

Are You on the *Org A* Path?

A 20-question self-assessment for IT and data leaders preparing to deploy Microsoft Fabric.

18 mo · **\$2.3** M

ORG A - STILL NOT IN PRODUCTION

90 days

ORG B - DEPLOYED, LESS BUDGET

Same platform. Same vendor. Different result.

The difference wasn't resources. It was the order they did things — and the decisions they made (or didn't make) in the first 30 days.

Answer the questions below honestly. One check mark per row.

COMPLETED BY

DATE

PROJECT / WORKSTREAM

EXECUTIVE SPONSOR

01 PHASE ONE Assess

FOUR QUESTIONS
0-4 PTS

Sponsor, scope, sources, and capacity. The decisions made here determine whether everything downstream lands or drifts.

QUESTION	<input checked="" type="checkbox"/> ORG B PATH	<input type="checkbox"/> ORG A PATH
Q 1.1 Do you have one named executive sponsor who can resolve a cross-team blocker within 48 hours?	<input type="checkbox"/> Named. Accountable.	<input type="checkbox"/> "Leadership is aligned" / committee
Q 1.2 Is your Day 90 success defined as a specific business outcome?	<input type="checkbox"/> "Finance self-serves the GL report by 8am Monday without an IT ticket"	<input type="checkbox"/> "Modernize our analytics platform"
Q 1.3 Have you completed a data source inventory with quality ratings?	<input type="checkbox"/> All sources rated 1-5, quality 1-2 sources have remediation plans	<input type="checkbox"/> "We know our data sources" (no written inventory)
Q 1.4 Is your deployment capacity sized and finance-approved before any pipeline work begins?	<input type="checkbox"/> Capacity approved. Budget confirmed.	<input type="checkbox"/> "We'll figure that out when we need more"

<p>PHASE 1 SCORE</p> <p><i>Count the check marks in the Org B column.</i></p>	<div style="border: 1px solid white; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"> 0 </div> <p>OF 4</p>
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02

PHASE TWO

Govern

FOUR QUESTIONS
0-4 PTS

Naming, identity, security, and promotion. The guard rails that keep the build from accreting tech debt week by week.

QUESTION	<input checked="" type="checkbox"/> ORG B PATH	<input checked="" type="checkbox"/> ORG A PATH
Q 2.1 Is your workspace naming convention written, approved, and in use before any workspace is created?	<input type="checkbox"/> Documented. IT-signed. No exceptions.	<input type="checkbox"/> "We'll standardize later"
Q 2.2 Is your service principal provisioned and tested before Phase 3 begins?	<input type="checkbox"/> SP provisioned in week 2. Tested in dev.	<input type="checkbox"/> "We'll add it when the scheduled refresh needs it"
Q 2.3 Is your security model (who sees what, who can deploy) decided before any item is created?	<input type="checkbox"/> Security matrix complete. Signed.	<input type="checkbox"/> "Developers have admin during build — we'll lock it down later"
Q 2.4 Does your deployment pipeline run end-to-end (dev → test → prod) before any pipeline is built?	<input type="checkbox"/> Automated promotion tested.	<input type="checkbox"/> "We'll set up CI/CD once we have something to deploy"

PHASE 2 SCORE Count the check marks in the Org B column.	<input style="width: 40px; height: 20px; border: 1px solid white;" type="text"/> OF 4
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03

PHASE THREE

Land

FOUR QUESTIONS
0-4 PTS

Bronze, silver, gold — and the gates between them. Get the medallion contract right and the rest of the build is mechanical.

QUESTION	<input checked="" type="checkbox"/> ORG B PATH	<input checked="" type="checkbox"/> ORG A PATH
Q 3.1 Have you completed the medallion matrix for every source before writing a single pipeline?	<input type="checkbox"/> Matrix complete. Pipeline counts known.	<input type="checkbox"/> "We'll design it as we go"
Q 3.2 Is bronze append-only, with an error table for failed rows?	<input type="checkbox"/> Bronze is immutable. Errors are captured.	<input type="checkbox"/> "We load raw data directly into reporting tables to move faster"
Q 3.3 Does your silver layer have quality gates before promotion to gold?	<input type="checkbox"/> Row count checks, type validation, quarantine tables.	<input type="checkbox"/> Silver = bronze with column renames
Q 3.4 Has your business owner previewed at least one gold table before Phase 4 begins?	<input type="checkbox"/> Business owner confirmed the data is right.	<input type="checkbox"/> "The developer signed off on data quality"

PHASE 3 SCORE Count the check marks in the Org B column.	<input style="width: 40px; height: 20px; border: 1px solid white;" type="text"/> OF 4
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04

PHASE FOUR

Build

FOUR QUESTIONS
0-4 PTS

Reports, audits, UAT, and row-level security. Where the business meets the data — and where rushed sign-offs turn into post-go-live tickets.

QUESTION	<input checked="" type="checkbox"/> ORG B PATH	<input checked="" type="checkbox"/> ORG A PATH
Q 4.1 Are your report acceptance criteria written and signed by the business owner before development starts?	<input type="checkbox"/> Criteria documented. Test cases with expected values.	<input type="checkbox"/> "We'll define success when we see the reports"
Q 4.2 Has a BPA audit been run with zero critical violations before any report goes to UAT?	<input type="checkbox"/> BPA clean. Violations resolved before UAT.	<input type="checkbox"/> "We'll clean that up after go-live"
Q 4.3 Does UAT involve the business owner working independently — without the developer in the room?	<input type="checkbox"/> Business owner tested solo. Discrepancies documented in writing.	<input type="checkbox"/> "We walked through the reports together and they looked good"
Q 4.4 Is RLS tested by someone other than the developer?	<input type="checkbox"/> IT lead or business owner validated with two different profiles.	<input type="checkbox"/> "The developer confirmed RLS is working"

<p>PHASE 4 SCORE</p> <p><i>Count the check marks in the Org B column.</i></p>	<div style="border: 1px solid white; width: 40px; height: 40px; display: inline-block;"></div> OF 4
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05 PHASE FIVE Operate

FOUR QUESTIONS
0-4 PTS

Monitoring, runbooks, adoption, and sign-off. The handoff that turns a delivered project into something the organization can actually run.

QUESTION	<input checked="" type="checkbox"/> ORG B PATH	<input checked="" type="checkbox"/> ORG A PATH
Q 5.1 Are monitoring alerts configured for pipeline failure, refresh failure, AND monitoring-script failure?	<input type="checkbox"/> All three alert types live before go-live.	<input type="checkbox"/> "We'll set up monitoring after we see if there are problems"
Q 5.2 Does your operational runbook include an escalation path by severity, a capacity baseline, and step-by-step incident response?	<input type="checkbox"/> Runbook complete. First on-call person has read it.	<input type="checkbox"/> "The developer knows how to fix issues if they come up"
Q 5.3 Has at least one business owner demonstrated self-service navigation without any IT assistance?	<input type="checkbox"/> Observed. Documented.	<input type="checkbox"/> "We showed them how to use it"
Q 5.4 Does your go-live sign-off require signatures from the sponsor, IT lead, AND business owner?	<input type="checkbox"/> Three signatures. Go-live is a formal event.	<input type="checkbox"/> "IT declared it done and sent an email"

<p>PHASE 5 SCORE</p> <p><i>Count the check marks in the Org B column.</i></p>	<div style="border: 1px solid white; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center;"> 0 </div> <p>OF 4</p>
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SECTION TWO – SCORING

Your Diagnosis

TOTAL SCORE

Phase 1 _____ + Phase 2 _____ + Phase 3 _____ + Phase 4 _____ + Phase 5 _____

/ 20

TOTAL SCORE	WHAT IT MEANS
18–20	You're on the Org B path . Protect the gates. Don't let momentum pressure you to skip them.
14–17	Strong foundation with specific gaps. Identify which phases scored low — those are your risk areas.
10–13	Real risk of Org A outcomes . The gaps in Phase 1–2 are the most expensive to fix later.
Under 10	Stop. Don't open the Fabric admin portal yet. Fix the Phase 1 gaps first — sponsor, use case, inventory. Everything else depends on those.

THE ONE THING THAT PREDICTS THE MOST

Who is your executive sponsor, and when did they last attend a project meeting?

IF THE ANSWER IS...

“We have leadership *buy-in*” — without a name. You're on the **Org A path**.

IF THE ANSWER IS...

A name *and* a date from last week. You're on the **Org B path**.

EXECUTIVE SPONSOR

IT LEAD

BUSINESS OWNER

NAME · SIGNATURE · DATE

NAME · SIGNATURE · DATE

NAME · SIGNATURE · DATE