asae annual meeting & exposition

AUGUST 9-12, 2025
LOS ANGELES, CA

The Strategic Cost of Standing Still

Mapping and Solving Technical Debt

Room 405

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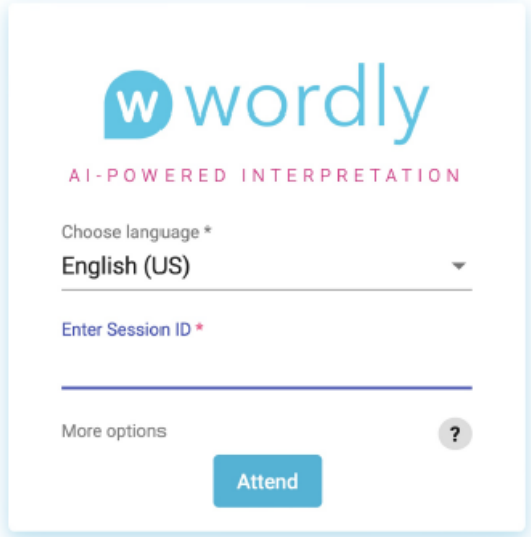

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Thanks for joining us!

Evan Reid

Senior Director of Analytics

American Speech-Language-Hearing Association

Wes Trochlil

President

Effective Database Management

A Quick Thank You

Rhoni Rakos
Lead Consultant, Digital Strategy
Ellipsis Partners

Tracie Harris
Director, Marketing
DelCor Technology Solutions

MMC+Tech Resource

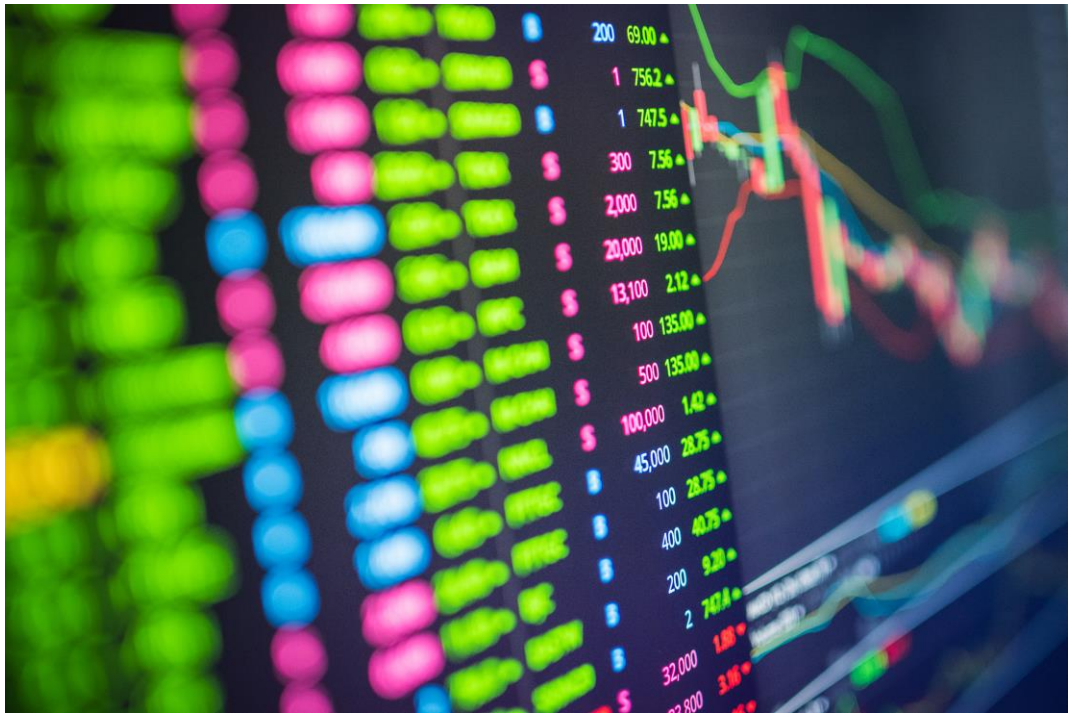
- Full worksheet for evaluating technical debt
- MMC presentation on technical debt in your marketing stack

On the Docket

- Understanding and Identifying Technical Debt
- Methods of Assessment
- Road Mapping your way out

What is Technical Debt?

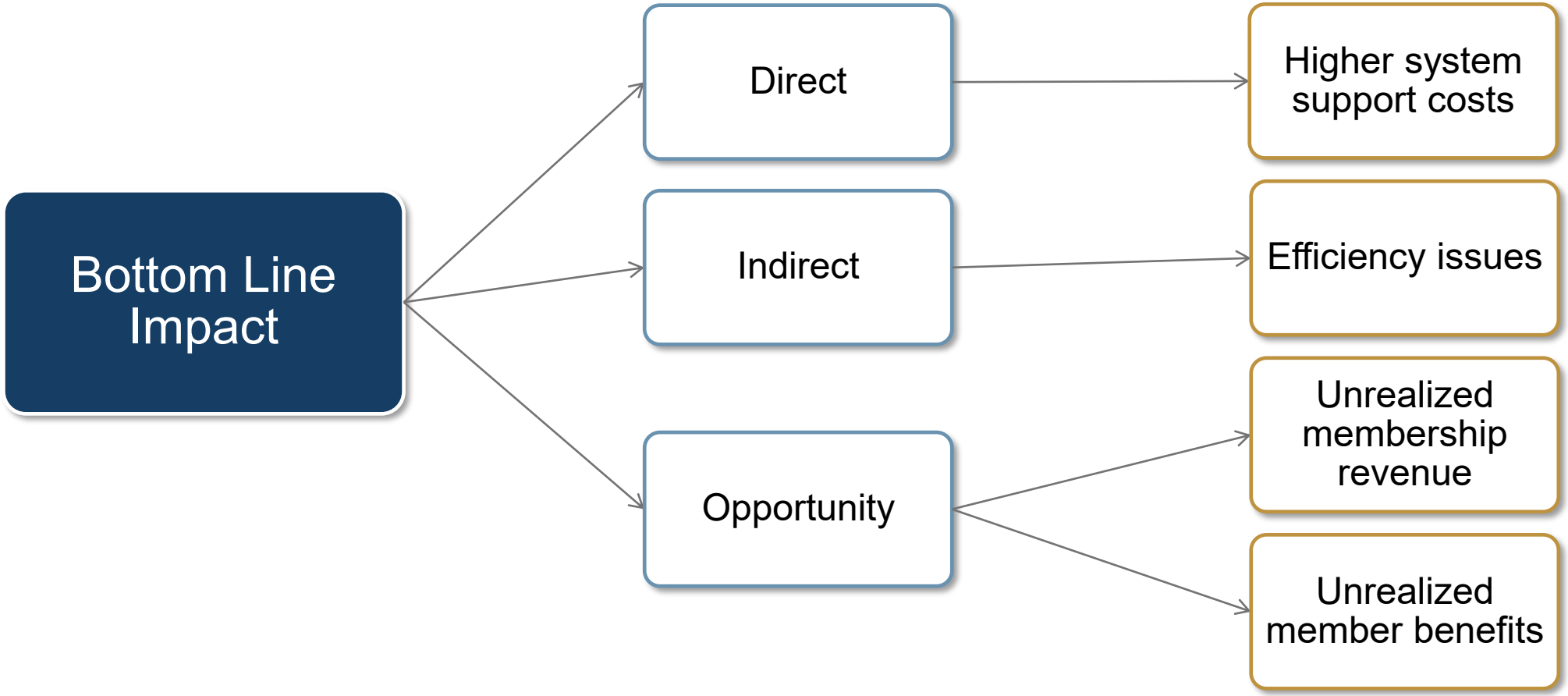
- Future cost of reworking your systems
- "Borrow" now, pay more later
- Can be incidental or strategic



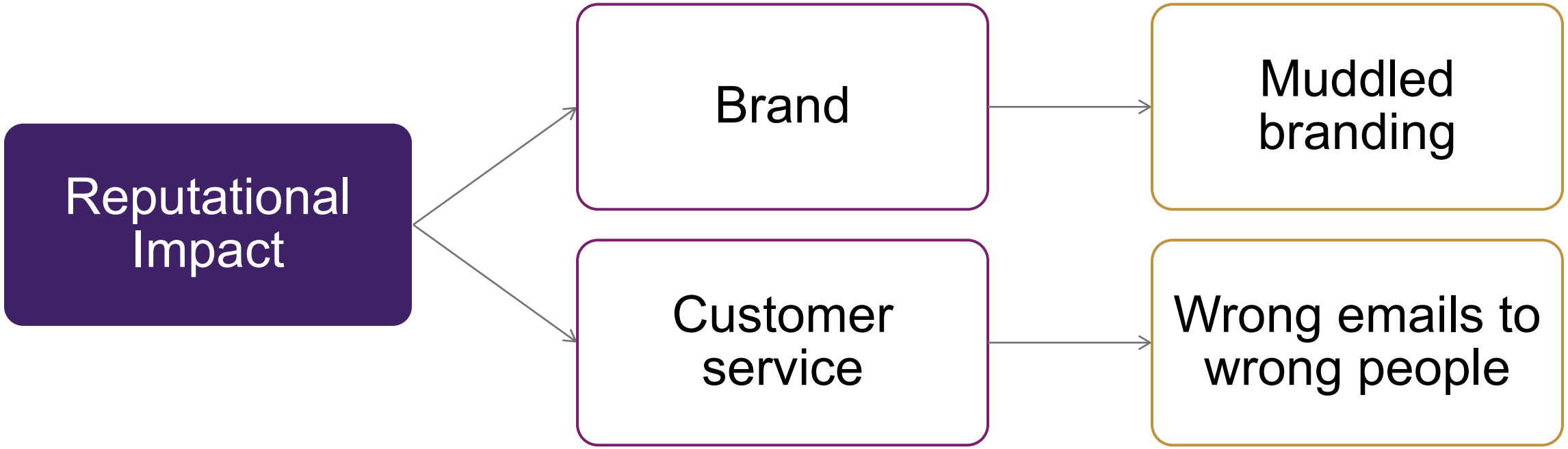
Tech Debt Challenges

- X Outdated Technology Stack
- X Unintegrated Systems
- X Absence of Systems
- X Manual Processes
- X Lack of Training
- X Poor Data Quality
- X Poor Process Decisions

Tech Debt Challenges



Tech Debt Challenges



Tech Debt Continuum

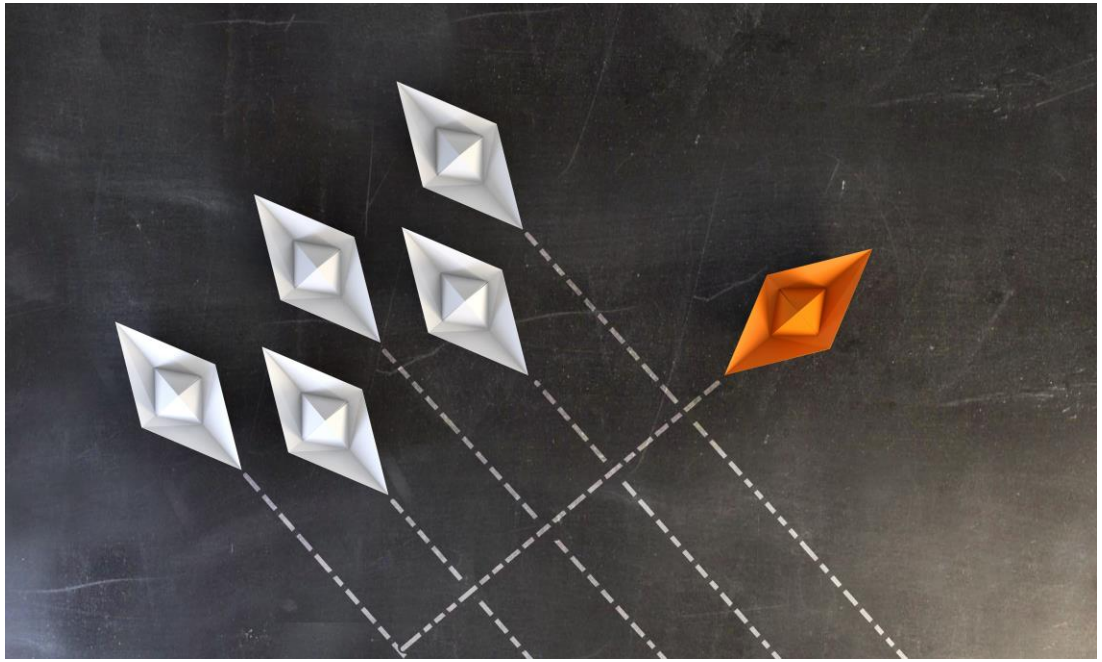
Pencil and Paper is Fine

The Bleeding Edge

Tech Debt Continuum

Tech Debt Continuum

Tech Debt Continuum



Incurring Technical Debt is a **Strategic Decision**

- Transparency
- Understand costs
- Have a plan

Scenario 1:

Our association has no formal data governance framework. Data lives in multiple systems with unclear lineage, there's no central data dictionary to define key fields, and no coordinated effort across departments to manage data quality—forcing teams into manual workarounds for every report or integration.

- **Inefficient Operations**
- **Poor Decision-Making**
- **Campaign Misfires**
- **Member Frustration**
- **Compliance Exposure**

Scenario 2:

As we prepare to move to a new AMS, we must choose: spend time and budget cleaning outdated and duplicate records first or migrate as-is and face inflated license fees, broken integrations, and a costly manual cleanup afterward.

- Inflated Costs
- Delayed Go-Live
- Broken Integrations
- Member Confusion
- Adoption Resistance

What is your scenario?

- Five minutes
- Roughly document a scenario where you currently have technical debt
- Discuss with your neighbors

What is the Trigger?

Gut Feeling

Technical Debt Positioning

Known Pain Points

Stuff Broke

Evaluation is fun!

- Where are you on the technical debt spectrum?
  - Translate technical debt into a common metric… cost.
  - Evaluate existing systems
  - Quantify new technical debt moving forward
  - Justify cost of upgrades and new implementations

Evaluation


Document
Evaluate Impact
Envision Alternative
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)
- **Update** documentation as new debt is incurred

Purpose:

Make hidden debt visible

Current State Costs

- What is the cost to maintain your current stack?

- AMS → $45,000 per year
- LMS → $25,000 per year
- Infrastructure/hosting → $60,000
- Data governance efforts → $0

Step 2 – Evaluate Impact

What are the impacts/costs of your technical debt?

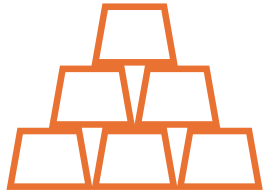
Impact can take many forms

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

Think Strategically About Costs

Opportunity Costs

What opportunities are you missing out on?



Sunk Costs

What are you doing to make up for missing functionality?

Opportunity Costs

- Your website is not mobile friendly → losing 10% of potential non-dues revenue
- Segmented membership data not available to your marketing platform → 15% fewer members renew
- Outdated page structures and missing metadata → lower SEO and site traffic → 18% fewer new members
- No real-time dashboards to inform leadership decision-making → 5000% decrease in leadership efficiency

Sunk Costs

- Staff data review due to lack of faith in AMS data → 25hrs per week
- Support contracts for legacy systems → $75,000 per year
- Internal hosting of key data processes → $100,000 per year (no scaling)
- Lack of integration of AMS with marketing stack → 2 FTE required for list generation/segmentation → $300,000 salary and benefits

Step 3 – Envision the Alternative

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?

Cost to Upgrade

- New platform cost → $50,000 per year for a new/different AMS
- Training costs → $10,000 for staff training costs
- Transition costs → $45,000 for data migration and implementation
- Be sure to identify first year and ongoing costs

Be sure to identify Implementation and ongoing costs

Scenario 1: Lack of Data Governance

Current State

$0

No Data Governance

Opportunity

$100,000/yr

- Lost NDR from mis-targeted lists
- 10% Lower renewal rate
- 15% Lower acquisition rate

Sunk

$200,000/yr

- ½ FTE used for data cleaning
- CAN-SPAM incident (legal+PR+fine)
- Unused/redundant tool development

Upgrade

$150,000 first year
$100,000/yr

- ½ FTE to lead program
- DG Framework and Implementation
- Staff Training

Scenario 1: Lack of Data Governance

Current State Costs
per Year

$0+$100,000+$200,000 = **$300,000**

vs.

Ideal State Costs
first year/per year

$150,000 first year **/ $100,000**

Scenario 1: Lack of Data Governance

Current State	Opportunity	Sunk	Upgrade
$0	**$15,000/yr**	**$100,000/yr**	**$125,000 first year** **$75,000/yr**
No Data Governance	- Lost NDR from mis-targeted lists - 10% Lower renewal rate - 15% Lower acquisition rate	- ½ FTE used for data cleaning - CAN-SPAM incident (legal+PR+fine) - Unused/redundant tool development	- ½ FTE to lead program - DG Framework and Implementation - Staff Training

Scenario 1: Lack of Data Governance

Current State Costs
per Year

$0+$15,000+$100,000 = **$115,000**

vs.

Ideal State Costs
first year/per year

$125,000 first year **/ $75,000**

Scenario 2: Data Cleaning in Transition

Current State

$120,000

- Cost of vendor led data transition

Opportunity

$50,000/yr

- Lower hosting costs
- Lower licensing costs
- 15% Lower renewal rate

Sunk

$50,000/yr

- DB structure for old data model
- Transition scripts for dirty data

Upgrade

$185,000

- Time to clean dataset
- Project timeline delay
- Current state costs

Scenario 1: Lack of Data Governance

Current State Costs
First year

$120,000+$50,000+$50,000 = **$220,000**

vs.

Ideal State Costs
First year

$185,000

Scenario 2: Data Cleaning in Transition

Current State

$50,000

- Cost of vendor led data transition

Opportunity

$10,000/yr

- Lower hosting costs
- Lower licensing costs
- 15% Lower renewal rate

Sunk

$5,000/yr

- DB structure for old data model
- Transition scripts for dirty data

Upgrade

$85,000

- Time to clean dataset
- Project timeline delay
- Current state costs

Scenario 1: Lack of Data Governance

Current State Costs
First year

$50,000+$10,000+$5,000 = **$65,000**

vs.

Ideal State Costs
First year

$85,000

What is your scenario?

- Five (more) minutes
- What are some costs around your scenario
  → get creative… realistically.
- Discuss with your neighbors

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

Road Map

Structured → Actionable → Priority driven

Steps

1. Discovery/Needs Assessment
2. Analysis and Strategy
3. Planning
4. Solutions
5. Continuous Improvement

Steps

Discovery/Needs Assessment

- Inventory of systems and data sources
- Documenting debt

Steps

Analysis and Strategy

- Analyze debt and determine impact
- Set priorities (low-hanging fruit)

Steps

Planning

- Track backlog
- Execute quick wins
- Develop maintenance plans

Steps

Solutions

- System debt – update or replace
- Data debt – clean, centralize, data governance

Steps

Continuous improvement

- Regular review
- Track key metrics
- Communicate with stakeholders

Example

Step	Systems Debt Actions	Data Debt Actions
Discovery	Inventory platforms, document issues	Inventory sources, assess quality
Analysis	Document functional needs	Data dictionary, system mapping
Planning	Tech debt backlog, quick fixes plan	Prioritize data fixes, set policies
Solutions	Reinstall or replace tech	Cleaning, integration, governance
Improvement	Review cycle, metrics, documentation	Data quality dashboards, stewardship

What is your scenario?

- Five (more) minutes
- How can you get started?
- Who should be involved in the roadmap?
- Discuss with your neighbors

Questions?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IMAGINE THE POSSIBILITIES
AUGUST 9-12, 2025
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Key Takeaways

- Technical Debt is a strategic choice
- Document the real-world costs of your debt
- Have a plan!

For more Tech Debt…

Empower Your Association: Leverage Technical Debt for Strategic Technology Investments

Monday, Aug 11, 2025 3:30 PM - 4:30 PM PDT

Location: 501 ABC, Los Angeles Convention Center

Evaluation

- How did we do?
- What did you take away?

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