



FREE RESOURCE — READINESS ASSESSMENT

SD-WAN Readiness Assessment

Score whether your multi-site network is ready to move to SD-WAN today — sites, links, applications, security and management. Six fillable sections, a 60-point readiness score, and the prioritised gap list you take into vendor selection.

6

SCORED
DIMENSIONS

/60

READINESS
TOTAL SCORE

A4

PRINT &
WORKSHOP
READY

Fillable

TYPE & TICK
IN ANY VIEWER

SITES & TOPOLOGY

LINKS & BANDWIDTH

APPS & QOS

SECURITY & SASE

PREPARED FOR

Cloudswitched Knowledge Library
Cloudswitched Ltd.

PREPARED BY

VERSION

2026 Edition

FORMAT

Interactive PDF

00

How to use this assessment

SD-WAN replaces the traditional hub-and-spoke MPLS pattern with software-defined overlays running on top of whatever underlay you can buy — FTTP, leased line, 4G/5G, or commodity broadband. It promises application-aware path selection, automatic failover, central policy, and a clean stepping-stone to SASE. The promise only lands if you go into the project with a clear map of your sites, links, applications and security boundary.

Walk through six dimensions with your network lead or your managed service provider. **Tick every readiness statement that is fully in place today** — documented, configured, and verifiable. Score each section out of 10 in the box at the foot of the page, then carry the six numbers to the summary on page 07. The yellow underscore lines become real text inputs in any modern PDF viewer; the squares become real checkboxes.

WHAT THIS ASSESSMENT IS

A factual snapshot of your readiness to deploy SD-WAN — sites in scope, link inventory, application traffic priorities, security posture and operational maturity. It is not an SD-WAN design and it does not recommend a vendor; it surfaces the work you need to do before a vendor presentation is useful.

SCORE HONESTLY

Half-measures do not score. Award a tick only where the capability is in place and you could show evidence today. A score **below 6 in any dimension** is a candidate for the top-three priority actions on page 08. Use the gap list to set the agenda for the first vendor workshop.

The six scored dimensions

- **01 Sites & Topology** — sites in scope, user counts, current hub/spoke pattern, cloud-direct exits.
- **02 WAN Links & Bandwidth** — primary and backup links per site, bandwidth headroom, link diversity.
- **03 Applications & Traffic Priorities** — critical apps, QoS today, cloud vs on-prem, traffic visibility.
- **04 Security Posture** — perimeter at each site, inspection capability, ZTNA, SASE ambitions.
- **05 Management & Operations** — central policy, telemetry, change control, incident response.
- **06 Readiness Score Summary** — carry section scores forward, interpret the total, plan gap closure.

01

Sites & Topology

Document every site that will sit on the SD-WAN fabric — HQ, branches, data centres, regular co-working, and any persistent home-office anchor sites. Capture the user count and the role; SD-WAN sizing and licence count both flow from this list.

Site inventory

SITE NAME	LOCATION	USERS	ROLE	EXISTING CONNECTIVITY
HQ / Head office	_____	_____	_____	_____
Branch 1	_____	_____	_____	_____
Branch 2	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Topology readiness statements

- ☐ The **full list of sites** in scope is documented above — no “we’ll add that one later” sites left out.
- ☐ A **target topology** is decided in principle (*hub-and-spoke / partial mesh / full mesh / cloud-direct gateway*).
- ☐ You know whether **direct internet breakout** at each branch is acceptable, or whether traffic must hairpin to HQ / a security stack.
- ☐ **Cloud presence** is mapped — Azure / AWS / GCP regions, M365 tenant location, SaaS dependencies — so the design can land traffic where it belongs.
- ☐ Persistent **home-office anchor sites** for executives / power users have been identified, or explicitly excluded.
- ☐ User counts above are **current**, not aspirational; growth plans (hire pipeline, M&A) over the contract term are noted in the margin.

SECTION 01 SCORE _____ / 10

Aim for 8+. Below 6 = site / topology scoping gap.

02

WAN Links & Bandwidth

SD-WAN binds together whatever underlay each site can buy. Capture the link types, bandwidth and contract status at every site — under-spec or end-of-contract links are the most common cause of an SD-WAN rollout slipping by two quarters.

Per-site link inventory

SITE	PRIMARY TYPE	PRIMARY BW (D/U)	BACKUP TYPE	BACKUP BW	CONTRACT END
HQ	-----	-----	-----	-----	-----
Branch 1	-----	-----	-----	-----	-----
Branch 2	-----	-----	-----	-----	-----
-----	-----	-----	-----	-----	-----
-----	-----	-----	-----	-----	-----

Bandwidth & diversity readiness statements

- ☐ Every site has a **credible second underlay** available (*diverse carrier, 4G/5G, or second-fibre route — not just the same Openreach exchange twice*).
- ☐ **Current utilisation** per site is measured, with peak figures — not just monthly averages.
- ☐ Existing MPLS / leased-line **contract end dates** are documented; renewal lock-ins beyond the SD-WAN target date are flagged.
- ☐ A view exists on whether **MPLS will be replaced entirely** by SD-WAN over internet, or kept as one of the underlays during transition.
- ☐ **Public IP requirements** per site are documented (*for VPN heads, SIP, mail, partner inbound*); portability with the new circuits is checked.
- ☐ Sites where **lead time** for a new circuit exceeds 8 weeks have been identified; mobile / 5G bridges are budgeted where needed.

SECTION 02 SCORE ----- / 10

Aim for 8+. Below 6 = link / underlay gap.

03

Applications & Traffic Priorities

SD-WAN earns its keep when it steers each application across the right path. List the applications that carry real business pain when they sit on the wrong link — voice, video, ERP, EHR, CAD, hosted desktop, M365, line-of-business SaaS — and decide a priority for each.

Critical application inventory

APPLICATION	TRAFFIC TYPE	PRIORITY (H/M/L)	HOSTING	LATENCY / LOSS SENSITIVITY
Microsoft 365 / Teams	Voice + collab	-----	-----	-----
Hosted VoIP / SIP	Voice (RTP)	-----	-----	-----
ERP / line-of-business	-----	-----	-----	-----
Hosted desktop / VDI	-----	-----	-----	-----
-----	-----	-----	-----	-----
-----	-----	-----	-----	-----

Application & QoS readiness statements

- ☐ The **top 10 critical applications** are listed and prioritised — the vendor can map them to SD-WAN steering policy on day one.
- ☐ For each app you know whether traffic terminates **on-prem, in a cloud region, or as SaaS**; the egress point per site is decided.
- ☐ A **traffic visibility tool** (*NetFlow, sFlow, Meraki Insight, ThousandEyes, vendor analytics*) is in place or budgeted, so steering policy can be tuned post-go-live.
- ☐ Voice and video have **measured loss / latency / jitter** baselines per site — the “before” number to compare against.
- ☐ **QoS marking** on the LAN side (*DSCP / 802.1p*) is configured or will be configured as part of the rollout.

SECTION 03 SCORE ----- / 10

Aim for 8+. Below 6 = application / QoS visibility gap.

04

Security Posture

SD-WAN changes the security perimeter. Direct internet breakout at every branch means every branch becomes an edge that needs inspection — either via on-box NGFW, cloud-delivered SSE / SWG, or backhaul to a central stack. Decide the security model before vendor selection, not after.

Perimeter & inspection readiness

- ☐ Every site that will get **direct internet breakout** has — or will have — perimeter inspection, whether on-box NGFW, cloud-delivered SWG, or both.
- ☐ **TLS / deep packet inspection** capability is either in place at branch, or is the agreed responsibility of a cloud SSE provider.
- ☐ **DNS-layer filtering** (*Umbrella, Cloudflare Gateway, equivalent*) is deployed at every site, including remote workers.
- ☐ Inter-site traffic is **encrypted end-to-end** on the SD-WAN overlay — not relying on the underlay alone.
- ☐ **Network segmentation** requirements are documented (*corporate / IoT / guest / payments / PCI / OT*); the SD-WAN overlay can carry them.

Identity, ZTNA & SASE direction

- ☐ Legacy **site-to-site IPsec / SSL VPN** usage is inventoried — you know which tunnels move to the SD-WAN overlay and which stay.
- ☐ **ZTNA / SSE** for remote users is either deployed, selected, or explicitly out of scope for this phase.
- ☐ A **SASE direction of travel** is documented — whether SD-WAN is a stepping-stone to a single SASE platform or stays loosely coupled.
- ☐ All branch & cloud-edge access enforces **MFA**; admin access is on a privileged-access pattern, not shared credentials.
- ☐ A view exists on **compliance scope** (*Cyber Essentials Plus, ISO 27001, PCI-DSS, FCA, NHS DSPT*) and how SD-WAN evidences each control.

SECTION 04 SCORE _____ / 10

Aim for 8+. Below 6 = security model / SASE gap.

05

Management & Operations

SD-WAN's biggest day-two benefit is central policy — one console pushing config to every edge instead of an engineer logging into each router. That benefit only materialises if you have the operational practices to manage from one console: a clean policy model, telemetry pipelines, change control, and an incident process the SOC actually runs.

Central management readiness

- ☐ A **named owner** for the SD-WAN controller / orchestrator is identified (*internal lead or managed partner*) — not “the network team in general”.
- ☐ **Role-based access** to the controller is mapped (*super-admin / network-admin / read-only / vendor*), with named individuals.
- ☐ Policy templates are **versioned** — the same template can be applied across sites instead of bespoke config per branch.
- ☐ **Configuration changes** follow an existing change-control process — ticket, approval, scheduled window, backout plan.

Telemetry & incident readiness

- ☐ **SD-WAN telemetry** (*path quality, app performance, edge health*) ships to a monitoring stack on day one — not retrieved by login to the controller during an incident.
- ☐ Logs ship to a **SIEM or log archive** with a documented retention period that meets your compliance obligations.
- ☐ An **incident playbook** exists for the new failure modes SD-WAN introduces — controller outage, certificate expiry, overlay tunnel flapping, brown-out path selection — not just the old “link down” runbook.
- ☐ A **day-two service model** is agreed: who patches the edges, who renews certificates, who responds to alerts at 2 a.m.
- ☐ **Quarterly reviews** are scheduled to look at app performance, policy drift, capacity headroom and licence consumption.

SECTION 05 SCORE / 10

Aim for 8+. Below 6 = operations / NOC gap.

06

Readiness Score Summary

Bring the five section scores forward and add an overall posture score for the sixth row. The total is out of 60. Anything below 36 means the project is being driven by deadline rather than by readiness — close the lowest-scoring dimension first.

#	DIMENSION	SCORE / 10	PRIORITY (H/M/L)
01	Sites & Topology	-----	☐ H ☐ M ☐ L
02	WAN Links & Bandwidth	-----	☐ H ☐ M ☐ L
03	Applications & QoS	-----	☐ H ☐ M ☐ L
04	Security Posture	-----	☐ H ☐ M ☐ L
05	Management & Operations	-----	☐ H ☐ M ☐ L
06	Commercial & Sponsorship	-----	☐ H ☐ M ☐ L
Σ	OVERALL READINESS TOTAL	----- / 60	

Readiness interpretation

48–60 **SD-WAN ready.** Strong foundations across the board. Move to vendor shortlist and proof-of-concept.

36–47 **Good foundation, gaps exist.** Prioritise any dimension below 6 with named owners and deadlines before contract signature.

Below 36 **Significant gaps.** Close the lowest dimension(s) before committing to a vendor — an SD-WAN project that starts here usually slips by two quarters.

COMMERCIAL & SPONSORSHIP ROW

The sixth row is a posture score, not a dimension this assessment scores in detail. Award 8+ if you have an agreed budget envelope, a named executive sponsor and a 3–5 year contract horizon; 5–7 if budget is approved but sponsorship is thin; below 5 if you have neither.



Priority actions & sign-off

Translate the scores on the previous page into a small number of decisions. The goal is one page of commitments, not a wish list — three actions, three owners, three deadlines. Re-run this assessment in 90 days and watch the curve.

Top 3 priority actions

01

02

03

Additional notes

Sign-off

ASSESSMENT COMPLETED BY	DATE	APPROVED BY
EXECUTIVE SPONSOR	NEXT REVIEW DUE	TARGET GO-LIVE WINDOW

Ready to plan your SD-WAN rollout?

Cloudswitched designs and delivers SD-WAN, SASE and cloud-networking programmes for UK SMEs — vendor-agnostic readiness review, target design, phased delivery and managed day-two operations.

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