B audits combined, depending upon the scope of the audit.

During the audit, the partner must provide access to the appropriate personnel who can discuss and disclose evidence that demonstrates compliance with program requirements. We highly recommend that subject matter experts for each section attend as well as a person who is familiar with the entire audit.

On the day of the audit, the partner must be prepared to provide the auditor with access to live demonstrations, documents, and personnel, as necessary to demonstrate compliance with the requirements. During the audit, the auditor will seek to verify that the partner's evidence has addressed all required audit checklist items satisfactorily.

A note on audit checklist effective dates: Partners are audited against the checklist items that are active on the date of their remote audit, not the date they apply. Audits are updated twice annually. The partner application or renewal date has no bearing on the version of the checklist that is used for the audit.

The audit can produce either of two (2) outcomes:

1.   The partner passes the audit.
   - The auditor will present a brief synopsis of the audit. This will include identifying observed strengths and opportunities for improvement.
   - The auditor will provide a Final Report to the partner.
   - The auditor will notify Microsoft.

2.   The partner does not satisfy all checklist items during the audit.
   - The auditor will present a brief synopsis of the audit at the end of the day, including observed strengths and Open Action Items, as outlined in the Gap Report, within two (2) business days.
   - The partner will acknowledge receipt of the Gap Report within two (2) business days.
   - The partner will move into the Gap Review phase and schedule their Gap Review Meeting within fifteen (15) calendar days.

The Gap Review

If the partner does not, to the auditor's satisfaction, provide evidence that meets the required scores across all audit categories during the audit, the partner will move into a Gap Review. A Gap Review is part of the audit and completes the process.

Within two (2) business days after the audit, the partner will receive a Gap Report, which details any Open Action Items and the outstanding required evidence. It is suggested to begin remediation on any open action items as soon as possible following the audit.

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The partner then has two (2) business days to acknowledge receipt of the Gap Report and schedule a Gap Review Meeting. The Gap Review Meeting is conducted with the auditor over the partner's virtual conference platform of choice. The meeting must take place within fifteen (15) calendar days of when the Gap Report was sent, and it may last no longer than one (1) hour. During the Gap Review Meeting the partner must present evidence that addresses any and all Open Action Items.

The Gap Review Meeting can produce either of two (2) outcomes:

1. The partner resolves all Open Action Items.

    - The auditor confirms that the partner has provided the required evidence.
    - The auditor provides a Final Report to the partner.
    - The auditor notifies Microsoft about the outcome (subject to Auditor Terms and Conditions).

2. The partner does not resolve all Open Action Items.
    - The auditor presents a brief synopsis of the audit, including missed items.
    - The partner receives a Final Report that details the missed items.
    - The auditor notifies Microsoft about the outcome (subject to Auditor Terms and Conditions).

If the partner is still unable to provide satisfactory evidence to the auditor during their Gap Review Meeting, the partner will be deemed to have failed the audit. Partners that still want to earn this Azure specialization will need to begin the application process again.

Completion of the audit

The audit process concludes when ISSI issues the Final Report after the audit or after the Gap Review. Partners will be awarded a Pass or No Pass result upon completion of the audit process, including if they withdraw from the audit process. At the conclusion of the audit process, the auditor will issue a Final Report to the partner and notify Microsoft of the pass or no pass result. A Pass result satisfies the audit requirement for this Azure specialization for two (2) years. A "No Pass" result is generated when a partner fails or withdraws from the audit. When a No Pass result is entered into Partner Center, you will see your status as "Audit Failed" in your dashboard. This status will reset within one week to "Not Enrolled," allowing you to reapply. Contact Partner Center Support if needed.

Audit preparation best practices and resources

Partners should ensure that the audit checklist has been thoroughly read in advance of the audit

- Partners should ensure that all partner stakeholders involved have a copy of the audit checklist and that a stakeholder who knows the entire process is available for the duration of the audit
- Partners should confirm that they have live access granted and files and tools are readily available during the audit exhibits

Stakeholder SME attendance in the audit

Stakeholders who can best address the relevant section should be available for the audit. However, please make sure that a stakeholder who knows the entire process is available for the duration of the audit.

Auditors often probe for more information

The auditor probes for more information to ensure that mature and repeatable processes are in place with the partner and that they are established, effective, and efficient. The auditor is looking to see how a document was created, where it is located, and what source materials were used to create the document. By probing for more information, the auditor evaluates and validates that the partner is operating at an advanced level. This can only be done by questioning during the audit. This approach is explained to the partner during the opening meeting.

Acceptable evidence: Excerpts, exhibit file formats and use of PowerPoints

PowerPoints are a common and accepted format for presenting a high-level overview of a partner's systems. However, please also be prepared to present live demonstrations from source files so that the

auditor may confirm that the systems in place are mature and effective. Excerpts can be used to communicate the high-level overview but are not acceptable evidence, source documents must be presented.

Additional resources: Two optional audit preparation offers from the auditing firm *

To ensure objectivity, consulting auditors and auditors conducting the actual audits are different ISSI auditors.

1. Partners can participate in an <u>optional</u>, one (1)-hour, live Audit Process & Controls Overview session provided by ISSI. This session provides a high-level overview of key aspects of the Azure Specialization audit process. The session includes a discussion of the checklist requirements along with best practices to help partners prepare for the audit. Partners work directly with ISSI to schedule this remote session (via online web conference). For more information about this session, see <u>Azure Specialization - Audit Process and Controls Overview</u>

2. ISSI also provides <u>optional</u> extensive, in-depth consulting engagements to help partners prepare for their Azure specialization audit. Partners work directly with ISSI to schedule this remote session (via online web conference). For more information about this type of in-depth engagement, see Azure Specialization Consulting Offer <u>https://www.issi-inc.com/services/audit-readiness-preparation</u>

* Please note that there is a cost associated with the consulting and audit preparations services. See Payment Terms and Conditions.

Audit checklists

The Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI specialization audit checklist contains two modules, **Module A:** Cloud Foundation and **Module B**: Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI workload.

Module A, **The Cloud Foundation** module evaluates the use of a consistent methodology and process for Azure adoption that is aligned with customers' expected outcomes, spanning the entire cloud adoption lifecycle. Module B, The Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI workload checklist validates that the partner has adopted robust processes to ensure customer success across all phases of deploying Azure Stack HCI, from the assessment phase to design, pilot, implementation, and post-implementation phases.

Review the following audit checklist tables for more details about each control phase and to learn how the partner will be evaluated for an audit. The same customers may be used for Module A & B. The estimated length of both modules together is eight (8) hours.

Module A: Cloud Foundation

1. Strategy
2. Plan
3. Environment readiness and Azure landing zone
4. Governance
5. Manage

Module B: Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI workload

1. Assess
2. Design and proof of concept (POC) or pilot
3. Deployment
4. Review and release for operations

To pass the audit, the partner must complete all audit checklist items.

Module A: **Cloud Foundation** is required for multiple Azure specializations. To complete Module A, Cloud Foundation, the partner needs to pass all controls in Module A by providing the specified evidence. **Module A: The Cloud Foundation** evaluates the use of a consistent methodology and process for Azure adoption that is aligned with customers' expected outcomes, spanning the entire cloud adoption lifecycle. Module A is part of the Module B specialization audit package, and as a requirement must be renewed by audit for all Azure specializations.

To complete or renew Module A, the partner needs to pass all controls in Module A by providing the specified evidence or provide evidence of a recent (within two years) Module A+B Pass result. The relevant date for each partner is the Module B Anniversary Date (AD) shown in Partner Center.

To waiver out of Module A, the partner must provide evidence of a recent (within two years) Pass result for an applicable A+B audit or a Pass result for the AEMSP Control 3.A within the last year.

Module A waivers:

All Azure Specializations: When applying to renew subsequent Azure specializations, a previous Module A +B audit Pass result will satisfy the requirements for Module A if the result has been within two (2) years and is on the same Module A version. (Module A updates every two years in July). Partners who have passed an A+B Azure specialization audit within the last two years have satisfied the requirements for Module A in all Module A+B Azure specialization audits, unless otherwise noted. The relevant Module B Anniversary Date (AD) is shown in Partner Center.

Special note: Partners who have passed a Module B Azure specialization audit before July 1, 2021, and specifically for the Analytics on Microsoft Azure specialization before Oct 1, 2021, have likely not passed the Module A audit and will need to do so to qualify for an Azure Module B specialization audit.

AEMSP: Partners who have passed Azure Expert MSP V1.9 and later Module 3.0 (in Full and Progress audits) have satisfied the requirements for Module A in all Module A+B Azure specialization audits, unless otherwise noted. AEMSP Partners audit yearly to stay enrolled, and Module 3.A Cloud Adoption Framework is a yearly control requirement.

Special note: Partners who sequentially waiver out of Module A in multiple Module A+B audits and then subsequently waiver out of AEMSP Module 3.A within a two-year timeline will likely be required to take a Module A audit at Module A+B renewal.

If there are questions regarding a potential waiver for Module A, reach out to the Azure Partner Specializations <azureAS@microsoft.com>

Module B: **Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI workload**. Each control has one (1) or more requirements and required evidence the partner must provide for the auditor. Both the requirements and the required evidence are defined in the following tables. For some controls, a reference customer or customer evidence is the documentation requested. Unless otherwise stated, the partner must show at least **two (2)** unique customers with deployments completed within the last **twelve (12)** months. Please note some checklists call for four (4) customer examples and shorter evidence timelines.

The partner can use the same customer across audit checklist controls, or they can use a different customer. For audit evidence relating to customer engagements, the partner can use a customer case study and reference it multiple times. The same or different customers can be used for Modules A & B if they demonstrate requirements.

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Module A: Cloud Foundation

1.0 Strategy and FinOps
The partner must have a defined approach for helping their customer evaluate and define a cloud adoption strategy beyond an individual asset (app, VM, or data).
Requirement

1.1	**Cloud Adoption Business Strategy** The partner must have a defined process that captures the data-driven business strategies being used to guide customer decisions. The process should include, at minimum, the following: 1. A strategy review that captures the customer's business needs and the problems the customer is trying to solve. 2. Personalized recommendations from the partner for the customers' business strategies. **Required evidence:** A Report, Presentation, or Documented Plan that captures strategic inputs and decisions for **two (2)** unique customers, and that demonstrate the Azure Cloud Adoption Business decisions for the Azure Cloud Framework, by using the Cloud Adoption Strategy Evaluator (CASE) assessment output. These projects should have been completed in the past **twelve (12)** months. The projects must be aligned with the above-described processes 1 and 2 and highlight both customer Business and FinOps (Financial) outcomes. For an example, see the Cloud Adoption Strategy Evaluator, Strategy and plan templates in the Cloud Adoption Framework for Azure, and especially the FinOps Assessment best practices in Build.

2.0 Plan
The partner must have a consistent approach to planning for cloud adoption that is based on the strategy outlined in the preceding section.
Requirement

2.1	**Cloud Adoption Plan** The partner must have a process and approach for planning and tracking the completion of cloud adoption projects. **Required evidence:** The partner must provide evidence of their capability for process and approach to planning and completion with examples of **two (2)** unique customer projects that were completed in the past **twelve (12)** months. Acceptable evidence will include at least **one (1)** of the following for each customer: - Azure DevOps backlog **OR** - Tools for project planning and tracking used by the partner **OR** Cloud Adoption Plan Generator output using the Azure Cloud Adoption Framework
2.2	**Plan for Skilling** When customers adopt the cloud, their existing technical staff will need a variety of new skills to aid in making technical decisions and to support the new cloud implementations. To ensure the long- term success of the customer, the partner must document a skilling plan to prepare the customer's technical staff. The Partner must document a list of key customer technical roles expected to require new skills such as, but not limited to, IT Admins, IT Governance, IT Operations, and IT Security. **The documentation must include:** 1. A description of the new skills the technical roles will need to achieve to successfully manage the new environment. 2. Resources the customer can leverage when training their technical employees such as Microsoft learning paths, technical certifications, or other comparable resources. For guidance, review Microsoft docs Azure Cloud Adoption Framework How to build a skilling readiness plan. **Required evidence:** The partner must provide a skilling plan for at least **two (2)** unique customer engagements completed within the last **twelve (12)** months. The **two (2)** skilling plans documented can include a customer-facing presentation, planning documents, post deployment documentation or similar plan documentation.

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3.0 Environment Readiness and Azure Landing Zone
The partner must be able to demonstrate that the following design areas are addressed through their approach to landing zone implementation.
Requirement

3.1 **Repeatable Deployment**

The partner must demonstrate adherence to Azure landing zone (ALZ) design areas through a repeatable deployment. The deployment should configure, at minimum, the following identity, network, and resource organization attributes:

- Identity
    - o Adoption of identity management solutions, such as Microsoft Entra ID (formerly Azure Active Directory) or equivalent.

- Networking architecture design (topology)
    - o Define an Azure network topology - Cloud Adoption Framework | Microsoft Docs
    - o Application of hybrid architectures that use Azure ExpressRoute, VPN Gateway, or equivalent services for connecting local datacenters to Azure.

- Resource organization
    - o Implementation of tagging and naming standards during the project.

The partner must demonstrate which of the following approaches they used when they deployed Azure landing zones for **two (2)** unique customers:

1. Start small and expand: Azure landing zone does not deploy governance or operations configurations, which are addressed later in the implementation.

2. Full Azure landing zone (ALZ) conceptual architecture: Azure landing zones implement standard approach to the configuration of governance and operations tools prior to implementation.

3. Alternative approach: If the partner follows a proprietary approach or a mixture of the **two (2)** approaches above, the partner must clearly articulate their approach to environment configuration.

4. Brownfield scenario: The partner's customer has a landing zone that does not follow best practices, and an update is required to follow best practices in the Cloud Adoption Framework.

Required evidence:

The partner must provide evidence of a repeatable deployment they used to create landing zones, aligned to the Azure landing zone (ALZ) conceptual architecture, deployed to **two (2)** unique customer environments using Bicep or Terraform modules, and ARM (AZURE Resource Manager) templates to automatically deploy the environment configuration.

If a customer deviates from the specified architecture, the partner must demonstrate the customer requirements to justify the deviation.

The provided template can be pulled directly from the Cloud Adoption Framework Landing zone implementation options, or it can be based on the partner's own IP (Intellectual Property).

In either case, the output evidence must demonstrate the configuration of the identity, network, and resource organization, as described earlier above.

Special Evidence Note:
For Analytics on Azure specialization deployments and Data Warehouse Migration to Azure specialization deployments only: If no Identity or Networking components are deployed in the Azure Landing Zone, a documented focus on Resource organization attributes is sufficient to pass this control.

4.0 Governance

The partner must demonstrate their customer's role in governing cloud-based solutions and the Azure tools they use to facilitate any governance requirements their customer might have today or in the future.

Requirement

4.1	**Governance Tooling** The partner must demonstrate the ability to deploy the required governance tools for **two (2)** unique customer projects. **Required evidence:** The partner must demonstrate the use of Azure Policy to provide controls to govern the environment for **two (2)** unique customers with Azure projects that were completed in the past **twelve (12)** months. See governance tools for templates.

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5.0 Manage
The partner must demonstrate that they have set up their customers for operational success after the deployment is completed. All partners have a role in setting up operations management, even if they do not provide long-term managed services.
Requirement

5.1	**Operations Management Tooling**
	The partner must demonstrate the use of Azure products or equivalent to help their customer and/or managed service provider operate the environment after deployment.
	Required evidence:
	The partner must demonstrate the deployment of at least **one (1)** of the following Azure products or third-party equivalents: Azure Monitor, Azure Automation, or Azure Backup/Site Recovery, for **two (2)** unique customers with projects that were completed in the past **twelve (12)** months.
	Special Evidence Note:
	For Analytics on Azure specialization deployments and Data Warehouse Migration to Azure specialization deployments only: If no Operations Management Tooling is deployed, this control may be skipped.

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Module B: Hybrid Cloud Infrastructure with MSFT Azure Stack HCI workload

1.0 Assess
The partner must have a consistent approach to assessing customer requirements for the workload.
Requirement

| 1.1 | **Workload Assessment**
The partner must demonstrate how they assess each data center modernization opportunity to migrate physical and virtual production workloads to a modern hyperconverged infrastructure solution. This assessment must lead from defining how to complete a Proof of Concept (POC) at the customer site (or on a virtual POC platform if needed) to moving the customer to the production deployment. This includes doing proper sizing and pre-deployment planning, including TCO calculations for the customer.

The assessment should include:

- Cataloging the virtual and physical (if physical to virtual workload migration is required) workloads that must remain on-premise (on Azure Stack HCI).
- Appropriate sizing of the physical infrastructure needed for these workloads to achieve optimum performance (as needed for the project).
  - Number of IOPS
  - Number of nodes, processors, and cores
  - Amount of memory
  - Storage options including disk and caching requirements.
  - Appropriate networking architecture
  - Customer-specific growth metrics
  - Optimization of existing virtual workloads to right-size the new environment
  - Physical to Virtual (P2V) workload migration
  - Identification of the new/changed data (Daily Working Set)
  - Consolidation of infrastructure
  - Support of suitable Guest Operating System and applications
  - Design considerations for stretch cluster environments
  - Design considerations in relation to the customer Highly Available (HA) requirements for the new platform

This sizing assessment will be used to identify the correct hardware solution and architecture recommendation to the customer. Microsoft Sizer, a sizing assessment tool, is available in preview here.

Supported solutions are available in the Azure Stack HCI Documentation either as a validated node solution or an integrated system:

- Migration strategies for existing physical and/or virtual workloads to the new environment with minimal downtime.
- Business Continuity and Disaster Recovery (BCDR) strategies for the new infrastructure.
- Explanation of key Azure Services and costings that can be used in conjunction with Azure Stack HCI (this would help the customer in operation and potential cost reduction). |

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- Identification of customer existing limitations and/or pre-requisite actions needed for the successful deployment of AzSHCI (this would also include platforms that are not part of but are linked to Azure Stack HCI, i.e., site to site connectivity customer core Local Area Network etc.)
- The licensing and cost management requirements if the PoC leads to production deployment.
- Documentation of the steps necessary to deploy the new solution in the production environment.

Required evidence:

The partner must provide relevant output <u>documents</u> including assessment, sizing, and design documents, showing that the preceding items were reviewed for at least **two (2)** unique customers with Azure Stack HCI projects completed within the last **twelve (12)** months. The partner must show that all assessment details were considered for that customer. Assessments may be done manually or through an industry-accepted assessment tool.

<u>Accepted documentation</u>: Outputs from partner Documents, Assessment Tools, Assessment Checklists, Sizing Templates, Questionnaires, Presentations, and Project Plans.

2.0 Design

The partner has robust methodologies for designing the on-premise and cloud opportunity.

Requirement

2.1 **Design**

The partner must provide solution designs that show a consistent approach to addressing customer requirements that were captured at the assessment phase.

Completed data center and digital transformation projects must provide design considerations/outputs that cover customer data center, branch office, and edge locations and must also meet at least one of the following scenarios:

- Provide the customer with the technical and financial justification to conduct a POC if deemed appropriate in the assessment.
- Provide the customer with the technical and financial justification to migrate on-premises physical and virtual workloads, regardless of their original platform, to Azure Stack HCI

The solution design must demonstrate (if multiple locations are in scope i.e., data center, branch office, and edge, then all locations must comply) the following:

- A high-level design for AzSHCI on-premise architecture, or AzSHCI POC, including all AzSHCI components and integration with customer-specific platforms
- Rationale/evidence for the on-premises design and how this design meets the goals/outputs of the assessment and the customer requirements
- A migration design or strategy that outlines all physical and virtual workloads in scope and a strategy to migrate the workloads to the new infrastructure. For production deployments, high- level migration design should include deployment, migration sequence, estimated time to finish, success criteria to validate that the migration to Azure Stack HCI was completed successfully.
- Include design criteria for the Business Continuity and Disaster Recovery (BCDR) strategies

2.1	identified in the assessment stage. These should include backup and recovery solutions, including Azure Site Recovery, to ensure data retention. • Include design criteria for a monitoring solution to provide proactive remediation for the Azure environment that is integrated into the customer's existing monitoring tooling, if appropriate. • Include design criteria for deployment of the AzSHCI platform and baseline testing in accordance with the Business Continuity and Disaster Recovery (BCDR) strategies • Include design criteria to ensure that the platform is working as expected within known tolerances to support the customer datasets/workloads. • Design should address the platform capabilities, including Windows Admin Center (WAC), Azure Portal (through Azure Arc), PowerShell (if required), standard deployment tasks within AzSHCI, and integration with key Azure services, if appropriate • Include design criteria for deploying the customer datasets/workloads for use on the AzSHCI POC platform (if required) • Include design criteria for how to migrate the workload and applications running on physical, virtual and/or legacy platforms to the new AzSHCI platform with minimum downtime. • Design should address the value of using Azure Services to simplify everyday tasks such as policy, monitoring, etc. if appropriate • Design should address the licensing arrangements customers will have to put to deploy the solution in production if appropriate • Document customer testing/success criteria • Include design criteria to ensure all data and workloads have been securely deleted/removed to meet data governance requirements **Required evidence:** The partner must provide relevant solution design documents that address the preceding points for at least **two (2)** unique customers, and the data center modernization project must have been completed within the past **twelve (12)** months. Acceptable documentation: Design Documents, Presentations, Functional Specifications, Architectural Diagrams, Automated Tooling Reports, Physical and Logical Diagrams.
2.2	**Azure Well-Architected Review of Workloads** The partner must demonstrate usage of Azure Well Architected Review on Hybrid Cloud Infrastructure with Microsoft Azure Stack HCI workloads. The Azure Well-Architected Review is designed to help partners evaluate your customers' workloads against the latest set of industry best practices. It provides actionable guidance to design and improve your customers' workloads. The review can be used to evaluate each workload against the pillars of the Azure Well-Architected Framework that might apply to that workload. **Required evidence:** Unless otherwise specified, Reviews may be conducted before, during, or after deployment. The partner must provide exported results from the completed Well-Architected Review, using the assessments in the Well Architected Review, from at least **two (2)** business critical workloads migrated to Azure stack HCI completed within the last **twelve (12)** months, indicating the customer's name. The **two (2)** workloads can come from **one (1)** or more customers.

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3.0 Deployment
The partner has robust methodologies for managing and executing deployment of Azure Stack HCI.
Requirement

3.1	**New Infrastructure and Software Deployment for Proof of Concept (PoC)** The partner must provide evidence of a completed Azure Stack HCI proof of concept (POC) or pilot for the Azure Stack HCI platform. The POC or pilot project must validate the design decisions, review the design, and adjust it, as appropriate, before the production rollout. The POC or pilot must cover a new Azure Stack HCI (AzSHCI) platform. The POC or pilot must document its purpose, customer pain points, project success criteria, intended benefits, and results. The <u>documentation</u> must show the physical and/or virtual workload running on Azure Stack HCI successfully and within the customer success criteria guidelines. **Required evidence:** The partner must provide relevant <u>documentation</u> for **two (2)** unique customers with completed AzSHCI POC projects within the past **twelve (12)** months. To cover the entire sequence of the POC, including success criteria/goals, design, execution, the <u>documentation</u> must include at least **two (2)** of the following: • Signed statements of work (SOWs) for all projects • Solution design documents for all projects • POC success criteria and confirmation that the criteria were achieved • A project plan and migration and deployment sequence • Architecture diagrams • As-built documentation including baseline testing
3.2	**Virtual and/or Physical Workload Migration** The partner must provide evidence of their ability to migrate physical and virtual workloads from legacy platforms to the new Azure Stack HCI leveraging appropriate tools. Partners need to identify, select, and justify the most cost-effective solution for the customer data and compute migration. **Required evidence:** The partner must provide documentation for **two (2)** unique customer production deployments that align with the solution design requirements in Control 2.1 To cover the entire sequence of the project, including design, deployment, and execution, the <u>documentation</u> must include at least **two (2)** of the following: • Signed SOWs for all projects • Solution design documents for all projects • A project plan, migration, and deployment sequence • Architecture diagrams • Successful migration documentation and testing • As-built documentation

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3.3	**Automated Deployment and Provisioning Tools** The partner must demonstrate specific products, tools, or scripts that were used for automated provisioning and deprovisioning of infrastructure and deploying HCI clusters as required by the solution. **Required evidence:** The partner must show a successfully automated deployment and automated provisioning of AzSHCI for **one (1)** customer with a completed project within the last **twelve (12)** months. The partner must provide demonstrations of products, tools, or scripts that were used for: - Automated deployment of the HCI clusters, including the creation/preparation of HCI clusters. - Deploying Azure cloud services attached to the HCI clusters in a hybrid configuration. - Automation of routine operations, patching, and cluster monitoring.

4.0 Review and Release for Operations

The partner has robust methodologies for transitioning the workload.

Requirement

4.1	**Service Validation and Testing** The partner must validate the deployment, documented process, approach, and documented outputs for testing and evaluating: - The performance of all applications and workloads against customer expectations and Azure best practices. - The AzSHCI cluster and associated Azure services are working as expected, failure and failover testing completed successfully, and User Acceptance Testing (UAT) completed successfully - Improving architectural best practices to remediate issues with migrated platforms or workloads that do not meet performance or cost expectations. - Project closure and operational handover of the platform to the customer, including all customer required <u>documentation</u> relating to the production platform - Handover to the partner support desk for ongoing customer support, if required, including documented outputs and customer sensitive information i.e., username and passwords and associated process to ensure data protection/governance **Required evidence:** The partner must demonstrate process and documented outputs relating to testing, validation, and performance evaluations that address the preceding points for **two (2)** unique customers with projects completed within the last **twelve (12)** months. The **documentation** must indicate that the implemented solution meets customer expectations and <u>include a sign-off from the customer</u>. These projects can be the same as the projects evidenced in previous sections.

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4.2	**Post-deployment Documentation**
	The partner must provide post-deployment operational <u>documentation</u> to show that customers are successfully using the new service on Azure.
	Demonstrate how the partner's documents, decisions, architectural designs, and procedures were implemented.
	Demonstrate standard operating procedures for the business-as-usual operation steam that describe "how-to" scenarios.
	Required evidence:
	Documentation showing the preceding points for **two (2)** unique customers. These projects can be the same as those in previous sections.

Azure Specializations Partner FAQ

Questions regarding the Azure Partner program specializations, the current checklists and pre-qualifications for partners can usually be answered by visiting Microsoft Azure Partner Specializations

Questions on the audit checklists and program can be sent to the Azure Partner Specializations help alias <mailto:AzureAS@microsoft.com>

If you have questions that have not been answered, please go to Partner Center support to create a ticket with our Frontline team.

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