

Membership Review Process

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MACH
ALLIANCE

Membership Review Process

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Introduction

Our certification standards have become increasingly influential in buyers' decisions. To ensure members continue to align with our evolving criteria, as outlined in the [Admissions Playbook](#), we have introduced a mandatory review process that takes place every two years or when a member company is part of a merger or acquisition. In the case of the latter, the company in question must alert the MACH Alliance team asap and a review is put in place immediately.

By committing as a membership to this, we continue to uphold our promise to the market - that we don't just talk MACH, we do MACH - and assure the broader industry of our integrity, and transparency in the space.



Two Year Review
Mandatory Survey

M&A
Immediate trigger

Initial
Evaluation

M&A Review

No change in status

Removal

Re-certification

Identification by MACH
Alliance central team of a
pivotal shift/crucial
change

Certification
Review

No change in status/No re-certification necessary

Rejection: Set of expectations and milestones
within a specific time frame

Requirements met, review complete

Requirements not met: Member company will be
asked to leave the Alliance

Approved
No further
requirements
needed

Two Year Review: Framework and Process

As of July 2024, all MACH Alliance member companies are required to complete a mandatory survey every two years. This survey helps identify any changes in the company, product, or strategy that may necessitate a Certification Review. The review process ensures that members continue to meet the MACH standards.

Framework:

Confidentiality: All survey responses are confidential and shared only with designated MACH Alliance central team members facilitating the review.

Certification Review: If significant changes are identified, a Certification Review will be conducted. The depth of the review depends on the nature of the changes, using the most up-to-date technical criteria published in the Admissions Playbook.

Post Review: If the review results in a rejection, clear expectations and milestones will be provided. Members failing to meet these requirements within the agreed timeframe will receive a 30-day notice of membership termination.

Two Year Review: Framework and Process

Process:

Survey Timing: The July after each two year increment from the start date of membership.

Initial Evaluation: The MACH Alliance central team conducts an initial review of the survey responses to identify any significant business changes, including mergers and acquisitions (M&A).

M&A Review: If M&A activity is disclosed, it triggers an M&A Review as outlined in this Playbook.

Certification Review: If required, based on the survey, a Certification Review will be initiated.

The process is streamlined to take place via email, with no need for scheduled presentations. The MACH Alliance central team may request additional materials based on the member's role:

For ISVs: Documentation and marketing materials for newly developed products that qualify as 'new products' (not an add-on or feature).

For SIs: If survey responses indicate a shift away from MACH investment or partnerships, further discussions will be required to assess the situation.

Criteria for Initial Evaluation

An Initial Evaluation is completed by the MACH Alliance central team which considers the following criteria:

For ISVs

Are the new products disclosed considered to be “features or add-ons” to existing products, an accelerator solution, or are they clearly a new product?

- Add-ons, minor features, or accelerators to existing MACH products do not need any additional review.
- Indications of product investment significant enough to warrant a review would be the following:
 - ◆ Does the new product have a significant marketing and go-to-market effort behind it? This would include evidence such as:
 - Press releases of other marketing activities related to a product launch
 - Added to website navigation under Products/Platforms, as well as product documentation

If the **majority** of the above is true, this should require an additional review by the MACH Alliance Admissions Panel.

For SIs

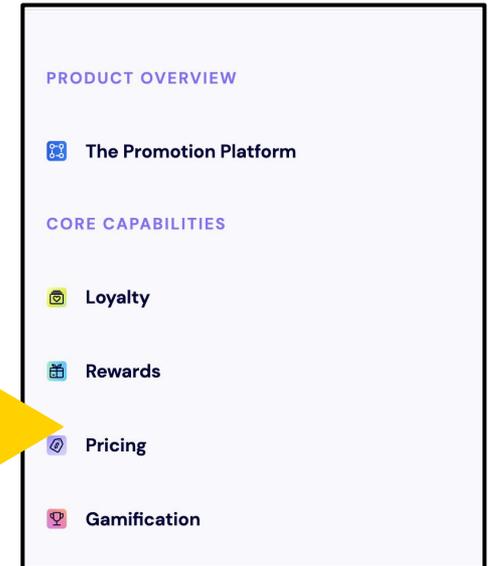
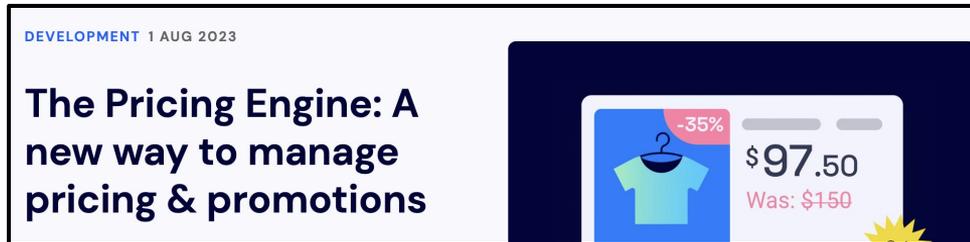
- M&A (usually this process is triggered at the time of M&A)
- The growth of the non-MACH business is outpacing the growth of the MACH business

Criteria for ISVs

Product example

The following would be considered an example that meets the criteria for additional review:

A MACH member released a new product and it was announced via corporate channels and has a standalone section under “Core Capabilities” within the product overview on their website.



Criteria for ISVs

Accelerator example

The following would be considered an example that does not meet the criteria for additional review:

Commercetools Foundry appears from the website and documentation to be an accelerator and therefore not a new product to review.

The screenshot shows the 'Foundry' documentation page. The left sidebar contains a navigation menu with the following items: Overview, Solution introduction, Plan your project, Discovery, Start working, Move beyond sample data, See it working, and Closing chapter. The main content area is titled 'Overview' and contains the following text:

With our Blueprint for B2B Manufacturing, combining commercetools Composable Commerce for B2B, Frontend, and Connect into a ready-to-run solution, we're giving your commerce project a jump-start. This guide walks you through the process of setting up and steering your project from the start all the way to a successful go-live.

The first three chapters, [Solution introduction](#), [Plan your project](#), and [Discovery](#), offer a comprehensive overview of the Blueprint, including all essential planning and decision-making aspects required before beginning the implementation. These chapters are equipped with practical templates, designed to organize and efficiently manage your

The screenshot shows the commercetools website. The header includes the logo, navigation links (EN, Support, Careers), and a 'START FREE TRIAL' button. The main content area is titled 'What's inside commercetools Foundry for B2B Manufacturing.' and features three main sections:

- Tailored resources for manufacturers:** A [comprehensive blueprint](#) containing all the components to start your composable journey, plus best practice guides and a sample data set, so manufacturers can leverage digital commerce to its fullest potential.
- Store launchpad for B2B Manufacturing:** Expedite the launch of your digital storefronts with a comprehensive, [ready-to-use B2B eCommerce template](#) leveraging the features of commercetools Composable Commerce and Frontend.
- Leverage commercetools expertise:** Supercharge your commercetools adoption with [AI-powered developer onboarding tools](#) and [expert services](#), designed to help you accelerate your implementation.

At the bottom, there are three more sections: 'B2B Product discovery', 'Cutting-edge purchasing processes', and 'Business, customer and workflow management'. A 'START FREE TRIAL' button is also visible in the bottom right corner.

templates, designed to organize and efficiently manage your

the technical setup you'll need to connect commercetools
set up your delivery pipeline.

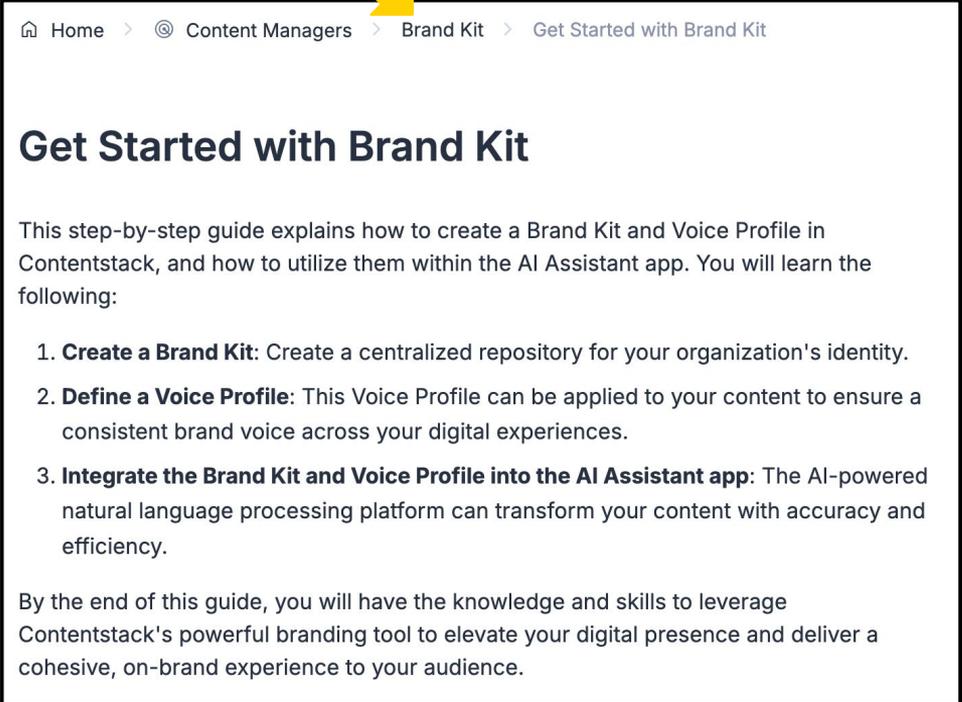
[Sample data](#) and [See it working](#), you'll learn how to exchange the
ing proven best practices and data modeling advice.

Criteria for ISVs

Feature example

The following would be considered an example that does not meet the criteria for additional review:

Contentstack Brand Kit is considered a feature. Although it was announced via major marketing channels (inc a press release) it does not have its own section in the website navigation, and it depends on functionality tied to the core content repository within Contentstack.



Home > Content Managers > Brand Kit > Get Started with Brand Kit

Get Started with Brand Kit

This step-by-step guide explains how to create a Brand Kit and Voice Profile in Contentstack, and how to utilize them within the AI Assistant app. You will learn the following:

- 1. Create a Brand Kit:** Create a centralized repository for your organization's identity.
- 2. Define a Voice Profile:** This Voice Profile can be applied to your content to ensure a consistent brand voice across your digital experiences.
- 3. Integrate the Brand Kit and Voice Profile into the AI Assistant app:** The AI-powered natural language processing platform can transform your content with accuracy and efficiency.

By the end of this guide, you will have the knowledge and skills to leverage Contentstack's powerful branding tool to elevate your digital presence and deliver a cohesive, on-brand experience to your audience.

Certification Review

If new “major” product activity is disclosed in the Initial Evaluation, it will initiate an additional Certification Review where changes are evaluated against technical criteria.

Similarly, if there is a major change in SI ownership and direction regarding MACH investment, this will also require a Certification Review.

Process:

- The MACH Alliance central team will identify product(s) that require additional information. Given that the review is to occur offline (i.e. no live presentations necessary) we would ask that the following be provided:
 - ◆ Documentation
 - ◆ Any enablement material that would assist with the process such as whitepapers or videos
- The evaluation team for the Certification Review (two members of the Admissions Panel) review this material under the same criteria as the current MACH [Admissions Playbook](#).
 - ◆ If the evaluation team finds that the new products or services do not meet MACH certification criteria, then a set of expectations with milestones will be set.

M&A Process

The Alliance has the following rules regarding company acquisitions and mergers:

- ◆ Membership of the MACH Alliance is either company-wide or can be for stand-alone entities within larger companies, provided they meet the criteria in the [Admissions Playbook](#).
- ◆ There are a number of potential paths due to acquisition:
 - No change in status (in the case of a company remaining standalone)
 - No re-certification necessary (one member acquiring another MACH member - though this may have implications for membership category and fees)
 - Removal (such as an ISV being absorbed by a much larger non-MACH ISV that is unlikely to reach certification status such as a legacy vendor)
 - Re-certification (process varies depending on the nature and size of the acquisition)

M&A Process: Re-certification

- There will be a clear set of expectations and milestones set out to certify the new entity
- During the period in which the company is under review, it will remain a member with full rights including sponsorship of events and conducting its own 'Power of MACH' events/content
- In the member directory an asterisk will denote that they are under review due to recent M&A activity until re-certification is complete
- The company is allowed to update its logo and company information in the member directory (if applicable)

In addition to understanding the rationale and scope of the acquisition, it is important for the MACH Alliance to understand the goals of the company/independent brand with regards to the MACH movement.

We assume 'good intent' and that companies seek to remain members of the MACH Alliance unless we see or hear otherwise, but we do need to work to ensure that organizations remain compliant to keep standards high. Examples of not seeing good intent include:

- Outright indication that MACH Alliance membership is not of interest going forward
- Actively evangelizing against MACH or no desire to migrate towards MACH architectures for all products
- Lack of executive engagement from the acquiring company
- Not providing information promptly for milestones
- Not following these requirements would trigger removal (and the typical appeals process, if required).

M&A Process: Secondary Reviews

If the initial review indicates that a re-certification is needed, there are four types of subsequent reviews:

Minor Milestone Review (SI)

Requires an **offline** case study review - but only a small number are required due to the MACH capabilities of the existing member.

- Boutique SI - 1 new case study
- SI - 2 new case studies
- GSI - 3 new case studies

Timeframes:

- Boutique SI - 2 months
- SI - 4 months
- GSI - 6 months

Major Milestone Review (SI)

Schedule intro review call to meet with new executive team and new/existing internal sponsors to discuss their plans for MACH enablement.

Requires an **offline** case study review - but a **larger** number are required due to the diminished MACH capabilities of the existing member within the larger company.

Boutique SI - 2 new case study

SI - 3 new case studies

GSI - 6 new case studies

Timeframes:

- Boutique SI - 3 months
- SI - 6 months
- GSI - 9 months

Tech Check (ISV)

If non-MACH technology is being acquired, it would need to be evaluated by the admissions panel.

Re-certification

In cases where the MACH-certified company is being absorbed by a significantly larger non-MACH entity, it may trigger a full recertification process.

M&A Process: Evaluation Framework for SIs

| SIs | Acquirer company is MACH certified | Acquirer company is <i>not</i> MACH certified |
|---|---|---|
| Acquired company is MACH certified | <p>If both are equal size and no category change, no review is necessary</p> <p>⚠ Note - this may affect membership category status and therefore mean a change in fee</p> | If acquired company is more than 50% of employees a minor milestone review is required (unlikely scenario) |
| | | If acquired company is 25-50% of employees, a major milestone review is required |
| | | If acquired company is less than 25% of employees, it is treated as a re-certification (as the new company retains very little of the MACH entity) |
| Acquired company is <i>not</i> MACH certified | If acquired company is less than 25% of employees, no review is necessary | N/A |
| | If acquired company is less than 25-50% of employees, a minor milestone review is required | |
| | If acquired company is more than 50% of employees, a major milestone review is required (unlikely scenario) | |

M&A Process: Evaluation Framework for ISVs

| ISVs | Acquirer company is MACH certified | Acquirer company is <i>not</i> MACH certified |
|---|---|--|
| Acquired company is MACH certified | Likely no review necessary since both were certified independently and prior to acquisition ⚠️ Note - this may affect membership category status and therefore mean a change in fee | Acquire people - acquisition by larger non-MACH entity would trigger a major milestone review . |
| | | Run standalone would require a central team review to determine if they meet the standalone criteria. |
| | | Acquire product - product assets embedded into larger company would trigger a major milestone review . |
| | | Acquire customers (but retire MACH product) would trigger a major milestone review . |
| Acquired company is <i>not</i> MACH certified | Run standalone would likely not trigger review | N/A |
| | Acquire people would require no review . | |
| | Acquire product - assets embedded into larger company would trigger a major milestone review . | |
| | Acquire customers (but retire non-MACH products) would require close monitoring to ensure timeframes and milestones are met. | |



For any questions or further information, please reach out to Shellie Urquhart at shellie.urquhart@machalliance.org



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