Cloud workload rebalancing solution

Service overview

Cloud workload rebalancing service is a comprehensive service designed to help organizations migrate selected workloads from public cloud environments back to on-premises or hybrid infrastructures. This end-to-end service supports enterprises in evaluating, analyzing, and implementing cloud exit strategies with minimal risk and optimal efficiency. It is driven by a consultative approach supported by automated tools, best practices, and a robust technology ecosystem including Hewlett Packard Enterprise, VMware®, and other platforms.

Core service features

Strategy and assessment
The strategy and assessment phase lays the groundwork for cloud workload rebalancing by aligning business and IT objectives, discovering current cloud workloads, and evaluating their suitability for rebalancing. Using tools such as HPE Application Modernization Services – Right Mix Advisor, cloud discovery tools, and structured workshops, HPE assesses application disposition, identifies optimal target platforms, and delivers a tailored migration and modernization road map.

Key features
Business-aligned planning

— HPE Application Modernization Services

— Focused workshop sessions

— Workload disposition and prioritization

— Target platform evaluation

— Cost analysis of the existing platform

Outcome
— Comprehensive rebalancing road map

— Workload inventory and disposition matrix

— Workshop summary and readiness reports

— Initial migration plan and first movers list

Design and build
The design and build phase focuses on translating the rebalancing strategy into a functional and secure on-premises or hybrid environment. HPE designs the architecture, landing zones, and governance models tailored to the selected platforms (that is, HPE Private Cloud Enterprise, HPE Private Cloud Business Edition, HPE Morpheus VM Essentials Software). It then builds and configures infrastructure components, including container platforms and core services, helping ensure the environment is production-ready for workload migration.

Key features
— Validate requirements of target platforms

— Build-out, optimize, and secure target platforms

— Platform design, implementation, and monitoring

— Container platforms design and implementation

Outcome
— Costs in line with expectations

— Target platforms built and optimized for workloads

— Secure design and implementation

— Cloud platform design and implementation

Migrate and modernize
The migrate and modernize phase involves securely transitioning workloads from public clouds to the newly built on-prem or hybrid environment. HPE uses migration tools for low-downtime migration while simultaneously modernizing applications through refactoring, containerization, and DevOps/DevSecOps integration using AI-driven tools and GenAI—enabling agile, future-ready application delivery.

Key features
— Migration factory

— Reengineer applications for target platform

— Design, plan, optimize, and transition application modernization

— Develop a DevOps road map

— Implement container adoption services

— Perform cloud-native engineering

— Implement cloud-native agile development service

Outcome
— Application migrated to target platform

— Applications optimized for target platform

— Establishment of DevOps best practices

Optimize and manage
The optimize and manage phase establishes centralized operations and governance for the rebalanced environment. HPE deploys tools such as HPE Morpheus Enterprise Software for hybrid cloud management, HPE OpsRamp Software for AIOps-based monitoring, and Exivity for FinOps-driven cost optimization, enabling continuous visibility, automation, and operational efficiency across on-prem and multicloud environments.

Key features
— Provide advisory for multicloud and application management

— Implement hybrid cloud automation

— Manage workloads and platforms

— Provide best practices for monitoring

— Multicloud management adoption service

— Perform integration and management

Outcome
— Ability to self-manage workloads and platforms across clouds

— Monitored applications and platforms based on best practices

— Accelerated time to market

— Increased efficiency and reduced risk

— Achieve IT service agility

Service implementation

The implementation of the cloud workload rebalancing service is structured into four strategic and implementation-oriented phases, each designed to reduce risk, ensure alignment with business goals, and deliver a smooth transition from public cloud to optimized on-premises or hybrid environments.

Strategy and assessment
This phase establishes the strategic foundation for cloud rebalancing. It aligns IT and business objectives, performs comprehensive workload discovery, and identifies the optimal rebalancing path using HPE frameworks and advisory services.

Table 1. Service implementation—strategy and assessment

Prerequisites.	— Executive sponsor and stakeholder identification — Access credentials to public cloud environments (AWS, Azure, GCP™) — Current workload inventory and application documentation — Infrastructure topology diagrams — Security and compliance baseline (if available)
Implementation	**Kickoff and stakeholder alignment** — Confirm objectives, timelines, stakeholders, and success criteria **Conduct workshops** — Cloud rebalancing planning — Cloud security posture review — DevOps/DevSecOps readiness — Container and hybrid cloud readiness **Discovery and analysis** — Use cloud discovery tools for infrastructure mapping, dependency analysis, and compliance report generation — Perform application and workload assessment using RMA **Assessment and planning** — Use HPE Application Modernization Services to assess workload disposition (retain, retire, rehost, replatform, refactor) — Identify **First Mover** candidates based on complexity and business value **Target platform evaluation** — Match applications to platforms such as HPE Private Cloud Enterprise, VM Essentials, HPE Private Cloud Business Edition, Azure Local, EKS Anywhere, OpenShift, VMware, and so on **Road map development** — Prioritized migration plan with timelines, cost-benefit analysis, and transformation opportunities
Assumptions	— Customers will provide timely access to environments and key SMEs — All discovered environments are within customer administrative control — Standard cloud platforms (AWS, Azure, GCP) are used
Exclusions	— Physical audits of data centers — Detailed application code reviews or penetration testing — Remediation of discovered vulnerabilities
Deliverables	— Executive summary report — Rebalancing road map — Application disposition matrix — Platform suitability matrix — Workshop summary documents

Design and build

In this phase, HPE designs and builds the rebalancing target platform based on assessment outcomes. This includes infrastructure setup, platform landing zone creation, and container platform deployment.

Table 2. Service implementation—design and build

Prerequisites	— Completed and approved assessment documentation — Finalized list of target platforms — Infrastructure hardware availability and site readiness (power, cooling, networking) — VPN or remote access enabled for build activities
Implementation steps	**Architecture finalization** — Define high-level and low-level designs for platforms (HPE Private Cloud Enterprise, VM Essentials, and so on) **Landing zone design** — Create blueprints with security, networking, IAM, monitoring, and backup patterns — Align with customer's compliance and governance requirements. **Platform build** — Deploy and configure chosen infrastructure (virtualization, hypervisor, HPE Alletra, and so on) — Deploy container environments (OpenShift, EKS Anywhere, and so on) — Integrate identity services (AD, LDAP, SSO, and so on) **System validation** — Perform smoke tests and ensure platform readiness for migration — Validate landing zone compliance and operational readiness
Assumptions	— Target infrastructure is available and accessible before the start date — Platform builds follow standard reference architectures with minor customization — Container platforms use HPE-supported distributions
Exclusions	— Application or data migration — Integration with customer's third-party systems is not scoped in the design — On-premises hardware procurement (assumed customer responsibility)
Deliverables	— Landing zone architecture document — Target platform configuration guide — Access, IAM, and networking setup documentation — Build a validation and readiness report

Migrate and modernize

This phase implements the migration of selected workloads and enables modernization through refactoring, containerization, and DevOps pipeline setup.

Table 3. Service implementation—migrate and modernize

Prerequisites	— Completed target platform build with verified readiness — Final migration scope and cutover schedule approved — Access credentials to source cloud accounts and target infrastructure — Application interdependency mapping validated — Network connectivity between on-prem and public cloud to ensure sufficient bandwidth for data migration
Implementation steps	**Detailed migration planning** — Define wave plans, rollback strategies, and cutover timeline — Choosing migration toolset **Environment preparation** — Set up staging areas and replication configurations — Create application-consistent snapshots **Application modernization (optional)** — Use vFunction, CodeMRI, or GenAI to refactor monoliths to microservices — Containerize eligible workload **DevOps/DevSecOps integration** — Implement CI/CD pipelines with integrated security scanning — Automate build-test-deploy lifecycle **Migration implementation** — Perform test migration followed by production cutover — Validate functionality, data consistency, and performance **Post-migration optimization** — Tune applications and infrastructure — Conduct final user acceptance testing (UAT)
Assumptions	— Business users will support testing and validation — Network bandwidth and latency allow for real-time replication or planned offline transfers — Modernization scope is limited to applications selected in the assessment
Exclusions	— Manual recoding of applications unless specified — Legacy OS or unsupported applications (for example, EOL systems) — Long-term managed services post-cutover
Deliverables	— Migration runbook and implementation logs — Refactored application documentation — Container orchestration manifests — CI/CD pipeline setup — Performance benchmark comparison (pre/post migration)

Optimize and manage

This phase delivers centralized operations management using HPE Morpheus Enterprise, AIOps (HPE OpsRamp Software), and FinOps (Exivity). It establishes visibility, governance, and optimization for rebalanced environments.

Table 4. Service implementation—monitor and manage

Prerequisites	— Successful completion of workload migration — Admin access to deployed infrastructure and management tools — Defined SLA, thresholds, and escalation matrix
Implementation steps	**Management tool deployment** — Install and configure HPE Morpheus Enterprise for hybrid workload management — Integrate HPE OpsRamp Software for monitoring, observability, and intelligent alerting — Connect Exivity for cost analytics and optimization **Governance and policy setup** — Define operational policies (backups, patching, alerting) — Configure role-based access controls (RBAC) **Training and knowledge transfer** — Conduct operational training — Provide SOPs, runbooks, and user guides
Assumptions	— Monitoring scope limited to workloads and platforms migrated by HPE — Customer team available for training and operational onboarding — SaaS versions of tools or preapproved on-prem installs used
Exclusions	— 24x7 managed services (unless separately contracted) — Monitoring of third-party systems or legacy platforms outside project scope — Custom plug-in or script development beyond standard tool features
Deliverables	— SOPs, escalation matrices, and training materials — Final operations guide and handover pack

Note

The service does not include cloud transformation services, network consultation services, identity or access management system integration, customer ITOM or ITSM system integration, workload migration, deployment, or customer workload performance monitoring services, customer-specific administrative or user configuration services, or other services not explicitly described herein. HPE provides additional professional and managed services that can be customized to meet the requirements of the customer environment.

RACI matrix—cloud workload rebalancing framework

Table 5. RACI matrix—strategy and assessment

Activity	HPE	Customer
Conduct project kickoff and stakeholder alignment	A/R	C
Facilitate strategic workshops (cloud rebalancing, DevOps, Security, and so on)	R	C
Perform cloud environment discovery and inventory	R	C
Collect existing application and infrastructure documentation	C	A/R
Analyze workload dependencies and performance metrics	R	C
Assess workload disposition (retain, retire, rehost, refactor, and so on)	R	C
Identify first mover candidates for rebalancing	R	C
Recommend suitable target platforms (HPE Private Cloud Enterprise, VM Essentials, and so on)	R	C
Develop migration and modernization road map	A/R	C
Approve final assessment report and recommendations	C	A/R

Table 6. RACI matrix—design and build

Activity	HPE	Customer
Finalize architecture and design documents for target platform	A/R	C
Design and document landing zone, including security, IAM, network, logging	R	C
Approve infrastructure and landing zone designs	C	A/R
Procure and deliver hardware (if applicable)—if using HPE GreenLake cloud	A/R	C/I
Build and configure target infrastructure (HPE Private Cloud Enterprise, VM Essentials, so on)	R	I
Deploy and configure container platforms (EKS Anywhere, OpenShift, and so on)	R	I
Configure IAM, RBAC, network segmentation, firewall rule	R	C
Conduct platform readiness testing and validation	R	C
Approve readiness for migration phase	C	A/R

Table 7. RACI matrix—migrate and modernize

Activity	HPE	Customer
Finalize migration plan and sequencing (wave planning)	R	C
Define maintenance windows and cutover schedule	C	A/R
Set up replication and data transfer tools	R	C
Run test migrations and validate results	R	C
Perform production migration	R	I
Modernize applications (refactor, containerize)	R	C
Implement DevOps and DevSecOps pipelines	R	C
Perform rollback planning and testing (if needed)	R	C
Sign off on migration completion	C	A/R

Table 8. RACI matrix—migrate and modernize

Activity	HPE	Customer
Deploy HPE Morpheus Enterprise for hybrid workload management	R	I
Integrate AIOps and observability (optional)	R	I
Implement FinOps reporting and optimization (optimization)	R	I
Define alerting thresholds, SLAs, and escalation policies	C	A/R
Create operational dashboards and performance reports	R	I
Conduct training and knowledge transfer	R	C
Provide documentation and runbooks	R	C
Transition monitoring and management to customer team	R	A/R

Other considerations

Document review process
If HPE provides documentation as part of the project, each document will initially be developed in draft form. The HPE project manager/lead consultant and customer project manager may schedule working sessions, inclusive of HPE and/or customer personnel, to refine the draft document as it is written.

When the draft document is complete, the HPE project manager/lead consultant will submit the initial release document to customer project manager for review. The customer project manager will be responsible for distributing copies of the initial release document for internal review. The customer project manager is responsible for consolidating customers' comments and for providing a clearly marked version of the draft document to HPE project manager/lead consultant. The customer project manager will have three working days to review and return the consolidated comments to the HPE project manager/lead consultant, unless otherwise agreed to by both parties. If no revisions are received within the three-day

time frame, the document will be considered accepted. HPE will review and evaluate customer comments and respond to them in writing within three working days. Customer comments and HPE's recommendations will be discussed and integrated within three working days into a final version and delivered to the customer's project manager. Delivery of the final version of a document will constitute customer's acceptance of the document.

Change process
HPE may initiate a change in writing to the project. The change will be evaluated, and any project impact will be identified. If the evaluation of a change request submitted by HPE takes more than four hours to complete, the cost of evaluation may be charged to HPE, and any schedule slippage because of performing the evaluation will be documented as a formal change to the schedule. The price, scope, and schedule impact, if any, will be analyzed and documented. The change impact will then be processed for HPE authorization or closure.

The change request will include a description of the change, reason for the change, and initiator of the change, as well as impact to scope, price, quality, schedule, resources, and risks. All changes must be mutually agreed by the parties in writing. Once approved, changes to the initial project will be implemented as described.

If HPE is unable to resolve the disposition of change order, the project will remain as defined in this document.

General assumptions

HPE consulting services are available in contiguous days/weeks only. Each HPE consultant will be utilized for a minimum of 40 hours per week. If the expected hours to be worked are over 40 in any given week, HPE's delivery management team will be notified at least a day in advance of the anticipated work effort by HPE. In this case, HPE Delivery Management will inform you if the additional requested work is approved.

Work on this service engagement will be performed at customer facilities and/or HPE locations, typically between the hours of 8:00 a.m. and 5:00 p.m. local time, Monday through Friday, excluding holidays. Weekend and holiday hours are excluded from this agreement.

Services provided by HPE pursuant to this memorandum of understanding (MOU) are accepted upon performance. Good faith cooperation: HPE acknowledges that successful completion of this project will require full and mutual good faith cooperation.

Where agreement, approval, acceptance, consent, or similar action by either party is required by any provision of this statement of work, such action will not be unreasonably delayed or withheld. HPE agrees that to the extent its failure to meet its responsibilities results in a failure or delay by HPE in performing its obligations under this statement of work, HPE will not be liable for such failure or delay.

Any services or deliverables not documented in Section 2 are considered outside the scope of this MOU.

The HPE team has ownership and accountability for the overall customer project. resources will be responsible for the tasks assigned by this MOU.

Services mean consulting, integration, or technical services performed by HPE Services, and Advisory and Professional Services. **Services** exclude hardware maintenance and repair, software maintenance, or other standard support services provided by HPE (**Support**); software as a service; managed print services; and other managed or outsourcing services.

HPE Services delivery and pricing are based on HPE Services standard terms.

This MOU sets for the terms for the HPE Services portion of a project delivered by HPE Services for an individual customer. To the extent the customer agreement has terms in it that are in addition to or vary from HPE Services standard terms, such terms shall not apply to HPE Services delivery of services except as otherwise expressly agreed by HPE Services in this MOU. The HPE Services project manager is responsible for notifying the delivery lead of any specific terms in its agreement with the customer that have the potential to impose additional or nonstandard requirements upon HPE Services. Prior to implementing any change in HPE Services delivery of the services resulting from such additional or nonstandard requirements, HPE Services must document and obtain HPE Services management approval for any agreed-upon change, revenue treatment modification, or price impact through a change order.

Learn more at

HPE.com/us/en/services/infrastructure-modernization.html

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