



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

**You Are Invited**  
**March 7 – 10, 2010**  
**Marriott Suites Clearwater Beach**

Dear CAM-I Members and Guests,

Please join us as the Consortium for Advanced Management International (CAM-I) hosts its first meeting of the year at the Marriott Suites on Sand Key, in Clearwater Beach, Florida. As an industry-led collaborative research consortium, CAM-I continues to produce the “best of the industry” solutions, techniques, methods & tools for over 35 years in the field of Cost, Process and Performance Management.

Our quarterly meetings enable participants to work in diversified interest groups developing leading-edge research, hear presentations by leading experts in our Tuesday General Session, and develop a network of contacts from industry, government, consultancies and academia.

Speakers on Tuesday morning, March 9<sup>th</sup> –

1. Mohan Nair, Executive Vice President & Chief Marketing Executive, Regence
2. Denise Zaporzan, CMA, President, Denise Zaporzan & Associates
3. Speaker - TBD

Monday, Tuesday afternoon and Wednesday morning are dedicated to meetings on projects in which you can participate. A short description of each of the interest groups is listed on pages 7 & 8. If you have any questions, please do not hesitate to contact the group leader at the phone or email provided.

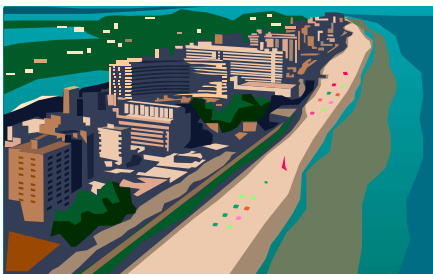
We will be offering a 45 minute Newcomer Orientation with an overview of CAM-I, the individual interest groups, projects and deliverables. **First time attendees are requested to attend this orientation.**

On Wednesday, March 10<sup>th</sup>, we will be offering an 8-hour interactive workshop on “Target Costing: Enhancing Revenues Through Effective Product Development”. Registration fee is \$200 for the workshop. There is no charge for CAM-I members. Space is limited so please sign-up early.

**Attendees also qualify for up to 20 CPE (Continuous Education) credit hours.**

For additional information please contact:  
Ashok Vadgama, CAM-I President  
Phone 512-617-6428 (O) or 512-296-6872 (M)  
ashok@cam-i.org

**Register today by calling CAM-I  
at 817-426-5744 or online at our  
website [www.cam-i.org](http://www.cam-i.org) and click on  
“meetings and events” at the top of the  
page to view entire agenda .**



# **GENERAL SESSION PRESENTATION** **OVERVIEWS**

***“Social Media: Health care consumers are talking –  
Are you joining the conversation?”***

**Mohan Nair, Executive VP and Chief Marketing Executive**

Facebook has over 20,000 health related groups on the internet today. Health 2.0 sites like DailyStrength and PatientsLikeMe are growing rapidly. Consumers are starting to rate their provider experience on Angie’s List, Yelp and other consumer sites.

How is social media driving changes in health care today and what will it look like tomorrow?  
How will the delivery system change?

Hear as Mohan discusses how one health insurance industry, Regence, is reacting to this new participatory health care movement.

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***“Leadership in Times of Uncertainty”***

**Denise Zaporzan, CMA, President, Denise Zaporzan & Associates**

Leaders today are facing unprecedented levels of uncertainty and stress. The magnitude of the recent financial upheaval has increased this exponentially. More and more, we are being asked to help leaders throughout all levels of an organization cope with their own anxiety as well as respond to employees’ increasing levels of stress as change continues at lightning speed.

This session explores practical strategies to help leaders and employees at all levels contribute to and create a healthier organizational climate. We explore changing career paradigms, the many different causes of stress, ways to increase both our personal and organizational **resilience**, and a simple model for managing through these times of unparalleled uncertainty.

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**THIRD SPEAKER TO BE ANNOUNCED**



# MEETING AGENDA



## SUNDAY, MARCH 7<sup>TH</sup>

5:30p – 7p Get Acquainted Reception

## MONDAY, MARCH 8<sup>TH</sup>

Dress Code: Casual

7:15a – 8:30a Registration /  
Continental Breakfast

7:45a – 8:30a CAM-I Newcomer Orientation

8:30a – 5:00p\* Interest Group Sessions:

- Business Intelligence
- Health Care
- Performance Management
- Planning & Budgeting
- Process Based Management
- Risk Management
- Target Costing Best Practices
- Sustainability
- Transparency

12n – 1:30p Management Meeting/Lunch  
(By invitation only)

## TUESDAY, MARCH 9<sup>TH</sup>

Dress Code: Business Casual

7:30a – 8:15a Continental Breakfast

8:15a – 8:30a Welcome & Introductions –  
Bill Dummer – Industry Chair

Ashok Vadgama, CAM-I President

8:30a – 9:30a Mohan Nair, Exec. VP & Chief  
Marketing Executive, Regence  
“Health Care Consumers are  
Talking – Are You Joining the  
Conversation?”

9:30a – 9:45a Break

9:45a – 10:45a Denise Zaporzan, President,  
Denise Zaporzan & Associates  
“Leadership in Times of Uncertainty”

10:45a – 11:00a Break

11:00a – 12:00n Speaker TBD

12:00n– 1:30p LUNCH PROVIDED

12:00n – 1:30p Futures Committee Lunch  
(By invitation only)

1:30p – 5:00p All Interest Group Sessions  
Reconvene

5:30p – 7:30p Networking Reception

## WEDNESDAY, DECEMBER 10<sup>TH</sup>

Dress Code: Casual

7:15a – 8:00a Continental Breakfast

8:00a – 12:00p\* Interest Group Sessions:

- Business Intelligence
- Health Care
- Performance Management
- Planning & Budgeting
- Process Based Management
- Risk Management
- Target Costing Best Practices
- Sustainability
- Transparency

8:00a – 4:00p Target Costing Workshop

\* Monday and Wednesday break times will be determined by each individual group chair.

**AGENDA SUBJECT TO CHANGE**

## Message to First Time Attendees

Over the past thirty-five years CAM-I has enabled changes in the way companies manage their business. Recognized as the world's leading forum in advancement of cost, process and performance management, CAM-I's programs and interest groups draws upon its extensive international network of subject matter experts, academia and leading managers to provide participants the opportunity to develop and utilize leading-edge cost and resource management processes in their organizations.

The implementation/utilization of these advanced concepts provide participating organizations a tremendous competitive advantage in their business practices and knowledge acquisition well in advance before they go public. Quarterly meetings allow all participants to:

- ◆ Leverage their knowledge through interaction with leading experts by collaborative work,
- ◆ Compare and benchmark their organization's practices and performance against those of world class competitors, and
- ◆ Develop implementable solutions which incorporate leading-edge cost and resource management methods from CAM-I's existing applied research.

CAM-I hosts four Cost, Process & Performance Management meetings each year. These three day events enable participants to engage in collaborative work, hear presentations by leading experts in all areas of cost management and to develop an invaluable network of professional contacts from industry, government, SME's, consultancies and academia.

Please review this meeting notice for insights into the work underway in our existing interest groups. If you have any questions, or need further information please contact:

Ashok Vadgama, CAM-I President  
[ashok@cam-i.org](mailto:ashok@cam-i.org)

## 2010 Meeting Schedule

### 2<sup>nd</sup> Quarter Meeting

June 6 – 9

San Francisco, California



### 3<sup>rd</sup> Quarter Meeting

September 12 – 15

Jackson Hole, Wyoming



### 4<sup>th</sup> Quarter Meeting

December 5 – 8

New Orleans, Louisiana



**MARRIOTT SUITES  
ON SAND KEY  
1201 Gulf Blvd  
Clearwater Beach, FL  
1-727-596-1100**

CAM-I will be hosting its 1<sup>st</sup> Quarter Meeting of 2010 at The Marriott Suites on Sand Key, Clearwater Beach, Florida. We have reserved a block of rooms for \$127. Make reservations directly with the hotel as soon as possible. Please advise you are attending the CAM-I meeting to receive the preferred group room rate.

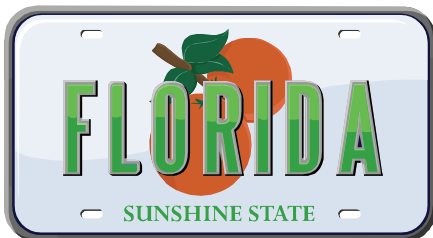
**RESERVATIONS MADE AFTER FEBRUARY 6<sup>TH</sup> ARE SUBJECT TO AVAILABILITY SO PLEASE CALL AS EARLY AS POSSIBLE.**

**LOCATION:**

The Marriott Sand Key is located approximately 23 miles from the Tampa International Airport. Unless you rent a car, we suggest you use Super Shuttle which is \$25 one way. Taxi service is approx. \$55 one way.

**Hotel Facilities:**

- Watercolour Steakhouse (breakfast, lunch & dinner)
- Kokomos Grille & Bar (poolside)
- Fully equipped fitness center
- Lagoon Pool & Whirlpool
- 24 hour business center
- 24 hour room service



**NASBA  
NATIONAL REGISTRY  
OF CPE SPONSORS**

**This 3-day CAM-I CMS Program  
qualifies for 20 credit hours.**

**Course Level: Intermediate**

**Prerequisite: Basic knowledge of Cost and/or Process & Performance Management. No advanced preparation is necessary**

**All Study is Group - Live**

CAM-I is registered with the National Association of State Boards of Accountancy as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on acceptance of individual courses. Complaints regarding sponsors may be addressed directly to NASBA, 150 4<sup>th</sup> Avenue N., Suite 700, Nashville, TN 37219



**Refund/Contact Information:** For more information regarding administrative policies such as complaints, cancellations and refunds, please contact the CAM-I office at 817-426-5744.

## **CAM-I PARTICIPATING ORGANIZATIONS**

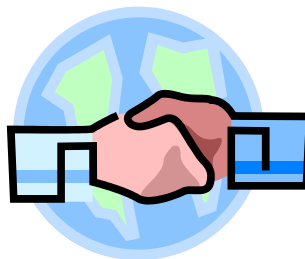
- **ABS Consulting**
- **Alliance Enterprises**
- **Alta Management**
- **Arkonas, Inc.**
- **Avnet, Inc.**
- **Boeing Company**
- **CALIBRE Systems**
- **Cost Vision**
- **Certified Management Accountants Canada**
- **Decimal**
- **Executive Management Associates**
- **Grant Thornton LLP**
- **Institute of Cost & Works Accountants of India**
- **Korea Management Accounting Assn.**
- **Navistar**
- **Pilbara Group Inc.**
- **Pinnacle West**
- **Regence**
- **Rockwell Collins**
- **Royal Australian Navy**
- **SAP AG**
- **SAS Institute**
- **South Carolina Research Authority**
- **Shell Oil Company**
- **Tata Consultancy Services**
- **U. S. Air Force**
- **U. S. Coast Guard**
- **U. S. Marine Corps**
- **U. S. Patent & Trademark Office**
- **U. S. Department of Treasury**
- **Whirlpool Corporation**

# CURRENT CAM-I INTEREST GROUPS

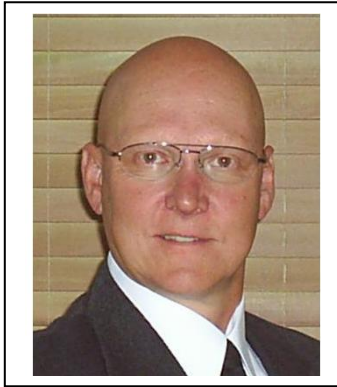
- **Health Care** – This group is working to provide practical solutions for improving U.S. healthcare to healthcare stakeholders by customizing CAM-I's industry-leading process improvement and performance management techniques to address today's healthcare needs – improving healthcare quality, reducing cost, and enhancing availability. One key effort will be to use these world-class methods and tools to help healthcare providers more effectively address the new public-private value chain. Chair: Clifton Williams, Phone 703-637-2889 or [Clifton.Williams@gt.com](mailto:Clifton.Williams@gt.com)
- **Sustainability** – The planned deliverable “Pragmatic Lean - A Practical Guide to Lean Adoption” will cover topics such as: Lean Principles and Lean Thinking; Value, Value Streams, Flow, Pull, and Perfection; Performance Management in a Lean Enterprise; Adopting Lean; and a number of topics of interest like Standard Costing; Intangibles and R&D; Lean Maturity Stages; Overhead and support functions; Shared Services and Monuments; Allocations and Cost Assignments; Products and Product Groups; Lean in the context of Lean Six Sigma; and Lean in the context of CAM-I SIG's for Target Costing, Process Based Management, Performance Management, and Planning and Budgeting. Chair: Carsten Hilker, [carsten.hilker@sap.com](mailto:carsten.hilker@sap.com).
- **Transparency** - CAM-I will launch a new interest group on the subject of transparency with the December 2009 meeting in San Antonio. The subject of the interest group: Defining and measuring organizational transparency for internal and external stakeholders. In September 2009, CAM-I convened a roundtable of distinguished thought leaders to help guide this important effort. The group strongly reinforced the need for research in this area. With their input, CAM-I has an enormous foundation on which to build a body of knowledge on the issue of Transparency that will hopefully answer important questions: What is it? When do we know we have it? What benefits should we expect from it? What are the dangers / unintended consequences of transparency and how do we mitigate them? Chair: Robert Shea, [Robert.Shea@GT.com](mailto:Robert.Shea@GT.com)
- **Target Costing Best Practices**– Provide a vehicle for sharing target costing best practices. The current focus is to develop a series of “how to” technical bulletins on extending target costing to the supply side. The first is “Involving the Extended Value Chain in a Target Costing/Life Cycle Cost Process Model”. The second will cover leading practices for accessing manufacturing cost data and recommendations for the future on integrated costing systems across the supply chain. The 3rd paper addresses how to prepare for commodity forecasts fluctuations in the target costing process. Chair: Tami Capperauld, Phone 206 332-2305 or [tami.capperauld@regence.com](mailto:tami.capperauld@regence.com)
- **Performance Management** – The group has developed a practical framework that will enable any organization to assess their level of performance management maturity. In addition, the framework recommends specific techniques to assist in areas of performance management that require improvement taking into consideration the organization's capability of effecting change. Chair: Derek Sandison, Phone 905-855-0765 or [derek.sandison@pm2.ca](mailto:derek.sandison@pm2.ca)
- **Business Intelligence** - This group will be developing a metrics reference model that will provide organizations a way to measure, analyze and act in an integrated way toward solving common business issues. It will also be looking at mechanisms to integrate the flow of information and decision-making capabilities of cost, performance and process management within organizations. Chair: Shobhik Chaudhuri, Phone (703) 637-2728 or [Shobhik.Chaudhuri@qt.com](mailto:Shobhik.Chaudhuri@qt.com)

- **Process Based Management**– This group is developing the next generation process and enterprise maturity model assessment that advances contributions of previous models in the following ways: 1) addresses multi-dimensions of organizational performance in the language of business vs. process; 2) uses direct input (self-administered) from individuals in the organization vs. facilitation of outside experts to administer; and 3) suggests next steps from a database of best practices that will be collected over time from participating organizations. Target audiences for the assessment: 1) executives (Phase 1) , mid-level managers (Phase 2) , and front line employees (Phase 3). Results of taking a Process and Enterprise Maturity include a visual profile along multiple dimensions. Uses include jumpstarting the organization rollouts on a periodic basis by measuring progress over time against evidenced-based characteristics of high maturity organizations, or as a unifying framework for identifying opportunity areas using a “systems thinking view of the enterprise” vs. a fragmented, stovepipe view. They collectively seek to elevate the importance of process by better engaging business leaders in the language they best understand – performance. Chair: Martha Batorski, Phone 703-637-3010 or Martha.Batorski@gt.com.
- **Planning & Budgeting** – This group is taking a big picture approach to analyzing the Planning and Budgeting process. The group, made up of private and public sectors members, is examining current and future trends in the budgeting and planning process to make the process more valuable and less costly. As part of this effort they have developed a “Wiki” that invites broad public participation to publicize and further develop insights and recommendations. Chair: Jennifer Beasley, Phone 202-622-5843 [jennifer.beasley@do.treas.gov](mailto:jennifer.beasley@do.treas.gov)
- **Risk Management** – The Risk Management Interest Group is researching risk management in both public and private sectors as a key element of a truly integrated performance management system. It has completed short articles on risk management in 07 and 08. A comprehensive risk management guideline will be completed in 3Q '10 . Chair: Frank Wood, Phone 202-372-4564 or Frank.S.Wood@uscg.mil
- **Operational Data & Financial Measurement Assessments** – The team has developed assessment criteria for operational data required for relevant operational planning and control, as well as criteria for cost measurement that is integrated with and driven from the operational data. A questionnaire and examiner’s handbook are also completed. Phase II will incorporate planning and forecasting tools. Chair: George Millush, Phone 248-637-8665 or gbm5@wowway.com

***Join us for our networking reception Tuesday evening at 5:30***



# Wednesday Workshop Target Costing: Enhancing Revenues Through Effective Product Development



**Keith Hallin**  
Director Cost Knowledge & Targeting  
Whirlpool Corporation



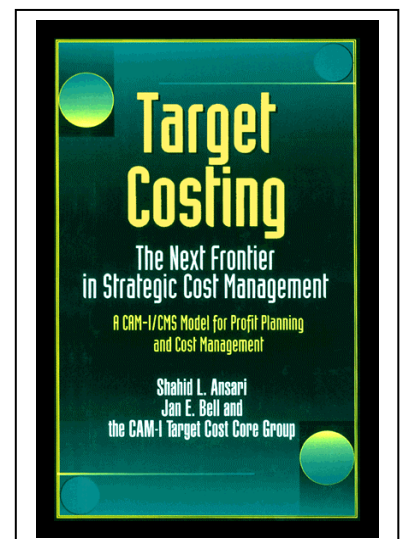
**Bill Dummer**  
Sr Project Manager – Target Costing  
Whirlpool Corporation

From corporate growth strategies, to enhancing shareholder value..... companies with an effective product development process have a definite competitive advantage in the new millennium. As product life cycles shorten and "time to market" becomes crucial, a reliable method of delivering the right product - at the right time - for the right price is essential. Target Costing is a proven method that leading-edge organizations are using to reduce the inherent risk of new product development by providing "best value" products to their customers while, at the same time, increasing profits.

In this interactive workshop, Keith Hallin, Director of Cost Knowledge and Targeting, and Bill Dummer, Senior Project Manager Target Costing Integration for the Whirlpool Corporation share their implementation experiences. Using a case study approach with focused discussion, you will learn how to apply the fundamentals of Target Costing to your organization's product development processes. Specific topics to be covered include:

- Target Costing principles and process
- Key core tools
- Product definition alignment with customer value
- Product life cycle management
- Multi-year product, profit and cost planning
- Implementation realities

The focus of instruction is an interactive case study, by which the participants experience practical application of the Target Costing process. The case study participants will develop the necessary information to employ Target Costing and seek to optimize the case study design, in terms of customer requirements and the company's internal cost objectives.



## Target Costing Definition\*:

The Target Costing process is a system of profit planning and cost management that is price led, customer focused, design centered and cross-functional. Target Costing initiates cost management at the earliest stages of product development and applies it throughout the product life cycle by actively involving the entire value chain.

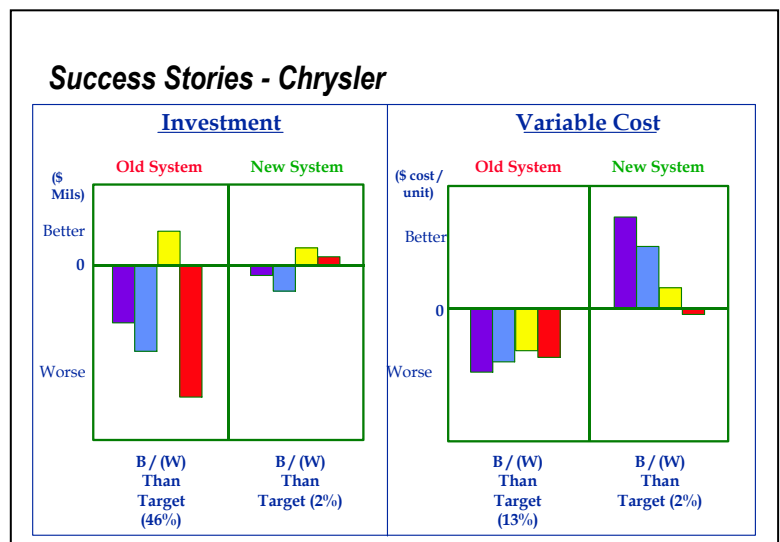
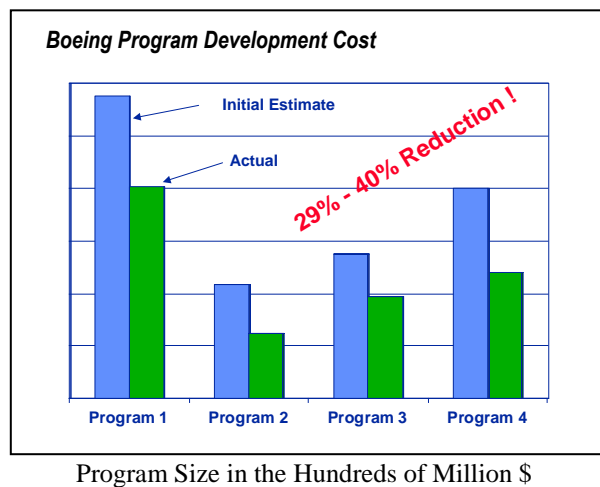
## Why do Target Costing?

Some Realities:

- New products account for an ever-increasing percentage of sales and revenues.
- Product life cycles in many industries continue to shorten. Product turnover is quicker.
- Customers are demanding more customized better quality products at affordable prices.
- Global competition is making speed and customer satisfaction competitive weapons.
- New competitors make market share maintenance/enhancement a difficult proposition.

**Bottom Line:** Companies need a systematic approach of providing customer driven product requirements and features, while still being able to produce an acceptable return for the company and it's shareholders. Target costing is the management system that can ensure both customer satisfaction and company profitability.

**Successes:** Boeing & Chrysler (prior to the merger with Daimler):



Other prominent companies utilizing target costing for successful product development and maintaining targeted market share include: Toyota, Honda, Caterpillar and Harley-Davidson.

- From "**Target Costing: The Next Frontier in Strategic Cost Management**", Ansari/Bell and the CAM-I Target Costing Interest Group. Irwin Press 1996.



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Suite 256  
Austin, Texas 78746  
PH 512-517-6428

## **REGISTRATION FORM**

Please fax this form to 817-426-5799  
or register online at <http://www.cam-i.org>

Name \_\_\_\_\_

Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

Dept/Mail Stop \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_

Fax \_\_\_\_\_

E-mail \_\_\_\_\_

### **PLEASE INDICATE WHICH OF THE FOLLOWING CONCURRENT SESSIONS YOU WILL PARTICIPATE IN**

- Business Intelligence
- Health Care
- Sustainability
- Performance Management
- Planning & Budgeting
- Process Based Management (PBM)
- Risk Management
- Target Costing Best Practices
- Transparency

### **OPTIONAL EVENTS**

- Sunday Get Acquainted Reception
- Monday CAM-I New Comer Orientation
- Tuesday Evening Networking Reception
- Wednesday Target Costing Workshop

**PLEASE REMEMBER TO  
MAKE YOUR HOTEL  
RESERVATIONS AS  
SOON AS POSSIBLE.**

