



# Data Warehouse Migration to Microsoft Azure Specialization

Program guide, audit checklist, and FAQ

V2.41 Checklist

Valid Jan 1, 2024 – June 30, 2024

## Program updates and announcements

### Module B- May 7, 2024

**The V2.41 checklist is published. This allows a waiver for an Analytics enrollment if a partner has a current Program enrollment in the Data Warehouse Migration to Microsoft Azure Specialization. The program will provide an Analytics Module B enrollment waiver if qualifications are met**

If the partner can provide evidence of current enrollment in the Data Warehouse Migration to Microsoft Azure Specialization, **and they meet the prerequisites (Performance ACR, Knowledge certifications and Solution Partner (Data and AI designation) for the Analytics on Microsoft Azure specialization** this will be considered a waiver into the Analytics on Microsoft Azure specialization. The partner will be enrolled for one (1) year, requiring an audit on renewal in year two (2). To take advantage of this, apply for the Analytics on Microsoft Azure specialization in Partner Center.

### Module B – Jan 1, 2024

**The V2.4 Checklist for Data Warehouse Migration to Microsoft Azure Specialization is published.**

This checklist is required Jan 1, 2024 – June 30, 2024. Changes to the checklist include:

- Optional use of Microsoft Fabric in Module B control 2.3 Proof of Concept

### Module B – December 1, 2023

**The V2.4 PREVIEW of Data Warehouse Migration to Microsoft Azure Specialization was made available for partners**

### Module A - December 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

**V2.3 Data Warehouse Migration to Microsoft Azure Specialization checklist is published**

This checklist version is required July 5, 2023- Jan 2, 2024. No control changes have been made in V2.3 from the V2.2 checklist. Preview for V2.3 was published June 5, 2023

### Module B - Jan 2, 2023

**V2.2 Data Warehouse Migration to Microsoft Azure Specialization checklist is published**

This checklist version is required Jan 2, 2023- June 30, 2023

### Module B- Dec 5, 2022

**The PREVIEW for V2.2 Data Warehouse Migration to Microsoft Azure Specialization was made available for partners.** This checklist will be required Jan 2, 2023

- There are no new Module A or B control updates
- Updates to Module B include FAQ updates including the clarification that a “No Pass” result when a partner fails or withdraws from the audit. This status will reset from “ Audit Failed” within one week to “Not Enrolled,” allowing you to reapply

### Module B- Oct3, 2022

**Microsoft retired Gold Cloud partner competency, Solutions partner designation required** Gold and

Silver competencies are retired and replaced with [Solutions Partner](#) designations. Azure specialization requirements are now associated with your achievement of a required Solutions Partner designation. For this specialization, your organization must have an active Solutions Partner for Data & AI (Azure) designation

### **Module A - July 1, 2022**

**Checklist updates published in the May 2, 2022, preview for Module A are now required**

InControl 2.2, a new required Skilling Plan has been added to the checklist

## **Module B - May 2, 2022**

1. Guidance for the definition of Proof of Concept and Pilots has been added to the FAQ
2. The new partner Preview for the Module A Cloud Foundation audit checklist was made available for review

## **Module B- Jan 1, 2022**

General Guidance and FAQ Updates

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# Data Warehouse Migration to Microsoft Azure Specialization Program Overview

This document defines the requirements to earn the Data Warehouse Migration to Microsoft Azure specialization. It also provides further requirements, guidelines, and an audit checklist for the associated audit that is required to earn this Azure specialization.

The Data Warehouse Migration to Microsoft Azure specialization is designed for partners to demonstrate their deep knowledge, extensive experience, and proven success in planning and deploying Azure cloud data warehouse migration solutions for their customers. Such partners empower their customers to use massive volumes of data to power predictive analytics and machine learning models, or to uncover business-changing insights when analyzing existing workloads, generating schema models, and performing extract, transform, and load (ETL) operations to migrate data to cloud-based data warehouses to realize the full breadth of data warehouse migrations and to build transformative, secure data warehouse solutions at enterprise scale.

The Data Warehouse Migration to Microsoft Azure specialization allows partners with an active [Solutions partner](#) designation to further differentiate their organizations, demonstrate their capabilities, and build stronger connections with customers. Partners who meet the comprehensive requirements to earn an Azure specialization, receive a customer-facing label they can display and a business profile in [Microsoft AppSource partner gallery](#).

In AppSource, access to specific Microsoft go-to-market programs is prioritized in customer searches to help drive new business. Partners can also generate a certified letter from Microsoft that verifies the Azure specialization that they have earned. For these reasons, this opportunity is available only to partners that meet additional, stringent requirements.

## How to apply

Partners with the appropriate role and access permissions can apply. Only a Cloud AI Partner Program Admin or a Global Admin of an organization 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.

Important: Take note of the audit effective dates and access the most current version from Partner Center. (Audit checklists are updated twice a year). Partners audit on the version that is live on their audit date, not the application date. Partners may apply for the audit only after all other program requirements have been fully met. **Partners must complete the audit within thirty (30) calendar days of the audit application, including any Gap Review and posted results. They must complete it against the then-current program requirements.**

## NDA's 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 Data Warehouse Migration to Microsoft Azure specialization for one (1) calendar year.

The status and the Data Warehouse Migration to Microsoft Azure 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 collected 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.



## Audit Process: High-level overview

Step	Action	Responsibility
1	Review: Specialization requirements in Partner Center. Review audit checklists 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 the 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.*

## 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.

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 Azure 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 optional, 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 [Azure Specialization - Audit Process and Controls Overview](#)
2. ISSI also provides optional 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 <https://issi-inc.com/az-advspeconsulting/>

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

## Audit checklists

The Data Warehouse Migration to Microsoft Azure specialization audit checklist contains two (2) modules, **Module A:** Cloud Foundation, and **Module B:** The Data Warehouse Migration to Microsoft Azure 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 Data Warehouse Migration to Microsoft Azure workload module validates that the partner has adopted robust processes to ensure customer success across all phases of deploying data warehouse migration solutions, 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: Data Warehouse Migration to Microsoft Azure 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. Partners who have passed Azure Expert MSP V1.9 (Full and Progress) and later have satisfied the requirements for Module A in all audit versions unless otherwise noted. Module A: Cloud Foundation is required for multiple Azure specializations. When applying to subsequent Azure specializations, a previous audit Pass result will satisfy the requirements for Module A if the Pass result has been within two (2) years.

It can only be applied to the same version of Module A. Alternatively, the partner may present evidence of a previous pass result from another Azure specialization audit conducted on V2.0 or later. Partners who have passed an Azure specialization audit before July 1, 2021, and for the Analytics on Microsoft Azure specialization audit before Oct 1, 2021, have likely not passed the Module A audit and will need to do so to qualify for the Module B workload audits

**Module B:** Data Warehouse Migration to Microsoft Azure 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 **twenty-four (24)** months. Please note some checklists call for four (4) customer examples or for 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.

## Module A: Cloud Foundation

1.0 Strategy and Economics	
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	<p><b>Cloud adoption business strategy</b></p> <p>The partner must have a process that captures the data-driven business strategies being used to guide customer decisions. The process should include, at minimum, the following:</p> <ul style="list-style-type: none"> <li>• A strategy review that captures the customer’s business needs and the problems the customer is trying to solve</li> <li>• Personalized recommendations from the partner for the customers’ business strategies</li> </ul> <p><b>Required evidence:</b></p> <p>A Report, Presentation, or Document that captures strategic inputs and decisions for <b>two (2)</b> unique customers, that demonstrates Cloud Adoption Strategy Evaluator assessment output, with projects completed in the past <b>twelve (12)</b> months. These projects must be aligned with the above-described process and highlight both customer Business and Financial outcomes.</p> <p>For an example, see the <a href="#">Strategy and plan template</a> in the Cloud Adoption Framework for Azure, or the <a href="#">Cloud Adoption Strategy Evaluator</a>.</p>
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	<p><b>Cloud adoption plan</b></p> <p>The partner must have a process and approach for planning and tracking the completion of cloud adoption projects. For an example of a cloud adoption plan, see the <a href="#">Azure DevOps Demo Generator</a> for the Cloud Adoption Framework.</p> <p><b>Required evidence:</b></p> <p>The partner must provide evidence of their capability with examples of <b>two (2)</b> unique customers, with projects that were completed in the past <b>twelve (12)</b> months. Acceptable evidence must include at least <b>one (1)</b> of the following:</p> <ul style="list-style-type: none"> <li>• Cloud Adoption Plan Generator output or</li> <li>• Azure DevOps backlog or</li> <li>• Any other tools for project planning and tracking</li> </ul>	
2.2	<p><b>Planforskillling</b></p> <p>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.</p> <p>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.</p> <p>The documentation must include:</p> <ul style="list-style-type: none"> <li>• A description of the new skills the technical roles will need to achieve to successfully manage the new environment.</li> <li>• Resources the customer can leverage when training their technical employees such as Microsoft learning paths, technical certifications, or other comparable resources.</li> </ul> <p>For guidance, review Microsoft docs Azure Cloud Adoption Framework <a href="#">How to build a skilling readiness plan</a></p> <p><b>Required evidence:</b></p> <p>The partner must provide a skilling plan for at least <b>two (2)</b> unique customer engagements completed within the last 12 months. The <b>two (2)</b> skilling plans documentation can include a customer-facing presentation, planning documents, post deployment documentation or similar plan documentation.</p>	

### 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 design areas through a repeatable deployment. The deployment should configure, at minimum, the following identity, network, and resource organization attributes:

- Identity
  - Adoption of identity management solutions, such as Microsoft Entra ID (formerly Azure Active Directory) or equivalent
- Networking architecture design (topology)
  - [Define an Azure network topology - Cloud Adoption Framework | Microsoft Docs](#)
  - Application of hybrid architectures that use Azure ExpressRoute, VPN Gateway, or equivalent services for connecting local datacenters to Azure
- Resource organization
  - Implementation of tagging and naming standards during the project

The partner must demonstrate which of the following [deployment approaches](#) they used when they deployed Azure landing zones:

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 conceptual architecture: Azure landing zones implement a 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.

##### **Required evidence:**

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

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

The provided template can be pulled directly from the [implementation options](#), or it can be based on the partner's own IP (Intellectual Property). In either case, the script as evidence must demonstrate the configuration of the identity, network, and resource organization, as described earlier.



## 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 or equivalent tool to provide control to govern the environment for **two (2)** unique customers with projects that were completed in the past **twelve (12)** months.

## 5.0 Manage

The partner must demonstrate that they have set up their customer 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.

## Module B: Data Warehouse Migration to Microsoft Azure workload

1.0 Assess	
The partner must have a consistent approach to assessing customer requirements for a data warehouse solution.	
Requirement	
1.1	<p><b>Assessment</b></p> <p>The partner must demonstrate how they assess each data warehouse prior to migration, to ensure that adequate pre-migration or pre-deployment planning and sizing are performed.</p> <p>The assessment must include all of the following:</p> <ol style="list-style-type: none"> <li>1. Dependency mapping shows the dependencies upstream from the resources that will be migrated.</li> <li>2. Existing environment: the type of software and hardware, users, and software products they are using.</li> <li>3. Data warehouse environment: the actual environment, the products used, and the number of tables and rows.</li> <li>4. User environment: the number of users, how they access the environment, and their patterns of access (daily, weekly, monthly, hourly).</li> </ol> <p><b>Required evidence:</b></p> <p>The partner should provide relevant design documents showing that the preceding items were reviewed for at least <b>three (3)</b> unique customers with data warehouse migration projects that were completed within the last <b>twenty-four (24)</b> months. The evidence must show that all assessment details were considered for each customer. Assessments may be done manually or through an industry-accepted assessment tool.</p> <p><b>Accepted Documentation:</b> Output from assessment tools such as Azure Migrate, Movere, or other similar Third-party Tooling Reports, an Assessment Checklist, Templates, Questionnaires, or Project plans that demonstrate the four requirements above.</p>
2.0 Design and Proof of Concept (PoC) or Pilot	
The partner has robust methodologies for designing the workload.	
Requirement	
2.1	<p><b>Design</b></p> <p>The partner must provide solution designs that show a consistent approach to addressing customer requirements that were captured from the assessment phase.</p> <p>Completed migration projects must be from any <b>two (2)</b> of the following <b>nine (9)</b> migration scenarios:</p> <ul style="list-style-type: none"> <li>• Migrate or refactor Teradata instances to Azure Synapse</li> </ul>

- Migrate or refactor Netezza instances to Azure Synapse
- Migrate or refactor Oracle Exadata instances to Azure Synapse
- Refactor Amazon Redshift instances to Azure Synapse
- Migrate or refactor Snowflake instances to Azure Synapse
- Refactor Google Big Query instances to Azure Synapse
- Migrate or refactor SQL Server instances to Azure Synapse
- Migrate Analytics Platform System (APS) to Azure Synapse
- Migrate other data warehousing technologies to Azure Synapse

The solution design must show:

- A migration design and strategy that outlines how the partner has addressed schema, data, ETL processes, pipelines, authorization privileges, users, BI tool semantic access layers, and analytic applications.
- The potential migration method that can be used for each data warehouse database object that is being migrated.
- Migration risk assessment and mitigation frameworks.
- Azure landing zone: Data warehouse landing zones have specific requirements that might not be present in other landing zones. Specifically, these landing zones must include tools or deployments to account for management and governance of data.
- The environment that supports the reference deployments should address each of the following required design areas below. If an item is not relevant, the partner must document the customer's decision to deviate from applying best practices:
  - Implementing Identity & Access Management (IAM) and role-based access control (RBAC), data sovereignty and encryption, application security, and auditing.
  - Establishing a hub and spoke architecture or retrofitting the existing deployment to separate out the network components of a hub for optimal performance and security.
  - Using security products, such as Azure security services, Microsoft 365 security, or other security solutions, to secure access to the data.
  - Using governance tooling to support cost optimization across the environment. After estimating the initial cost, setting budgets and alerts at different scopes to proactively monitor the cost.
  - Using backup and recovery solutions to ensure data retention.
  - Meeting requirements for government regulatory compliance in the new environment, such as GDPR and HIPAA, and implementing them through multiple datacenter regions, as needed.
  - Implementing a monitoring solution to provide proactive remediation for the Azure environment, to integrate with the customer's existing monitoring tooling, if appropriate.
  - Showing that visualization and alerting considerations for solutions are in place, where appropriate.

**Required evidence:**

The partner must provide relevant solution design documents that address all the preceding points, for at least **two (2)** unique customers with migration projects that were completed within the last **twenty-four (24)** months.

**Acceptable Documentation:**

Project Plan, Functional Specifications, Solution Design Documents, Architectural Diagrams, Automated Tooling Reports and Physical and Logical diagrams.

2.2	<p><b>Azure Well-Architected Review of Workloads</b></p> <p>The partner must demonstrate usage of the <a href="#">Azure Well-Architected Review</a> on migrated Data Warehouse 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.</p> <p>The Review can be used to evaluate each workload against the pillars of the <a href="#">Azure Well-Architected Framework</a> that matter to that workload.</p> <p><b>Required evidence:</b></p> <p>Unless otherwise specified, Reviews may be conducted before, during, or after deployment. The partner must provide exported results from the completed Azure Microsoft Well Architected Review using the assessments in the Well Architected Reviews for at least <b>three (3)</b> migrated data warehouse projects workloads that were completed within the last <b>twelve (12)</b> months, indicating the customer's name.</p> <p>The <b>three (3)</b> projects can come from <b>one (1)</b> or more customers.</p>
2.3	<p><b>Proof of Concept (PoC) or Pilot</b></p> <p>The partner must provide evidence of a completed Data Warehouse Migration to Microsoft Azure Synapse proof of concept (POC) or pilot. The POC or pilot must validate the design decisions, review the design, and adjust it, as appropriate, before the production rollout.</p> <p>The POC or pilot must cover a data warehouse migration to Azure Synapse. The Proof of Concept can include Microsoft Fabric workloads. This is optional and not required. The POC or pilot must document its purpose, customer pain points, project success criteria, intended benefits, and results.</p> <p><b>Required evidence:</b></p> <p>The partner must provide relevant <a href="#">documentation</a> for <b>two (2)</b> unique customers with a data warehouse migration POCs or data warehouse migration pilots that were completed within the last <b>twenty-four (24)</b> months.</p> <p><b>Accepted Documentation:</b></p> <p>POC or Pilot Architecture Diagrams, Reference Architectural Design Blueprints, Test Plans and Results, Implementation Documentation, other POC Documents, a Monitoring Tool Report.</p>
<h3>3.0 Deployment</h3>	
<p>The partner has robust methodologies for deploying the workload.</p>	
<h3>Requirement</h3>	
3.1	<p><b>Data Warehouse Migration Project Deployment</b></p> <p>The partner must provide evidence of their ability to implement data warehouse migration projects to a production environment based on a customer-approved design.</p> <p>Design and delivery <u>must include</u> the following elements:</p> <ul style="list-style-type: none"> <li>Automating wherever possible, using metadata from system catalog tables in the legacy data warehouse system to generate data definition language (DDL) for Azure Synapse</li> <li>Archiving unused data and tables to remove complexity and lower risk prior to migration</li> </ul>

3.1	<ul style="list-style-type: none"> <li>• Migrating data marts first, one by one, to enable an incremental migration approach that is more manageable than trying to migrate the data warehouse and data marts all at once</li> <li>• Performing any required data model changes or data mapping optimizations on Azure Synapse</li> </ul> <p><b>Required evidence:</b> The partner must provide <u>documentation</u> for <b>two (2)</b> unique customers with data warehouse migration projects that were completed within the last <b>twenty-four (24)</b> months.</p> <p>To cover the entire sequence of the project, from design to production deployment, the <b>documentation</b> must include at least <b>two (2)</b> of the following items:</p> <ul style="list-style-type: none"> <li>• Signed statements of work (SOWs) for all projects</li> <li>• Solution design documents for all projects</li> <li>• A project plan and migration/deployment sequence</li> <li>• Architecture diagrams</li> <li>• High-level designs (HLDs) and low-level designs (LLDs)</li> <li>• As-built documentation</li> </ul>
3.2	<p><b>Data Migration</b></p> <p>The partner must provide evidence of their ability to migrate data from existing systems to Azure while maintaining data integrity and security for <b>two (2)</b> unique customers with migrations that were completed within the past <b>twenty-four (24)</b> months.</p> <p><u>Documentation must</u> include all of the following items:</p> <ul style="list-style-type: none"> <li>• Connectivity implementation between the source and the Azure data warehouse</li> <li>• Handling of data loads (bulk/delta) that continued to be generated during the migration</li> <li>• Security and privacy considerations for moving data</li> <li>• Tooling that was used to automate the data migration, such as Azure Data Factory or equivalent third-party tools</li> <li>• If no tools were used, show documentation of the manual process.</li> </ul> <p><b>Required evidence:</b> The partner must provide documentation for <b>two (2)</b> unique customers with data warehouse migration projects that were completed within the last <b>twenty-four (24)</b> months.</p> <p>To cover the entire sequence of the project, including design and production deployment, the <b>documentation</b> must include <b>two (2)</b> of any of the following items:</p> <ul style="list-style-type: none"> <li>• Signed Shows for all projects</li> <li>• Architecture diagrams</li> <li>• HLDs and LLDs</li> </ul>
3.3	<p><b>Extract, Transform, and Load (ETL) and Extract, Load, Transform (ELT) processes</b></p> <p>The partner must provide evidence of their capability to bring data from various systems into Azure Synapse successfully for <b>two (2)</b> unique customers with completed data warehouse migration projects. The <b>documentation</b> must describe the processes used for ETL and ELT. <u>Documentation</u> must describe the use of any of the following tools:</p> <ul style="list-style-type: none"> <li>• Informatica</li> <li>• DataStage</li> <li>• Attunity</li> <li>• Talend</li> </ul>

	<ul style="list-style-type: none"> <li>• SQL Server Integration Services (SSIS)</li> <li>• Other similar tools that perform extract, transform, and load (ETL) and extract, load, and transform (ELT) operations</li> </ul> <p><b>Required evidence:</b> The partner must provide documentation for <b>two (2)</b> unique customers with data warehouse migration projects to production environments that were completed within the last <b>twenty-four (24)</b> months.</p> <p>To cover the entire sequence of the project, including design and production deployment, the <b>documentation</b> must include <b>two (2)</b> of any of the following items:</p> <ul style="list-style-type: none"> <li>• Signed SOWs for all projects</li> <li>• Architecture diagrams</li> <li>• HLDs and LLDs</li> </ul>
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#### 4.0 Review and Release for Operations

The partner has robust methodologies for transitioning the workload.

#### Requirement

4.1	<p><b>Service Validation and Testing</b></p> <p>The partner must validate the deployment, including:</p> <ul style="list-style-type: none"> <li>• A documented process and approach to testing and evaluating the performance of all applications against customer expectations and Azure best practices.</li> <li>• A documented process and approach to evaluating and improving architectural best practices to remediate issues with migrated platforms or workloads that do not meet performance or cost expectations.</li> </ul> <p><b>Required evidence:</b> <b>Documentation</b> of a testing, validation, and performance evaluation that addresses the preceding points for <b>two (2)</b> unique customers. The documentation must indicate that the implemented solution met customer expectations, and it must include a sign-off from the customer.</p> <p>Data warehouse projects must have been completed within the last <b>twenty-four (24)</b> months. These projects can be the same as the projects evidenced in Control 3.1</p>
4.2	<p><b>Post-deployment Documentation</b></p> <p>The partner must provide post-deployment operational documentation to show that their customers are successfully using their new service on Azure. This documentation must demonstrate:</p> <ul style="list-style-type: none"> <li>• How the partner implemented documents, decisions, architectural designs, and procedures.</li> <li>• Standard operating procedures for their business-as-usual operations team that describe “how- to” scenarios.</li> </ul> <p><b>Required evidence:</b> <b>Documentation</b> of the preceding points for <b>two (2)</b> unique customers with data warehouse migration projects that were completed within the last <b>twenty-four (24)</b> months. These projects can be the same as the projects evidenced in Control 3.1</p>

## **[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.