



SD-WAN UNDERLAY VISIBILITY FOR TECHNOLOGY ADVISORS

**How to reduce troubleshooting delays,
improve renewal planning, and stay useful
after the SD-WAN sale**

WanAware Technology Advisor Playbook Series

www.wanaware.com

Executive Overview:

SD-WAN can make the WAN easier to manage at the policy layer.

It does not make the underlay simple.

Most client environments still run on a mix of broadband, fiber, MPLS, wireless, satellite, or other access types across multiple carriers and sites. Each service has its own records, contracts, support process, and renewal dates.

That creates a problem for Technology Advisors.

When application performance drops or an outage hits a site, the issue may not be the SD-WAN platform at all. It may be the underlay circuit, the edge device, the carrier handoff, or a contract choice that no longer fits the site.

If no one has one current record of the underlay, troubleshooting gets slower, renewal planning gets harder, and cost issues stay hidden.

WanAware helps advisors build one trusted record of the SD-WAN underlay across carriers, circuits, contracts, sites, and network assets. That gives advisors a stronger way to support clients after the initial SD-WAN sale.

For advisors, that means fewer surprises, clearer client conversations, and a more useful monthly role.

Partner outcome

- Build one current record of the SD-WAN underlay
- Reduce troubleshooting delays and renewal surprises
- Give clients clear monthly actions on circuits, contracts, and risk
- Deliver this as a white-labeled service under your own brand

The Challenge

Clients often buy SD-WAN because they want a WAN that is more flexible, more cloud-friendly, and easier to manage than a traditional MPLS-only model.

That part is real.

But the underlay usually becomes more mixed, not less.

A single client may now rely on:

- Broadband from multiple providers
- Fiber circuits at larger sites
- MPLS at selected locations
- Wireless backup links
- Satellite or microwave at hard-to-reach locations
- Different contract dates and support paths by site

The overlay can help route traffic more intelligently.

It does not remove the need to manage the transport underneath it.

That is where advisors start spending too much time piecing together the underlay before they can solve the real problem. The SD-WAN platform may be visible, but the underlay records are often scattered across carrier portals, spreadsheets, site documents, and email threads.

Questions advisors should be able to answer quickly

- Which circuits support this site?
- Which carrier owns each link?
- Which contracts renew this quarter?
- Which locations depend on aging hardware?
- Which sites are carrying more risk than they should?

What the SD-WAN Overlay Hides

SD-WAN can make the network look cleaner than it really is.

From the top, a client may see centralized policy, path steering, and a simpler management layer.

Underneath that, the advisor is still dealing with:

- Multiple circuit types
- Multiple carriers
- Uneven service levels by site
- Different renewal dates
- Different support teams
- Different hardware at the edge

This is one reason SD-WAN projects can look complete before the operational work is actually under control.

The client may believe the WAN is now “managed,” while the advisor is still dealing with incomplete underlay records and site-by-site exceptions.

That mismatch often leads to slower troubleshooting, missed renewal planning, and site risks that stay hidden longer than they should.

Why the Underlay Still Determines Experience

The user experience still depends on the quality and condition of the underlying links.

If a broadband circuit is unstable, if a backup link is undersized, or if a provider is missing its service levels, the overlay cannot fully hide that.

The same goes for site hardware and configuration details. If records are incomplete, even simple troubleshooting can take longer than it should.

That matters because the advisor is often the first person the client turns to when there is a performance issue, an outage, or a renewal decision to make.

To help quickly, the advisor needs a current record of:

- What each site is using
- Which carriers are involved
- Which circuits are primary or backup
- What hardware is in place
- What contracts and renewal dates apply

Without that, the advisor spends too much time piecing the picture together.

What Technology Advisors Usually Cannot See in One Place

In many SD-WAN environments, the advisor cannot easily see all of the following together:

- Circuit inventory by site
- Carrier assignment across locations
- Circuit IDs and bandwidth details
- [Renewal dates and contract terms](#)
- Edge devices and firmware details
- Which sites have weak backup coverage
- Where costs and service levels no longer match business needs

That slows down routine work.

It becomes harder to prepare for renewals, harder to compare sites, and harder to explain where the real issue sits when performance drops.

This is often the missing layer between the SD-WAN sale and long-term operational value.

Why Underlay Inventory Comes First

Before advisors can help clients clean up costs, plan renewals, or improve site resilience, they need one current record of the underlay.

That record should show:

- What circuits are active
- Who provides them
- Where they terminate

Start small, expand later

Start with underlay inventory
Then add deeper visibility as the client need grows

- What they cost
- When they renew
- What hardware supports them
- Which sites depend on them

Without that foundation, every review starts with manual digging.

WanAware [Asset Inventory Management](#) helps advisors build and maintain that underlay record across sites and carriers.

That gives you a practical base for better client conversations and better ongoing support.

What WanAware Discovers and Organizes

WanAware helps Technology Advisors build one current record of the SD-WAN underlay.

That can include:

Transport circuits

- Cable broadband
- Fiber
- DSL
- MPLS
- 4G and 5G wireless
- Satellite
- Microwave

Circuit records

- Carrier name
- Circuit ID
- Bandwidth

What gets easier when the record is current

- Renewal planning
- Circuit cleanup
- Site risk review
- Bandwidth right-sizing
- Troubleshooting triage

- Location
- Status

Network hardware

- SD-WAN edge appliances
- Routers
- Switches
- Firmware details
- IP addressing details

Carrier contracts

- Renewal dates
- Service levels
- Support contacts

Site-level underlay details

- Primary and backup link structure
- Underlay mix by location
- [Dependencies that affect resiliency and troubleshooting](#)

This gives the advisor a clearer view of what the client is actually running site by site.

What You Can Deliver Once the Underlay Is Visible

Once the underlay is visible in one place, the advisor can provide more than the initial SD-WAN recommendation.

You can help the client with practical follow-through such as:

- Identifying circuits that no longer fit site needs
- Finding underused backup links
- Spotting contracts that need attention soon
- Reviewing whether bandwidth matches real site demand
- Flagging sites with weak redundancy
- Speeding up [troubleshooting when performance drops](#)

This is where the advisor becomes more useful after the sale.

Instead of being pulled back in only when there is a major issue or contract event, you can help the client manage the WAN in a more steady, informed way.

What a Technology Advisor Can Deliver Each Month

A strong monthly service does not need to be complicated.

It usually starts with a short review and a short action list.

Month 1: Build the current underlay record	Monthly: Keep it current and flag issues	Quarterly: Plan ahead
Help the client establish a trusted record of: • Active circuits by site • Carrier assignment • Bandwidth and service details • Key hardware • Renewal dates and contract basics	Provide a short list of actions such as: • Renewal watchlist • Backup circuit review • Underused link cleanup opportunities • Site exceptions that need follow-up • Performance or support issues tied to specific circuits or sites	Guide larger conversations such as: • Bandwidth right-sizing • Site resiliency gaps • Provider consolidation • Hardware refresh timing • Contract strategy before renewal

This gives the client a reason to keep the advisor involved after the SD-WAN rollout is complete.

Monthly advisor deliverables

- Renewal watchlist
- Circuit cleanup list
- Site risk review
- Bandwidth review
- Priority issues for this month

Why This Creates Stickiness

Clients are less likely to switch advisors when that advisor owns the most trusted record of the underlay and helps them act on it.

That matters because the underlay affects everyday operations:

- Site uptime
- User experience
- Troubleshooting speed
- Renewal planning
- Resiliency decisions

When you help the client keep that layer current and manageable, your role becomes harder to replace.

You are no longer tied only to the initial SD-WAN design or circuit sale. You become part of the client's ongoing WAN management rhythm.

Stickiness drivers

- ☐ Trusted underlay record
- ☐ Fewer surprises
- ☐ Better renewal planning
- ☐ Useful monthly actions

Why WanAware Fits Technology Advisors

WanAware fits the way many advisors actually work.

You can start with one client, one group of sites, or one underlay problem that needs attention.

From there, you can build a current record, help the client act on it, and expand the relationship over time.

This matters because many clients do not need a large operational program on day one. They need a clearer handle on the underlay that supports their SD-WAN.

WanAware gives advisors a practical way to provide that.

Deliver It Under Your Brand

WanAware can be delivered as a white-labeled experience, so partners can offer the platform under their own brand.

That helps keep your name in front of the client during reviews, reporting, and ongoing service discussions. It can also strengthen the client experience by tying your advisory role to the platform they rely on.

For partners building a recurring service offer, that branded experience can become an important part of how clients understand and remember the value you provide.

How to Start with Your First Client

Start with one client's SD-WAN environment or one group of sites.

Here is a simple way to begin:

Step 1	Step 2	Step 3
Build the current record of carriers, circuits, contracts, and edge devices.	Find one renewal risk, one cost or cleanup issue, and one troubleshooting or resiliency gap.	Use that to run a simple monthly review with clear next actions.

This keeps the first engagement practical and easy to explain.

It also gives the advisor a repeatable way to show value without making the first phase too large.

First-client quick start

- Inventory the underlay
- Find one cost or cleanup issue
- Find one renewal or resiliency risk
- Set a monthly review rhythm

Common Questions

"The client already has an SD-WAN dashboard."

That may show policy and path behavior, but it usually does not serve as one current record of all underlay circuits, contracts, hardware, and renewal details across carriers.

"We already have carrier portals."

Carrier portals show one provider at a time. WanAware helps you keep one record across providers and sites so you can manage the underlay as a whole.

“Why does this still matter after SD-WAN is deployed?”

Because the underlay still affects user experience, resiliency, renewal planning, and troubleshooting. The overlay does not remove those dependencies.

“Do I need to start with the full WAN?”

No. Most advisors start with one client, one region, or one set of important sites, then expand from there.

Conclusion

SD-WAN can simplify policy and path control.

It does not remove the need to manage the underlay well.

When underlay records are scattered across too many systems, troubleshooting slows down, renewal planning gets harder, and site risk is easier to miss.

WanAware helps Technology Advisors build one current record of the circuits, contracts, hardware, and site dependencies that support the SD-WAN environment.

That gives advisors a practical way to stay useful after the initial sale, support clients more consistently, and build a stronger recurring service model.

Next Steps

New to WanAware?

Join the [Technology Advisor Partner Program](#) and learn how to build recurring services using WanAware.

[Apply to the Technology Advisor Partner Program](#)