# CMTrends

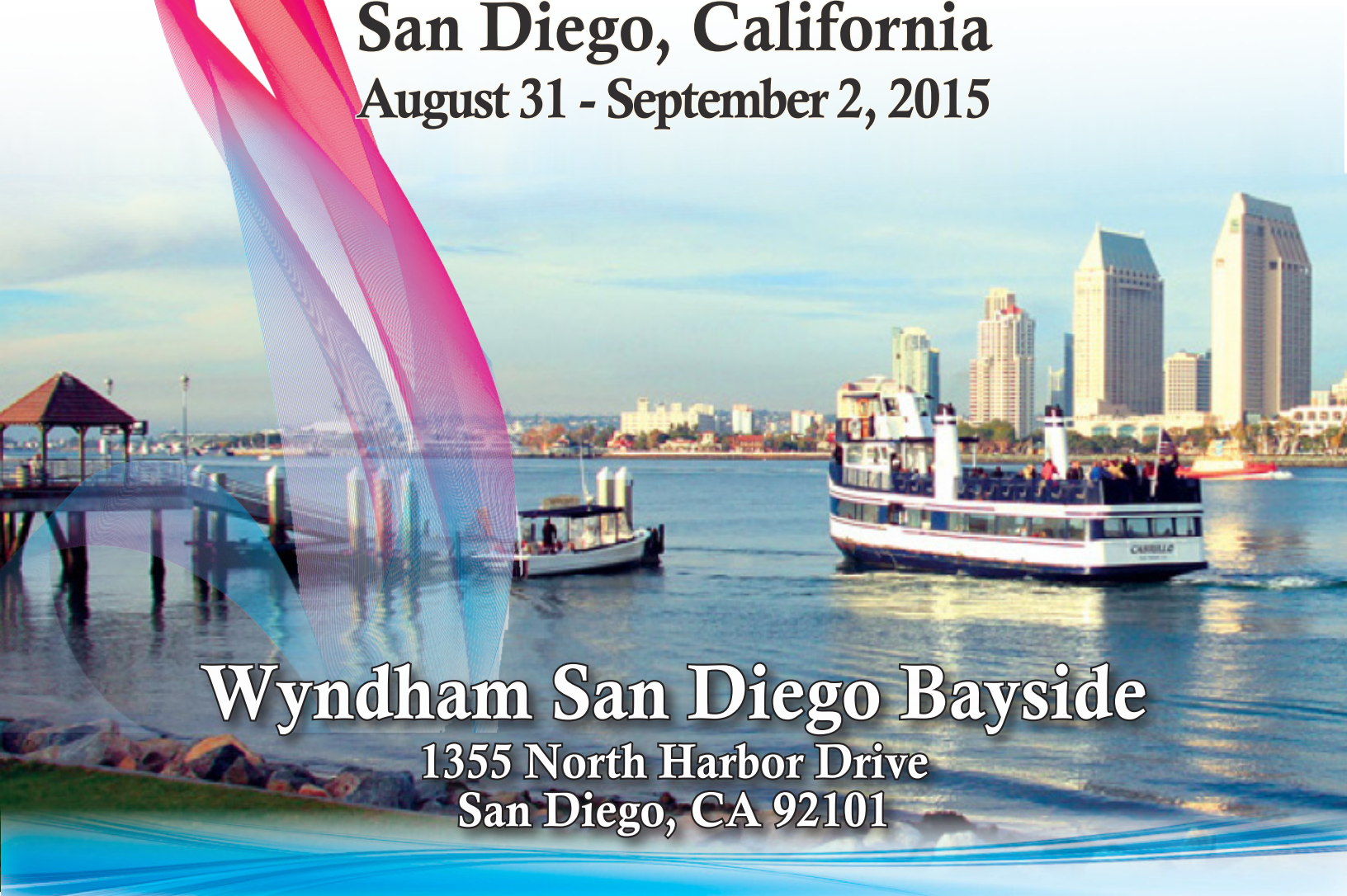
## 2015 S.W.A.T.

*Seminars, Workshops, And Training*

## SPEAKERS & PRESENTATIONS

### San Diego, California

**August 31 - September 2, 2015**



## Wyndham San Diego Bayside

1355 North Harbor Drive
San Diego, CA 92101

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# Peter A. Bilello, CIMdata Inc.

Peter Bilello, President of the strategic management consulting and research firm CIMdata—an internationally recognized authority on Product Lifecycle Management (PLM)—has more than 24 years of experience in the development of business-enabling information technology (IT) solutions for research, engineering, and manufacturing organizations worldwide. He has participated in PLM analysis, selection, implementation, and training; CAD/CAM/CAE/CIM implementation and management; synchronous and lean manufacturing consulting; software engineering; and general data management strategy development and support. He has authored numerous papers and research reports on PLM and related topics, and his articles, commentaries, and perspectives have appeared in publications throughout the United States, Europe, and Asia.

Mr. Bilello has been directly involved with consultation on the selection, integration, and implementation of large-scale PLM solutions. He has spoken on a number of different PLM-related topics in Europe, North and South America, the Middle East, Africa, and Asia.

Mr. Bilello holds a Bachelor of Science degree in Computer Science with a minor in Physics from the California State University, Fullerton, and a Master of Science in Engineering degree, in Manufacturing Systems Engineering, from The University of Michigan.

## "The Emergence of the PLM Platform and its Support for Closed-Loop CM"

The Product Lifecycle Management (PLM) industry is entering an era of accelerating end-to-end business-platform enablement. The shift towards enabling robust and resilient business platforms focused on product innovation requires fundamental changes for all PLM users, including configuration management practitioners. Industrial companies who wish to implement enterprise business platforms and the closed-loop processes they enable must rethink their solution set strategy, and how they are identified, assessed, and deployed. They must also identify and adhere to standards and the openness of interfaces that permit their chosen solutions and their managed data to be adaptable, maintainable, extensible, scalable, compatible, stable, and reliable over multiple upgrade cycles. This presentation will describe this major industry development, and what this means to today's and tomorrow's CM practitioners.

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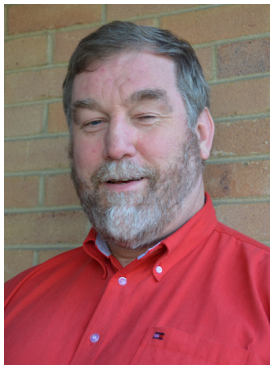
# Mike Bostelman, Cummins Inc.



Mike Bostelman is the manager of Configuration Management and Design Integration (CM/DI) for high horsepower engines worldwide at Cummins Inc. He is recognized as a leading CM/DI expert, not only in high horsepower, but throughout Cummins global engine business units. Mike has 25 years in product configuration management and product definition experience at Cummins and has taken products from concept to manufacturing. Throughout his tenure at Cummins, he has garnered vast experience in marketing and service which have provided great insight for continued process improvement efforts for CM/DI. He started his career in product design; it was during those 10 years in design he realized his passion for product configuration management. With that passion, Mike has developed product definition and configuration management processes, procedures, and systems for a number of Cummins engine joint ventures around the globe. Mike holds a Mechanical Engineering degree from the University of Toledo and is CMII certified.

Mike has had opportunity to travel globally for Cummins and lived in the United Kingdom for several years. During Mike's time in England, he developed a love for steam traction engines.

## "An Application of Configuration Management for a Highly Customizable Product, Part 2"

Cummins' products are customer driven and are highly customizable. We will examine how Cummins utilizes configuration management in a surprising way to manage the complexity of their products. By modularizing the bill of material and capturing the engineering intent, Cummins has reduced the complexity in all views of the product. This talk will explore the way that Cummins configuration management manages these modularized bill of materials.

# David Cumti, FAA

David Cumti is the program manager for the FAA's Configuration Management Automation project. Working with the FAA since 2004, but still relatively new to the Configuration Management world, he has seen the parallels between CM and his old roles of finance, planning, and performance measurement. David graduated from the University of California, Davis with a degree in Economics and a minor in Communications.

## "Buying in: Finding the Right Organizational Stakeholders to Promulgate CM"

Have you ever pitched such a simple and effective concept only for implementation to be held back by gatekeepers? In most cases, it's not even the decision maker's ambivalence or villainy that prevents Configuration Management concepts from being promoted within an organization. Getting buy-in requires aligning CM benefits with decision makers' objectives. This presentation will help you target the right supporters and champions for CM, and find common goals toward building alliances. Topic areas include:

Playing to your CM team's strengths
Analyzing your stakeholders
Tailoring presentations in plain language
When a decision maker cannot be convinced

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# Steve Easterbrook, CMPIC

Steven Easterbrook is the president and lead instructor of CMPIC LLC. He has over 12 years experience as a CM manager in both government and commercial organizations, and over 19 years experience as an instructor/consultant in configuration management. He has received incredibly high reviews and recommendations.

Steve has conducted assessments for both government and commercial organizations, one of which being NASA's international space station program. He has presented at various CM & related conferences, sometimes as keynote speaker, and has had the honor of being selected to speak to the FAA as part of FAA's Distinguished Lecturer series.

Steve has a BS from Cornell University and an MBA in Management from Bryant University. He is CMPIC Certified, CMII Certified, and a member of ACDM, NDIA, and ASQ.

## "Configuration Management Requirements"

Configuration Management (CM) requirements are taking on an increasingly more prevalent role in ISO and related quality standards. This presentation will address the current state of industry CM standards and update specific requirements for CM in the various quality standards (ISO 9001, TS16949, TL 9000, AS9100). CM requirements are also supported by regulation in many environments and can be found in the US Code of Federal Regulations (CFR). The presentation will also discuss what these requirements are and why meeting and exceeding, these CM requirements are essential to achieving an organizational success.

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# David Ewing, Aras

David Ewing is responsible for product management at Aras, where he focuses on the design, definition and development of future solutions including configuration & change management. David has over 15 years of experience implementing configuration management concepts in PLM in the aerospace industry. Prior to joining Aras, David was responsible for PLM usage and development at Cummins and previously at B/E Aerospace where his team developed capabilities for Model Based Definition, Configuration Management, Materials Libraries, design automation and other business process workflows. Previously, David was with General Electric where he developed CAD automation capabilities for the Energy and Aircraft Engine businesses. David is certified in configuration management, project management and a green belt in DMAIC and DFSS.

## "Enabling Model Based Systems Engineering (MBSE) with Configuration Management"

As design and development get more complicated with each new product, highly collaborative cross-discipline engineering processes are essential to the successful development of next generation vehicles, aircraft, industrial equipment, defense technologies, and consumer products. To deal with the growing complexity and tie requirements through functional, logical and physical product structure organizations are moving to implement Model Based Systems Engineering (MBSE). Learn how configuration management provides the foundation for MBSE and how CM can enable MBSE during product development.

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# Lisa Fenwick, CMstat

Ms. Fenwick has been employed by CMstat - a leading provider of COTS Configuration Management and Contract Deliverables Management software – in a number of roles for the past 19 years. With a degree in Engineering from the University of Maryland and an extensive background in Mechanical Engineering and Configuration Management, she has provided support to various departments including Sales/Marketing, Training, Customer Support, Implementation, and Consulting and is currently the Vice President of Product Development. In the past ten years, Ms. Fenwick has become very involved with new product development and standards compliance. She is a member of the Association of Configuration and Data Managers (ACDM), certified in Configuration Management (CMII) by the Institute of Configuration Management, holds CMPIC CMAssessor Certification and is a reviewer for both Configuration and Data Management standards.

## "Marrying Process with Technology"

Process Leads, tools follow….when tools lead, fools follow. This talk will take an in-depth look at this premise and challenge traditional thinking about software tool implementations. We'll look at the potential risks of allowing the existing process or the tool itself to dictate implementation of a PDM/PLM/CM system. Several real-life examples will be used to illustrate what can happen when a narrow focus is used during implementation and planning. Participants will take away a techniques that will help them determine the correct path to take when standing up a software solution.

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## A. Larry Gurule, i-Infusion / CMPIC

A. Larry Gurule is President of i-infusion, Inc., a CMPIC Associate and an active participant on the SAE G33Committee which is responsible for ANSI/EIA 649, The Standard for Configuration Management and its Handbook. Mr. Gurule has years of hands-on and leadership experience for a successful list of clients he has helped become more operational efficient and effective. Larry has also owned and/or held senior level positions in manufacturing, software and service based businesses. Larry has lectured to and/or consulted with hundreds of individuals from Fortune 500 companies on process improvement and enterprise technology implementation initiatives, as well as taught hundreds the principles of CM. Larry holds a Mechanical Engineering degree from the University of Colorado and is a CMPIC SME and CMII Certified Professional.

## Daniel K. Christensen, NAVAIR

Daniel K. Christensen is the Configuration and Data Manager, defining policy, processes, procedures and responsibilities governing Configuration Management (CM) for 34 naval weapon system program offices within the Naval Air Systems Command (NAVAIR). He has over 43 years of naval experience with 20 years in the U.S. Navy, retiring as an Aviation Maintenance Duty Officer. For the last three years Daniel has been the Defense Standardization Counsel Configuration Management Working Group (DSC CMSWG) Chairman, which has developed the EIA-649-1 "Configuration Management Requirements for Defense Contracts" standard.

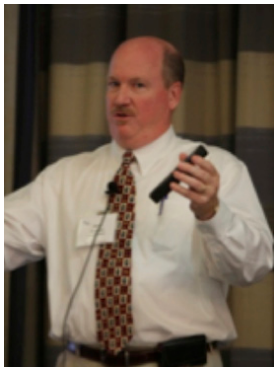
Daniel has a CMPIC Masters Certification of Enterprise CM and CM Subject Matter Expert from the University of Houston, TX. Additionally, Daniel is a certified Enterprise CM Professional and a member of the International Society of CM, is a certified CMII Professional, a certified Configuration and Data Manager from NDIA, and a graduate of the Defense Systems Management College Level III Advanced Program Management, Logistics and Information Resources Management curriculum. Daniel is the government liaison to the SAE International G33 CM committee, a member of the team for ANSI/EIA-649B, and the government liaison to the NDIA Technical Information Division committee and is a 2012 recipient of the TechAmerica Associate Technical Fellowship award. Daniel has a BS in Marketing from Oklahoma City University, Oklahoma city, OK, and an MBA in Entrepreneurial Management from National University, San Diego, CA. He lives in California, MD, is married to Yolanda P. Christensen.

## WORKSHOP: "EIA-649-1 Configuration Management Requirements for Defense Contracts"

In November 2014 Defense Secretary Chuck Hagel said the Pentagon will make a new push for fresh thinking about how the U.S. can keep and extend its military superiority despite tighter budgets and the wear and tear of 13 years of war. He also stated "The U.S. can no longer count on outspending its rivals and potential adversaries." It is imperative that the Department of Defense and its suppliers work cohesively in support of the war fighter in a more effective and efficient manner.

This presentation and workshop will discuss how SAE/EIA 649-1, Configuration Requirements for Defense Contracting, is establishing a sorely missed and needed cornerstone of the Acquirer/Supplier relationship, namely the tailored requirements needed to reinforce confidence and cooperation. Acquirer/Supplier CM is also applicable to Commercial enterprises, although not always recognized, so they will also benefit from this presentation and workshop.

# Mitch Kaarlela, Lockheed Martin



Mitch Kaarlela is a 32 year employee with Lockheed Martin Aeronautics (heritage General Dynamics & Lockheed). He has Configuration Management and Contracts experience on several major domestic and international military aircraft programs. Mr. Kaarlela is a LM Corporate resource for programs needing specialized Configuration Management trouble-shooting and assistance. He presently provides Systems Engineering/Configuration Management expertise to the F-35 program and coaches others regarding CM within LM Aero. Mr. Kaarlela holds a Bachelor's Degree from the University of Texas and a Master's Degree from Texas Christian University. He is an Industry CM Technical Fellow, and is a Vice-Chair with SAE's Systems, Standards and Technology Council (SSTC). Mr. Kaarlela is a member of the prime authoring team for EIA-649, the US Industry Standard for Configuration Management, and presently holds a CMPIC Masters certification. He is passionate about CM! Mr. Kaarlela is married and has three children.

## "Interface Management: Solutions / Challenges for Complex Systems"

This presentation will delve into what Interface Management is about and some of its elements. The briefing will also address why CM should care about Interface Management. Some examples of challenging Interface Management scenarios will be presented, including some discussion about "solutioning" the scenarios and related notes about things to consider. Common themes will be noted to allow the audience to synthesize the information. Attendees will come away with more clarity on the topic, with associated concepts and ideas for the practitioner to address back at their home organizations.

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# Randy McCullough, Leidos

Randy McCullough has 20 years of working in DoD IT (Information Technology). He has worked several roles in the software development lifecycle; as a software developer, data analyst, configuration manager, and a build release engineer. He currently serves as Leidos' AHLTA Change Manager supporting DoD MHS (Military Health System) on the AHLTA EHR (Electronic Health Record). He manages internal software configuration changes to the various test environments. Mr. McCullough is responsible for writing and streamlining processes for successful implementation as well as DoDAF (DoD Architecture Framework) input.

## "Configuration Management Toolbox"

Configuration Management (CM) is one of the most hated jobs in software development. I am going to equip your CM toolbox with the necessary tools to be successful. As we go through this journey we will discuss software reuse, 'when to CM', 'what to CM', and even 'how to CM'. With the right tools and answers you will become one of the key positions in your project.

The problem is that most people to do not understand the importance of configuration management. To prove the importance of CM I will show how this applies to your daily life; inside and outside the workplace. Embracing CM is the only way you can truly prove its importance to your customer. CM is about creating and maintaining a blueprint… Let's get started.

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# Daniel McCurry, Boeing Commercial Airplanes

Daniel has over 30 years of experience with military and commercial programs in the fields of Configuration and Data Management, first with Hughes and McDonnell Douglas Helicopters then with Boeing Commercial Airplanes for Configuration Management, Audits, and Regulatory Compliance for Systems Engineering and Change Management since 1989.

His contributions to these disciplines encompass his active participation in the National Defense Industrial Association, Technical Information Division, Executive Board since 1996. Daniel has served as Chairman from 1998-2010, and is now Chair Emeritus. He has presided as CM Chairman of the Association of Configuration and Data Managers from June 2001-2010. He served as the Vice-Chair of the Government Electronics & Information Technology Association, G-33 committee for the 2000/01 and served as the Chairman September from 2001-2003. He was a member on six ASME Y14 Engineering Drawings Practices Committees from 1999-2009. Dan is currently Vice-Chairman for the SAE Systems Standards and Technology Council.

Dan has received Distinguished Contribution Awards that include the GEIA President's Award for Leadership, NDIA Stern's Award for Technical Excellence, and NDIA Gold Medal for Exceptional Leadership Award. He has received a Technical Fellowship in Configuration Management from GEIA/ TechAmerica.

## WORKSHOP: "Standardizing Configuration Management Terminology: Is it Possible?"

This workshop will review specific CM terminology to determine how it is currently being defined and used in various environments. Attendees will discuss the various meanings and possible misinterpretations of a handfull of widely used CM terms. Workshop results will be discussed and determinations will be made as to the value of reaching a universally accepted definition for all environments.

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# Pablo Moratal, Airbus

Pablo Moratal currently holds the position of Expert for Change Process at Airbus (aircraft manufacturing company). In this role, Mr Moratal is typically involved in activities surrounding CM such as: technical advice to management, knowledge management and sharing of expertise, innovation, and senior project management. Before holding this position, Pablo's career path allowed him to gain a CM "vertical" view, going from Information Technology stakes up to CM Operations, and eventually CM strategic & organisational decisions. Pablo graduated with an Engineering diploma in Computer Science & Applied Mathematics. In his spare time, Pablo enjoys trail running, as leisure or competition.

## "How to Get Your Company Executives to Finance Your CM Activity?"

For a lot of us CM Professionals, CM is such an interesting domain (hopefully…). Though, at the same time, it may also become a real source of pain and frustration.How many times were you asked to fire-fight sudden situations, or to produce urgent reports? While at the same time, what resources and recognition were you granted by your company managers for doing so? The point here is that you are not expected to sacrifice your self-fulfilment for the sake of CM. If you want to actually be in a CM career and to enjoy it, you have to create the conditions for it to happen. This goes through convincing the company managers to invest in CM, which requires speaking their language ($...). The good news is that CM professionals have all in hands to achieve it: facts, cost of "bad CM", concrete examples, etc. It's all about finding the right approach to leverage these assets in order to get managers to support your CM activity and projects.

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# Terry Quan, EbD Advisors

Terry Quan is the CEO of EbD Advisors, a consulting firm he founded. Terry is the consummate CM professional. He started his career as an engineer in the commercial nuclear industry and earned his CMII certification almost twenty-five years ago. He is also CMPIC certified. He has held management roles in engineering, IT, and CM. Terry has been a CM instructor for ICM and CMPIC. Terry is a serial entrepreneur, starting two companies and being an integral part of two other early-stage endeavors. Terry also had a stint in the Accounting and Finance Consulting Industry in a business development role. Terry has a Bachelor of Science in Mechanical Engineering and an MBA, both from Arizona State University.

## "So You Want a Career in CM?"

Terry will reflect on his professional journey to share his observations and decisions that resulted is his extensive and diverse CM career. He hopes that his presentation will provide inspiration, encouragement, and ideas on how you can manage and thrive in your CM career.

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# Crystal Reed, SPAWAR

Currently employed at Space and Naval Warfare Command (SPAWAR) in San Diego as the Configuration Management Technical Process Owner under Systems Engineering Technical Authority. Started CM career in the US Marine Corps then moved into a US Navy Civilian position to perform CM tasks and activities while training other CM professionals with over 34 years of experience.

## "Configuration Management Standards, Policy, and Process"

How to use a CM standard to create an Enterprise (Command) CM policy showing core CM requirements to include process steps and visual aids for CM professionals.

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# Harald Schwabe, usb GmbH

Harald Schwabe holds a Diploma in mechanical-engineering technician from the Technical school of Munich. He is working for usb GmbH as senior consultant and project manager specialized on Product Lifecycle and Configuration Management with the special focus on status accounting. Since 1994 he is working for usb GmbH as Configuration Manager. Mr. Schwabe is also the project manager for the development of usb's status accounting tool. His focus of work is in the field of aerospace industries for over 25 years. Harald Schwabe is working as contractor for Airbus military and the predecessors EADS, DASA and MBB. During his career has was involved in several projects e.g. Tornado, Eurofighter/Typhoon, UAV Talarion and several System and Software activities.

## "CM Identification & Status Accounting Based on a System Breakdown Structure and a Development Plan"

My presentation will give an introduction and overview to handle the Configuration Management Status Accounting for a project. Status accounting is based on a defined System Breakdown Structure and Development plan. A development plan includes all tasks with the resulting configuration items for each system/subsystem and software levels. The status of each task and system level will be constituted with traffic lights. The constituted view is possible for each single Change Request, for a defined Baseline or for the full status of the project. Therefore is it possible to get the relationship between a systems level and all configured items of the different levels. This concept of status accounting provides every project member easy and fast traceability and full overview of the project status.

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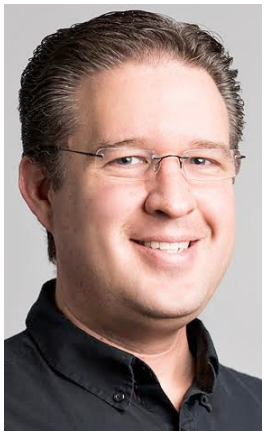
# Rob Stone, PSA / CMPRO



Rob Stone is a Senior Systems Analyst at Professional Systems Associates, Inc. with 16-years experience in the configuration and product lifecycle management industry. He has worked in the planning, implementation, and support of information systems (hardware and software) since 1992 (23 years). Rob is CMPIC and CMII certified and has received Bachelor of Arts (with a minor in Portuguese language studies) and Master of Science degrees in Business Information Systems from Utah State University.

## "Regarding Forms: Form-Driven CM/PLM Process Automation Planning Perspectives"

Forms are used in many organizations as a primary artifact for the management of processes and their key data elements. The automation of form-driven processes using a CM/PLM software tool is potentially one of the largest benefits of implementing such a solution. That being said, unless proper planning is executed, the success of form-driven process automation efforts will likely never be fully enjoyed. In this presentation we'll discuss perspectives for thinking about the planning of form-driven processes that will be automated using a CM/PLM software tool.

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# Ken Wallace, Sikorsky Helicopter

Ken is currently working as a Configuration Manager at Sikorsky Global Helicopters in Coatesville PA. This division produces civilian helicopters (S92A and S76D) for worldwide customers including the US Presidential Helicopter. Ken previously worked at DRS Technologies (Defense Contractor) in Horsham PA for 10 years as a CM Manager where he supported a host of different products including land and ship based radar systems, communications equipment, etc. Before that, Ken worked at Smith's Aerospace in Malvern PA (Communications Equipment) for 2 years as a CM Manager. The main focus of that job was FAA documentation, running the CCB, and product configuration. For 8 years, Ken worked at Southo Inc. in Concordville PA (Commercial Fasteners) as a CM Manager. Ken's interests include: family, gardening, and oval track car racing (dirt/asphalt).

## "Superheroes vs. CM"

In this era when super heroes seem to be everywhere, I thought it'd be a good time to look at how super heroes would positively or negatively impact our business as it relates to Configuration Management. During this presentation, we will look at specific super heroes and the talents and abilities they possess. For example, would Wonder Woman's "Lasso of Truth" be an asset since it doesn't come with a PC filter? How would Spiderman fare in Web Design? Is Iron man suited to work in a magnet factory? Next, we'll spend a little time speaking about the super heroes we work with every day. Some may be more super than others, and none really have extraordinary powers, but these heroes, time and again, rescue our organizations from disaster by: 1) putting in super long hours; 2) super dedication; and 3) a super willingness to do whatever it takes to get the job done right. Lastly, we'll take a look at the CM professionals and processes in our organizations and see how they stack up against the superheroes among us.

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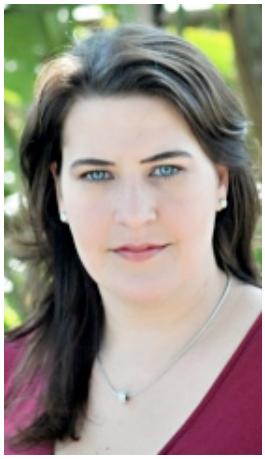
# Danielle Yockman, US Navy



Ms. Yockman received a degree in Political Science in 1999, from Auburn University Montgomery. She has worked in the advertising industry, mergers and acquisitions, and bio-tech, before becoming a defense contractor, and now a Navy employee. She provides overarching configuration management policy and guidance for C4I equipment at shore sites around the world while participating as a member of the PEO C4I and SPAWAR Configuration Management Teams that provide significant input into the policy direction for PEO C4I and Team SPAWAR.

## "So You Want to Manage Something Virtual…"

As the digital world shifts to virtual environments, practitioners of configuration management will face new challenges to keep pace with the management of technology and services. For Program Executive Office Command Control, Communications, Computers, and Intelligence (PEO C4I) that means management of platforms and infrastructures as a service (PAAS/IAAS). This paradigm carries CM from the physical systems engineering process into a virtual environment where services will play as big a role in the process as design engineering. Identification of configuration items, virtual architecture, test and integration management, and ultimately the identification and management of virtual baselines are some of the topics an organization must addressed.

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# Susana Young, Toro Company

Susana Young is the Product Data Management (PDM) Supervisor for The Toro Company at their Micro Irrigation Business unit. She's currently working with a team of experts from corporate on implementing WindChill/PDMLink as their new Product Life Management tool, as well as a global Engineering Change Management (ECM) process for the unit as part of an initiative to standardize their PLM process. She discovered her passion for PDM after working as Mechanical Designer at KSC Industries (Speaker designer and manufacturer). She improved and wrote document and change control procedures to comply with ISO requirements. Since then, Susana has worked for the last 15 years on implementation and improvement of PLM/PDM processes for organizations in the medical industry, sports industry, and a DOD contractor.

Susana received a Bachelor's degree in Industrial Mechanical Engineering from the Technological Institute of Celaya (ITC) in Mexico before she moved to the United States. She is a CMPIC Certified CM Professional and recently completed training to receive a CM Assessor Certification from CMPIC and the University of Houston.

She currently lives in San Diego, CA with her husband, daughter, and dog Brody.

## "Change Management: As You Never Thought of it Before"

The only constant in today's competitive organizations environments is change. The reason is survival. Organizations that do not adopt new technologies, make changes in their process to address existing quality, waste or cost issues, or invest in product innovation are doomed.

Most organizations' leaders have a very good idea where they want to go and what changes initiatives need to be launched in order maintain a competitive advantage. What happens when the human factor is left out of the equation when deploying and implementing these changes?