



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

CAM-I MEETING AND TRAINING

2022

June 6 - 8 2022

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) Meeting and Training, June 6 – 8, 2022.

Meeting details:

All meetings, interest group sessions and general sessions will be virtual through Microsoft Teams.

The member's forum is on June 7th, at 12:30 PM EST, by invitation only.

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 maximum of 50 minutes of CPE credit hours for every hour attended for the two and a half days of 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.

Meeting evaluations will be sent out to all registrants via an email survey.

We are launching two new special Interest Groups at this meeting –

Environmental Sustainment – Meeting on Monday June 6th, 2022

Digitalization – Meeting June 8th, 2022

[Click To Register For "CAM-I Meeting 2022"](#)

On Registration:

- Tuesday Morning Session - This option is pre-selected for your convenience.
- 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 512-296-6872.

I look forward to connecting with you at the meeting.



Ashok Vadgama
President, CAM-I

Agenda

MONDAY, JUNE 6, 2022

ALL EASTERN TIME ZONE

INTEREST GROUP SESSIONS

- | | |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 10:00 AM – Noon | Value, Cost and Profitability Management
Contact – Bob Misch (bob.misch@cbh.com) |
| 10:00 AM – Noon | Supply Chain Management
Contact – Jim Holman (Jim.holman@cbh.com) |
| 9:00 AM – Noon | Environmental Sustainment
Contact – Alasdair C Grainger (alasdair.c.grainger@uk.gt.com) |
| 9:00 AM – Noon | Improving Efficiency/Effectiveness in the Finance Function
Contact – Contact - Sonya Ball (sonya.ball112@mod.gov.uk) |
| 1:30 PM to 5:00 PM | Interest group sessions for the following groups -
Value, Cost and Profitability Management
Environmental Sustainment
Supply Chain Management
Improving Efficiency/Effectiveness in the Finance Function |

TUESDAY, JUNE 7, 2022
ALL EASTERN TIME ZONE

GENERAL SESSIONS

- 9:45 AM Welcome
Chauntelle Hellner, Deputy Director Business Resource Center, King County, CAM-I
Industry Chair, Ashok Vadgama, CAM-I President.
- 10:00 AM “Update Supply Chain Management Interest Group”
Jim Holman, Director, Cherry Bekaert LLP, CAM-I Supply Chain Group Special Interest
Group Leader
- 10:45 AM “Digitalization – Analytics to Automation and Digital Platforms”
Luis Gallardo, Principal, Cherry Bekaert LLP
- 11:30 AM “The Future of Work – A Pragmatic Case Study of King County”
Caroline Whalen, County Administrative Officer, King County
Sean Catanese, Enterprise Risk Management Program Manager
Whitney Abrams, Chief People Officer, King County
- 12:30 PM Adjourn General Session
- 12:30 PM - 1:30PM Members Forum (by invitation only)

INTEREST GROUP SESSIONS

- 1:30 PM – 5:00 PM Value, Cost and Profitability Management
Supply Chain Management

WEDNESDAY, JUNE 8, 2022
ALL EASTERN TIME ZONE

INTEREST GROUP SESSIONS

9:30 AM – 1:00 PM Value, Cost and Profitability Management
Contact – Bob Misch (bob.misch@cbh.com)

Supply Chain Management
Contact – Jim Holman (Jim.holman@cbh.com)

Digitalization Introductory Group
Contact Phillip Wooley (phillip.woolley@uk.gt.com)

Registration

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

On Registration -

- **Tuesday Morning Session**

This option is pre-selected for your convenience.

- **Special Interest Groups**

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

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

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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 is group live:

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 office at 512-617-6428.

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Dress Code

All scheduled meeting and evening events are business casual.

Upcoming Meetings

- June 6 - 8 2022, Virtual
- September 12 - 14 2022, Alexandria, Virginia
- October 17 - 18 2022, London, United Kingdom
- December 5 - 7 2022, Tempe, Arizona
- February 6 - 7 2023, United Kingdom
- March 6 - 8 2023, Alexandria, Virginia

CAM-I General Session Presentations

Speaker 1

TITLE: “Update – Supply Chain Management Group”

Jim Holman, CAM-I Supply Chain Director, Cherry Bekaert LLP,
CAM-I Supply Chain Group Special Interest Group Leader

Field of Study: Specialized Knowledge

Learning Objectives

- Process & Questionnaire Development
- Supply chain strategy and approach
- Maturity Modeling
- Maturity Technology / Enablement
- Thought leadership from various aspects applied in the journey

CPE Level – Intermediate

Speaker 2

TITLE: “Digitalization – Analytics to Automation and Digital Platforms”

Luis Gallardo, Principal, Cherry Bekaert LLP

Field of Study: Specialized Knowledge

Learning Objectives

By the end of this session, participants will understand the concept of Analytics maturity models that extend into actions (decisions, tasks, processes). We will explore how to get there with design, tools and steps showing some example case studies along with expanding to overall Digital Platforms and the technologies driving this movement.

- Maturity model to illustrate static, predictive, automation, etc. to Analytics
- Bridging the gap between Data to Insights to Actions
- Digital Platforms for Industries and how Cloud, IoT, etc. is shaping them

CPE Level – Intermediate

Speaker 3

TITLE: “The Future of Work – A Pragmatic Case Study of King County”

Caroline Whalen, County Administrative Officer, King County
Sean Catanese, Enterprise Risk Management Program Manager
Whitney Abrams, Chief People Officer, King County

Field of Study: Management Services

Learning Objectives

By the end of this session, participants will understand the context, scope, goals, and phases of King County’s Future of Work project.

This will include how – in the context of changing operations during the pandemic and looking to a future beyond it – King County:

- Ensured this work exemplified its values, with a specific focus on equity and social justice
- Anticipated and modeled potential change in finance, greenhouse gas emissions, and personal costs to employees
- Measures success and identifies areas for improvement as this work continues

CPE Level – Intermediate

Value, Cost and Profitability Management

Strategic Cost and Profitability Value Management Roadmap – Over the years CAM-I has contributed significantly to the field of Cost, Process and Performance Management. This group is using existing the CAM-I body of knowledge to further innovate the application of traditional cost models by putting more emphasis on additional stakeholders beyond the shareholder. Specific targets of study include costing methodologies such as Activity Based Costing and Target Costing, and the CAM-I's capacity models. The objective of this research is to expand current thinking, and understand the intersection of various models, to help organizations understand and quantify their impact on employees, society, the environment, as well as customers.

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 industries and 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 functions who want to understand how internal stakeholders view value and to help improve a function's ability to deliver value. The principle-based framework has 9 value principles which enable member organizations to consistently define the value business support functions bring to an organization. The framework allows cost and value trade-offs to be quantified.

Future Focus - The interest group plans to continuously review methodologies and recent work to ensure relevance to organizations in light of 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.

An additional focus for this group is evaluating how Industry 4.0 impacts CAM-I's body of knowledge. CAM-I understands the importance of Industry 4.0, and as a first step in contributing to industry 4.0 learning and body of knowledge, we will focus on linking CAM-I's existing Target Costing methodologies to Industry 4.0.

Learning Objectives:

After participating in this interest group, you will:

- Understand the key values and principles that business support functions need to embrace in order to demonstrate 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 |

Improving Efficiency/Effectiveness in the Finance Function

Organizations are being continuously challenged by customers, shareholders, governing bodies and internal business partners to develop and implement new ways of working that improve effectiveness and productivity to maximize value creation. National Governments, Defense and Commercial customers have never been more challenged with budget constraints as a result of the Global pandemic therefore it's an imperative for organizations to develop more agile, less bureaucratic processes and revised ways of working.

Project Purpose - To examine methods of benefit realisation and embedding a culture of effectiveness through sharing and collaborating with CAM-I members and extended Industry and Academic partners.

Learning Objectives

After participating in this interest group, you will:

- Be familiar with academic research related to the project - what does the theory say and how has it evolved over time?
- Understand leading practices on the automation/elimination of processes to remove non-value add activity.
- Understand how to extract the most value from a variety of different business partnering models.
- Learn improvement and leading practice recommendations related to improving the efficiency and effectiveness of the finance function through participation in case studies and other analysis.

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 one of the following group chairs:

- | | | |
|-----------------|----------------------------|------------------------------------|
| • Sonya Ball | Phone: +1-44-030 679 37727 | Email: Sonya.Ball112@mod.gov.uk |
| • Ann Underwood | Phone: +1-44-030 679 81602 | Email: Ann.Underwood538@mod.gov.uk |
| • Rob Young | Phone: +1-44-7826 510552 | Email: Rob.Young252@mod.gov.uk |

Supply Chain Management

Multiple shifts in the world of supply chain, transportation, and logistics pose challenges to the leaders of supply chain in the private and public sectors. By utilizing the latest technological solutions together with other physical and digital assets to redesign logistics practices, supply chains can adjust better to the fast-paced, highly competitive, omnichannel business environment. The increasing outsourcing practices, off-shoring, product versatility, supply chain security, and substantial interdependence throughout the supply chain further accentuate the importance of dealing with risks, resiliency, sustainability in the supply chain. Modern logistics practices focus on the circular supply chain concept, involving previously used products as raw materials. This “reverse logistics” can improve sustainability and resiliency when managed well and the potential to be a cash and resource-consuming quagmire when managed poorly.

How well are global supply chains able to withstand disruptive events?

Digitization of the supply chain featured prominently in the ongoing automation of Industry 4.0 improves the speed, dynamics, and resiliency of the supply chain operations, leading to an improved ability to respond to customer demands and ultimately higher delivered value. By embracing digitalization, organizations can drive up resiliency and sustainability efforts and reduce operating costs of the supply chain.

Learning Objectives:

After participating in this interest group, you will:

- Understand how organizational responses to global disruptive events have introduced new methodology and approaches to anticipate and react to future interruptions in the global supply chain.
- Study how organizations create a supply chain that can provide goods and services while maintaining and improving sustainability goals and objectives.
- Appreciate how to design supply chains that can cope with the policy environment's fluid nature and how policy changes offer new constraints and new opportunities.
- Learn how new potential global alliances and trade agreements can provide increased opportunities for supply chain resiliency and mitigating risks.
- Study how the integrated, automated, and digital "Smart Factory" of Industry 4.0 can help organizations respond and recover from global changes more effectively.
- Know how increased cybersecurity breaches the global supply chain and the increased digital interconnectedness has led to increased risk of cyber threats and outcomes.

Field of Study:

Specialized Knowledge

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 (404) 733-9611 Email: jim.holman@cbh.com

Environmental Sustainability

Over the years CAM-I has worked in this area but with all the legislative, compliance and international changes in this area.

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. Sustainability 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 Sustainability 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 sustainability 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 focus initially on the Scope 3 emissions requirements. Scope 3 are the most challenging assessments to perform for any business – as they require data and insight from other organisations in the firms' supply chain and are derived from the indirect activities of the organisation ie those which occur from sources not owned or controlled directly. Data quality is hence reduced.

Learning Objectives:

After participating in this interest group, you will:

1. Understand the key principals for driving environmental sustainability in your organization
2. Learn current legislative boundaries
3. Work on methodologies and models
4. Reporting requirements, including Task force on Climate-related Financial Disclosures (TCFD)
5. Impact of Risk Management, metrics and targets
6. Financial impacts

Field of Study:

Business Management, ESG.

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 chair:

Alasdair C Grainger Phone: 00-44-207-728 2866 Email: alasdair.c.grainger@uk.gt.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.
- 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.
- General lack of process automation.

Learning Objectives:

After participating in this interest group, you will:

- Find out how to assess the potential for automation of specific processes or processes with a specified function
- Be able to measure and quantify benefits of automating a process, or number of processes within a function.
- Initiate and manage small scale automation projects, with appropriate controls and assurance in place.

Field of Study:

Business Management

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 chair:

Phillip Wooley

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