



HashiCorp Partner Network

Competency Program Guide



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HashiCorp SI Competency Program Guide

Highlight your HashiCorp technical expertise to differentiate your business

The HashiCorp Partner Network (HPN) Systems Integrator Competency Program officially recognizes our partners' ability to deliver and integrate HashiCorp products and solutions successfully.

Partners who meet the requirements for our Competency program will receive preferred lead routing, eligibility for Partner Services Funds (PSF), enhanced visibility within HashiCorp and our customers, and increased differentiation to help their HashiCorp practice stand out.

Program Overview

At program release, we will have two competencies centered around key capability domains for our customers – Infrastructure and Security. These domains broadly align to our core products and provide a strong indication of our partner's capability to deliver solutions for customers around our Enterprise Terraform and Vault products.

We continue to build out additional competencies in the second phase based on our commercial paid products first followed by advanced solutions of multi-products as those solutions mature over time.

- Infrastructure Competency
- Security Competency
- Networking Competency (Coming Soon)
- Application Competency (Coming Soon)

Unlock benefits to build, market, and sell with HashiCorp

Benefits Include:

- Eligibility for Partner Services Funds (PSF)
- Preferred lead routing
- HashiCorp Partner Directory listing prioritization & competency visibility
- Enhanced visibility within the HashiCorp sales teams
- Increased market differentiation, helping your HashiCorp practice stand out

- HashiCorp Competency Badge for use on your website, collateral, social channels, and everywhere else
- Additional co-marketing support

Requirements

Each Competency domain has a specific set of requirements outlining the minimum expectations that partners must meet to be granted the competency, however there are some common elements which may not need to be repeated in successive applications.

Common Criteria

| Item | Description |
|-------------------------------------|--|
| Cloud Operating Model - Presentaion | Ability to deliver a Cloud Operating Model presentation during the audit based on HashiCorp's " Unlocking the Cloud Operating Model " presentation |
| Public speaking engagements | Slide outlining a minimum of 4 public speaking events (HashiCorp User Groups, conference presentations, etc) on HashiCorp solutions |
| Certification Details | Slide (with certification links) outlining either 40 technical staff members certified or over 30% of total technical staff certified |
| Customer Satisfaction Report | Slide showing a minimum of 5 customers with an overall average customer satisfaction score of 70% or greater |

Infrastructure Specific Criteria

The criteria below are specific to the Infrastructure Competency domain and are classified either as mandatory or optional. It is preferred that the case studies are a mixture of Terraform Enterprise and Terraform Cloud for Business to demonstrate breadth of capability.

| Item | Description/ Examples |
|---|--|
| Customer Case Studies | <p>Presentation of two (2) customer case studies outlining the business challenges, high level solution (including on-premises and/or public cloud architecture), value proposition of HashiCorp enterprise products and the benefits realized through the engagement.</p> <p>Specific technical solution areas detailed below should be discussed in the context of the case studies.</p> |
| Approach to Infrastructure as Code with TFC/E | Example: Terraform with AWS |
| Approach to Image Management with Packer | Example: HashiCups with Packer |
| Approach to Policy as Code using Sentinel | Example: Sentinel Policy for Terraform Deployment |
| Approach to producer/consumer workflows using private modules | Example: Terraform Private Module Registry |

| | |
|---|---|
| Integration with Version Control Systems and CI/CD integration | Example: Terraform Cloud VCS Workflow Example: Consul, NIA, CTS and Palo Alto Networks |
| Ability to show Network Infrastructure Automation use cases using Consul/Terraform Sync | Example: Terraform with AWS |



Security Specific Criteria

The criteria below are specific to the Security Competency domain and are classified either as mandatory or optional. It is preferred that the case studies are a mixture of Vault Enterprise and HCP Vault to demonstrate breadth of capability.

| Item | Description / Examples |
|--|--|
| Customer Case Studies | <p>Presentation of two (2) customer case studies outlining the business challenges, high level solution (including on-premises and/or public cloud architecture), value proposition of HashiCorp enterprise products and the benefits realized through the engagement.</p> <p>Specific technical solution areas detailed below should be discussed in the context of the case studies.</p> |
| Approach to Advanced Data Protection requirements | Example: Tokenize Data with Transform Secrets Engine |
| Approach to Encryption as a Service Implementation | Example: Encrypting Data with Transform Secrets Engine |
| Approach to Secrets Management | Example: Set up AWS Auth Method for HCP Vault |
| Examples of custom Vault plugins or integrations | Example: Vault HA Cluster with Integrated Storage on AWS |
| Approach to CI/CD integrations and workflows | Example: AppRole With Terraform & Chef |
| Approach to Machine Identity in Zero-Trust architectures | Example: Vault as Consul Service Mesh Certification Authority |



Audit Process and Timing

To begin planning for a HashiCorp Competency audit, HPN members should speak to their Partner Development Manager and/or Partner Solutions Engineer to initiate the process which begins with a self-assessment against the program requirements detailed above.

Applicants will be given details on the process and where to upload the completed self assessment to move to the next stage of application. It is strongly recommended that the Partner has its Partner Solutions Engineer (PSE) and Partner Development Manager (PDM) review the completed self-assessment before submitting for formal review.

Each competency is assessed independently however multiple audit sessions can be scheduled at the same time to minimize rework and streamline the process.

Each audit is scheduled to take 3-4 hours and involves stakeholders from across the HashiCorp business including Channel, Sales Engineering, Customer Success and our Professional Services teams.

Partners will be given feedback on their application in real-time and will receive an audit summary within 20 business days detailing the outcome of the assessment, strengths, opportunities for improvement and action items.

Annual Performance-Based Renewal Process

The HPN Competency Program requires an annual performance-based renewal process (“Renewal Process”) to ensure high quality and consistent customer experiences. HPN Partners are expected to continue to meet the initial standards defined for the competency qualification audit.

HashiCorp SI Competency Audit Process & Timing

Audit Process and Timing

| Action | Timing | Who |
|---|---|-----------|
| Competency Qualification Audit submission | Day 1 | Partner |
| Audit Summary: action items and preliminary score | 20 business days after Competency Qualification Audit submission | HashiCorp |
| Response to action items | 10 business days after receipt of Audit Summary | Partner |
| Final Audit Report submission | 11 business days after partner received Audit Summary: action items and preliminary score | HashiCorp |
| Final determination of acceptance or denial | 20 business days after Final Audit Report submission | HashiCorp |

The program starts with the partner submitting to a competency qualification audit. Each competency is assessed separately, with a badge awarded for the specific attainment, though assessment for multiple competencies can be submitted for audit at the same time. Compliance or failure of one does not impact the others under audit and the Partner should receive an audit summary (within 20 business days) from the auditor detailing strengths, opportunities for improvement, and action items.

A preliminary score from the auditor will be provided with the audit summary. The Partner has 10 business days from receipt of the audit summary to respond to and address any identified action items, which will be categorized as either Mandatory Action Items or as additional compliance Action Items. Mandatory Action Items are items that must be closed out prior to approval of entry into the Program. If the Partner is not able to fully close a Mandatory Action Item in 10 business days, an action plan detailing how and when the item will be closed must be provided to the Partner team with a defined date otherwise compliance is automatically denied.

Compliance Action Items are items that negatively impact the overall score, but may be closed by providing evidence of how to comply with the auditor within 10 business days. Any such items satisfactorily closed within the 10 business days, as determined by the auditor, will raise the Partner's score, and the new score will become the final score submitted to HPN with the final audit report. Any compliance Action Items not addressed, or not fully closed within the 10 business days, will result in no change to the Partner's score and will not be included on the final audit report.

The audit team will submit the final audit report to HPN after the 10 business days allowed for a Partner to address Mandatory and compliance Action Items has passed, and no later than 10 business days after the audit.

The final determination of acceptance into the HPN Program will be made within 20 days after HashiCorp reviews the final audit report.

Adjudication & Expiration

The Partner will be adjudicated only after a successful audit and approved by the Audit Adjudicator. The Audit Adjudicator is the PSE RM/RD for the geo or the PSE WW Leader. The competency will be valid for 2 years starting on the adjudication date. The review team notifies the Partner of its performance against requirements and, if complete, will notify the Partner of successful renewal of HPN Program status prior to the Partner's anniversary date. If a Partner fails to meet the performance requirements, they may, at HashiCorp's sole discretion, be offered a brief window of time to complete an action plan and achieve the requirements or will otherwise be removed from the Program. The Partner will be able to apply for a 6-month extension that needs to be approved by the Partner Leadership Team.

Impact of Merger, Acquisition and Divestiture Activity

The Program incorporates the use of an audit to validate the Partner's technical capabilities, as well as its business and delivery models. These business and delivery models are often significantly impacted in the process of mergers, acquisitions, and divestitures. As a result, Partners may be required to reapply and complete a new Full Audit.

Please refer to the guidelines below:

Acquisition/Merger

- HPN Partner acquires non-HPN Partner:
 - No immediate action required.
 - The HPN Partner must show any impacts to its HPN practice during its next regularly scheduled Full Audit.
- Non-HPN Partner acquires HPN Partner:
 - Acquiring partner has a 6 month grace period before required submission of new application and full audit in order to be recognized as an HPN Partner.
- HPN Partner acquires another HPN Partner:
 - No immediate action required.

Divestiture

- If an HPN Partner divests a portion of its business related to its HashiCorp practice, the divesting business must immediately disclose significant impacts to its practice that would materially impact its standing as an HPN Partner. Depending on the significance of the impact, the Partner will either be immediately removed from the Program or it will be required to highlight impacts to its business during its next regularly scheduled Full Audit. The divested business will be required to apply to the Program as a new HPN Partner.

Annual Performance-Based Renewal Process

The HPN Competency Program requires an annual performance-based renewal process (“Renewal Process”) to ensure high quality and consistent customer experiences. HPN Partners are expected to continue to meet the initial standards defined for the competency qualification audit.

The renewal process consists of the Partner completing a self-assessment and providing 3 up-to-date examples (last 3 months) of the assessment assets to the HPN renewal team.

Continued compliance with all current Program requirements listed in the self-assessment is the key to the Partner remaining in good standing and a Partner complying with the HPN Terms and Conditions.

The review team notifies the Partner of its performance against requirements and, if complete, will notify the Partner of successful renewal of HPN Competency status prior to the Partner’s anniversary date. In addition, a member of the review team updates the partner record in SFDC to indicate attainment of competency status. If a Partner fails to meet the performance requirements, they may, at HashiCorp’s sole discretion, be offered a brief window of time to complete an action plan and achieve the requirements or will otherwise be immediately removed from the Program.

To maintain standards between full audits, an annual renewal process is conducted, as HashiCorp expects continued compliance to previously audited requirements and requires that Partners disclose any material changes to policies and processes that impact their compliance as soon as those changes are made. A Partner should complete the self-assessment checklist and submit it to the PDM along with Framework requirement qualification.

Scoring Explained

The scoring system is an essential piece of the Partner's self-assessment and the initial Audit. Scoring allows an objective and quantifiable means to assess the Partner's capabilities and provides clarity and consistency in expectations.

The pass mark required is a 90 points or greater to successfully gain program competency.

In the scoring checklist, there are two related columns:

- In the table below, the first column lists mandatory passes. The partner has to receive a pass in this column.
- The second column has a point value that is either the full value assigned or zero.

These points will be added to determine the overall score for a given competency, and points are awarded in full; no partial score values are awarded.

Infrastructure Competency Checklist

| | Mandatory | Add to Score | Self-Assessment | Auditor |
|--|-----------|--------------|-----------------|---------|
| Infrastructure Competency | | | | |
| OSS to Enterprise - presentation | Must Pass | 20 | | |
| Cloud Operating Model - presentation | Must Pass | 20 | | |
| laC with TFC / Image Management with HCP Packer examples | | 5 | | |
| Policy as Code - cost or security enforcement | | 5 | | |
| Implementation using private module | | 5 | | |
| Integrations with at least one VCS & ability to show NIA/CTS use cases | | 5 | | |
| Cloud deployment example | | 5 | | |
| Public/Private Case Studies x2 | | 10 | | |
| CSAT scores | | 10 | | |
| Public speaking engagements x 4 | | 10 | | |
| Certifications | | 10 | | |
| Section Total | | | | |

Security Competency Checklist

| | Mandatory | Add to Score | Self-Assessment | Auditor |
|--|-----------|--------------|-----------------|---------|
| Security Competency | | | | |
| OSS to Enterprise - presentation | Must Pass | 20 | | |
| Cloud Operating Model - presentation | Must Pass | 20 | | |
| Implementation using ADP | | 5 | | |
| Implementation using Encryption as a Service | | 5 | | |
| Implementation using Secret Management | | 5 | | |
| Pipeline specialists (CI/CD integrations) | | 5 | | |
| Zero Trust or Cloud deployment example | | 5 | | |
| Public/Private Case Studies x2 | | 10 | | |
| CSAT scores | | 10 | | |
| Public speaking engagements x 4 | | 10 | | |
| Certifications | | 10 | | |
| Section Total | | | | |

Example

An example pass score would be amassed like this for an Infrastructure competency:

40 points from the mandatory competency + 65 available points if a partner passes off of the other sections for a grand total of 105 points for a full pass. The partner only needs 90 points to pass an audit.

The Final Partner Score is the score provided by the auditor after adjusting the score for any closed Score-Impacting Action Items.



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