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# capabilities document



## MOBIUS VENDOR PARTNERS

### THE SOURCE FOR BUSINESS RESOURCES

*Established in 1999, Mobius VP, LLC is an Indianapolis-based company. Our mission is to assist our clients in effectively managing business processes including finance, marketing, learning & development, training, sales distribution, product & service support.*

MVP accomplishes its mission by providing a variety of services that run the gamut from strategy development to roll-up-your-sleeves execution.

MVP offers such a full spectrum of services because of the exceptional experiences of our principals and partners. Our executives have a combined total of more than 100 years of hands-on experience in business management, processes, marketing, sales, enterprise learning, and performance improvement. For projects that require specialized skills, we call on our extensive network of strategic partners. Each of these industry lead-

ers has been carefully selected due to their unique abilities, creative solutions, and compatible business philosophies. With MVP, you get the right balance of conceptual knowledge, real world experience and entrepreneurial passion.

Just as there is no beginning or end to a Mobius strip, so it is with Mobius VP. We can help you at whatever level you have a need. And while other companies claim to offer end-to-end solutions, we believe in providing a closed loop of services that feed into one another to produce continuous improvement.



## SUCCESS

We believe we continue to be successful in our mission because we:

- Staff projects with seasoned and experienced executives and partners.
- Tailor project scope and deliverables to specific measurable requirements.
- Ensure execution of recommendations by staying involved in projects for as long as you need us to. In many instances, we maintain ongoing operational responsibilities for clients who may not be ready to hire a specific executive position.

# Our services

At Mobius VP, we understand that business in the real world is rarely as simple as it is in textbooks and the latest business best-seller. Business is complex, multi-layered and easily affected by the idiosyncrasies of the human beings who conduct it. That's why MVP offers services that give you exactly the help you need, exactly how you need it.

## **Business Planning & Management**

As the famous adage states, "Most companies do not plan to fail, they fail to plan." So much has been written about the importance of planning, yet so few companies perform effectively in this area. At MVP, we believe there are four key reasons for this:

- Internal resources are frequently not appropriately experienced in the planning process.
- Employees' planning is often influenced by their own biased opinions and self interests.
- Staff who are "doers" tend to see the planning process as something they have to do in addition to their jobs, not as a part of their job. Therefore, planning is viewed as an intrusion to the core competency, creating task interference.
- Once a plan has been developed, stakeholders typically don't want to have their ideas challenged by objective project management.

MVP facilitates business planning at whatever level you like, from oversight of your internal process to a complete turnkey solution. Our business planning process includes a review and analysis that focuses on goals, objectives, and measurement systems, as well as placing the plan into a structure that ensures your plans are aligned and understood by all stakeholders. To assure ongoing success, we design or redesign your internal strategic and tactical planning processes.



## **Marketing/Sales Management**

The ability to achieve sales goals is impacted by any number of variables, many of which may be outside of a company's control: Are customers demanding lower pricing? Are suppliers driving up your costs? Are competitors introducing innovations that put you at a disadvantage? Does your sales force confuse activity with achievement? A properly designed sales process will help to provide true control and structure in an area that often seems beyond control.

MVP develops sales processes that keep your sales force focused on high leverage activities and marketing strategies that move your target audience from interest to action. We help your staff spend more time closing sales, and less time selling. Our process includes a review and analysis of your current system, and recommendations for improvements. MVP will also manage the implementation of the recommendations and even assist in the development of creative, effective marketing materials.



**MOBIUS VENDOR PARTNERS**

# Our services

## **Business Relationship Management**

Often confused with Customer Relationship Management (CRM), Business Relationship Management is a process for utilizing business relationships to meet company objectives, reduce marketing costs, boost credibility, and increase influence. MVP's Business Relationship Management services help our clients to acquire and leverage outside support. Through the choppy waters of industry trade associations to the ever-pressing need to identify centers of influence, MVP is skilled in supporting our clients' efforts to build business relationships that make a difference.

## **Financial Management**

If Business Management services are the engine that powers a car, then MVP's Financial Management services are the dashboard that helps the driver control where the car is headed and how fast it gets there. MVP can enhance your understanding of what's happening and its impact by restructuring financial statements to provide more meaningful management information

We can also prepare budgets in connection with business planning, assist in securing capital through traditional and nontraditional sources, and provide business and product valuations.

## **Process Improvement and Management**

Frequently we find that clients have the right product, for the right market, yet they still find themselves falling short of objectives because of challenges in the execution phase. Using our proprietary assessment methodology, MVP can help your company analyze your processes and identify areas that require significant improvement. If desired, we can also develop and implement a plan for achieving the desired change.



**MOBIUS VENDOR PARTNERS**

# Our services

## Service / Account Management Processes

According to Don Peppers and Martha Rogers, authors of the best-selling book *The One to One Future—Building Customer Relationships One Customer at a Time*, it costs the typical company five times more to acquire a new customer as it does to keep an existing one. And it's getting harder to know when a customer will bolt. An astonishing 90% of unhappy customers never complain ... they just don't buy again.

The financial argument for retaining customers and solving issues before they become problems has never been stronger. MVP can help design service and client account management processes that support your organization's ability to maximize client satisfaction and minimize churn. Our service and account management process examines account management planning, designation of service goals and objectives, and measuring and reporting processes. We also produce written findings from the process review and recommendations. If desired, MVP can then assist your organization in implementing and managing these recommendations.



## Employee Performance Improvement through Learning and Development

The most valuable resource of any business is its human resources. And as businesses acquire new technology and implement new processes to remain competitive, the development of those human resources must become a critical component of enterprise-wide change. MVP can conduct an assessment of the learning and development needs of an organization's employees. Then, we can develop an enterprise-wide or departmental performance improvement strategy to help close the gap between the current skill level of employees and the required skill level. MVP can design and develop customized learning solutions to close the skill gaps. We can either implement these learning solutions or coach a business' learning and development professionals to implement the solutions themselves.



**MOBIUS VENDOR PARTNERS**

# mvp *portfolio*

For a subsidiary of a Fortune 250 firm, MVP designed, developed, implemented, and currently manages a web-based data collection, database management, and reporting system for their clients use. MVP accomplished what had been thought to be a 12-month project in 90 days, at half the projected cost.

For a spin-off venture of an IT firm, MVP developed financial systems and assisted in raising capital for their wide area network and subscription computing offerings.



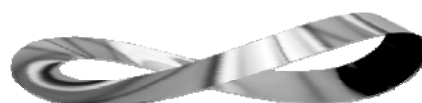
For a national trade association in the travel and leisure industry, MVP designed, developed, and implemented several integrated e-marketing and other direct marketing strategies to grow the organization's membership base. Although originally positioned as a test, this effort generated profits and generated memberships from day one.

For a venture capital firm, MVP supplemented and managed their own analysts in the evaluation and capital structure recommendations for a robotics company being taken public. For a Swiss-based venture firm, MVP evaluated the costs and operating structures of one of their US call center holdings that was posting losses well in excess of plan. MVP helped to trim costs by more than 50% in the first 12 months.

For a national trade association in the teleservices industry desiring to enhance revenue opportunities for a national conference, MVP assumed the management role, more than doubling the prior year's results in both sponsorships and attendees within a 60-day window.



A new entrant in the Vacation Ownership industry required a 144-seat call center to be up and running in less than 90 days. MVP led the effort from plan creation to implementation of equipment and service requirements.



**MOBIUS VENDOR PARTNERS**

# mvp portfolio



For a major timeshare exchange company, MVP managed the entire process of designing, developing, deploying and current managing an online customer survey system with quality initiative reports for their affiliate timeshare resorts. The online system is designed to replace the existing process of direct mail as the primary vehicle saving our clients several hundred thousand dollars each year while increasing the response rate. To date, MVP has surveyed over 2,000,000 consumers. This initiative led to the creation of *CustomerCount*, the enhanced online continuous survey system being used by the exchange company and several large resort developers.

For a timeshare subsidiary of a Fortune 500 company, MVP designed, developed, implemented and currently manages a web based data collections, database management and reporting system for their clients use. MVP accomplished what had been thought to be a 12 month project in 90 days at half to projected cost.

For a national trade association in the leisure travel industry, MVP designed, developed and implemented several integrated e-marketing and other direct marketing strategies to grow the organizations member base. Although originally positioned as a test, this effort generated new memberships from day one.

For a venture capital firm, MVP supplemented and managed their own analysts in the evaluation and capital structure recommendations for a robotics company being taken public.

For a Swiss based venture firm, MVP evaluated the costs and operating structures of one of their US call center holding that was posting losses well in excess of plan MVP helped trim costs by more than 50% in the first 12 months.

For a global trade association in the teleservices industry desiring to enhance all business processes and grow revenue, MVP assumed the management role, more than doubling the prior year's results in all areas including dues and non dues revenues. MVP continues it roll as the association management company after more than 5 years and continues its roll today.

For a major timeshare company MVP was retained to design, develop and launce a new call center initiative. The call center was anticipated to employ 350 people 6 days a week. From specifying and selecting all technology, to ensuring the call center was completely integrated into every other department, MVP was responsible. Managing each task and launching the initiative was accomplished on time and under budget.



**MOBIUS VENDOR PARTNERS**

# mobius *strip*

At first glance, it seems like a simple closed loop. It is often confused with the sign of infinity. In fact, it is infinity and was largely responsible for the industrial revolution.

Upon closer inspection its unique properties become apparent. You see, ordinary 'circles' (think of a rubber band or wedding ring) have two surfaces: an outer surface and an inner surface. A mobius strip, on the other hand, has only one surface. There's no 'back' side of a mobius strip. If you trace a line the length of a mobius strip you will always end up back where you started, with an unbroken line marking the entire surface .

And here's something even more curious... if you make a simple loop out of paper, tape the ends, then cut the loop in half lengthwise, you'll end up with two loops that are half the width of the original circle. However, cut a mobius strip in half and you'll end up with one Mobius strip that is twice the length of the original. Where an ordinary loop is easily diminished, a Mobius strip continues to grow.

What makes the Mobius strip so remarkably different?



A simple half twist.

That elegant little turn changes something simple and ordinary into something remarkable and efficient. At Mobius VP, we take the same approach to management services that August Ferdinand Mobius applied when creating the Mobius strip. We deliver an ingenious twist that can take your organization out of the realm of the ordinary and into a whole new plane.



**MOBIUS VENDOR PARTNERS**

**ROBERT A. KOBEK**  
**President**

In October of 1999, Bob Kobek launched Mobius VP, LLC. Under Mr. Kobek's leadership, MVP has attained significant partner resources, built a solid company infrastructure, and acquired leading technology capabilities to position itself effectively in growing and servicing its current and future clientele.

Prior to forming MVP, Mr. Kobek spent more than 20 years in the direct marketing industry. He successfully launched and then sold or completed mergers of two companies whose core competencies were in the teleservices industry. Mr. Kobek has specialized in the integration of marketing and sales through direct marketing, with an emphasis on database management/ marketing, including the design and implementation of more than 150 outbound telemarketing, inbound customer service and order processing operations and interactive information systems.

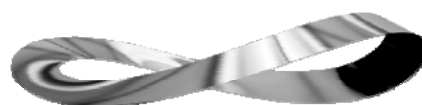
Mr. Kobek's expertise is in the design, implementation, and marketing of products and services. He also excels at assisting company department heads in determining appropriate processes for streamlining their functions. Mr. Kobek has traveled abroad to provide telemarketing strategy presentations to European counterparts in six countries. His articles on sales and marketing have been published in several national and regional trade and business publications. In 1986, Mr. Kobek was accepted as a member of "Outstanding Young Americans." In 1988, Mr. Kobek received a TELO Award for Excellence in Telemarketing from the American Tele-marketing Association for his design and implementation of a selling system that increased the sales of a high-ticket product by 150% in 12 months.

Mr. Kobek's career began in Washington D.C. as the Director of Indiana Liaison for United States Senator Vance Hartke, Ret. (1971-1974). During that time Mr. Kobek specialized in the monitoring of consumer protection and telecommunications legislation. Mr. Kobek then spent two years as the director of Special Projects for Indiana General Assembly Speaker of the House, Phillip Bainbridge.

Since then, Mr. Kobek has worked hands on within the marketing industry, including a position as the National Sales Manager for Terstep Recreation Company and Trans Alaska Energy Corporation. His ownership of AMI Telemarketing, Inc., a business-to-business telemarketing service bureau, was the beginning of his expertise as a business-to-business marketing professional. Mr. Kobek was awarded a Casper Award in 1993 by the Central Indiana Chapter of the United Way for his participation in the WIBC Radio Hurricane Andrew Relief Drive.

Mr. Kobek is a member of the American Resort Development Association (ARDA) and has been a featured presenter at several of its conferences, including the ARDA Fall Conference off Site Marketing "Think Tank."

Mr. Kobek attended Holy Cross College at Notre Dame and Indiana University, concentrating on Political Science and Business.



**MOBIUS VENDOR PARTNERS**

**BILL MORRIS**  
**Managing Partner**

Bill Morris has held a number of executive level positions across a broad range of industries over the past 25 years, with an emphasis in Finance, Information Systems and Strategic and Business planning.

Mr. Morris started his career in the publishing industry, rising to become the Executive Publisher of the Saturday Evening Post Company and its 18 publications. In this capacity, Mr. Morris maintained responsibility for all production, finance, sales and circulation planning, and execution.

Along with a small team from Curtis Publishing Company, Mr. Morris started a co-operative advertising billing and audit service firm which provided its advertising billing and audit service firm which provided its services to national retail hardware manufacturers, such as Stanley Tools, Hudson, Ames, and Black & Decker. This firm was subsequently sold to a global advertising agency.

Mr. Morris went on to become Vice President of Finance, Planning and Development for Resort Condominiums International, which saw its revenues increase twenty-fold to more than \$350 million during his 10-year tenure. Mr. Morris has also held the position of CEO for a high net worth Family Office, with management and oversight responsibilities for business, traditional, and venture investments.

During his career, Mr. Morris has also had direct responsibility for turn-around situations, several start-ups, capital funding, acquisitions, and large-scale planning and development assignments.



**MOBIUS VENDOR PARTNERS**

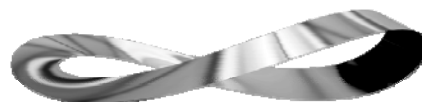
**C. RANDOLPH STONE**  
**Executive Vice President, Strategic Research Services**

Randy Stone has dedicated more than 20 years to maximizing sales and marketing initiatives through the collection, analysis and dissemination of strategic data. Throughout his career, Mr. Stone has designed and implemented market research studies, business-to-business lead generation programs, strategic planning and program consultation that drive results.

Mr. Stone's expertise has served a variety of industries, including manufacturing, high-tech enterprises, healthcare and financial institutions, professional service organizations, the transportation industry, advertising firms, commercial developers, and business-to-business publishers, among others. His emphasis on *making data actionable* helps to analyze markets and market segments, evaluate competitor threats and vulnerabilities, enhance market positioning, profile prospective opportunities and open the doors to increased sales.

Mr. Stone has also conducted numerous international projects. For example, following the Velvet Revolution in the Czech Republic (formerly Czechoslovakia), Mr. Stone performed training and marketing consulting to introduce free-market concepts and marketing strategies to firms in Prague (1996 & 1998). He also administered an international BPA audit campaign for a global publication, requiring the management of a 24/7 service bureau agency in collecting the data.

With emphasis on identifying, quantifying, qualifying and penetrating markets, Mr. Stone has administered hundreds of assignments from which clients have benefited.



**MOBIUS VENDOR PARTNERS**

**DR. B.J. BISCHOFF**  
**Performance Improvement Services**

Dr. B.J. Bischoff is an independent consultant, certified as an Indiana Women's Business Enterprise, who leads Mobius Vendor Partners' Performance Improvement Services practice. She specializes in developing performance improvement strategies for educational institutions, businesses, government agencies, nonprofit organizations, and professional associations. Her experience includes 28 years of program evaluation, project management, training trainers, management and leadership development, instructional design, interpersonal communications, organizational planning, meeting facilitation, and needs assessment. She is assisted Golden Rule Insurance Company to adopt best-in-class practices for its new Learning and Development Center. She has also worked with the Executive Leadership of Butler University's College of Business Administration to implement the Butler Business Accelerator, a five-year \$22 million Lilly Endowment initiative designed to create strong academic-business linkages. Since 1999, Dr. Bischoff has provided cross cultural competence training and consulting services to Eli Lilly and Company. She serves on the Boards of the Indianapolis Public Schools Education Foundation and NPower Indiana. Dr. Bischoff is a Governor's appointee to Indiana's nine-member Workforce Proficiency Panel, responsible for establishing Certificates of Technical Achievement

Dr. Bischoff has served as a site evaluator for the Indiana Department of Workforce Development's (DWD) Career Majors initiative for three years. She developed grant proposals to improve education attainment in select Indiana counties, resulting in over \$28 million in funding from the Lilly Endowment to five rural Indiana counties. She completed an evaluation of Indiana's public education system with the National Association of State Boards of Education and the National Governors Association. She created and managed FaithWorks Indiana, one of the nation's top-ranked faith-based initiatives. She managed Indianapolis Mayor Bart Peterson's public outreach process for addressing the city's combined sewer overflow problems and Indianapolis' public health community assessment process. She managed a statewide assessment for the Indiana Arts Commission, a feasibility study for Indiana State University to determine the need for higher education access in Northeast Indiana, and a study examining the State of Philanthropic Giving in Northwest Indiana. She worked on the project team that transitioned the Muscatatuck State Development Center from the State of Indiana to another entity. She led projects with the Indiana Department of Transportation to improve local government services and with the Indiana Department of Workforce Development to improve implementation of the Workforce Investment Act. She was a Governor's appointee to Indiana's statewide Human Resource Investment Council/Workforce Investment Board for ten years.

From 1999 to 2005, Dr. Bischoff established the government consulting practice for Crowe Chizek, the eighth largest accounting and management consulting firm in the U.S. She owned White River Training & Consulting, Inc. from 1990 to 1999. In her previous academic career, she served as the Director of Ball State University's Center for Entrepreneurial Resources, the Manager of Extended Services for Ivy Tech Community College, and the Associate Director for Credit Programs in Continuing Studies at Indiana University - Purdue University at Indianapolis. Dr. Bischoff was the executive director of Indiana Training Exports, a not-for-profit organization started with a grant from the U.S. Department of State and the Indiana Department of Commerce, providing training services to developing nations and emerging economies throughout the world. As a result, Dr. Bischoff has conducted over 50 training programs for participants from Romania, Russia, Ukraine, Georgia, Armenia, Belarus, Azerbaijan, Latvia, Croatia, Jamaica, Bosnia, Bulgaria, Hungary, Morocco, and Albania. Her international work has taken her to 25 countries.

Dr. Bischoff earned her Doctorate in Higher Education Administration, her Master of Science degree in College Student Personnel Administration, and her Bachelor of Arts in Journalism and Theatre from Indiana University-Bloomington.



**MOBIUS VENDOR PARTNERS**

As a consultant, Ms. Kobek has assisted companies and organizations such as Anthem Blue Cross Blue Shield, Resort Condominiums International (“RCI”) and Christel House, a non-for-profit organization.

Ms. Kobek’s Management success is based on a solid foundation of experience working in an industry where customer satisfaction is paramount and customer loyalty is essential.

Prior to joining forces with Mobius VP, LLC., Ms. Kobek spent nearly 20 years taking on progressively more challenging leadership roles at Resort Condominiums International, a leader in the travel industry. Ms. Kobek’s extensive talents in project and people management contributed significantly to RCI experiencing record growth and development during Ms. Kobek’s tenure there.

As Vice President of Resort Services, Ms. Kobek established strategic business plans, goals and objectives designed to meet the diverse needs of more than 1200 resorts based in the United States and Caribbean. In doing so she supervised a staff of more than 50 travel industry professionals. Ms. Kobek was also responsible for managing a consolidation effort that resulted in integrating more than 15 regional offices into a single location at the company’s international headquarters. In spite of the size of the undertaking, Ms. Kobek accomplished the task in just 90 days.

Organizing people and departments for greater efficiency and effectiveness is nothing new for Ms. Kobek. During a three-year stint as Project Sponsor of RCI’s Business Process Reengineering Project, Ms. Kobek was responsible for managing aspects of a project that impacted more than 30 company facilities around the world. Ms. Kobek led project teams through a quality improvement process that addressed company processes, training procedures and information systems.

In previous positions at RCI Ms. Kobek has been responsible for managing and motivating large staffs, satisfying large numbers of customers, developing and meeting sales goals and objectives, administering large budgets and creating processes that work in many locations and in many cultures.

Ms. Kobek holds a Bachelor of Science degree in Business Administration from Butler University and an AEI Certification with Honors from the American Resort Development Association (“ARDA”) Educational Institute. She has served on the ARDA Resort Management Committee and has completed several speaking engagements at various ARDA sponsored conferences.



# Our *people*

## **KARL JACOBS** **Management Services**

Karl Jacobs' exceptional organizational and leadership skills have been the catalyst for getting things done quickly and effectively on three continents.

Before joining Mobius VP, Mr. Jacobs served as a Vice President for Transcom, an international customer relationship management company with annual revenues of \$200 million. Initially brought on as the VP of Operations, Mr. Jacobs was responsible for leading start-up operations that resulted in the hiring of 800 employees and the opening of four U.S. and three European facilities in just 18 months. His actions contributed to Transcom being named the fastest growing company in its industry in 1997. With Transcom's operations running smoothly, Mr. Jacobs moved to the position of VP of Human Resources and Administration. In this role, Mr. Jacobs automated HR functions to support 1,200 associates and established processes to better manage procurement and property accountability. Mr. Jacobs also took the lead in assuring on-going professional development for all staff members, from the executive and management level staff to entry-level employees.

Prior to joining Transcom, Mr. Jacobs served in several management positions for Resort Condominiums International, a leader in the worldwide vacation and travel industry. After starting as Manager of Corporate Quality, Mr. Jacobs next was responsible for planning and directing RCI's member services operations, which served more than one million customers annually. As a result of his outstanding performance he was asked to lead a company-wide re-engineering effort that redesigned the customer sales and service process. In his final year at RCI, Mr. Jacobs served as Vice President of Information Technology.

Not only does Mr. Jacobs know how to reach goals, he also has a solid understanding of the ripple effect that business decisions have on companies' financial picture. Before joining RCI, Mr. Jacobs served as a Financial Consultant with Merrill Lynch, where he built and managed a client base of more than 200 clients and \$10 million in assets. He also formed a partnership which managed more than 1,000 clients and \$75 million in assets.

Prior to working in the private sector, Mr. Jacobs spent 20 years in the U.S. military. Mr. Jacobs graduated from the U.S. Military Academy at West Point in 1967 and served tours with the U.S. Army in Europe and Vietnam. He returned to the United States in 1973 to serve as an Associate Professor of German at West Point. He then moved on to serve as an Executive Officer to the Personnel Director for the XVIII Airborne Corps, an organization of 27,000 people. After three years, Mr. Jacobs moved to Washington, D.C. to serve as the Program Manager for the GI Bill and Army education programs. His next promotion involved planning and directing more than 20 Department of the Army conferences for top management. He also provided advice and assistance on protocol matters to the Secretary of the Army and the Chief of Staff of the Army and worked daily with military and civilian VIPs, including representatives of foreign governments. Mr. Jacobs was then selected to command an Army battalion, directing a staff of more than 60 personnel who motivated, trained, and graduated 12,000 finance, legal and personnel specialists annually.

Mr. Jacobs holds a B.S. in Engineering from the United States Military academy, an M.A. in German Language and Literature from Middlebury College and an M.B.A. from Long Island University.



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