Over Five Decades of Industry-led Collaborative Research

CAM-I Meeting and Training 2024

September 9 - 11 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) Meeting and Training, September 9th to 12th, 2024.

All meetings, interest group sessions and general sessions will be on site and also virtual through Microsoft Teams. Registrants will be sent out the teams invitation five days before the meeting.

The closest hotel to the venue is Tysons Corner Marriott 8028 Leesburg Pike Tysons Corner Virginia 22182. CAM-I does not have any negotiated rates.

The meeting is at –

Cherry Bekaert LLP, 1850 Towers Crescent Plaza, Suite 200, Tysons, VA 22182

The member's forum is on September 10th at Cherry Bekaert LLP site at 12:15 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 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.

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

Click To Register For "CAM-I Meeting 2024"

On Registration:

- Monday 9th September 1:00 PM – General Session, 2nd Floor, 1850 Towers Crescent Plaza, , Tysons, VA 22182, please select if attending.

- Special Interest Groups Monday morning, Tuesday all day, Wednesday morning at Cherry Bekaert LLP, 1850 Towers Crescent Plaza, Suite 200, Tysons, VA 22182

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, SEPTEMBER 9, 2024
All Eastern Time Zone

Interest Group Sessions

9:00 AM – 12:00 PM	Value, Cost and Profitability Management Contact – Bob Misch (bob.misch@cbh.com) Contact – Carmel Call (carmel.call@kingcounty.gov)
9:00 AM – 12:00 PM	Supply Chain Management Contact – Jim Holman (Jim.holman@cbh.com)
11:30 AM – 1:00 PM	Artificial Intelligence Contact – Nate Regimbal (nateregimbal@gmail.com) Contact – Saju Skaria (saju.skaria@digitechserve.com)
9:00 AM – 12:00 PM	Environmental Sustainability Contact – Lea Patterson: (Lea.Patterson@pilbaragroup.com)

General Sessions

1850 Towers Crescent Plaza, 2nd Floor, Tysons, VA 22182

1:00 PM	Welcome - Ashok Vadgama, CAM-I
1:15 PM	"Activity Based Planning (ABP) Closed Loop and linkage to Lean and Digital Twin of an Organization (DTO)", Mike Haley - Process Improvement Architect, Landmark Decisions
2:15 PM	"3 Keys To Embracing Digital Innovation", Dr. Saju Skaria, CEO, DIGITECH Services
3:15 PM	Break
3:30 PM	"Next Generation CAM-I" , CAM-I Board
4:30 PM	Adjourn General Session

TUESDAY, SEPTEMBER 10, 2024
All Eastern Time Zone

Interest Group Sessions

Cherry Bekaert LLP, 1850 Towers Crescent Plaza, Suite 200, Tysons, VA 22182

9:00 AM – 5:00 PM	Value, Cost and Profitability Management
9:00 AM – 5:00 PM	Supply Chain Management
1:00 PM – 5:00 PM	Artificial Intelligence
9:00 AM – 5:00 PM	Environmental Sustainment

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WEDNESDAY, SEPTEMBER 11, 2024
All Eastern Time Zone

Interest Group Sessions

Cherry Bekaert LLP, 1850 Towers Crescent Plaza, Suite 200, Tysons, VA 22182

9:00 AM – Noon	Supply Chain Management

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 at 512-617-6428.

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Upcoming Meetings

December 2 - 4 2024 Virual
March 3 - 5, 2025 Site TBD
June 9 - 11, 2025 Virtual

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

CAM-I General Session Presentations

Speaker 1

TITLE: **"**Activity Based Planning (ABP) Closed Loop and linkage to Lean and Digital Twin of an Organization (DTO)"

Speaker:

Mike Haley - Process Improvement Architect, Landmark Decisions

Field of Study: Business Management & Organization

Learning Objectives:

Update on Digital Twin Organization market

How Closed Loop Activity Based Planning can be further "looped" into the concepts of Lean Value Stream Mapping.

Illustration with some real-world examples on how Activity Based Planning-Value stream application in modeling work in the public sector with Passport Canada, Veterans Affairs Canada, and/or Nova Scotia Crown Lending Agency.

CPE Level: Intermediate

Speakers 2

TITLE: "3 Keys To Embracing Digital Innovation",

SPEAKER: Dr. Saju Skaria, CEO, DIGITECH Services

Field of Study: Management Services

Learning Objectives:

Highlights

- AI and Generative AI
- Immersive Technologies (AR/VR)
- Internet of Things (IoT)
- Low-Code or No-Code Technology

Challenges

- Resistance to Change
- Cybersecurity Concerns
- Leadership's Role

Futureproofing Businesses

CPE Level: Intermediate

CAM-I General Session Presentations

Speaker 3

TITLE: "Next Generation CAM-I"

Speakers:

CAM-I Board

Field of Study: Business Management & Organization

Learning Objectives:

- Strategic Roadmap and impact on current and future initiatives for your organization
- Strategic training needs
- Affiliations and partnership and their impact on CAM-I Roadmap
- Where is CAM-I going on Artificial Intelligence
- Impact on manufacturing excellence

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

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 Group

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. 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.

The COP28 UN Climate Change Conference in Dubai, the United Arab Emirates, was the biggest of its kind. Some 85,000 participants, including more than 150 Heads of State and Government, were among the representatives of national delegations, civil society, business, Indigenous Peoples, youth, philanthropy, and international organizations in attendance at the Conference from 30 November to 13 December 2023.

COP 28 decisions

COP28 was particularly momentous as it marked the conclusion of the first 'global stocktake' of the world's efforts to address climate change under the Paris Agreement. Having shown that progress was too slow across all areas of climate action – from reducing greenhouse gas emissions, to strengthening resilience to a changing climate, to getting the financial and technological support to vulnerable nations – countries responded with a decision on how to accelerate action across all areas by 2030. This includes a call on governments to speed up the transition away from fossil fuels to renewables such as wind and solar power in their next round of climate commitments.

The latest COP has highlighted just how important the work of the ESIG is to try and accelerate progress towards reduction targets by researching ways to incentivize high emitting sectors to rapidly reduce emissions in a financially sustainable/profitable way. The ESIG will also work on ways to demonstrate to organizations that rapid reductions in emissions is not only good for the environment, but also good for business.

Previous work provided by Environment 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

Environmental Sustainability Group Continued

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.

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

Artificial Intelligence

Initial thoughts for discussion

- Leverage using tools
- AI can become an advisory tool
  - Ask the model to provide advise
  - For instance: AI as faculty advisor, emotional support services
  - AI for data cleaning
  - Analyze pictorial data
- Digital assembly environment needs AI tools and blockchain
- Current tool kits like Chat GPT
- Using regenerative AI Tools to move to decision making
- Human to collect data Moto
- Ability to process quickly
- Mindful AI
- Linking machine to people
- CAM-I previous work to accelerate that today using AI
- Learning from Data
- Health Care
- AI linkage to help Enterprise Systems linkage
- Come up with use cases of GenAI, or different applications of AI in different industries
- How to successfully integrate AI into business
- Bots as a featured solution type. Specifically, Microsoft Copilot Studio enabled bots. Many use cases enabled by our repeatable design pattern
  - Everyday AI helper
  - License: $10 per person
  - Custom bots
  - Microsoft finance copilot: analyze data and provide recommendations

AI is being used in materials manufacturing to:

- Optimize logistics
- Quality inspection
- ID potential errors
- Materials modeling and simulation
- Data analysis
- Decision making analysis
- Production automation
- Inventory management
- Daily operations
- Patents: expedite, efficient
- Trademark: fraudulent applications

Artificial Intelligence Continued

Link AI to Past work, ability to process quickly:

- Value, Cost and Profitability Management
- Supply chain
- Environmental Sustainability
- Digitalization
- Target Costing
- Improving efficiency/effectiveness in the finance function
- Performance Management
- Integrated Risk and Value Management
- Closed Loop planning
- Capacity Management
- Intelligent Data Quality Management
- Principled Innovation
- AI IS advisory board,
- Digital assembly environment needs block chain, and tie to Ai

It is important for companies to understand and adopt AI technologies because it can help them improve their business operations, enhance customer experiences, and boost employee productivity. By leveraging AI, companies can streamline processes, make data-driven decisions, and automate repetitive tasks, leading to greater efficiency and cost savings. AI can also help companies personalize their services and products, deliver faster and more accurate customer support, and gain insights into customer behavior and preferences. Additionally, AI can improve employee experiences by providing tools and resources to enhance their work performance and reduce administrative burdens. Overall, adopting AI technologies can give companies a competitive advantage, improve their bottom line, and enhance their overall business performance.

Artificial Intelligence Continued

Learning Objectives

After participating in this interest group, you will…

- Better understand the definitions of AI and what it can do
- Better understand how AI is classified according to capability, functionality, and technology
- Better understanding AI capabilities across business departments / functions
- Better understanding keys to successful AI deployment
- Better understand challenges with AI deployment
- Better understand solution deployment considerations specific to AI
- Better understand the integrated workstreams for an AI-enabled solution deployment effort
- Better understand what is required in the design and deployment of AI solutions identified during the previous Special Interest Group meeting:
    - Commute Optimization
    - Claims Analysis
    - Inventory Insights and Management
    - AI Assistants in Daily Operation
    - Improving ERP Design & Configuration Processes Using AI
    - Improving Care Services for Seniors
    - AI Tutors and AI Grading Assistants for Secondary and Higher Education

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 basic knowledge of processes and systems; technology architecture (infrastructure, applications, integrations); application development; diagramming a data supply chain (data sources, movements, transformations, readiness for analytics or AI processing); capability enablement; organizational change management; performance management

Contact:

For more details on the special interest group please contact:

- Ashok Vadgama Phone: (512) 296-6872 Email: ashok@cam-i.org
- Nate Regimbal Phone: (858) 337-3311 Email: nateregimbal@gmail.com