



For 2018 we've updated the entire MAFSI Technology Certification program. As an existing MTC firm, we will need you to re-evaluate your firms to see what level you are now eligible for within the new requirements. Below is an outline of what we will need from you and what you can expect from the new MTC.

What is the MAFSI Technology Certification (MTC) and Why is It Important?

The MAFSI Technology Certification or MTC was created in 2001 to provide an industry benchmark for rep firms on software and hardware systems.

We know that our rep firms are always ahead of the curve when it comes to investing in new technologies. By creating the MTC Program, we wanted the commitment your firm had made in time and money to become "hi-tech and high touch" with your manufacturers and customers to understand

And we wanted your representative agency to be publicly recognized and promoted for your technology investments in hardware, software and training.

Well none of that has changed, we have just updated the certification to reflect today's technological realities.

Ways MAFSI Technology Certification Benefits You:

- Identifies your rep firm as leader in technology, software and business transactions relating to agency operations and the digital landscape of today.
- Provides your agency with a technology roadmap and comparative analysis.
- Provides you with peer networking relating to efficient use of hardware and software in agency applications.
- Provides your manufacturers and customers with a clearer understanding of how your tech investments have enhanced their market position.

What has changed?

For one, we have updated all the requirements to be more in sync with today's technologies. We have renamed the levels and re-structured the program to provide guidance as well as some flexibility. We understand that not all rep firms operate the same way.

We have also designed new logos for your MAFSI Locator Listing and your website!

Our new levels are Core, Advanced, Expert and Master. You must meet all 10 of the core requirements to be eligible for the new MTC program. To move up from the core level you must have a certain number of additional requirements. The breakdown for each level is below.

New MTC Levels

- Core: 10 Basic Requirements
- Advanced: + 9 Additional Requirements
- Expert: + 12 Additional Requirements
- Master: + 15 Additional Requirements

How is my new level assigned?

Since the program has gone under a lot of changes, we will need each existing MTC firm to complete a re-evaluation checklist and send it back to MAFSI HQ. This way we can review and assign the appropriate level to your firm.

All you need to do is:

- Print out this checklist
- Complete all of the fields that apply to your rep firm
- Send you completed form to info@mafsi.org
- MAFSI will reach out to you with your new MTC Level



Please print out this checklist and complete it for your firm. Simply print this form, and use it around your office to capture any necessary information, and then email it back to MAFSI at info@mafsi.org.

If you have any questions about a requirement, please email info@mafsi.org.

Core Requirements (Must have all 10 to qualify for MTC)

MTC Requirement	Applicable to your firm?	If yes, fill in the requirement details. <small>List any important details here: brand, company, example, model, program, service provider, etc.</small>
Smartphones	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Color Laser Printer Duplex Capability with Scanner	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Website	Yes <input type="checkbox"/> or No <input type="checkbox"/>	http://www.
Laptop or Tablet	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Email: Company/Domain Specific Email Address	Yes <input type="checkbox"/> or No <input type="checkbox"/>	@
High-Speed Internet at all Offices	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Office Suite Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Appointment/Scheduling Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Quoting Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Accounting Software/ Outsourced Accounting Services	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
You must have all Core requirements to be eligible for the Core level. If you do not meet all 10 Core requirements, please email info@mafsi.org for assistance.		MTC Requirement Score: _____ / 10

Additional Requirements (9 Advanced, 12 Expert, 15+ Master *Needed for Master level)

Active Social Media Presence	Yes <input type="checkbox"/> or No <input type="checkbox"/>	<ul style="list-style-type: none"> • Twitter Username: @ • Facebook Address: • Other Account Info: • On average, how many posts per week?: • On average, how many posts per month?:
Backup & Recovery	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
CAD Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Cloud Based, Mobile Access	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Conference Call Capabilities	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Data Security – Router/Protecting Internal or Servers/Virus Protection	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Digital Fax	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Digital File Storage/Sharing	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Electronic Commission Reconciliation*	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Email Campaign Capabilities	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Expense Reimbursement Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
IT Specialist or Outsourced IT Services	Yes <input type="checkbox"/> or No <input type="checkbox"/>	

MAFSI technology training per year (conference or webinar, 3+ hours)	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Monthly monitoring for updates, computer clean up and compliance of company computer policies	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
OCR Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
On-going training for Outlook & Smartphones & other software programs	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Paperless Office	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
PDF Editing Abilities	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Photo & Video Editing Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Plotter/Large Format Printer	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
SpecPath®	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Video Conferencing*	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Virtual Reality Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Webinar/Seminar Hosting	Yes <input type="checkbox"/> or No <input type="checkbox"/>	
Advanced Website	Yes <input type="checkbox"/> or No <input type="checkbox"/>	This is a multipart question: Each part counts as .5 of a requirement. The max requirements you can earn here are 2.
<ul style="list-style-type: none"> • Interactive: Yes <input type="checkbox"/> or No <input type="checkbox"/> • Contact Forms/Lead Capturing Capabilities: Yes <input type="checkbox"/> or No <input type="checkbox"/> • Line List with links: Yes <input type="checkbox"/> or No <input type="checkbox"/> • Mobile Friendly/Responsive Website: Yes <input type="checkbox"/> or No <input type="checkbox"/> 		Website: http://www.
MAFSI Survey Participation 50%	Yes <input type="checkbox"/> or No <input type="checkbox"/>	Q1 Barometer: Yes <input type="checkbox"/> or No <input type="checkbox"/> Q2 Barometer: Yes <input type="checkbox"/> or No <input type="checkbox"/> Q3 Barometer: Yes <input type="checkbox"/> or No <input type="checkbox"/> Q4 Barometer: Yes <input type="checkbox"/> or No <input type="checkbox"/> Market Forecast: Yes <input type="checkbox"/> or No <input type="checkbox"/> Benchmarking: Yes <input type="checkbox"/> or No <input type="checkbox"/>
MAFSI Survey Participation 100%*	Yes <input type="checkbox"/> or No <input type="checkbox"/>	Q1 Barometer: Yes <input type="checkbox"/> or No <input type="checkbox"/> Q2 Barometer: Yes <input type="checkbox"/> or No <input type="checkbox"/> Q3 Barometer: Yes <input type="checkbox"/> or No <input type="checkbox"/> Q4 Barometer: Yes <input type="checkbox"/> or No <input type="checkbox"/> Market Forecast: Yes <input type="checkbox"/> or No <input type="checkbox"/> Benchmarking: Yes <input type="checkbox"/> or No <input type="checkbox"/>
Rep Agency Management Software	Yes <input type="checkbox"/> or No <input type="checkbox"/>	This is a multipart question: Each part counts as .5 of a requirement. If you have all 5, it will count as 3 requirements).
<ul style="list-style-type: none"> • Customer Relationship Management Software (CRM): Yes <input type="checkbox"/> or No <input type="checkbox"/> • Contact Management Software: Yes <input type="checkbox"/> or No <input type="checkbox"/> • Opportunity Tracking Software*: Yes <input type="checkbox"/> or No <input type="checkbox"/> • Forecasting Sales Software*: Yes <input type="checkbox"/> or No <input type="checkbox"/> • Sales Activity/History Software: Yes <input type="checkbox"/> or No <input type="checkbox"/> 		<ul style="list-style-type: none"> • CRM: • Contact Management: • Opportunity Tracking*: • Forecasting Sales*: • Sales Activity/History:
MTC Additional Requirement Scoring Core: 1-8 Advanced: 9-11 Expert: 12+ Master: 15+ All* (You must have all requirements marked * to be eligible for the Master level. If you have 15+ requirements and do not have the *requirements, you will be at the Expert level.)		MTC Additional Requirement Score: _____ / 31