



Software-Defined Wide Area Network (SD-WAN) Discovery Questions

Introduction

Here are several conversation starters for SD-WAN opportunities that can uncover a company's basic needs, assess their current solutions, and understand long-term objectives. Use these targeted questions to engage diverse audiences – from CIOs to marketing teams and sales representatives.

Leading questions

1. What applications is your company using today?
2. Do you consider your network to be under control? Why?
 - a. Leverage the discovery questions below to help identify customer pain points because the customer will likely respond with “yes, my network is under control.”
 - b. Further engage with these questions to discover where they are hurting.

CIO/CTO

1. What network services do you currently have in place?
2. If you have an existing MPLS, what are you looking to change about your network services? What challenges and/or limitations are you experiencing with your current MPLS?
3. How do you manage network and security policies at your locations?
4. What is your current WAN architecture? What sort of QoS, if any, does your organization currently have in place?
5. What has been budgeted for next years projects?
6. What applications would you consider heavy usage at your organization?
 - a. **Do you have control over the bandwidth utilization/consumption so other applications don't suffer?**
 - b. **What methods are you using to handle mission-critical (and non-critical) apps so they don't bog down your available bandwidth?**
7. What causes your critical applications to perform poorly?
8. Have you experienced any outages or surges? Do you have recovery or business continuity protocols in place?
9. How are you managing corporate devices?
 - a. **Mobile? Laptops? Etc.**
10. How many internet connections do you have at each of your locations?
 - a. **If they have no secondary/tertiary circuits – what has prevented your organization from purchasing additional circuits?**
11. What does your customer's experience typically look like?
 - a. **What tools are you currently using to measure their experience?**
 - b. **What trends are you noticing in your industry that may change this?**
 - c. **How are your competitors leveraging technology to improve customer interaction and engagement?**
12. Are you exploring any new ways to monetize the digital experience?
13. What new applications are you planning to roll out in the next 12-18 months?
14. Do you expect more applications to move to the cloud in the next 18-24 months?
15. What are your biggest challenges with application rollout and support (ex. Installing patches, monitoring performance, ensuring adequate bandwidth, etc.)?
16. What is the current performance level of business applications (ERP, CRM, etc.) and cloud-based applications? What is your desired level?





Sales

1. What concerns you most about your rep's ability to access critical information to help customers? How do reps handle interactions?
2. Are you integrating your technologies (UCaaS, CRM, etc) to get the most out of them today?
 - a. **Would it be a benefit to do so?**
3. What challenges are reps experiencing with the technology they have today?
4. Are your reps experiencing any failures to access the site from your office? From a client location?
5. What gaps in the customer experience are impeding your overall sales strategy? How do your reps explain downtime to their customers?
6. Which of your customer-facing technologies are getting results? Which ones aren't producing as expected?

Marketing

1. Do you have a seamless experience when running campaigns across a variety of platforms?
2. How often are you running marketing campaigns?
 - a. **How are you tracking their success?**
3. Do you experience buffering issues when streaming or on video meetings (ex. Webinars)?
4. Do you experience any site delays during flash sales or any promotion where traffic peaks for short periods? How do you prepare for these peaks?
5. Has your site performance ever caused you to lose a sales?
6. What methods are you using to reach customers and start engaging conversations.
 - a. **Have you considered AI integrations?**
7. What technologies does your department utilize?
8. Are you currently doing anything to integrate an individual's online and in-person experience? If so, what?



Operations

1. Do you experience any connectivity issues when employees are accessing tools or resources?
2. Have you looked into Automation and how it could be applied to your organization?
3. Do you experience issues with application performance or latency that is impacting the productivity of your employees?
4. Are there busy periods or times of the day that your employees have trouble accessing the network?
5. Does network or application performance ever effect operations?

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