



Please print out this checklist and complete it **before** you begin your online form. This checklist has all the information you will be asked to provide during your submission. Simply print this form and use it around your office to capture any required information so you can quickly input the data online.

Rep Firm Name:

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

MTC Requirement	Applicable to your firm?	If yes, fill in the requirement details. List any important details here: brand, company, example, model, program, service provider, etc.
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: @ • Facebook: • LinkedIn: • How many posts per week?: • 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"/> 		<ul style="list-style-type: none"> • 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"/>
MAFSI Survey Participation 50%	Yes <input type="checkbox"/> or No <input type="checkbox"/>	MAFSI will confirm your firm's participation in the quarterly Business Barometer, Market Forecast and/or Benchmarking Survey.
MAFSI Survey Participation 100%*	Yes <input type="checkbox"/> or No <input type="checkbox"/>	MAFSI will confirm your firm's participation in the quarterly Business Barometer, Market Forecast and/or Benchmarking Survey.
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