Specializations Checklist Step-by-Step

Specializations are the key to **unlocking higher incentives, standing out to customers, and becoming a trusted partner to Microsoft sellers**. However, many Partners struggle with understanding the process and meeting Microsoft's requirements.

This checklist will walk you through each step, helping you evaluate your readiness, close gaps, and successfully earn a Specialization. **Use the checklist at the end to track your progress!**

Step 1: Understand Specialization Requirements

Before you begin, log into **Microsoft Partner Center** and review the **specialization requirements** under your chosen solution area. Every Specialization has three key components:

1. **Solution Partner Designation (SPD):** You must hold the corresponding SPD in your specialization's category.
2. **Skilling Requirements:** Partners must pass the required Microsoft certifications for their Specialization.
3. **Performance & Validation:** Depending on your specialization, you may need to pass an audit, submit customer references, or wait for Microsoft's approval.

Microsoft offers Specializations in the following key areas:

✔ **Azure:** Infrastructure Migration, AI & Machine Learning, etc.
✔ **Modern Work:** Teamwork Deployment, Adoption & Change Management, etc.
✔ **Security:** Threat Protection, Identity Management, etc.
✔ **Business Applications:** Low-Code Application Development, Small & Midsize Business Management, etc.

Pro Tip: Different Specializations have different validation requirements:

✔ **Azure Specializations** require an **audit.**
✔ **Modern Work & Security** require **customer references.**
✔ **Business Applications** require meeting all **SPD, Skilling, and Performance** criteria**.**

Step 2: Prepare for the Audit or Customer References

Microsoft validates your expertise through either an audit, customer references, or approval process, depending on your specialization.

✓ **Specializations That Require an Audit (Azure Specializations Only)**

Partners pursuing an Azure Specialization must undergo a formal audit to verify their technical capabilities. This process includes:

- **Providing 2-3 customer examples of deployments that meet Microsoft's standards.**
- **Ensuring your deployments follow Microsoft's Cloud Adoption Framework (CAF).**
- **Completing all preparation before scheduling the audit, as approval can take up to a month.**

> **Pro Tip:** Many Partners don't structure their deployments in line with Microsoft's expectations. Start aligning your projects with the Cloud Adoption Framework early to avoid delays.

✓ **Specializations That Require Customer References (Modern Work & Security Specializations)**

For Modern Work & Security Specializations, you must submit customer references instead of completing an audit. This includes:

- **Providing 2-3 real-world customer success stories that demonstrate your expertise**
- **Ensuring customers can verify the work completed**
- **Meeting Microsoft's customer add and deployment requirements**

✓ **Specializations That Require Microsoft Approval (Business Applications Specializations Only)**

For Business Applications Specializations, once you meet the SPD, Skilling, and Performance requirements, you must wait for Microsoft's approval before earning the Specialization.
No audit or customer references are required.

Step 3: Meet Skilling Requirements

Microsoft requires Partners to complete the necessary certifications to qualify for Specializations.

- Verify the required **Microsoft certifications** for your Specialization in **Partner Center**.
- Assign certification exams to key team members.
- Use **Microsoft Learn** for free training resources.
- Consider **third-party training providers** like Pluralsight or Udemy to help with certification prep.

Don't have the time, resources, or personnel to complete the required certifications? We can help.

Our **Certification-as-a-Service** connects you with a trusted team of experts who handle the certifications for you, so you can focus on growing your business while meeting Microsoft's requirements with ease.

Learn more about Certification-as-a-Service ⟶

Step 4: Meet Performance Requirements

Along with skilling and validation, Microsoft requires Partners to meet specific **performance metrics** to earn a Specialization.

✓ Monitor **monthly performance metrics** to ensure compliance after approval.
✓ Review **Partner Center** for your specialization's required revenue, deployments, and active customer usage.

Step 5: Wait for Microsoft's Approval

Once you've met all requirements:

- **Azure Specializations:** Schedule your audit in Partner Center, complete it, and wait for Microsoft's approval.
- **Modern Work & Security Specializations:** Submit your customer references for review and wait for approval.
- **Business Applications Specializations:** No additional submission is needed—once SPD, Skilling, and Performance are met, you must wait for Microsoft's approval.

Track Your Progress with This Checklist

☐ Review **Specialization requirements** in Partner Center

☐ Prepare for audit **OR** gather customer references

☐ Ensure you hold the **Solution Partner Designation (SPD)**

☐ Verify **performance metrics** are met

☐ Meet **skilling requirements** (Microsoft certifications)

☐ Schedule audit **OR** submit customer references **OR** wait for Microsoft's approval

Maximize Your Microsoft Partnership with Specializations

Earning a Microsoft Specialization is more than just a credential—it's a **game-changer** for your business. Specializations unlock **higher incentives, increased credibility, and better co-sell opportunities**, but the process can be complex and time-consuming.

That's where we come in.

Need help meeting requirements? We guide countless Microsoft Partners through the Specialization process, helping them navigate audits, customer references, and performance metrics.

Struggling with certifications? Our **Certification-as-a-Service** connects you with experts who handle the certification process for you—so you can focus on growing your business while ensuring compliance with Microsoft's requirements.

Learn more about Certification-as-a-Service ⟶

Don't let Specialization requirements slow you down.

Let's create a roadmap to get you certified and unlock new growth opportunities.

Want a personalized roadmap?
Schedule a consultation at no cost and let us help you achieve your goals.

Our CEO spent over five years at **Microsoft**, giving us unique insight into what sellers are looking for. We've helped Partners **unlock millions in incentives, drive co-sell engagements,** and **grow their businesses** through proven strategies.

Schedule a free strategy session today!