

The CAM-I Investment Management Matrix

CORE PROCESSES: STEPS IN THE INVESTMENT MANAGEMENT PROCESS					
Levels of Complexity ↓	Strategic Planning	Option Development	Decision Making	Execution & Tracking	
Level One	<ul style="list-style-type: none"> ✓ Identify goals & objectives ✓ Establish performance targets 	<ul style="list-style-type: none"> ✓ Identify costs & cost drivers ✓ Identify alternative approaches 	<ul style="list-style-type: none"> ✓ Assess & analyze risks ✓ Evaluate investments ✓ Select an investment portfolio 	<ul style="list-style-type: none"> ✓ Integrate with cost management system ✓ Establish performance tracking system 	
Level Two	<ul style="list-style-type: none"> ● Bottom up list ● Top down mandates 	<ul style="list-style-type: none"> ● Single key discipline defines 	<ul style="list-style-type: none"> ● Based on available budget & "seat-of-the-pants" ● Investment in budget (blind faith) 	<ul style="list-style-type: none"> ● Standard public data 	
Level Three	<ul style="list-style-type: none"> ● Capital strategy 	<ul style="list-style-type: none"> ● Multi-discipline input 	<ul style="list-style-type: none"> ● In-depth reviews ● Checklists ● Additional approval layers ● Standard approval forms 	<ul style="list-style-type: none"> ● Progress reports ● Performance measures ● Audits 	
Level Four	<ul style="list-style-type: none"> ● Strategic choices 	<ul style="list-style-type: none"> ● Based on cost management system data 	<ul style="list-style-type: none"> ● Decision & risk analysis ● Decision Models ● Customized presentations 	<ul style="list-style-type: none"> ● Activity analysis & measures ● Life-cycle records 	
Level Five	<ul style="list-style-type: none"> ● Link / translation of strategy into performance measures, targets, goals & objectives 	<ul style="list-style-type: none"> ● Based on strategy 	<ul style="list-style-type: none"> ● Decision-support systems ● Link proposals to strategy ● Performance - measure value 	<ul style="list-style-type: none"> ● Performance management ● Continuous feedback 	
Integral part of the cost management system - continuous improvement					