

P R O O R B I S<sup>®</sup>

M A N A G E M E N T I N N O V A T I O N S

**General Services Administration  
Federal Supply Service  
Authorized Federal Supply Schedule Price List**

On-line access to contract ordering information, terms and conditions, up-to-date pricing and the option to create an electronic delivery order are available through GSA Advantage!<sup>™</sup>, a menu-driven database system. The Internet address for GSA Advantage!<sup>™</sup> is: <http://www.fss.gsa.gov>.

**Schedule for Management, Organizational, and Business Improvement Services (MOBIS)  
Federal Supply Group:** 874, Class: R499  
**Contract Number:** GS-10F-0310N  
**Contract Period:** April 1, 2008 - March 31, 2013

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at: <http://www.fss.gsa.gov>

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**Small, Woman-Owned Business**

For more information, please contact:  
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**Date Last Updated: 8/13/10**

## CUSTOMER INFORMATION

- 1a. Awarded special item number(s):
  - SIN: 874-1, Consulting Services
  - SIN: 874-2, Facilitation Services
  - SIN: 874-3, Survey Services
  - SIN: 874-5, Support Products
- 1b. See price list
- 2. Maximum order: \$1,000,000
- 3. Minimum order: \$300.00
- 4. Geographic coverage: Domestic Only
- 5. Point of production: Same as company address
- 6. Discount from list prices or statement of net price: Government net prices (discounts already reduced)
- 7. Quantity discounts: None offered
- 8. Prompt payment terms: Net 30 days
- 9a. Notification that Government Purchase Cards are accepted at or below the micro-purchase threshold: Yes
- 9b. Notification that Government Purchase Cards are accepted or not accepted above the micro-purchase threshold: Accept over \$2500
- 10. Foreign items: None
- 11a. Time of delivery: Specified on Task Order
- 11b. Expedited Delivery: None
- 11c. Overnight and 2-day Delivery: Not available
- 11d. Urgent Requirements: N/A
- 1. F.O.B. Point(s): Destination
- 13a. Ordering Address: Same as company

- 13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), and a sample BPA can be found at the GSA/FSS Schedule homepage ([fss.gsa.gov/schedules](http://fss.gsa.gov/schedules)).
14. Payment address: Same as company
15. Warranty provision: Contractor's standard commercial warranty
16. Export packing charges, if applicable: N/A
17. Terms and conditions of Government purchase card acceptance: Contact contractor
18. Terms and conditions of rental, maintenance, and repair (if applicable): N/A
19. Terms and conditions of installation: N/A
20. Terms and conditions of repair parts indicating date of parts price lists and any list from list prices: N/A
- 20a. Terms and conditions for any other services: N/A
21. List of services and distribution points: N/A
22. List of participating dealers: N/A
23. Preventive maintenance: N/A
24. Special attributes such as environmental attributes: None
25. DUNS number: 11-1570490
26. Registered in CCR

## **COMPANY OVERVIEW**

ProOrbis, LLC is a leading innovator of management theory and applications that set the standard for managing the value of investments in an enterprise to maximize return. The ProOrbis® Method is a unique combination of paradigm shifting theories, project management, analytic tools, change facilitation, and executive development in applications that produce transformative, real-world results. Although this approach addresses the performance of all tangible and intangible organizational assets, the Method is particularly deep in managing human capital — the most misunderstood and “under-worked” asset — creating significant productivity improvement opportunities for organizations, industries, and countries.

ProOrbis clients are world class leaders in their categories, often with a long track record of success. They range in size and nature, but are generally very complex, global businesses with a wealth of expertise. ProOrbis maintains a high degree of confidentiality with its specific client projects and data. Parent companies include: Johnson & Johnson, Morgan Stanley, MetLife, Mellon Financial, Rohm & Haas, DuPont, Motorola, and the US Federal Government. ProOrbis brings a new perspective to help them meet the next challenge – dramatic growth, productivity improvement, or migration to a new market by uncovering opportunities and a path to seize them. A ProOrbis project is ideal for senior executives who are new to their positions and need a fresh, comprehensive perspective as well as established executives who are staging for a major shift in the organization’s growth or profitability.

ProOrbis collaborates with universities, trade groups, publishers, think tanks, and government institutions to advance the recognition, accounting, valuation, and management of the world’s tangible and intangible assets. Our goal is to help design companies and economies that create a more productive, sustainable world.

Since its founding in 1998, ProOrbis has enjoyed tremendous growth and opportunity while working with the world’s most elite firms. ProOrbis has been listed on MOBIS since 2003 and was recently certified as a Women’s Business Enterprise (WBE) by the Women’s Business Enterprise National Council (WBENC) in 2006.

### **The ProOrbis® Method *Defined***

The foundation for all ProOrbis work is the break-through strategic Framework and analytic techniques that redefine management science. The ProOrbis® Method focuses on the return on the investments (ROI) an organization makes in its own capabilities — the next generation of the concept of productivity — to dramatically improve performance for publicly traded, private, non-profit, and governmental organizations. The ProOrbis® Method is comprised of the comprehensive Framework (ProOrbis® Framework) and real-world Applications (ProOrbis® Applications).

The ProOrbis® Framework is a strategic paradigm that defines the value-oriented architecture for an enterprise, including business strategy (positioning), operations design (organizational capabilities), asset portfolios (including tangible assets such as physical capital and intangibles such as human capital and technology) and asset management. The Framework classifies and connects all activities of the firm into a fully integrated system with analytical analyses for returns on investment that describe, explain, and predict performance. The ProOrbis® Framework is a combination of

strategic and analytic concepts with a project approach that offers a comprehensive, integrated, and value-oriented paradigm for managing ROI of the tangible and intangible assets of an enterprise. To learn more about the ProOrbis® Framework go to [www.ProOrbis.com](http://www.ProOrbis.com).

ProOrbis® Applications are tools and techniques configured to real business situations and designed for a particular client need. These Applications transform individual businesses, portfolios of businesses, and extended enterprises by taking a systematic and comprehensive approach — using best of what a client “currently has” and creating strategies that leverage their strengths and identify the gaps. Projects are architected from strategy through execution and designed to build the capability within each client’s organization to transform and sustain improvements. These Applications produce strategies, plans, and change facilitation that are executed — to dramatically improve results.

ProOrbis® Applications include:

- **Enterprise Structuring:** A project to structure an enterprise’s (including a Portfolio or Extended Enterprises) current business information using the strategic frameworks and analytics of ProOrbis including positioning, capabilities, asset portfolios, asset management, and measures to determine strengths, weaknesses, integration, and constraints. These are used to identify opportunities for improved performance.
- **Enterprise Transformation:** A project to transform an enterprise’s market position, capabilities, asset portfolios, asset management, and measures with a fused combination of executive education, data collection, synthesis techniques and change management.
- **Product Development:** Applying the ProOrbis® Method to improve a business’ offerings by classifying, integrating and linking their methods, tools, and practices to value. This includes framing the offerings and market messaging that they deliver to their customers.
- **Analytic Tools:** Comparative analytic tools that utilize signature analytics to describe, explain, and predict returns that organizations achieve in their asset investments (Ex. ProTrender™ and ProCompass™ Series for Self, Industry, and a Portfolio in all three asset management categories (HC, PC, TC).) See 874-5 Support Services for more information on our Analytical Informatics support tools

**Learn more at: [www.ProOrbis.com](http://www.ProOrbis.com)**

## ProOrbis MOBIS Service Offerings

### Consulting Services, SIN: 874-1

#### General Overview

Senior executives rely on ProOrbis to provide consulting services for their key strategic, organizational, and operational challenges and is best known for its world class market positioning and strategy work. What makes ProOrbis different is that every project is truly customized and tailored to the customer's need. Strategies are developed and supported all the way through execution with a combination of expert consult support, change facilitation, and a true executive development experience – thus building the capability *within* the organization to maintain the change. Because projects are highly customized, we offer category services in the ProOrbis® Framework, rather than a list of standard consulting products and services. Applications include: Enterprise Structuring and Enterprise Transformation projects.

Enterprise Structuring uses the ProOrbis® Framework to recast a client's existing Positioning, Capabilities, Asset Management, and analytics into a comprehensive view of the Enterprise that shows how it creates value. Using readily available company artifacts (business plans, organization charts, process maps, etc) and very limited client resources, ProOrbis is able to create a view of the company that offers insight into the causes of perplexing issues and opportunities for dramatic improvement. Structuring focuses on distillation of relevant information resulting in a fact-based, comprehensive, and executable approach to improving productivity.

An Enterprise Transformation generally follows Enterprise Structuring, which has provided the core information to move on to the decision-making phases of the project. A Transformation is undertaken when the client understands where their business stands today — its strength and opportunity areas — and is prepared to move forward in making productivity improvements identified. ProOrbis projects pay careful attention to the change management issues involved in transforming and are designed to maintain the organization's performance through the transition.

All consulting services are conducted under contractual agreement between ProOrbis and the client that licenses the client to ProOrbis' intellectual property (IP) for the duration of the services. This permits ProOrbis to get at the very heart of our client's specific business situation, and allows for the delivery of customized Applications. At the completion of the consulting services, clients own the final deliverables while ProOrbis retains the proprietary methods (IP) that have been applied.

Consulting Services include but are not limited to the following:

#### Strategy Development

- Structuring of market maps to display competitive profiles, key trends, and unmet needs for various segments.
- Articulation of the positioning (market or mission), business strategies, and new offerings including their migration over time and selection of targets for mergers and acquisitions.

- Creation of the human capital, physical capital, and/or technology capital asset strategies to maximize the returns on investments in the assets of an enterprise.

### **Organizational Capabilities Development**

- Structuring of organizational capabilities to articulate the current configuration of assets (business processes, human capital, technology capital, and physical capital) being deployed by the organization.
- Assessment of the capabilities alignment to the business strategies, asset configuration, and level of integration that identifies the key strengths, weaknesses, and opportunities for improvement.
- Articulation of a future capabilities architecture and operating model that is designed to deliver on the future positioning, business strategies, and offerings migration.
- Design and reconfiguration of the capabilities architecture, including business modeling and simulation.
- The services described in this section address business modeling and simulation; program audits and evaluations; and process and productivity analysis and improvement.

### **Asset Portfolio and Systems Reconfiguration**

- Structuring of human capital, technology capital (both product and process), and physical capital asset portfolios to profile and characterize the current organizational assets being deployed.
- Assessment of asset portfolio alignment to the organizational capabilities architecture and business strategies to determine opportunities for improvement (i.e. the assessment of organizational structures, IT infrastructure)
- Articulation of future asset configurations (i.e. organizational designs and IT systems architectures).
- Asset management system reconfiguration to meet asset requirements of the future capabilities architecture.
  - Human capital asset management (HCAM®) system reconfiguration including transforming HR practices and programs into integrated asset management systems that will more effectively manage human capital assets to improve overall human capital productivity.
  - Technology capital asset management (TCAM®) system reconfiguration including transforming IT practices and programs to more effectively acquire, manage, and divest of technology assets.
  - Physical capital asset management (PCAM®) system reconfiguration including transforming operational maintenance practices and programs to more effectively deploy physical capital.

- The services described in this section address leadership systems, workforce, and succession planning processes.

### **Measures and Analytics Development**

- Structuring of current business objectives and measures of effectiveness, efficiency, cycle time, resource use, return, and individual performance that are currently being tracked and monitored throughout the organization.
- Articulation of an enterprise dashboard that arrays and integrates all measures - cascading from strategic level to capability performance, and finally broken down by individual performance.
- Development of analytic tools for tracking the value and the investments of all assets (tangible and intangible) to put the investment in the context of value that creates the ROI business case for decision making in both the short term and long term.

### **Customized Training**

- Customized training in the ProOrbis® Framework and Applications.

### **Collaborative R&D**

- Collaborative R&D to imbed ProOrbis® Framework techniques into partner's consulting methods, software, and courses.

## FACILITATION SERVICES, SIN: 874-2

### **General Overview**

ProOrbis offers facilitation services in the development of clients' organizational capabilities. This includes facilitation and related decision support services to organizations engaging in collaboration efforts, working groups, or integrated product, process, and self-directed teams. ProOrbis assists clients in convening and leading large and small group briefings and discussions; preparing draft and final reports for dissemination; debriefing and overall meeting planning; recording discussion content and focusing on decision-making; defining and refining agendas; and resolving disputes, disagreements, and divergent views.

ProOrbis' methods rely on the notion that a dramatic organizational transformation is best done *by* the organization. Using a unique approach, ProOrbis is able to help companies transform themselves and realize dramatic improvements in performance. Highly skilled project experts work with a multi-disciplinary project team from within the organization (and licensed partners when needed) to apply the proprietary tools and techniques, resulting in a career transforming experience for members of clients' project teams. The development of internal staff creates significantly enhanced internal capability to dramatically improve the firm's own performance over time.

Change management is not a "separate event", but rather, is built into the process. This integrated approach ensures that decisions are made in the right order, the links to value are always present, and that remarkable shifts occur with speed and discipline. This helps to create excitement, momentum for change, and real-world results.

Facilitation Services include but are not limited to the following:

### **ProOrbis® Framework Workshops**

- Facilitation through project methods for the development of a positioning, organizational capabilities, asset portfolios and management systems, and measures and analytics.
- Designed to facilitate project teams through the data collection, analysis, synthesis, structuring, architecture, and design of business solutions.
- Providing tools and techniques that allow for the distillation of large amounts of information in a very fast and effective way for decision making.

### **Executive Development**

- Resolving disputes, disagreements, and divergent views through a structured approach that will draw out the key facts, articulate key decisions, and provide instruction to the organization for execution over time.
- Defining and refining the overall enterprise agenda through prioritization of initiatives based on key integration factors and its effect on the optimal order for decision making.

## **SURVEY SERVICES, SIN: 874-3**

### **General Overview**

ProOrbis offers survey services, including expert consultation, assistance and deliverables associated with ProOrbis® analytic reports. ProOrbis can assist and perform all phases of the survey process from research and questionnaire design through analysis and reporting.

Once an organization has a clear picture of its returns, the next question is “are these any good?”. Cross-company industry comparisons offer a context to answer that question. There are a myriad of external factors that affect an organizations performance (such as increasing oil prices, shortage of a major input, technology shifts, etc...). Cross-company industry comparisons wash out those exogenous variables from the analysis to clarify how well the organization navigated those factors. ProOrbis has designed a series of studies that offer organizations the opportunity to compare their own performance over time (most studies are 3 years) and to the industry using both traditional measures (which tend to be more cost oriented) and ProOrbis signature analytics (which use our ROI scheme for both tangible and intangible assets). These comparisons on both cost and value-oriented measures highlight the distortions that weak measures can create. Reports are narrated to enhance the interpretation of results.

### **Survey Planning and Design**

- Customization of measures for a particular organization or industry group to address specific business concerns or industry trends.
- Development of industry groups for optimum comparative data.

### **Survey Data Collection**

- Online Survey Input tools for data collection.
- Facilitation in the data collection process, including conference calls to orient key staff to the process.

### **Analysis and Reporting**

- Report generation and narration.
- Executive workshops to present key analysis and findings.

## **SUPPORT PRODUCTS, SIN: 874-5**

### **General Overview**

ProOrbis offers a suite of analytic reports that bring the next generation of measurement to human capital, technology capital, and physical capital assets. ProOrbis® analytic reports, combined with our survey support, provide a comprehensive service designed to give managers the information, tools, and insight to make investment decisions in assets that are targeted to achieve higher returns. The reports are intelligent tools that present your current returns on investments in human capital, technology capital, and physical capital to compare your results with your competition that frames how good your returns really are. Our analytical methods employ our signature economic techniques that relate firm performance, asset investments, and returns on those investments in an intelligent array.

Armed with analytical information, ProOrbis analytic reports offer strategic insight into how to use data to inform critical strategic decisions and determine how well your strategies have been executed. Our combination of state-of-the-art, web-based collaboration tools and face-to-face sessions prepare executives to manage human capital as a real business asset. Members get to know other talented professionals and executives, share experiences, and become valuable resources to one another.

ProOrbis® analytic reports include an intelligent drill-down of performance that shows sequences of measures from more traditional to the most sophisticated signature analytics. Reports include explanation and analysis to narrate the relevance of signature measures and the limitations of more traditional measures, helping to shift the paradigm from cost to investment.

### **The following ProOrbis® analytic reports are available:**

**ProTrender™ Series:** The ProTrender™ Report uses less than 30 data points for three consecutive years of data plus some key strategic inquiries that provide brilliant insight into your business performance – a remarkable return on your investment in data collection.

- SelfTrend™ Report: Compare relevant measures of a business unit's performance over time.
- IndustryTrend™ Report: Compare a business unit's performance to other companies in the industry – put the data into a competitive context.
- PortfolioDashboard™ Report: Index an organizations portfolio of units against industry performance to understand their comparative performance.

Each report is available in four different versions:

- HCPPro®: The Human Capital Performance Profile
- TCFPro™: The Technology Capital Performance Profile
- PCPro™: The Physical Capital Performance Profile
- EnterprisePro™: A Profile of the assets of the firm in the context of value

**ProCompass™ Series:** The ProCompass Report is ProOrbis' most comprehensive diagnostic tool using ProOrbis signature measures. ProCompass provides detailed drill-downs for the return on investment measures to create a diagnostic tool that goes beyond “what” to “why.”

- ProCompass™ Report: Diagnose and pinpoint opportunities to improve returns on investment in human capital. ProCompass™ provides enough detailed data to diagnose and correct or integrate investments in human capital.

## LABOR CATEGORIES

All of our labor classes are degreed professionals with the combination of education and experience to accomplish our work. All staff has entered in to a 2 year non-compete agreement and cannot perform work of this nature for a competitor. Staff members are trained in aspects of the proprietary methodology in keeping with their assignments, including analytical techniques and tools. Descriptions of the labor categories are as follows:

### **Principal:**

- Owner: ProOrbis is a woman-owned and controlled small business
- Thought leader and architect of the methodology
- Wharton MBA, 20 years of experience
- Published author and speaker on the topic
- Primary business development for the strategy consulting
- Architects projects, coaches and facilitates senior leadership
- Trains staff and clients on methodology
- Advances the science in the private and public sector

### **Managing Director:**

- MBA, 20 years of experience in HR consulting
- Consults with clients on methodology
- Manages the HCPPro® operation
- Manages projects and staff
- HCAM® expert
- Manages product development, oversees project deliverables, and facilitates meetings

### **Consultant:**

- 10 years of experience
- Degree and advanced degree optional
- Subject matters expert
- Consults on work products
- Facilitates meetings
- Conducts interpretation and presentation of data
- Manages projects or parts of projects

### **Analyst:**

- 3-5 years of experience
- Degree (usually finance or operations research)
- Conducts analysis and array of data for decision-making
- Manages complex analysis projects
- Supports client analytics when resources are not available

## SCHEDULE OF PRICES

The following are ProOrbis' 2006 GSA approved product fees and hourly rates for the various labor categories. The same rates apply for on-site and off-site performance in compliance with Public Law 99-234 and Federal Acquisition Regulation (FAR) 31.205-46, Transportation and Per Diem. ProOrbis' normal practice is to work either from our home office or at the customer's location, depending on the requirements of the job.

### **SIN: 874-5 Support Products**

#### **ProOrbis Analytical Informatics Tools:**

SelfTrend™ (For clients w/o an industry group. Data collection and collaborative environment plus report of core asset (HC, PC, or TC) data year-over-year on traditional and signature measures)	\$4,533.75/per business unit
IndustryTrend™ Report (A la carte for clients part of sponsored studies. Data collection and collaborative environment plus report of core asset (HC, PC, or TC) data year-over-year on traditional and signature measures)	\$7,052.50/per business unit
ProTrender™ Expert Suite (SelfTrend™ and IndustryTrend™. Data collection and collaborative environment plus report of core asset (HC, PC, or TC) data year-over-year on traditional and signature measures)	\$10,075.00/per business unit
PortfolioDashboard™ Report (Add-on to ProTrender™ Executive Suite: Data collection and collaborative environment plus report of core asset (HC, PC, or TC) data year-over-year on traditional and signature measures)	\$1,511.25/per business unit
ProTrender™ Executive Suite (SelfTrend™, IndustryTrend™ and PortfolioDashboard™)	\$11,082.50/per business unit
ProTrender™/ProCompass™ Diad (ProTrender™ Executive Suite plus ProCompass™ report)	\$19,041.75/per business unit

**SIN: 874-1/2/3, Consulting/Facilitation/Survey Services**  
**Quoted hourly rate applies to SINs 874-1/2/3**

**Labor Category \***

Principal	\$793.41
Managing Director	\$528.94
Project Manager/Consultant	\$396.70
Analyst	\$264.47

\* (Travel fees are additional and in accordance with ProOrbis/GSA travel guidelines)

Go to [www.ProOrbis.com](http://www.ProOrbis.com) for remaining pricing options and for additional information.

**Legal Notes:**

In the course of performing consulting services for a Contracting Party, ProOrbis may disclose trade secret, confidential and/or proprietary information regarding the ProOrbis® Method, ProOrbis® Framework and ProOrbis® Applications. ProOrbis' agreement to render services is contingent upon the Contracting Party agreeing to undertake certain obligations to protect the confidential nature of ProOrbis' proprietary intellectual property. These obligations include a duty to maintain the confidentiality of ProOrbis' proprietary intellectual property, a duty not to use or disclose information regarding such intellectual property other than for purposes of the services ProOrbis is hired to provide, and an undertaking by the Contracting Party to ensure that its employees do not breach these duties during or after their employment with the Contracting Party.