



Strategy before Spend.

How growing organizations stop wasting money on systems, vendors, and AI by fixing the right problem first.

WRITTEN BY

Tonia Dupler & Heather Troidl

*Where IT Strategy
Meets Action*

START HERE

Before the next big technology decision.

Most failed system investments are not caused by bad software. They are caused by unresolved operating decisions that get pushed into the software.

The definitions no one agreed on. The process no one redesigned. The report no one owns. The data no one trusts. The workaround everyone leans on but no one wrote down.

Those gaps used to cause inefficiency and reports nobody believed. Now they are the foundation your automation and AI will run on, and AI will not fix an unclear operating model. It will only run faster on top of it. A major technology decision is never just an IT decision. It's one of the largest checks you will write, and it reshapes how the whole organization runs, so getting it wrong costs far more than the price of the software.

We watched this almost go wrong with real money on the line. A growing membership organization, with smart leadership and no senior technology leader in the room, was about to spend between \$150,000 and \$250,000 to replace its CRM and membership platform. The vendor had done its job: Polished demo, confident plan, everyone ready to feel relieved.

We were asked to look before the money moved. The platform was not the problem. Underneath, the same data lived under conflicting definitions, reports were reconciled by hand before every board meeting, and no one owned the answer to the simplest question in the building: Which number is right? The new system would have worked exactly as designed, and imported every one of those conflicts into more expensive software.

So we said the thing no vendor is paid to say: Stop. Fix the foundation first, then buy. That one call prevented more than \$200,000 in misaligned spend, and when the new system finally went in, the reporting was trusted on day one.

We are Tonia Dupler, who founded MTC, and Heather Troidl, her partner, and that is the most common story we know. This guide is for the leader who has to approve a decision like that: A CEO, COO, CFO, executive director, founder, or board member. Maybe you have no senior technology leader at your side. Maybe you have a capable team that is simply too close to the work, and too stretched, to step back. Either way, this is the test we run before anyone signs anything. So let's start there.

THE CHECKLIST

7 questions to answer before you sign anything.

Before you approve a system, a vendor, an integration, or an AI initiative, you should be able to answer these clearly. If you cannot, the real problem is not the software yet.

- 01** **What business outcome are we actually trying to improve?** “Replace the system” is not an outcome.

- 02** **Which specific number, workflow, or report is untrusted today?** If you cannot point to one, the scope will drift.

- 03** **Who owns the definition?** Every critical term, active customer, member, revenue, risk, needs an accountable owner.

- 04** **Which system wins when two disagree?** If you have not decided, the project will decide for you, through workarounds.

- 05** **What manual work is propping up a broken process?** Reconciliation and re-keying are signals, not quirks.

- 06** **What named risk are we reducing?** Financial, compliance, security, capacity, or decision risk. Name it, or you cannot prove the value later.

- 07** **What has to be fixed before the tool can succeed?** Definitions, ownership, and data cleanup usually come before any vendor configures anything.

If those answers are not clear yet, you may not be ready to sign. That does not make the investment wrong. It means the foundation needs attention before the money moves. The rest of this guide is how we help you get those answers.

01 —

The symptom is **not** the problem.

Most leaders do not call us for strategy. They call because something got expensive, visible, or risky: A vendor contract on the table, an implementation drifting, an audit approaching, a board asking about AI, manual work eating the team.

Those are real. But they are usually symptoms. Underneath almost all of them sits the same short list: Requirements nobody agreed on, data defined differently across teams, processes never designed to work together, no single source of truth, and no clear owner. You can hear it in the request itself:

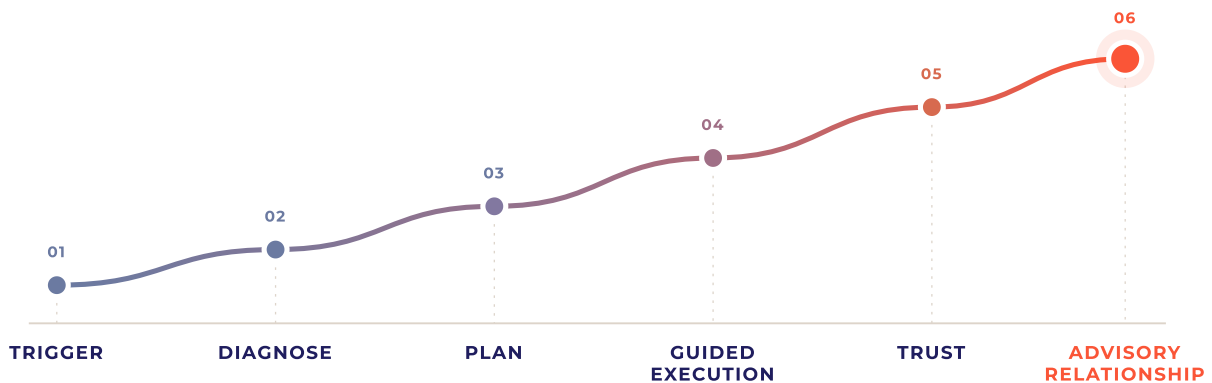
- “ **“We need a new CRM”** often means no one agreed on what counts as an active customer.
- “ **“The reports are wrong”** often means each system is correct by its own definition.
- “ **“What is our AI strategy?”** often means there is no trusted, governed data for AI to act on.
- “ **“The system does not work”** often means the process was never redesigned as the organization grew.

Structural problems do not disappear when a new platform goes live. They get imported, integrated, automated, and exposed in the next audit, and then they get blamed on the new system. As we tell clients: A system replacement without operating clarity is not transformation. It's relocation.

Tonia learned this by running a full ERP implementation from the inside. The software worked. What nearly sank it was the definitions, workflows, and ownership nobody had settled first. It's why we start with how your organization actually runs, not the tool you were sold.

You can usually feel this kind of problem before you can name it. Different people give you different answers to the same question. A simple report has to be cleaned up by hand before anyone trusts it. The same record lives in two systems that never quite agree, so someone re-keys it. And every new tool somehow recreates the last one's problem. None of that is a software bug. It's the operating model, not the platform, asking for attention. If that sounds familiar, a new system will not save you. A clearer decision will.

HOW THE ADVISORY WORKS: A PREVIEW



“Tonia helped us evaluate our IT environment, upgrade our internal systems, and plan for the future, shifting us from a reactive to a more strategic approach. We really trust her, and that is so valuable to have in a partner.”

JENNY ROTTMANN, THE GENESIS FUND

02 —

The integration illusion.

Here's something we hear constantly: We moved to the cloud years ago, the systems are connected, and things still don't run smoothly. Why?

Because a connected environment is not the same as an intelligent one. Integration moves data between systems. It does not make the data mean the same thing once it arrives.

The culprit is almost always definitions.

Member

Customer

Participant

Account

Active

Completed

Revenue

Eligible

These sound like simple words until every department uses them slightly differently. Membership counts one version of "active." Finance recognizes another. Programs tracks participation one way. Leadership sees a dashboard built from all three and assumes the numbers mean the same thing.

At fifty people, that is annoying but manageable. At five hundred, it quietly taxes every decision you make.

This is the part Heather knows in her bones, from leading the privacy and data governance work required to make GDPR operational. The lesson was bigger than compliance: Governance is how an organization agrees on definitions, ownership, access, quality, and accountability before those gaps show up in reporting, operations, customer experience, or AI.

That's what most people get backwards. Governance is not a checklist for an auditor. It's the operating agreement that lets you scale without fragmenting.

It answers five questions, out loud and in writing:

- 1 What do our core business terms actually mean?
- 2 Who owns each piece of our data?
- 3 How does a definition change, and who approves it?
- 4 How are privacy and access managed?
- 5 What quality standards apply, and who enforces them?

Answer those, and your systems, your people, and eventually your AI work from the same version of reality.

Skip them, and you can buy the most sophisticated warehouse on the market and still be stuck. You cannot warehouse your way out of definitional conflict.

A warehouse without governance is just expensive storage for the disagreements between your departments.

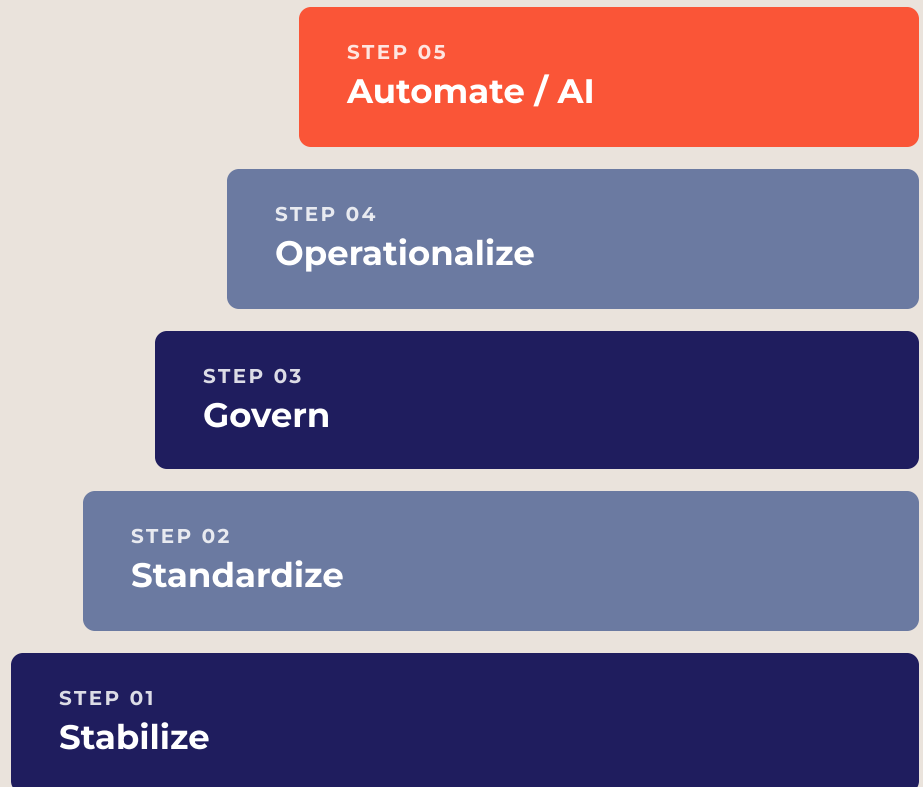
03 —

AI is not the **starting line**.

The AI pressure is everywhere right now: The board wants an AI plan, a competitor announced expanded AI investment, a vendor promised an AI assistant that will change everything.

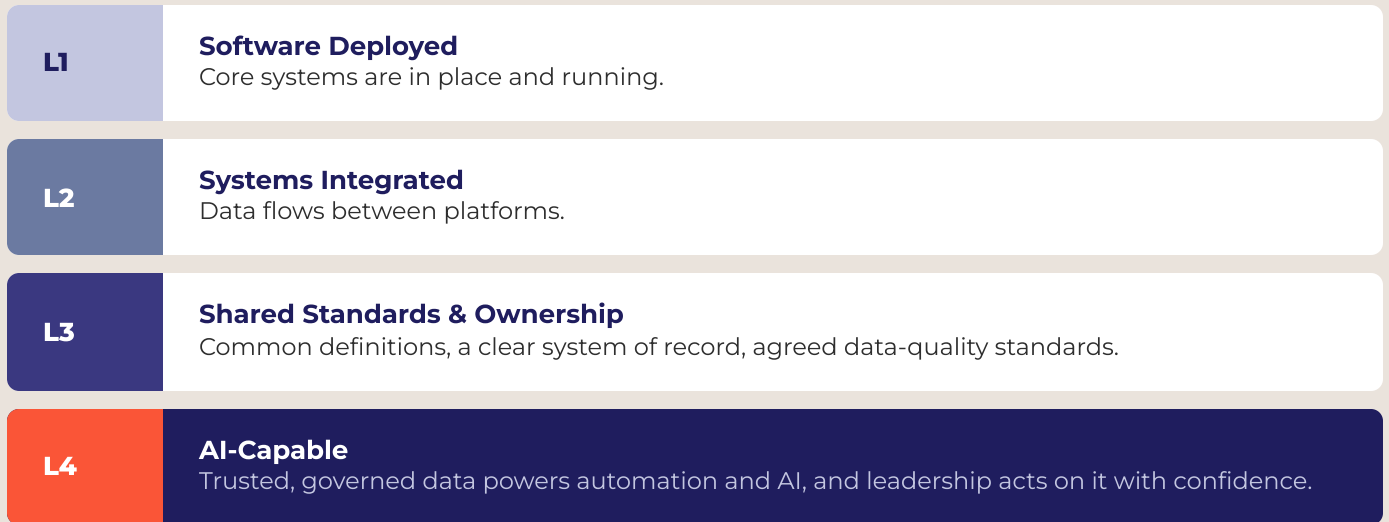
So here is the most useful sentence we know on it: AI magnifies the quality of your data foundations. It does not repair them. Point it at clean, governed data and it's powerful. Point it at the fragmentation from the last chapter and it amplifies the mess, faster and more confidently than any person could. We have watched AI tools give two answers to the same question, simply because two systems defined a customer differently. Blame the AI and you miss the point: It was reading exactly what you gave it.

That's why AI is not the first step. It's the reward for structural discipline.



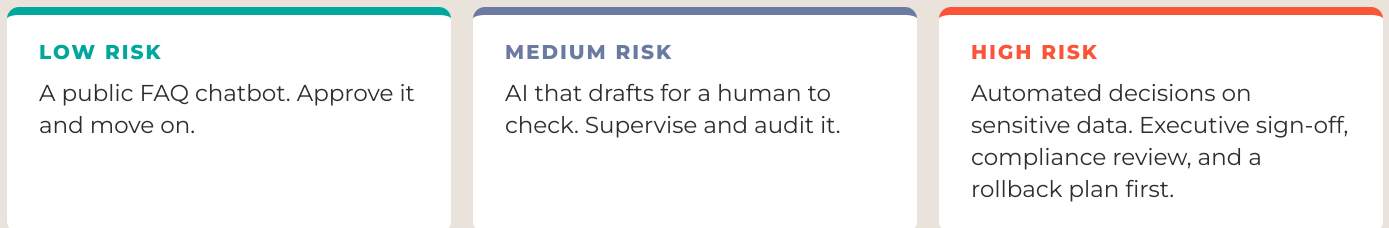
Before you say yes to anything with AI in the name, find out where you stand:

THE READINESS LADDER



Most organizations are sure they are further along than they are. The majority sit between Level 2 and Level 3, connected but never aligned on what the data means or who owns it. That ceiling is structural, not technical. You break through it with decisions, not purchases.

When you are ready to put AI to work, score each use case on three things: How sensitive the data is, whether the AI assists or decides, and how widely it reaches.



The rule underneath it all: Automate the busywork, never the judgment.

04 —

Fix this first: the order that protects the money.

If we could put one idea on every technology budget, it's this: Order matters more than effort. Doing the right things in the wrong order is its own kind of waste. The sequence we use is simple to say and hard to skip: Stabilize, standardize, govern, operationalize, and only then automate or add AI. In practice, five moves, in order:

- 01 Define your core entities.** Agree on what you mean by a Person, a Company, a Contract, and a Transaction.
- 02 Clarify system-of-record ownership.** Decide which system is authoritative for each kind of data, with a named owner.
- 03 Establish data decision rights.** Decide who can create or change a definition, so it holds under pressure.
- 04 Align your identifiers.** Resolve the mismatched IDs that keep systems from recognizing the same customer.
- 05 Sequence AI after governance.** Deploy it on trusted data, not as a shortcut around the work.

Heather puts the difference plainly:

“Plenty of advisors can help you pick a system and oversee the implementation. That’s not enough. The real work is making sure the business is ready for the system: The definitions are clear, the owners are named, the process is understood, and the onboarding is strong enough to hold after go-live. Otherwise, you don’t end up with transformation. You end up with a very expensive shell.”

HEATHER TROIDL, PARTNER & SENIOR CONSULTANT

That’s what the opening story was really about. It was sequencing the work so the new system did not just go live. It went live with the definitions, workflows, and reporting discipline leadership needed to trust the numbers from day one. It’s the difference between buying technology and actually making it work.

Sometimes the work is transformation, not prevention. A community lender came to us with a process that worked but could not scale: Staff reviewing bank statements by hand, and a guarantor step that stalled nearly 80% of applications. We redesigned it around exception-based underwriting, moved identity and fraud checks to the front, and automated the verification. Manual review dropped sharply, and they grew loan volume without adding headcount, because we built the business structure first and the technology second.

This is where vendor-agnostic stops being a slogan and starts saving money. We do not resell business software or take kickbacks, so when the honest answer is keep what you have and use it better, that is what you will hear. Sometimes the most valuable thing we do is talk a client out of a purchase.

“MTC has been a game-changing partner for our organization. Their team quickly identified long-standing IT and cybersecurity challenges, delivering clear solutions and a practical roadmap for long-term success.”

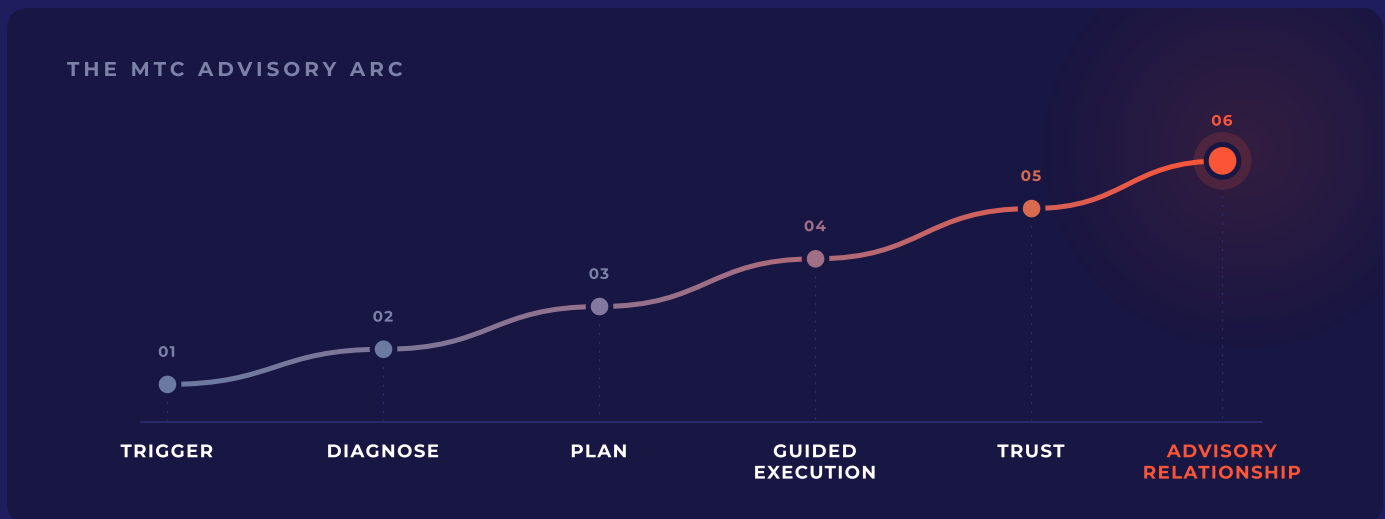
MICHAEL HALLUNDBAEK, DIRECTOR OF IT & TRANSIT SERVICES, WALDO COMMUNITY ACTION PARTNERS

THE SYNTHESIS

Putting it all together.

If you remember one thing: The problem you can see is rarely the problem you have. The failing system, the audit, the untrusted report, and the AI question are triggers. Underneath them are the things that decide whether your money is well spent: Clear definitions, trusted data, processes that fit, a source of truth, and an owner.

Get them wrong, and the cost compounds quietly, in a pattern of decisions, not one bad purchase. Get them right, and your reports are trusted, your team stops reconciling and starts deciding, your next system fits, and AI becomes an advantage instead of a risk.



That's what strategy before spend means. Not spending less for its own sake, but making sure every dollar goes to the real problem instead of a more expensive version of it. As Tonia tells clients: "I am not opposed to spending money on something that works. I just don't want to spend a lot of it finding out that something doesn't."

It's also why the three letters in our name are a promise: **Methodical, Trusted, Connected.**

You do not need more technology.
You need a clearer decision.

Who we work with best.

We do our best work with leaders who own technology decisions that matter. They run growing organizations of 25 to 200 people, where technology has become too important to manage by instinct, informal processes, or a few overextended staff. They lead nonprofits, associations, professional-services firms, or founder-led companies that are ready to make better decisions before they spend more money.

Some do not have a senior technology leader in-house. Others have a capable internal team that is already at capacity and needs an experienced outside advisor to frame the decision, challenge assumptions, and move the work forward. Either way, they want an honest advisor in their corner, not another vendor with a platform to sell. Most of all, they know that clear strategy is what protects every dollar they spend after it.

THE PATH FORWARD

Your next step.

If this sounded like your organization, the next step is a conversation, not a contract.

Start with a strategy call. We will listen first and give you an honest read on where the real problem sits. If it helps, that leads to a focused assessment, a few weeks with little time required from your team, that leaves you with four things:

A clear system of record

Aligned definitions

A written inventory of your risks

A prioritized roadmap of what to fix

Even if we never work together, you will leave with a clearer picture than you came in with. Diagnosing the real problem is what we do before anything else.

[Book a strategy call with Tonia →](#)

ABOUT THE AUTHORS

MTC was built by two people who spent their careers on the business side of technology, and never left it.

**Tonia Dupler**

FOUNDER & CEO

Tonia came up through banking and government, where she led enterprise shared services and the project management office for the State of Maine, and ran a full ERP implementation from the inside. She is a Lean Six Sigma Black Belt and former Board Chair of the New England Tech Hub, and she built MTC to do technology the way she always wished someone would: Business first, honest, and accountable.

**Heather Troidl**

PARTNER & SENIOR CONSULTANT

Heather is the bridge between what a business is trying to do and what its systems actually do. She led technology and client delivery for a global firm, including its governance work for the initial GDPR rollout, and ran revenue operations for a national managed-services provider serving nonprofits. She was MTC's client before she was its partner, which is exactly why she joined.

Together they bring more than forty years across the boardroom and the server room. MTC is a woman-owned firm, founded in Maine and now in Arizona. We are business people first, vendor-agnostic, and senior-led: You get experienced advisors on your decision, not a hand-off to junior staff after the kickoff call.

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