**Cloud Due Diligence Worksheet**

**Part 1 - Organizational Cloud Policy**

| Organizational Requirements – Checklist Items | External Requirements  | Organizational Requirements | Organizational Cloud Policy (Combination of External and Organizational Requirements) | Organizational Cloud Policy Relative Priority | Ownership (Project-Specific Consideration)  | Project Assessment/ RFP (Project-Specific Consideration)  |
| --- | --- | --- | --- | --- | --- | --- |
| **Accessibility-** List accessibility standards, policies, and regulations met by the service. |  |  |  |  |  |  |
| **Cloud service provider data-** Define cloud service provider data. |  |  |  |  |  |  |
| **Cloud service customer data-** Define cloud service customer data and usage terms. |  |  |  |  |  |  |
| **Intellectual property rights -** Describe any intellectual property rights the cloud service provider claims on cloud customer data and vice versa. |  |  |  |  |  |  |
| **Account data -** List the required account data fields (names, addresses, etc.). |  |  |  |  |  |  |
| **Derived data -** Define the types of derived data and policies for use/access. |  |  |  |  |  |  |
| **Data portability -** Data portability capabilities including methods, formats, and protocols. |  |  |  |  |  |  |
| **Data deletion -** Define the minimum and maximum times to completely delete cloud service customer data.Describe the data deletion process.Describe the data deletion notification policy. |  |  |  |  |  |  |
| **Data location -** List the geographic locations that data may be processed and stored, and if the cloud service customer can specify location requests. |  |  |  |  |  |  |
| **Data examination -** Describe how the cloud service provider examines cloud service customer data. |  |  |  |  |  |  |
| **Roles and** **Responsibilities -** The roles and responsibilities for the parties. |  |  |  |  |  |  |
| **Personal identifiable information (PII) -** The PII protection standards met by the cloud service provider. |  |  |  |  |  |  |
| **Information** **security -** The information security standards met by the cloud service provider. |  |  |  |  |  |  |
| **Termination** **of service -** The process of notification of service termination, including the length of time that data and logs are retained after termination, the process for notification, and the return of assets. |  |  |  |  |  |  |
| **Changes to features and functionality -** The minimum time between service change notification and implementation, and service change notification method.The minimum time period between the availability of a feature/function and the deprecation of that feature/function. |  |  |  |  |  |  |
| **Law enforcement access -** The policy for responding to law enforcement requests of cloud service customer data. |  |  |  |  |  |  |
| **Attestation, certification, and audits -** List/define the standards, policies, regulations, and applicable certifications that the cloud service provider attests to. Include audit schedule and location policies. |  |  |  |  |  |  |



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**Part 2 - Project-Specific Plan**

| Project Requirements – Checklist Items | Project Requirements | Project Requirement Priority | Ownership | Project Assessment/ RFP  |
| --- | --- | --- | --- | --- |
| **Availability-** The percentage of time that the service is available and usable. |  |  |  |  |
| **Capacity -** The number of simultaneous connections.The maximum capacity of resources.The number of inputs that will be processed over a period of time.The amount of data that will be transferred over a period of time. |  |  |  |  |
| **Elasticity -** How fast and how precise the service can adjust to the amount of resources that are allocated. |  |  |  |  |
| **Service monitoring -** The parameters and mechanisms to monitor the service. |  |  |  |  |
| **Response time -** The maximum, average, and variance in response time. |  |  |  |  |
| **Service resilience/ fault tolerance -** The methods used to facilitate resilience and fault tolerance (include mean times, maximum times, and units of measurement). |  |  |  |  |
| **Disaster recovery -** The maximum time required to restart the service in outage.The maximum time prior to a failure during which changes may be lost.The recovery procedures to restore the service and data. |  |  |  |  |
| **Backup and restore data -** The number of data backups made in a period of time.The methods of backup and backup verification.The backup retention period.The number of backups retained.The location of backup storage.The number of restoration tests and the availability of test reports.The alternative methods for restoring data. |  |  |  |  |
| **Cloud service support -** The available support plans, associated costs, and associated hours of operation.The specific contacts for service support.The service support methods (phone, web, tickets).For incident support: the incident support hours, levels of support, response time (average and maximum), reporting methods, and notification terms. |  |  |  |  |
| **Project-specific service feature and cost requirements (add additional rows as needed)** |  |  |  |  |



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