



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

CAM-I MEETING AND TRAINING

2nd Quarter 2025 June 2-3, 2025

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, 2nd Quarter 2025 on June 2nd to 3rd, 2025.

All meetings, interest group sessions and general sessions will be virtual through Microsoft Teams. Registrants will be sent out the team's invitation five days before the meeting.

The members' forum is on June 3rd at 4:00 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 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 2025"](#)

On Registration:

- Tuesday 3rd June 2025 at 9:30 AM EST, General Session, please select if attending.
- Special Interest Groups Monday 2nd June all day, and Tuesday 3rd June afternoon, please select if attending.

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 2, 2025 All Eastern Time Zone

INTEREST GROUP SESSIONS

- 11:00 AM – 5:00 PM Value, Cost and Profitability Management
Contact – Carmel Call (carmel.call@kingcounty.gov)
Contact – Anthony Pember (anthony.pember@cbh.com)
- 11:00 AM – 5:00 PM Artificial Intelligence
Contact – Nate Regimbal (nateregimbal@gmail.com)
Saju Skaria: (saju.skaria@digitechserve.com)
- 3:00 PM – 8:00 PM Environmental Sustainment
Contact - Lea Patterson: (Lea.Patterson@pilbaragroup.com)

TUESDAY, JUNE 3, 2025 All Eastern Time Zone

GENERAL SESSIONS

- 10:00 AM Welcome - Ashok Vadgama, CAM-I
Brttany Williams, Chief Partnership Officer, Collegiate Edu-Nation
- 10:30 AM **TITLE:** "Application of Value Analysis"
Speaker: William Dummer
- 11:20 AM **TITLE:** : "Drawing Alignment: How Visual Storytelling Transforms Projects and Unites Teams"
Speaker: Dan Hulen, Managing Partner, bppartners.co.
- 12:10 PM **TITLE:** "Leveraging a Fraud Analytics framework to identify anomalies"
Speaker: Aurpon Bhattacharya, Principal, SIKICH
- 1:00 PM Adjourn General Session

INTEREST GROUP SESSIONS

- 1:30 PM - 3:00 PM Value, Cost and Profitability Management.
Artificial Intelligence
- 3:00 PM Members Forum, by invitation only
- 4:00 PM – 8:00 PM Environmental Sustainment

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

September 8 - 9 2025 Virtual
December 8-9, 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

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www.cam-i.org

Phone: 512-617-6428

Cell Phone: 512-296-6872

CAM-I General Session Presentations

Speaker 1

TITLE: Application of Value Analysis

Speaker: Bill Dummer

Field of Study: Management Services

Learning Objectives:

Organizations in every industry are facing significant cost challenges in the light of material inflation, supply chain challenges and labor shortages, to name a few. Traditional methods of cost reduction efforts to meet these challenges often turn out to be ineffective. A proven alternative is the application of Value Analysis that identifies where costs are out of proportion and identifies ways to bring it into alignment.

Some of the topics include -

- Identify areas for cost reduction.
- Improving processes to meet challenges
- Identifying process changes to achieve improved value
- Identifying new areas for promoting additional value
- How to determine customer requirements relative importance
- Mapping requirements to proposed solutions
- How to Create and interpret the Value Index
- Identification of specific areas of opportunity
- Evaluate how current product/service meets requirements

CPE Level: Intermediate

Speaker 2

TITLE: "Drawing Alignment: How Visual Storytelling Transforms Projects and Unites Teams"

Speaker: Dan Hulen, Managing Partner, bppartners.co.

Field of Study: Management Services

Learning Objectives:

In this session, we'll explore how combining storytelling with visual tools can accelerate project alignment, reduce friction, and drive successful outcomes. Drawing from real-world experiences, including orchestrating global transformations and integrating diverse systems across multiple organizations, we'll uncover how a simple "one-pager" or illustrative diagram can serve as a powerful tool to unify teams and stakeholders.

Continued

CAM-I General Session Presentations

Speaker 2 Continued

Key Points

- **The Challenge of Alignment**
- **The Power of Visual Storytelling**
- **Crafting the 'One-Pager'**
- **Real-World Applications**
- **Engaging Stakeholders Through Storytelling**
- **Implementing Visual Storytelling in Your Organization**

Supporting Research

Visual Management Enhances Communication: Visual tools improve clarity, visibility, and understanding of project scopes and plans.

Storytelling Builds Credibility and Engagement: Effective storytelling is audience-specific, clearly contextualized, human-centric, action-oriented, and humble.

Takeaways

Accelerated Alignment: Visual storytelling expedites the alignment process, moving teams swiftly from confusion to clarity.

Enhanced Engagement: Stories and visuals engage stakeholders, fostering a deeper connection to the project's goals.

Improved Outcomes: Clear communication leads to better decision-making, increased efficiency, and successful project execution

CPE Level: Intermediate

CAM-I General Session Presentations

Speaker 3

TITLE: "Leveraging a Fraud Analytics framework to identify anomalies"

Speaker: Aurpon Bhattacharya, Principal, SIKICH

Field of Study: Management Services

Learning Objectives:

In an increasingly data-driven world, the ability to detect anomalies is critical for organizations across industries. This session explores how the principles and methodologies of fraud analytics can serve as a powerful framework for identifying anomalies beyond traditional fraud detection. By leveraging techniques such as statistical modeling, and behavioral analysis, participants will gain insights into building scalable anomaly detection systems that proactively flag irregular patterns and potential risks. Real-world case studies will demonstrate how applying fraud analytics tools can enhance operational efficiency, strengthen compliance, and support data integrity across various business domains.

CPE Level: Intermediate

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:

- | | | |
|------------------|-----------------------|---|
| • Anthony Pember | Phone: (757) 228-7033 | Email: anthony.pember@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

CAM-I Artificial Intelligence (AI) Special Interest Group (SIG)

Summary

CAM-I is pursuing a strategy for employing AI technology(ies) in order to benefit its members, its members' organizations, and the broader business community. This approach is in alignment with the Mission of CAM-I, which is to foster operational excellence in organizations by:

- Developing collaborative solutions for the most urgent current and future problems that hinder the journey to operational excellence
- Enhancing capability of organizations through people development
- Exposing organizations to thought leaders
- Augmenting capabilities through information dissemination and training for improving performance

The approach taken thus far can be boiled down to the following, proven steps:

1. Define AI and provide examples of what it can do – as to inspire solutions to problems
2. Review deployment methodologies, keys to success, and key risks – as to help planning
3. Incorporate fundamentals of prioritization and planning – to know where to start

The AI SIG has progressed through step 3, and is now preparing to enter execution phase.

Indicative Focus Areas

The AI SIG, in working with CAM-I members, has aligned on two solution models:

1. Digitize CAM-I Content and Make it Searchable – Including Using AI technologies
2. Automate – in whole or part – the creation of business process documentation and business process change scenario modeling via methods employing company profiling survey(s) and file uploads.
Once the business process depiction is created, apply AI and ML techniques to recommend changes based on user-provided business objectives.

The solutions shall focus on the following, prioritized business areas:

- Closed Loop planning and budgeting
- Target Costing and Value Analysis
- Supply Chain Management

CAM-I Artificial Intelligence (AI) Special Interest Group (SIG)

Continued

Teaming Across the CAM-I Network

In alignment with CAM-I's Mission regarding collaboration, execution on the AI SIG solutions will involve teaming across CAM-I membership, with noted contributions of resources from Arizona State University, College of DuPage, and University of Bristol. All members and member organizations are encouraged to raise additional collaboration opportunities, which includes not only solution development matters, but also deployment opportunities – e.g. “early adopters”.

Learning Objectives & Discussion

Understanding what AI is, what it can do, its limitations, and key deployment considerations
Linkage of AI technologies to management approaches within CAM-I's Body of Knowledge
How to scope an MVP – not just technologically but also from a commercial operations perspective

Field of Study: Management Services

Required Knowledge / Prerequisites: Basic knowledge of technologies, applications, processes and systems. Understanding of systems, data supply chain, transformations and readiness for analytics.

Contact:

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

- | | | |
|-----------------|-----------------------|---|
| • Nate Regimbal | Phone: (858) 337-3311 | Email: nateregimbal@gmail.com |
| • Saju Skaria | Phone: (602) 758-9982 | Email: saju.skaria@digitechserve.com |