



**Over Five Decades of Industry-led
Collaborative Research**

CAM-I MEETING AND TRAINING

2024

March 4 - 6 2024

CAM-I Vision:
***To be recognized as a premier
collaborative forum for innovative,
leading edge management solutions
that create lasting value.***



Code Of Conduct

As CAM-I members we:

- Value and nurture the ideas and viewpoints of others.
- Value and leverage the diversity that others bring.
- Respect the time, contributions, confidence, and rights of others.
- During meetings, we suspend the specific interest of our own organization in favor of promoting the general welfare of CAM-I members.
- Conduct ourselves during CAM-I meetings in an uplifting, reputable manner.
- Are learning and growing individually and collectively.
- Respect the collaborative environment and commitment not to market or procure during the meetings.
- First time guests are invited to the meeting. Guests will not receive any post meeting output from the working groups as that material belongs to the members. When guests participate in these groups, we would like guests to make Interest Group Leaders aware if there is anything that we should not quote upon their input in these meetings on our post meeting notes to members.

Invitation from the President of CAM-I

You are formally invited to the Consortium for Advanced Management International (CAM-I) Spring Meeting, March 4th-6th 2024. This quarterly meeting is hosted by Arizona State University at Tempe, Arizona. The meeting will also have a virtual option.

All meetings and interest group sessions will take place at McCord Hall Arizona State University, 450 E Lemon St., Tempe, AZ 85281. A networking reception will be hosted by CAM-I at Arizona State University on March 5th, 2024.

At this meeting, we are launching a new project on Artificial Intelligence.

Our Tuesday session will be extended by more than half a day as in addition to speakers, we will discuss status on our current work and new initiatives for the future.

Our quarterly meetings are the primary vehicle to further CAM-I's mission – To serve as a collaborative forum of thought leaders who develop practical and effective management tools, techniques, and methods to advance the way organizations manage costs, processes, and performance.

Attendees will receive a maximum of 50 minutes of CPE credit hours for every hour attended for the two and a half days of the meeting. For specific details on learning objectives, fields of study, applicable CPE credits, and knowledge levels please refer to the agenda and other detailed sections of this document.

Please check the special interest group pages at the end of the meeting notice, which describes the groups.

[Click To Register For "CAM-I Meeting 2024"](#)

On Registration:

- Tuesday Morning Session – Please select if attending.
- Special Interest Groups – When selecting options for registering please select one Interest Group in which you plan to participate.

If you have any questions about our programs, please contact me any time at ashok@cam-i.org or call me at



Ashok Vadgama
President, CAM-I

Agenda

MONDAY, MARCH 4, 2024

All Mountain Standard Time Zone

McCord Hall • Arizona State University, 450 E Lemon St., Tempe, AZ 85281

INTEREST GROUP SESSIONS

8:45 AM	Registration
9:00 AM – 5:00 PM	Value, Cost and Profitability Management Contact - Bob Misch (bob.misch@cbh.com) Contact – Carmel Call (carmel.call@kingcounty.gov)
9:00 AM – 5:00 PM	Supply Chain Management Contact – Jim Holman (Jim.holman@cbh.com)
9:00 AM – 3:15 PM	Artificial Intelligence and Digitalization Contact – Ashok Vadgama (ashok@cam-i.org)
9:00 AM – 5:00 PM	Environmental Sustainability Lea Patterson: (Lea.Patterson@pilbaragroup.com)

TUESDAY, MARCH 5, 2024

All Mountain Standard Time Zone

McCord Hall • Arizona State University, 450 E Lemon St., Tempe, AZ 85281

GENERAL SESSIONS

- | | |
|----------|---|
| 8:45 AM | Registration |
| 9:00 AM | Welcome by Ashok Vadgama (CAM-I) and Professor Mohan Gopalakrishnan (Arizona State University) |
| 9:15 AM | <p>"Big Rocks Out There" - Panel on things to be tackled today and how we solve it.</p> <p>Panelists -</p> <p>Srikant Sastry - Managing Principal, Advisory Services, Cherry Bekaert LLP</p> <p>John Rome - Deputy CIO, Arizona State University</p> <p>Mohan Gopalakrishnan – Senior Associate Dean of Faculty, Arizona State University</p> |
| 10:00 AM | <p>New Business Models for the Manufacturing of the Future</p> <p>Speaker: Dr. David Romero, Scientific Vice-chairman, World Manufacturing Foundation</p> |
| 10:45 AM | Break |
| 11:15 AM | <p>Current trends in the areas of Artificial Intelligence</p> <p>Professor Pei-Yu Chen - Chair, Department of Information Systems, Arizona State University</p> |
| 12:00 PM | Networking Lunch |
| 1:30 PM | <p>Application of Target Costing at The Boeing Company, Navistar and Whirlpool</p> <p>Speaker: Bill Dummer – Senior Manager at various organizations</p> |
| 2:15 PM | <p>Application Examples of Environmental Sustainability and how organizations are approaching it</p> <p>Speakers:</p> <p>Chauntelle Hellner – Director of Fleet Services Division, King County.</p> <p>Lea Patterson, President/CEO, Pilbara Group In</p> |
| 3:00 PM | Break |
| 3:15 PM | <p>"Tackling Big Rocks Out There"</p> <p>Panelists -</p> <p>Professor Raghu Santanam - Senior Associate Dean, Arizona State University</p> <p>Second Panelist - John Rome – Deputy CIO , Arizona State University</p> |
| 4:00 PM | Professor Mohan Gopalakrishnan – Wrap up and closure |
| 4:30 PM | Network Reception |

WEDNESDAY, MARCH 6, 2024

All Mountain Standard Time Zone

McCord Hall • Arizona State University, 450 E Lemon St., Tempe, AZ 85281

INTEREST GROUP SESSIONS

- | | |
|----------------|--|
| 9:00 AM – Noon | Supply Chain Management
Contact – Jim Holman (Jim.holman@cbh.com) |
| 9:00 AM – Noon | Value, Cost and Profitability Management
Contact - Bob Misch (bob.misch@cbh.com)
Contact – Carmel Call (carmel.call@kingcounty.gov) |

Registration

Register today at www.cam-i.org and click on “Meetings” at the top of the page.

On Registration -

- **Tuesday Morning Session**

Please selected if you intend to participate.

- **Special Interest Groups**

When selecting options for registering please make sure to select one (1) **Interest Group** in which you plan to participate.

- **Tuesday After Noon Session – please register if attending**

Be sure to block out the time on your calendar, you may do so by opening the email with the ICS file from CAM-I upon registration.

- **ICS Calendar File**

The email that you receive after registering has a ICS calendar file that can be used to update your calendar.

If you need help understanding the calendar file attached CAM-I has a Calendar ICS Help Page.

Contact Info

CAM-I, Consortium for Advanced Management International

Ashok Vadgama

108 Wild Basin Road South, Suite 250

Austin, TX 78746

www.cam-i.org

Phone: 512-617-6428

Cell Phone: 512-296-6872

General Information

CPE Credits

NASBA
NATIONAL REGISTRY OF CPE SPONSORS

CPE Credits:

The 3-day program qualifies for a maximum of 18 CPE credits.

Program Level: The knowledge level for CAM-I sessions is “Intermediate”, meaning that participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and/or performance management.

Preparation: Generally, no advanced preparation is required. However, please refer to the details in subsequent sections of this document for specific exceptions should they occur.

All study group is Group Internet Based:

Learning Objectives and Program Description:

Descriptions and learning objectives for individual general session presentations and interest groups can be found in the next section of this document.

CAM-I is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website:
www.nasbaregistry.org.

Sponsor ID# 103282

Contact Information

For more information about this program or for any questions regarding administrative policies such as cancellations, please contact CAM-I t 512-617-6428.

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Upcoming Meetings

March 4-6, 2024, Arizona State University, Tempe, Arizona on site and virtual
June 3-5 2024, TBD
September 9–11 2024, TBD
October 2024, UK chapter meeting TBD

CAM-I General Session Presentations

Speaker 1

TITLE: “Big Rocks Out There - Panel on things to be tackled today and how we solve it.”

Speakers and Panelists:

Srikant Sastry - Managing Principal, Advisory Services, Cherry Bekaert LLP

John Rome - Deputy CIO, Arizona State University

Mohan Gopalakrishnan – Senior Associate Dean of Faculty, Arizona State University

Field of Study: Management Services

Learning Objectives:

Awareness of what organizations are doing for future and what are the current opportunities and trends, and how to prepare for it.

CPE Level: Intermediate

Speakers 2

TITLE: “New Business Models for the Manufacturing of the Future”

SPEAKER: Dr. David Romero, Scientific Vice-chairman, World Manufacturing Foundation

Field of Study: Management Services

Learning Objectives:

The Report aims to depict the key trends that are characterizing the current economy and thus, indirectly, the manufacturing sector. To address this purpose, a deep analysis has been conducted on both scientific and grey literature involving an international panel of experts in the field.

As a result, the identified trends suggested the establishment of six potential business models by manufacturing companies. Through the analysis of the six business models, 10 Key Recommendations have been delineated to suggest how to be competitive in this changed economy while covering the nine building blocks of the business models.

CPE Level: Intermediate

CAM-I General Session Presentations

Speaker 3

TITLE: Other emerging applications and new initiatives

Speakers and Panelists:

Srikant Sastry - Managing Principal, Advisory Services, Cherry Bekaert LLP

Mohan Gopalakrishnan – Senior Associate Dean of Faculty, Arizona State University

Professor Pei-Yu Chen - Chair, Department of Information Systems, Arizona State University

Lea Patterson, President/CEO, Pilbara Group Inc

Chauntelle Hellner – Director of Fleet Services Division, King County.

Bill Dummer – Senior Manager at various organizations

Professor Raghu Santanam - Senior Associate Dean, Arizona State University

John Rome – Deputy CIO , Arizona State University

Field of Study: Management Services

Learning Objectives:

Environmental Sustainability and how organizations are approaching it

Application of Target Costing

Current trends in the areas of artificial intelligence and Impacting Change

“Big Rocks Out There”

And “Tackling Big Rocks Out There”

CPE Level: Intermediate

Supply Chain Management

Digitization of the Supply Chain to Improve Resiliency – The rapidly changing landscape of supply chain, transportation, and logistics presents difficulties for leaders in both private and public sector organizations. To overcome these challenges, it's crucial to use the latest technology and physical/digital assets to revamp logistics practices. This will help supply chains to better adjust to the fast-paced, competitive, and multi-channel business environment. The trend of outsourcing, off-shoring, versatile products, security concerns in the supply chain, and increased interdependence between supply chain players only increases the significance of managing risks, ensuring resiliency, and promoting sustainability.

How well are global supply chains able to withstand disruptive events? How should organizations look at their supply chain upstream and downstream to change their perspective on customer and vendors to see them as business partners?

The digitization of the supply chain enhances the speed, agility, and stability of supply chain operations. This leads to a better ability to meet customer demands and ultimately deliver higher value. Organizations that embrace digitalization can increase resiliency and sustainability, as well as decrease supply chain operating costs.

Learning Objectives:

After participating in this interest group, you will:

- Discover the latest approaches and methodologies for anticipating and responding to global supply chain interruptions, arising from organizations' responses to disruptive events.
- Learn about how organizations are deploying process automation within their supply chain to increase revenues and reduce costs.
- Investigate the creation of sustainable supply chains that meet both goods/services delivery and sustainability goals.
- Analyze the design of supply chains that are equipped to handle the changing nature of policy environments, including the impact of policy changes on constraints and opportunities.
- Evaluate the potential benefits of new global alliances and trade agreements for enhancing supply chain resiliency and reducing risks, as organizations aim to bring their supply chains closer to home.
- Assess the impact of recent advancements in AI and ERP technology on the future of supply chains.
- Increasing emphasis on carbon & sustainability and the impact on global industrial suppliers
- Global and regional reporting & compliance requirements for supply chain
- Understanding the impact and opportunities from the Advisory Committee on Supply Chain Competitiveness (ACSCC)
- Understanding the impact on governance and compliance to the "Securing the Information and Communications Technology and Services Supply Chain" executive order

Field of Study: Management Services

Required Knowledge / Prerequisites:

Knowledge level – Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. Generally, no advanced preparation is required. However, the interest group chair will inform registered participants of any prerequisite work prior to the meeting.

Contact:

For more details on the special interest group please contact group chair:

• Jim Holman Phone (470) 289-8605 Email: jim.holman@cbh.com

Digitalization

Over the years CAM-I has done a lot of work in the areas of Business Intelligence, Closed Loop Planning, Customer profitability, Intelligent Data Quality, Target Costing, and other areas which all had some element of predictive and prescriptive analytics.

In many areas, CAM-I referred to automation, which has interdependency on digitalization.

Over the past two years, the focus per the speakers at the general session, a lot of focus was also given to Digitalization and automation like –

Cyber Security To Enable Digital Manufacturing

Digitalization at Work: Business Transformation

There is a need to focus on Digitalization with an emphasis on process automation to ensure complementarity to our current projects including Improving Efficiency/Effectiveness in the Finance Function.

On our survey we found –

- Digitisation was varied and an ongoing area recognised as needed for improvement. Where implemented it has driven behavioural changes mostly in accountability and has delivered savings. There is the general lack of process automation. Mainly reporting things that are easily measured and historic rather than forward looking.
- There was a wide range of digital tools and systems to support automation with a wide spectrum of investment costs, however, teams feel that existing desktop tools to support automation are rarely fully exploited.

Learning Objectives:

After participating in this interest group, you will:

- Learn how to identify the potential or need for digitalization
- Learn how to design and undertake a digital maturity assessment for your organization
- Learn how to develop a suite of competency profiles for digital skills in the finance professional across the range of grades
- Learn how to assess the potential for automation of specific processes or processes with a specified function
- Learn how to measure and quantify benefits of automating a process, or number of processes within a function.
- Learn how to initiate and manage small scale automation projects, with appropriate controls and assurance in place.
- Define a framework for the identification, prioritization and delivery of digital and data processes including automation – at the organizational level.

Field of Study:

Business Management & Organization

Required Knowledge I Prerequisites:

Knowledge level- Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. Generally, no advanced preparation is required. However, the interest group chair will inform registered participants of any prerequisite work prior to the meeting.

Contact:

For more details on the special interest group please contact the group chair:

• Phillip Wooley Phone: 01144161953 6430 Email: phillip.woolley@uk.gt.com

Value, Cost and Profitability Management

Value, Cost, and Profitability Management Roadmap – Over the years CAM-I has contributed significantly to the field of Cost, Process, and Performance Management. This group is using the existing CAM-I body of knowledge to further innovate the application of traditional cost models by putting more emphasis on stakeholders and stakeholder value beyond the shareholder. Specific targets of study include costing methodologies such as Activity Based Costing and Target Costing, Target Value, Principle Based Value Framework, Value Analysis, Capacity Model, the Closed Loop, and Performance Management Framework. The objective of this research is to expand current thinking and understand the intersection of various models to help organizations understand what it takes to become a Value-Driven Organization (VDO).

Defining Value for Services - Value Analysis is an optimization methodology of aligning resources (cost) in proportion to the relative importance of customer functional requirements. Value Analysis historically has been applied to manufacturing; however, it is equally effective for service organizations and for general process improvement. Services can present nuanced challenges in quantifying the processes performed and the associated importance to the customer. The group will continue to expand pilots of value analysis for services, including developing standards, approaches, and methods for measuring value.

Understand and Demonstrate the Value of Business Enabling Functions - The group's objective is to assist member organizations to understand and quantify the value business support functions bring to organizations. A Principle-Based Value Framework has been designed for enabling functions to understand how internal stakeholders view value and to help improve a function's ability to deliver value. The Principle-Based Value Framework has 9 value principles which enable member organizations to consistently deliver value to customers and stakeholders. The framework allows cost and value trade-offs to be quantified.

First Deliverable – The group's first deliverable is entitled, "Chapter One: Developing a Path to a Value-Driven Organization Leveraging the CAM-I Body of Knowledge", and it provides an overview of how each of the aforementioned concepts has evolved over time and contributes to a VDO.

Future Focus - The interest group plans to continuously review methodologies and recent work to ensure relevance to organizations considering the rapid changes that are occurring across industries today. By focusing on understanding additional stakeholders and their importance to an organization, along with a redefinition of value, we are re-aligning existing CAM-I methodologies and models to help organizations deliver sustainable stakeholder value.

Value, Cost and Profitability Management Continued

Learning Objectives:

After participating in this interest group, you will:

- Understand the key values and principles that organizations need to embrace in order to become Value-Driven Organizations and demonstrate increased value to their stakeholders.
- Understand the alignments between cost management and stakeholder value.
- Learn how to identify existing capabilities and gaps in quantifying value for service organizations.
- Recognize the value business enabling functions bring to an organization and thereby facilitate appropriate cost / value trade-offs.
- Discover how to create a value maturity approach and roadmap that can be scaled and customized for your organization.
- Understand how Target Costing is impacted by, and can support, organizations as they mature into an Industry 4.0 era.

Field of Study: Management Services

Required Knowledge / Prerequisites:

Knowledge level – Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. Generally, no advanced preparation is required. However, the interest group chair will inform registered participants of any prerequisite work prior to the meeting.

Contact:

For more details on the special interest group please contact the group chairs:

- | | | |
|---------------|-----------------------|---|
| • Bob Misch | Phone: (703) 548-8346 | Email: bob.misch@cbh.com |
| • Carmel Call | Phone: (206) 240-1617 | Email: carmel.call@kingcounty.gov |

Environmental Sustainability

Over the years CAM-I has worked in this area but with all the legislative, compliance and international changes in this area, has necessitated reinvigorating CAM-I's previous work.

This is no longer only about compliance with environmental legislation, although compliance as an ongoing need is given as regulation will increase in this area. Sustainment has now moved into the mainstream (and the C suite) with businesses re-orientating around the opportunities the ESG agenda provides. Financial services and large listed firms are the focus of regulation – though this boundary is likely to extend over time.

Net Zero: A country's total greenhouse gas (GHG) emissions would be equal to or less than the emissions removed from the environment. This can be achieved by a combination of emission reduction and emission removal (likely later in the period). General consensus is that advanced economies should be focused on Net Zero by 2050 – with developing economies in the decades that follow.

The 'Glasgow Climate Pact' at COP26 at the end of 2021 - sought renewed efforts to raise ambition on emissions reduction, Climate finance, adaptation and Loss and damage caused by climate change. As a result – this issue is close to the top of the diplomatic agenda.

Previous work provided by Environmental Sustainment Interest Group (ESIG) work:

1. Initial research led to a document outlining relevant regulations, mandates, and frameworks associated with Needs revision.
2. White paper on the use of Activity Based Costing (ABC) to measure and manage GHG footprint
3. Industry survey on how companies quantify and manage their carbon footprint
4. Wrote a white paper managing environmental sustainment using Target Costing principles
5. Conducted a case study.
6. Conducted a case study at Weber State University

This group will take the work further and will work with the E-liability institute to implement joint pilot models at volunteer organizations.

The E-liability Institute is a global not-for-profit advancing the urgent accounting upgrade needed to drive green innovation. E- (or environmental-) liability is an accounting algorithm that allows organizations to produce real-time, accurate, and auditable data on their total direct and supplier emissions (referred to as "cradle-to-gate"), and those for any of its products and services – say, a smartphone, a ton of cement, or a search on its website. Created by Professor Karthik Ramanna (University of Oxford) and Professor Robert Kaplan (Harvard University). The E-liability methodology has been developed to address issues with Scope 3 emissions calculations, specifically the lack of auditable data and the fact that scope 3 is counted multiple times.

The CAM-I methodology and E-liability methodology complement each other with the common link being the ABC model that allocated GHG emissions through to final product/service. The CAM-I methodology extends the E-liability methodology with the inclusion of financial costs to help organizations transition to a greener business model in a financially sustainable way.

Environmental Sustainability Continued

Learning Objectives:

As part of this interest group, you will:

1. Understand the key principles for driving environmental sustainment in your organization.
2. Learn current legislative boundaries.
3. Work on methodologies and models including the practical implementation of pilot models.
4. Be introduced to reporting requirements, including Task force on Climate-related Financial Disclosures (TCFD).
5. Identify Financial impacts of transitioning to a greener business model.

Field of Study:

Business Management & Organization

Required Knowledge / Prerequisites:

Knowledge level – Intermediate: Participants should have at least 5 years of relevant work experience and should have a basic knowledge of cost, process, and performance management. Generally, no advanced preparation is required. However, the interest group chair will inform registered participants of any prerequisite work prior to the meeting.

Contact:

For more details on the special interest group please contact group co-chairs:

• Lea Patterson Phone: (617 3103 8069) Email: Lea.Patterson@pilbaragroup.com