

A SUCCESS STORY “FOR DUMMIES”

BY NATE HABERMEYER



Michael Schweizer's challenge was cracking the highly competitive software market. As CEO of Org-Matters Solutions Inc., he spent four years developing easy-to-use organizational software for electronic documents. He knew generating quick market acceptance and strong product recognition would be tough since he was self-funded with no recognizable branding.

Most small software companies keep their heads down until they achieve critical mass. In dramatic contrast, Schweizer developed a revenue-sharing model that would enable him to bring on several big companies as partners to strengthen product branding and expand sales channels.

Before he posted a single sale, Schweizer signed a licensing agreement with John Wiley & Sons Inc. to co-launch the new software application under their engaging For Dummies® brand. The result was the *OrganizeMY™ Electronic Filing Cabinet For Dummies®*, the "how-to" brand's first major global software release.

"For Dummies has a unique leadership position. When people see the For Dummies brand, they know it'll be easy," said Schweizer.

"Our concept is simple," he continued. "Consumers are overwhelmed by the amount of documentation in a life that always seems to be too hectic and stressful. Think of all the bills, receipts, guarantees, licenses, and acknowledgements you get—a percentage of which must be kept. We offer a way to grab, save, file, and track all these necessary electronic documents.

"Our research and experience shows us that people want to know where they stand—what they're worth—their up-to-date, big-picture status," Schweizer explained.

It seemed obvious to Schweizer that the software could potentially be sold to every Windows user, of any skill level. It was necessary to narrow the market focus though. Schweizer saw that his software could appeal to financial services suppliers to help their clients make the transition to electronic documentation. He decided to try the same revenue-sharing/partnership approach with a big financial institution. BMO® Bank of Montreal's Mosaik MasterCard group jumped at the opportunity to offer their cardholders additional services, and developed a promo version of the software that is now offered free to all its cardholders. It fits appropriately with their goals, guides their cardholders into online banking, and helps to reduce paper statements, saving money and trees.

"If we can help simplify our customers' lives by providing them access to an efficient software tool that allows them to logically store an electronic statement, or scan in a paper

version of their statement, we're thrilled to do it," said BMO Bank of Montreal SVP of Card and Retail Payment Services, Mike Kitchen.

The BMO Mosaik MasterCard agreement gave Schweizer a significant boost in product recognition. His careful strategy of leveraging the size and market influence of larger companies helped the OrganizeMY Electronic Filing Cabinet For Dummies launch successfully. Cardholder response has been exceptional, with more than double the usual percentage pick-up rate from those who received the offer—substantially ahead of expectations.

The partnerships with well-known brands For Dummies and BMO Mosaik MasterCard have provided a firm foundation for the market acceptance of Org-Matters Solutions Inc.'s new software. One partner is the world's most-recognized reference series and epitomizes ease of use. The other is a trusted

bank with a user base of millions.

"Our product is life management software for busy people, who want to organize and save what matters, but do it as simply and quickly as possible," said Schweizer.

By teaming up with Org-Matters Solutions, For Dummies moved strongly into the global software market. BMO Bank of

Montreal Mosaik MasterCard gained an opportunity to guide its cardholders into online banking, while differentiating its own brand from other charge card suppliers. Org-Matters Solutions Inc.'s software won a unique co-branding opportunity and a chance to create solid sales channels and larger distribution networks.

But it doesn't stop there. The small Ontario company is already working to expand its channels. A deal signed in late March with Bell Sympatico will permit Org-Matters to market to all of the ISP's estimated two million customers. Also, a major distributor in the U.S. is providing access to one of the world's largest retailers.

"We have assembled an absolute 'A Team' of strategic partners and alliances," Schweizer said. "It is this brand partnership approach that will ultimately allow us to achieve our dream of seeing the OrganizeMY Electronic Filing Cabinet For Dummies software on every Microsoft Windows XP and Vista desktop in the world." **E**

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