

TECHNOLOGY ROAD MAP FRAMEWORK

How to sequence platform decisions strategically from assessment to an AI-ready ecosystem.

Once your technology assessment is complete, the question is no longer "what should we buy?" It's "in what order?" This framework gives you the sequencing logic, selection criteria, and scenario-planning tools to answer that question confidently regardless of your budget.

PART 1: THE SEQUENCING RULES

- 1

Hub First — Always
The AMS or Customer Data Platform is the foundation on which everything else is built. Never select a website platform, LMS, community tool, or AI layer before you know what your hub will be. Downstream tools selected before the hub are often incompatible creating new integration debt before the old debt is resolved.
- 2

Don't Let Perfect Be the Enemy of Sequential
You don't have to solve everything at once. Build a phased plan with clear decision gates. Short-term actions (0–6 months) should solve immediate pain without locking in future constraints. Medium-term priorities (6–18 months) follow once the hub is selected or confirmed.
- 3

Diagnose Before You Shop
Every platform decision should trace back to a gap identified in your assessment. If you cannot name the specific operational or member experience problem a tool solves, it's a shiny object, not a strategy.
- 4

The AI Test
Before adding any AI-powered tool, ask: Does this solve a problem our assessment actually diagnosed? Does it keep humans where judgment matters? Does it leverage assets only our association has? If the answer to any of these is no, defer the investment.

PART 2: THE SEQUENCING TIMELINE

Horizon	0 – 6 Months	6 – 18 Months	18+ Months
Focus	Assess, decide on hub, relieve immediate operational pain	Implement hub, select and build downstream integrations	Add AI layers, analytics, LMS, advanced community features
AMS / Hub	Evaluate options; confirm or select hub platform	Implement; migrate data; establish integrations	Optimize; add AI features as vendor roadmap matures
Website	Audit current site; define requirements	Redesign and launch with GEO-ready content architecture	Ongoing content and SEO/GEO/AEO optimization
Community	Assess current listserv/forum state	Select and launch modern community platform with SSO	Grow moderation capacity; integrate with AI assistant
LMS / Education	Inventory current CE delivery tools	Evaluate LMS options that integrate with hub	Implement LMS; build revenue-generating content catalog

Certification Mgmt.	Document manual process; calculate staff time cost	Select certification management system; configure workflows	Automate full certification lifecycle including renewals
AI Tools	Draft AI policy; assess vendor AI roadmaps	Deploy first AI tool against a diagnosed need (e.g., AI search or chatbot)	Expand AI layer as content and data architecture matures
Marketing / Comms	Audit email automation and segmentation capability	Integrate marketing automation with new hub data	Enable AI-powered personalization and predictive content

PART 3: THE SELECTION CRITERIA MATRIX

Apply these criteria to every platform under consideration. They should drive your RFP, your demo agenda, and your final decision. A tool that fails on integration or lifecycle cost is not a bargain at any price.

Criterion	Questions to Ask in Every Demo & Proposal
Integration Capability	- Does it connect to our AMS/hub bidirectionally not just read-only? - What does the integration require: native connector, API, middleware, or custom development? - Who owns and maintains the integration when things change? - Show us a live demo with our AMS. Don't tell us it's possible.
Lifecycle Cost	- What is the total cost over three years: including implementation, migration, training, support, and upgrades? - What triggers price increases? (users, data volume, feature tiers) - What customization costs are not included in the base license? - What does it cost to leave? (data export, contract exit terms)
Scalability & Accessibility	- How does the system perform at 2x our current member volume? - Does it meet WCAG 2.1 AA accessibility standards — and can you prove it? - Is there a mobile-native experience for members and staff? - How have other clients of similar size used it to grow?
Culture & Vendor Fit	- What is your support model and what are the SLAs? - Talk to us about a time a client implementation went wrong. What happened? - Can we speak with three reference clients at our revenue size? - How do your company values align with ours?
AI Roadmap	- What AI features are live today? What is in the 12-month roadmap? - How is AI trained — on our data, your platform data, or third-party models? - What are the data privacy and security implications of your AI features? - How will your AI roadmap evolve as member expectations for AI-powered service increase?

PART 4: MAP YOUR ECOSYSTEM — NOW AND NEXT

Use the table below to document your current ecosystem and your future state target. Complete the 'Now' column based on your assessment. Complete the 'Next' column after Phase 3 of your assessment process.

Function	Current Tool	Key Pain Point / Gap	Future Tool	Priority / Timeline
AMS / Member Data Hub				
Website / CMS				
Online Community				
Learning Management (LMS)				
Certification Management				
Event Management				
Marketing Automation / Email				
AI-Powered Tools				

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