

**Mi-Co Product Sales Manual:
Mi-Forms Mobile Data Capture Solutions**

ANY DATA, ANY DEVICE, ANY WHERE!

For Mi-Co Partner Use Only

Copyright © 2012 Mi-Co, Inc.

All rights reserved. Information in this document is subject to change without notice. No part of this document may be reproduced in any form by any means, electronic or mechanical, for any purpose without the express written permission of Mi-Co, Inc.

Mi-Co provides this publication “as is” without warranty of any kind, either expressed or implied, including but not limited to the implied warranties of merchantability or fitness for a particular purpose.

Mi-Co Product Sales Manual

Table of Contents

- I. The Mi-Forms Solution: What is it and Key Selling Points**
 - a. Key Differentiators: Flexibility, Enterprise architecture, Expertise
 - b. Components of the Platform: Client, Designer, Server, SDK
- II. Recommended Target Markets: Key talking points and terminology**
 - a. Home Health & Allied Health (Mental/Behavioral Health, Urgent Care etc.)
 - b. Hospitals
 - c. Clinical Research
 - d. Financial Services & Insurance
 - e. Field Inspections (Government, Utilities, Energy, Construction, Commercial etc.)
- III. Sales Process**
 - a. Prospecting & Qualification
 - b. Product Demonstrations (via web & on-site)
 - c. Pricing & Proposals
 - d. Pilots
- IV. Top 10 Objections and Responses**
 - a. Security
 - b. Hardware
 - c. Usability
 - d. Price
 - e. Need for hardcopy
 - f. Connectivity
 - g. Verification
 - h. Compatibility
 - i. Design
 - j. Forms Transfer
- V. Resources for Partners**
- VI. Sample marketing e-mail**

I. The Mi-Forms Mobile-Forms Solution:

The Mi-Forms solution is a mobile data capture system designed to convert paper forms into fast, secure, and easy to use electronic forms. It has been designed from the ground-up as a comprehensive forms workflow management suite that takes full advantage of mobile hardware platforms including iPads, Android Tablets, Windows Tablet PCs, Ricoh eQuills and Digital Pens. It is particularly appropriate in situations where users are highly mobile, meaning a keyboard is not practical, and want to use handwriting, touch, voice, photos etc. in completing forms.

Key Advantages of the Mi-Forms System: Realizing the full potential of mobile data capture

- Industry Leading Handwriting Recognition: Mi-Forms software sets the standard for handwriting recognition with 98.5% accuracy for alpha characters and 99.5% accuracy for numeric characters. As a result of its high recognition, Mi-Forms software doesn't just capture handwriting; it allows clients to use critical business data by translating it into machine readable text that can be stored and analyzed in existing databases.
- Maximal Flexibility in Data Capture: Capture ***any data*** with text, voice, photos, RFID tags, barcodes, external device readings and much more on any type of device (iPad, Android Slate, Windows Tablet, Ricoh eQuill, Digital Pen, laptop, desktop, smartphone etc.) and send the data anywhere (database, line of business application, document management system, email & more)!
- Data Integration: Mi-Forms software offers unparalleled integration with existing back-end database systems with built-in support for numerous data and image protocols. This allows the system to pre-fill information on forms in the field and to send data back to the enterprise database. The system is also customizable enough to meet the specific needs of any specific enterprise application. Such integration allows customers to fully leverage their existing investments in database software and to send data ***anywhere!***
- Platform Neutrality: With support for iPads, Android Tablets, Ricoh eQuills, Digital Pens, Windows Tablet PCs, and Smartphone devices, Mi-Forms software is not confined to a specific platform. This gives Mi-Forms customers the flexibility to choose the hardware that best meets their needs on ***any device!***
- Business Rule Verification: Mi-Forms software gives users the ability to design custom business rules into each form. This dramatically improves the accuracy of the data collected and ensures

that users complete all required criteria before they submit a form. By reducing errors and incompleteness, Mi-Forms software helps clients reduce their number of resubmissions and improve their overall data-processing turn-around.

- **Ease of Use:** The entire Mi-Forms software suite has been designed from the ground up to be extremely intuitive. From the straight-forward pen-on-paper interface of the Client, to the drag and drop tools in the Designer, the Mi-Forms solution gives clients the ability to implement electronic forms with advanced business rules and complex data communication paths without the need for extensive programming knowledge.
- **Return on Investment:** Mi-Forms can save clients money in several ways. By converting paper forms into electronic forms, clients reduce printing and storage expenses. Many clients also save money by reducing expenditures on data-processing and clerical tasks. Since data is directly transmitted from the field to the client database, there is no need for costly and time-consuming manual re-entry. Data verification in Mi-Forms reduces costly errors that could potentially require manual correction or resubmission. Mi-Forms allows customers to get better data, faster leading to quicker invoicing (and cash-flow) and higher productivity (more jobs done).

Mi-Forms also increases productivity in several ways. Since the pen on paper user interface of the Mi-Forms client is easy and intuitive, workers in the field can maximize their efficiency by spending more time with customers. The ability to pre-fill data from existing client databases reduces the time that users must spend filling out forms. By providing mobile data capture that extends the reach of a client's existing database into the field, Mi-Forms software increases the value of existing IT investments.

Specifics on Components of the Solution: Client, Designer, Server, SDK, On Demand

The components of these Mi-Forms solutions are:

1. **Mi-Forms Client:** The Mi-Forms Client is the primary user interface of the Mi-Forms system; it displays the document and allows users to record data in a traditional pen on paper fashion. The Mi-Forms client has four key abilities: Prefill, Capture, Verify and Validate, and Communicate.
 - i. **Prefill:** Prefill forms with pre-existing data. Data from another source may be 'pulled' and used as prefill information into a form. This decreases the

amount of information needed, reduces errors, and allows captured data to be linked back to an original source record.

- ii. **Capture**: Capture new data using any Tablet, Desktop/Laptop, or Digital Pen. The Mi-Forms Client on Windows Tablets has the ability to convert handwritten text into machine readable data as you write. The Mi-Forms Client on iPads & Android Slates utilizes touch-based entry. Drawings, diagrams, and a number of other data sources may also be captured if needed (images, audio, barcodes, GPS, attachments of any files, etc).
 - iii. **Verify and Validate**: Verify the handwriting recognition results and validate data relationships (date / time evaluation, business rules, etc.) on your form with user-defined business rules. This feature greatly reduces errors thus improving the accuracy and speed of data collection.
 - iv. **Communicate**: Communicate and share your data with existing enterprise systems. Data may be exported from the Mi-Forms Client to the centralized Mi-Forms Server and then to other existing data repositories or exported directly from the Mi-Forms Client. Recognized data may be exported via a variety of formats.
2. **Mi-Forms Designer**: The Mi-Forms Designer is a robust product with an intuitive graphic interface that enables users to design custom forms for a variety of applications. The Mi-Forms Designer has three key components: Layout, Business Rules and Data Path Technology
- i. **Layout**: The Mi-Forms Designer Software uses a drag and drop user interface for layout design. The software supports a wide range of data types and data collection objects including: alpha fields of various lengths; numeric fields; alphanumeric fields, check box groups; free form fields; as

well as a variety of specialized fields such as social security number or date and time fields. The form designer also supports image imports to further enhance the look of the form being created

- ii. **Business Rules**: With Mi-Forms Designer Software, custom business rules can be built directly into the form using the systems internal business rule and scripting language. Types of supported business rules include: simple business rules (required fields), cross field validation rules (if gender is Male then question 5 must be greater than 8) or sophisticated consistency checking.

- iii. **Data Path Technology and Communication**: The Mi-forms designer allows users to harness the true power of electronic data capture by designing communication protocols directly into forms allowing them to integrate captured data with existing enterprise applications. From Mi-Forms, data can be exported via ODBC, in XML files, or in comma-separated value (CSV) files. Images of forms and their ink can be exported in JPEG, GIF, TIFF, PNG, BMP, and PDF formats.

These Primary Components are supported by three additional products in the Mi-Forms catalogue: the Mi-Forms Server, the Mi-Forms SDK, and Mi-Forms On-Demand.

1. **Mi-Forms Server**: The Mi-Forms Server allows the enterprise to control the flow of data, manage accounts, implement predefined workflows, and deliver solution updates to the users. Some of the key functions of the Mi-Forms Server software include:
 - Manage users, passwords, groups and privileges (with Active Directory compatibility for ease of management/single sign-on)
 - Manage form and solution revisions
 - Centralized data export including custom data exports from script
 - Data validations can be performed server side
 - Supports workflow via concept of queuing
 - Decisions on routing can be made either automatically via script code or via user interaction at form-finish time

2. **Mi-Forms SDK:** Mi-Forms SDK is a Software Development Kit based on the Microsoft .Net protocol that bundles together Mi-Forms industry-leading handwriting recognition, natural user interface, and unified support for Digital Pens (Logitech, Nokia, Hitachi-Maxell), various Tablets and Smartphones.

At the heart of the system is the Mi-Forms Component, a rich forms-processing engine which can interpret any form built with the Mi-Forms Designer. The powerful component can provide the user interface, manage data collection, and ultimately, output the data to other systems.

3. Mi-Co's Mi-Forms On-Demand solution integrates the Anoto Functionality with Mi-Forms technology to provide greater flexibility in collecting time-critical, accurate data. The features of Mi-Forms on Demand include:
 - Manage Anoto pattern licenses
 - Allocate pattern from available licenses
 - Store pre-existing data with a pattern ID to be used later
 - Produce a client-side print out of combined form template, prefill data, and dot pattern
 - Reconcile incoming data with stored prefill data

II. **Recommended Target Markets – Key points and unique terminology**

1. **Home Health:**

Product Offering: Mi-Forms' ability to gather data at the point of care, makes it ideally suited for home health environments. In fact, Mi-Co has developed a specific solution to meet the demands of the home health environment. In addition to the standard client, designer and server software, the Mi-Forms Briggs' OAISync solution is based on industry-leading content from Briggs Healthcare, a leader in Home Healthcare paper forms & medical education and includes a variety of pre-built forms for an additional cost.

Industry Outlook: The Home Health industry is highly fragmented, consisting of approximately 8,800 home health agencies that operate primarily on a local or regional

level. There are a few major players in the industry that have locations and partnerships nationwide, the most prominent being Gentiva Healthcare. In addition many agencies are affiliated with regional hospitals.

Home health agencies have several business pains that make them an ideal candidate for Mi-Forms software. First, home health nurses are extremely mobile workers that need to be able to access patient information in the field and contribute to and update patient files directly from the point of care. Secondly, home health agencies are stringently judged by their quality of care, which is often dependent upon the time spent with patients. Also, home health agencies have strict paperwork requirements that must be completed in order to receive payment from government programs such as Medicaid. These forms are often denied due to errors, which causes the firm to incur costly resubmission fees and delays that increase their accounts receivable turn-around time. Lastly, home health nurses do not have a lot of computer training, so they need a solution that is intuitive and makes the transition from paper to electronic data capture easy.

Some considerations to take into account when approaching a home health agency include: limited access to capital and IT inexperience. Most home health agencies are fairly small and much of their costs are tied up in personnel expenses. As a result, they may have limited financial resources. This can be a severe roadblock for the implementation of company-wide IT projects such as Mi-Forms. In addition, most home health professionals are not well-versed in computer technology. These companies may not have IT infrastructure in place. Many home health decision-makers are also very likely to confuse the Mi-Forms system with an electronic medical records system. It is crucial to point out that Mi-Forms is in fact a distinct front-end component that will allow them to further leverage their investment in a back-end medical records system. Home health agencies may also require greater support services since most have few IT personnel on staff. Finally, several Home Health software competitors exist, which provide "Point of Care" mobile apps that customers might perceive as suitable alternatives to the Mi-Forms solution, especially if they are using that competitors' back-end system (with which their mobile solution is fully integrated typically). In such cases, it is best to move on to another opportunity as chances of winning this deal are slim at best.

Key Terminology:

1. Point of Care: The location where health services are rendered. Generally, at the patient's home.

2. OASIS: Outcome and Assessment Information Set. The primary forms that home health professionals use to monitor a patients progress. These forms are administered by the Centers for Medicaid and Medicare services which are part of the Federal Department of Health and Human Services
3. HAVEN: software provided free from CMS for HHAs to use to submit their OASIS data.
4. EMR: Electronic Medical Records System. Popular systems include: Cerner, McKesson, and MiSys.
5. Downcodes: OASIS Form errors that require resubmission.

ROI:

Hard Savings: Cost of printed forms, lower resubmission costs, lower clerical and administrative costs, faster accounts receivable turn-around

Soft Savings: More time with patients = higher quality of care, more efficient workers can make more visits per day, higher productivity

2. Hospitals

Industry Outlook: Hospitals also have a high percentage of mobile workers who need the ability to record and access data while they are on their feet. Like their home health counterparts, hospitals are also judged heavily on their quality of care and the time they spend with patients. Likewise, hospitals also have large form workflow demands that are the result of federal regulations and insurance processing.

As the cost of healthcare rises, hospitals are constantly looking for ways to control their own costs. The Mi-Forms solution can help them do this by reducing their clerical and administrative expenses. Hospitals are also moving further and further towards universal electronic medical records. Most hospitals have significant investments in IT infrastructure and personnel already in place. Most also have significant IT budgets as well. This means that they are often more open to investments in technology, however, it also means that most have a very structured approach to evaluating technology purchases. Likewise, the competition in the hospital market is also very heated.

Mi-Forms technology can complement the EMR systems in hospitals in several ways:

- 1) Most EMR systems DO NOT capture “Research” data for submission to clinical trials, national registries, JCAHO etc. causing Hospitals to have to double-enter data into EMR systems, as well as these systems. Mi-Forms can simultaneously transmit data to both.

- 2) Most EMR systems do not capture image-intensive data (such as discrete data from the annotation of an image), whereas Mi-Forms can do so and feed it to the EMR system
- 3) Most EMR customers/users still capture paper-consent forms leading to the potential to lose those consent forms, misplace it and more. When Mi-Forms is used instead, these forms can be stored electronically without scanning, hospitals can track how long a patient spent on each page, display multimedia content etc.

Key Challenge: Mi-Forms data can be integrated directly, indirectly or as a flat-file (PDF, CSV etc.) into EMR systems. At times, however, some EMR vendors will prove uncooperative in providing the interface/API to enable this integration, and in some cases despite customer requests if there are no tables for Mi-Forms data in the EMR (e.g., research data that EMR systems don't capture), then this will be a non-starter. Mi-Forms has previously been integrated with Meditech, Cerner, and a few smaller EMR systems. In the years to come this list will likely grow as hospitals complete EMR rollouts and look for additional ways to complement the EMR technology and drive efficiencies. Despite the iPad and other apps provided by EMR vendors, hospitals continue to need robust Tablet-forms technology for everything from patient check-in, consent forms, patient encounter, medical charge coding, registry data capture and more.

Key Terminology

1. HL7: is an all-volunteer, not-for-profit organization involved in development of international healthcare standards. "HL7" is also used to refer to some of the specific standards created by the organization. The current data standard is HL7 Version 3.
2. EMR: Electronic Medical Records System. Popular systems include: Meditech, McKesson, Epic Systems and AllScripts

ROI:

1. Hard Savings: Cost of printed forms, lower clerical and administrative costs
2. Soft Savings: More time with patients = higher quality of care, more patients seen, fully leverage existing IT investments, improved data accuracy, e-forms improve HIPPA compliance

3. Clinical Research

Industry Outlook: The Clinical research industry is well supported by big pharmaceutical companies that are required to carry out extensive clinical trials for the drugs that they

produce. Clinical research organizations that run these trials are under increasing pressure to lower costs and improve the speed of their trials as the cost and time to complete FDA approval has continued to increase over the years. By the same token, data accuracy is crucial in the Clinical research environment since the information will be subject to intense FDA scrutiny. Many clinical research organizations have taken steps to improve their work flow processes by investing in web-based electronic data capture systems. Nevertheless, most clinical researchers continue to use pen and paper for their primary data capture needs and re-key into EDC systems (see below, EMR equivalent for clinical trials).

Key Terminology:

1. CRO: Clinical Research Organization
2. Web-based EDC: web-based electronic data capture system.
3. CDMS: Clinical Data Management System. Similar to an EDC system. A web-based EDC can often be a component of a more comprehensive CDMS or and EDC can be a stand-alone product. Popular CDMS products include: Symetric, Oracle Clinical, ClinPhone, and OpenClinica
4. Double Data Entry Process: The most common method of data entry in the clinical research industry. The first screen looks for typographical errors while the second looks for logical errors. Mi-Forms can eliminate much of this work with its custom business rule verification.
5. Adverse Event: side-effects that occur after a patient has used a drug. Clinical researchers must report all adverse events to the FDA.

ROI:

1. Hard Savings: Cost of printed forms, lower clerical and administrative costs
2. Soft Savings: faster forms processing, increased efficiency in data verification, more accurate data (big cost-driver as 'queries' resulting from inaccuracies/discrepancies and resolving them account for a large cost in any trial's budget), faster time to market.

4. Financial Services/Insurance

Industry Outlook: Banks, insurance companies, wealth management firms and more have invested heavily in technology enabling such mobile 'apps' such as scanning checks to deposit them, looking at portfolios on iPads & managing properties from mobile devices. Trading firms have always been at the forefront of technology investments, especially to

gain even the smallest microsecond advantage in transactional processing. Despite all this technology investment, simple documents such as contracts, property management inspection forms, loan applications, new account enrollment forms etc. are often still processed on paper, scanned and entered into databases. Ample opportunity exists to take advantage of the technology-mindedness & cash-flow position of these organizations, to offer elegant forms-based solutions that utilize their existing hardware investments in Tablets and provide real-time data capture with far less processing and scanning.

Key Terminology:

1. Loan Processing: Often banks (whether community banks or large retail outfits) have a number of personnel dedicated to initiating, processing, approving & disbursing loans. Personnel such as Relationship Managers might meet with clients to initiate loan applications, which could then be sent to Credit Administrators or Credit Committees depending on the loan amount that needs to be approved before it is disbursed.
2. Property Management: Most financial services firm typically end up either owning, managing or using as collateral various types of properties ranging from residential to commercial. Those properties involve maintenance and needs to be monitored frequently. The process of sending out Property Management inspectors to these sites usually involves form-filling, picture-taking and subsequent report-completion activities, all of which could be automated with Tablet-forms technology.
3. New Account Openings/Enrollment: Almost any financial services firm enrolls new clients utilizing forms. In the cases that sales reps or other personnel do this with a mobile component in the field/client's house, this lends itself well to automation with Tablets. If such forms can be easily filled out on the web, there is less opportunity here.

ROI:

1. Hard Savings: Cost of printed forms, lower clerical and administrative costs, additional revenue from processing more account openings, significantly reducing scanning & manual processing.
2. Soft Savings: Ability to gather better data, Create more secure data using e-Forms, ability to gather more data: pictures, GPS, prescription barcodes.

5. Field Inspections

Industry Outlook: The field inspection market is extremely diverse, and therefore it is difficult to make assumptions about the market as a whole. Field inspection services range from fire inspections to cattle inspections to maintenance reviews of cell phone towers.

Numerous companies conduct such work. These can be private corporations, government agencies or independent businesses. The consistent qualities that make field inspectors a likely candidate for Mi-Forms are the inherent mobility of the work, the prevalence of paper forms in the field inspection environment, and the need to access data from previous inspections while in the field. Field inspection services can reap some of the most tangible benefits from the Mi-Forms system as well. For example, inspectors who no longer need to come back to the office to manually type their findings into the central database have more time to conduct additional inspections each day. Such tangible benefits make inspection services an excellent point of entry when targeting larger firms or government agencies, and ***if you can only pick one vertical to focus on for Mi-Forms sales, Mi-Co recommends “Field Inspections.”***

Key Terminology:

1. Terminology varies by application.

ROI:

1. Hard Savings: Cost of printed forms, lower clerical and administrative costs, reduced travel expense of going back and forth between the office and the field, faster invoicing and better cash-flow.
2. Soft Savings: Ability to gather better data, increased productivity – ability to conduct more inspections per day, easy access to previous data while in the field, real-time reporting of information for business decision-making.

III. Sales Process

Recommendations for Prospecting & Qualification

Telemarketing

1. Identify key decision makers: CIO, IT Manager, Department Head, etc.
2. Identify key attributes of the target environment: What database are they using; do they already have tablets, digital pens etc.?

Database of Contacts

1. As Mi-Co for contacts in your region/city/other criteria, investigate these prospects/suspects

2. Use NetProspex or Data.com to gather information about targeted companies/accounts of interest based on success criteria of Mi-Co implementations that can be replicated (from Case Studies, Press Releases, Discussion with Mi-Co personnel etc.). Ask Mi-Co for help as needed. LinkedIn and Alumni Networks from your alma mater are also a good source for contacts at targeted accounts.
3. Purchase email lists and market webinar invitations, downloads etc. to these lists

Webinar Live Demonstrations & Overview

1. Work with Mi-Co to setup live demonstrations & presentations to your existing customer-base (lowest hanging fruit). Follow up with calls to drive attendance and get several sales cycles going right away!
2. Work with Mi-Co to setup industry or vertical-focused webinars/demos with a targeted message customized as needed for attendees & your company

Networking & Partnerships

1. Form partnerships with companies in your territory/region that might be complementary to what you sell, make them aware of what you do and ask for referrals
2. Find consultants in target accounts/industries as they likely are trusted advisors to customers you would like to target and will 'whisper' in their ear
3. Be active on social media like LinkedIn Groups, Facebook pages etc. and pick up prospecting clues
4. Subscribe to industry newsletters and regional newsletters and read case studies/success stories to guide prospecting. If you know a company has a deployment of Tablets already, they might be a good target to call and ask if they are using any Tablet-optimized Forms applications or need one.

Tradeshows/Conferences

1. Work with Mi-Co on the 90-day go to market plan of action, that includes any tradeshows/conferences you plan to attend and see if co-marketing funds are available. Make a plan of action for before, during & after the show. Setup demos, Tablets etc for optimal showing. Follow up actively after the event.
2. Work with Mi-Co to setup lunch & learn events, happy hour events, breakfast events etc. for your existing customer base to provide education and initiate sales cycles with interested parties

Sample Qualifying Questions:

1. *What is your current process for data capture?*
2. *What sort of electronic records system are you currently using?*
3. *What challenges do you face in gathering data and maintaining your electronic records?*

4. *How do you plan to deal with these challenges?*
5. *Have you given any thought to implementing a mobile data capture solution? If so, what have you looked at thus far?*
6. *Approximately how much do you spend on IT projects each year?*
7. *What type of budget have you allotted towards implementing a mobile data capture solution? [Try a rough range (between \$20,000 - \$50,000, \$50,000 - \$100,000, \$100,000 - \$200,000 etc...) if needed.]*
8. *How do you evaluate potential IT projects, and how long does this process usually take?*
9. *How many users would you expect for your application?*
10. *What forms do you use on a regular basis?*
11. *How many pages are these forms?*
12. *How is the data currently stored? Will you need access to your data at later dates, either for statistical reporting or audits?*
13. *How did you hear about Mi-Co and the Mi-Forms Solution?*

Recommendations for Product Demonstrations

Do not show every benefit of the system. Tailor the demonstration to the audience and focus on benefits that are most important to them. The goal is not to present a solution that does everything. The goal is to present a solution that solves their specific pains.

1. Instructions for Conducting an iPad/Android/Web-Forms Demo

- a. Installing the Software
 - i. Download & install the “Mi-Forms” App from Google or Apple app stores
 - ii. Connect the app to the Mi-Forms demo Server Software or your own internal demo version of Mi-Forms Server with templates (ask Mi-Co how at info@mi-corporation.com)
 - i. To use the hosted Mi-Forms Demo Server, type in this URL and use the following credentials on the Settings page:
 1. Hostname: www.miforms.com
 2. Customer name: Doyle
 3. U/N & Password: demo
 - iii. Alternatively, use the 1 sample form that comes with the downloaded app
- b. The basic demo: Show the library of forms, open one, fill it out, show exports to the download center

- i. Once logged in, you will see a few different form templates (Sierra Creek HAF for Healthcare, EMS form for Field Service/Inspection, others...)
- ii. Select one with your finger/mouse by touching the “Green Pen” icon on the left of the form. Selecting this opens a blank template/new form. Selecting one of the forms below this opens up an existing form that was started, but not finished.
- iii. Touch the red bar, the grey bar to collapse and expand tabs to show rules on the form, navigate to different pages etc.
- iv. Use the “-” and “+” tabs to collapse or expand sections. Fill out using keyboard, make annotations on images etc. Capture photos by clicking the camera icon on the left of certain fields.
- v. Refer to the “Mobile web-forms” and “iPad and Android” client user manuals for more help as needed in filling out forms.
- vi. Visit the Download Center to show sample exports of forms that were filled out:
 - i. <http://demo.miforms.com/osdc>
 - ii. Customer name: Mi-Co
 - iii. U/N & Password: demo
 - iv. Click any of the sample exports to show PDF exports, CSV exports, XML exports etc.
- vii. Congratulations! You have just demonstrated the power of flexible data capture with Mi-Forms best-of-breed mobile-forms!

2. Instructions for conducting a Tablet PC Demo

- a. Installing the Software
 - i. Install Mi-Forms
 - ii. Reboot computer when instructed
 - iii. Install the demo files
- b. The basic demo: Fill out a form, verify it, and view it in an access database
 - i. Open Mi-Forms
 - ii. Select the form you would like to use
 - iii. Fill out the form
 - iv. Demonstrate the handwriting recognition, ability to write anywhere, and the eraser capabilities
 - v. Demonstrate the different field types: picklist, constrained text, open narrative, etc.
 - vi. Demonstrate the business rule verification by putting an invalid value in one of the fields

- vii. Complete the document
- viii. Assuming all entries meet the predefined business rules, the “Finish” button will be enabled. Click “Finish”
- ix. The Data is now exported to the appropriate database
- x. Close or minimize Mi-Forms
- xi. Open the “Mi-Forms Demo Databases” folder on your desktop
- xii. Double-click on the one that corresponds to the form you just filled out. This will open Access and you can view the exported data
- xiii. Congratulations! You have just demonstrated the power of digital writing with Mi-Forms

***** Sample proposals and quote sheets – please contact Mi-Co if you need any of these document examples!**

Pricing:

Mi-Co offers a variety of flexible pricing models to help you win the deal, for a range of customer budgets & project needs. Refer to the following documents for more detailed pricing information:

- Mi-Forms Pricing Calculator (spreadsheet)
- Mi-Forms Pricing FAQs for Partners
- Mi-Forms product tiers (at www.mi-corporation.com under “Products” and “Purchasing Options”)

In summary, Mi-Co offers the following primary pricing models, based on a simple named-user model (named user defined as anyone that requires a username & password logon, irrespective of software needed in the Mi-Forms system or hardware utilized):

- Perpetual license (1-time fee), with 20% annual maintenance
- Monthly term license (in increments of 3-months), with data stored on-customer servers
- Monthly hosted license (in increments of 3-months), with data stored in the Mi-Co cloud

For exceptional circumstances Mi-Co offers a transactional (forms-submitted-based) pricing model, only where the above primary pricing model proves to be a barrier to the sale. Contact your Mi-Co representative to discuss this option at sales@mi-corporation.com or 919-485-4819. Mi-Co Partners receive discounts on the list price of software, and in addition can earn rebates on a sliding scale, based on quarterly sales made of Mi-Forms Software, net to Mi-Co.

Recommendations for Pilot Programs:

A pilot program is a small scale implementation of one to five users that should generally go no longer than 30 days. This is a trial installation to reassure the customer and prove to them that the Mi-Forms solution will work in their environment. Goals of the Pilot should be explicitly stated in the contract agreement before the implementation proceeds. These goals should include: showing proof of concept for the Mi-forms software, design and implementation of at least one simple commonly used form, and providing answers to any questions that the client may still have about the software. It is critical to clearly articulate the goals of the pilot, the persons responsible for specific tasks, and the timeline to completion in order to judge the pilot's success and to close the sale.

IV. Top Ten Objections and Responses

1. **Security:** "Is the Mi-Forms solutions safe and secure?"
 - a. Form templates are encrypted to prevent tampering
 - b. 128-bit data encryption on the *Mi-Forms* client
 - c. Client-Server communication encryption via HTTPS
 - d. All data is time-stamped and logged to the originating user
 - e. Full document history handled by the *Mi-Forms Server*
 - f. Provides an added layer of security to existing HIPPA etc. programs.

2. **Hardware:** "What hardware do I need to take advantage of the *Mi-Forms* solution and how can I afford it?"
 - a. Leasing options allow customers to bundler software, hardware, and services into one low monthly payment.
 - b. We also work with several hardware partners that can sell and recommend the best solution
 - c. Mi-Forms is the most flexible mobile-forms solution in the market with support for iPads, Android slates, Windows 7/8 Tablets, Ricoh eQuill Tablets, Digital Pens, Laptops/Desktops and more. Customers **future-proof** themselves with an investment in Mi-Forms as the Tablet market continues to rapidly evolve and change.

3. **Usability:** "Is *Mi-Forms* easy to use and user-friendly? My people are used to pen and paper."
 - a. Pen on tablet is essentially the same work flow as Pen on Paper. Users can easily use handwriting recognition, touch, voice, and any other modes they are comfortable to capture data quickly, accurately & efficiently

- b. We also have a network of partners that specialize in software integration for particular industries. We can find someone that will meet your specific challenge.
 - c. We have been in business since 1999 and have done implementations in numerous vertical industries from healthcare to financial services.
 - d. *Mi-Forms* is infinitely customizable to meet the needs of any situation and any end-user.
4. Price: “How much does it cost and how can I justify that price to my boss?”
- a. Look at ROI calculations. Productivity improvements such as revenue per employee, Accounts Receivable turnaround and Quality of care will improve as well as almost all data-entry is eliminated.
 - b. Flexible licensing options include perpetual licenses, monthly-term licenses, lease-to-own options based on simple named-user formulas.
 - c. Three different product tiers are available – Basic, Department, Enterprise, that allows a customer to come in at the level they are comfortable and upgrade easily in the future. Visit the Mi-Co website, Products Page for the listing of functionality differences in these tiers.
 - d. Comparatively speaking the Mi-Co solution is relatively inexpensive. Customers who have already invested in an EMR, CRM, ERP, etc. understand the value software represents. However, if prospects are looking for primarily a desk-based system and are considering web-apps or other ‘free’ or ‘cheap’ applications, it’s better to move on to other opportunities.
 - e. Sitting between a completely custom-app and an off-the-shelf ready to use app in a vertical area without any customization allowed, Mi-Forms is well positioned to accelerate customers’ ability to capture mobile data exactly as they need it, while staying flexible in terms of hardware, data input type, integration etc. Ask Mi-Co for the “*Custom app versus Off-the-Shelf app*” collateral piece.
5. Need for Hardcopy: “I still need to have a hardcopy or a receipt as a backup; can *Mi-Forms* satisfy this requirement?”
- a. Digital Pen solution keeps paper in the equation
 - b. *Mi-Forms* can be setup to send an e-mail receipt to the user
 - c. Users can be outfitted with a mobile printer to print a form right after it’s filled
6. Connectivity: “Do my users need to be connected to the internet at all times, how do they connect with my back-end system when they are out in the field?”
- a. The Mi-Forms solution works in either a connected or disconnected mode. You do not need connectivity to capture data.

- b. Implementation question: Customer can invest in always connected solutions or setup periodic network access workflow.
 - c. *Mi-Forms Server* supports automatic synchronization out of the box.

- 7. Verification: “How do you ensure that the data collected is accurate, what about errors in the hand-writing conversion?”
 - a. Several safeguards designed into the software: *Forms designer* verification rules, constrained print recognition, 98.5% accuracy for alpha and 99.5% for numbers
 - b. Software can still be customized to send the documents through a review/workflow process

- 8. Compatibility: “Is *Mi-Forms* compatible with my back-end database?”
 - a. VB.Net scripting gives the *Mi-Forms* unlimited customization to support any back-end system and any type of workflow using APIs, web-services, SDK tools, ODBC exports, flat-file exports and more.
 - b. *Mi-Forms* also supports numerous types of export data: XML, CSV, TIFF, PDF, JPEG, BMP, WAV and many more that can be customized as needed.

- 9. Design: “I want my forms to look the same way they do on paper, my users don’t want to write solely in constrained text boxes.”
 - a. Users don’t want the final form to be in constrained text boxes: We can customize the system to output the data in more conventional forms for more intuitive presentation.
 - b. We also provide 4 ways to input handwritten data on the Tablet without the constrained blocks providing flexibility for how you want to access information within your enterprise.

- 10. Forms Transfer: “How do I transfer my existing forms over to the *Mi-Forms* solution?”
 - a. We have numerous system integrator and reseller partners that can provide forms design, workflow setup and data integration as a service.
 - b. We can provide this service directly – best in with a low number of forms
 - c. We can train customer users on the *Forms Designer* so that they can transfer the forms themselves
 - d. Texcel (www.texcel.com), a Mi-Co Partner, provides a forms conversion solution that will allow for quick and easy form transfers between different electronic formats like PDF, Excel etc. into the *Mi-Forms Designer*. In addition, word documents can be copied and pasted into the *Mi-Forms Designer*’s WYSIWYG layout tool to speed form-design.

V. Marketing Resources

- **Mi-Co Website Partner Portal** (visit www.mi-corporation.com)

Create a "Mi-Account" and Mi-Co will turn on access to the following for you:

- Product Sales Manual
- Case studies
- Rebrand-able Brochures
- White Papers
- Press Releases
- Informational industry articles
- ROI Calculator
- **Lead/Deal registration system**
- Pricing calculator & pricing FAQ documents
- Email marketing templates
- Much, much more!...

VI. Sample Introductory Email to Prospect:

Dear _____,

Have you thought about moving your paper-forms onto Tablets and sending data straight to databases? Would it save your organization time & money, and boost productivity, to reduce scanning and data-entry?

We can show you how, with Mi-Forms best-of-breed Mobile-Forms software for Tablets.

The Mi-Forms solution eliminates paper forms processes by allowing your *(insert employee type – e.g., nurses, field workers, inspectors etc.)* to input electronic data directly from the point of capture. Our system offers a user-friendly, pen on paper-type of interface that makes the transition to electronic forms as seamless as possible. A short video clip is below to demonstrate the concept:

(insert appropriate Mi-Co YouTube channel video link, based on industry or other factors)

Our customers include organizations like **Eli Lilly, AT&T, NC Department of Agriculture, Sutter Health** and more and they all report significant cost savings in terms of time, reduced errors, faster submissions and more accurate data collection.

Would you like to see a short demonstration of Mi-Forms to learn more? Would you like to receive some product information and case studies?

Thank you for your feedback,