What is your most frustrating system?

Find your people! Join the table that reflects your biggest challenge:

- CRM/AMS
- Data Quality
- Email marketing system
- Integrations
- Social Media Management

The Cost of Standing Still

Assessing Technical Debt in Your MarTech Stack

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marketing, membership, communications + tech

MAY 12–13, 2025
WASHINGTON, DC

WALTER E. WASHINGTON
CONVENTION CENTER

THE FUTURE
IS YOURS TO CREATE

Why, hello there!

Evan Reid

"Powered by tacos, sarcasm, and unrelenting curiosity."

ASHA

Tracie Harris

"Driven by creativity, grounded by rescue pups."

DelCor Technology Solutions

Rhoni Rakos

"Association Ally, CX Champ, Paw Patrol Parent"

Ellipsis Partners

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THE FUTURE IS YOURS TO CREATE

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Evan Reid

Senior Director of Analytics

ASHA

Tracie Harris

Director, Marketing

DelCor Technology Solutions

Rhoni Rakos

Lead Consultant

Ellipsis Partners

On the Docket

- What is Technical Debt
- Why You Should Care
- How to Calculate It
- Case Studies!

What Is Technical Debt?

- Future cost of reworking your systems
- "Borrow" now, pay more later
- Can be incidental or strategic

Gimme Some Examples

- X Outdated Technology Stack
- X Unintegrated Systems
- X Poor Data Quality
- X Absence of Systems

- X Inefficient/Manual Processes
- X Lack of Training
- X Lack of Omnichannel Delivery Platforms

And It's Bad Because...

Impacts Revenue

Decreases Brand Value

How?
- You can't reach the right people
- You can't share all the amazing things you're doing effectively
- You can't personalize touchpoints or create well-crafted messaging

Case Study 1: Email Automation System

- **Problem Statement:** My email marketing system is old and janky and doesn't help me achieve my goals
  - I can't create the audience segmentations I want
  - I can't send the types of journeys I want
  - I can't use omnichannel delivery

Anyone have experience with this?

Were you able to make a case to upgrade or make changes?

Case Study 2: Integration and Data Quality

- **Problem Statement:** I have the modern email system. I have the modern AMS. But they aren't integrated, and I don't trust the data.
  - I need to use manual processes to move lists from the AMS to the marketing system
  - I'm not sure I'm reaching the right members
  - I can't create the personalization I want, which affects my sales
  - The data is different in my email marketing and AMS, I'm not sure what's correct

Anyone have experience with this?

Were you able to make a case to integrate systems?

Breakout Activity!

Find your People!

Which types of marketing technical debt resonates with you most?

- CRM/AMS
- Data Quality
- Email marketing system
- Integrations
- Social Media Management

Discuss These Questions:

- What problems are you encountering?
- What do you wish you could do but can't?
- What is the lost opportunity?

Bring it Back Now Y'all

What did you discuss?

- What challenges are you encountering?
- What do you wish you could be doing but can't?
- What is the lost opportunity?

- CRM/AMS
- Data Quality
- Email marketing system
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- Social Media Management

We Have Problems... Now What?

Document → Evaluate Impact → Envision the Future → Develop a Roadmap

Step 1 - Document

- **List all systems** in your tech stack
- **Record** platforms, tools, customizations, and workarounds
- **Identify known issues** (slow performance, duplicate records, manual processes)

Purpose:

Make hidden debt visible

Step 2 – Evaluate Impact

What are the impacts/costs of your current technical debt?

Impact can take many forms

- Estimate extra staff hours (manual fixes, manual processes)
- Assess impact on member engagement and revenue
- Identify potential risks (security, compliance)

Step 3 – Envision the Future

Identify system requirements

- Could be one platform, or multiple modifications to current processes

- Consider both current technical debt and current organizational need

- Do a market scan to identify current technologies and approaches

- Identify the costs associated with your recommendation

What is an ideal, yet **realistic**, replacement?

Step 3 – Envision the Future

Be realistic!

Step 3 – Envision the Future

Seriously, this will not work if you are not realistic.

Step 3 – Envision the Future

What are we going to be?

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Step 1: Document the Current State

System	System Costs	Issues
Email Marketing System ("old and Janky")	$40,000 per year for licensing	• Lack of audience segmentation • No customer journeys • No omnichannel delivery

Step 1: Evaluate the Impact

Issues	(This is Your Technical Debt)	
	Work Around	Workaround Cost
Lack of Audience Segmentation	Staff manually cuts lists for each blast email	Equivalent of 2 FTEs support email marketing: **$300,000**
No Customer Journeys	Communication to members are disjointed, impacting the member experience	10% Lower Retention (1k members at $150DR and $50NDR = **$200,000**)
No Omnichannel Delivery	Staff posts same message across channels	Equivalent of .5 FTEs support social media marketing: **$75,000**

Cost of Standing Still:

$615,000/Year

Step 3: Envision the Ideal State

Ideal System(s)	Ideal State Costs		
	Licensing Costs	Implementation Costs	Training Costs
New Email Marketing System (year 1)	$80,000	$100,000	$20,000

Cost of Change:

$200,000

(+ 2.5 reallocated staff positions, first year)

Step 4: Compare the Cost of the Tech Debt!

Cost	Current	Ideal
Licensing	$40,000	$80,000
Opportunity Cost	$200,000	N/A
Staff Salary on Workarounds	$375,000	N/A (Staff time repurposed)
Implementation	N/A	$100,000
Training	N/A	$20,000
TOTAL	**$615,000**	**$200,000**

NOTE this is **not** your budget, this is the **cost of the technical debt**.
If you are discussing the budget, you need to include the cost of the 2.5 FTEs

Now, Let's Balance the Budget

Cost	Current	Ideal
Licensing	$40,000	$80,000
Opportunity Cost	$200,000	N/A
Staff Salary on Workarounds	$375,000	N/A
Implementation	N/A	$100,000
Training	N/A	$20,000
Repurposed Staff Salaries	N/A	$375,000
Totals	**$615,000**	**$575,000**

Now we're including the repurposed staff salaries for budgeting purposes.

Think Longterm!

	Year 1	Year 2	Year 3
Current System	$615,000	$615,000	$615,000
Ideal System (with 2.5 FTEs)	$575,000	$455,000	$455,000
Per Year Difference	$40,000	$160,000	$160,000

Year 2 and beyond does not require training and implementation costs.

Considerations:

- Estimates are ok, if you can support them.
- This does not have to be a full system selection.
- Unrealistic estimates decrease credibility.

Don't let perfection be the enemy of progress.

- Winston Churchill

Step 4 – Roadmap

Plan Your Escape!

- **Short-Term:** Quick wins (clean duplicates)

- **Mid-Term:** Upgrade/replace major systems (modernize CMS)

- **Long-Term:** Build a unified, modern tech ecosystem with regular audits
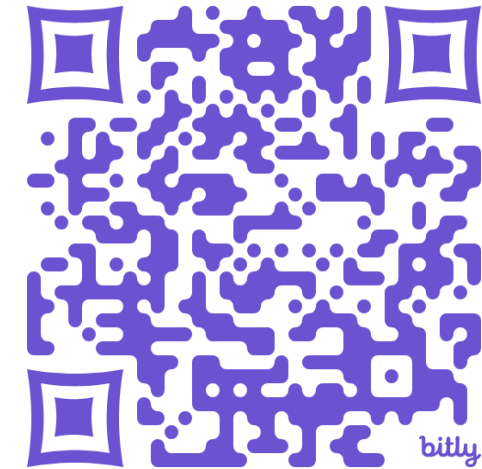
Group Discussion

- What's one thing you took away from today?
- Questions?

Our Top 3 Take Aways

- Be an advocate (data nerd...).

- Document. Evaluate. Envision. Roadmap.

- Show them the $!

Thank You!

Download the presentation and documentation worksheet here:

Complete Your Session Evaluation