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NO AI THEATRE · ADVISORY

Whose number moves

You have the money. The demo worked. Nobody is against it. And every next step turns out to be another meeting. This is why that happens, and what to do about it.

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Before we start

You have the money. The demo worked. Nobody is against it.

And yet every next step turns out to be another meeting. A date moves. Somebody needs to be consulted first. The thing is not blocked, exactly, because being blocked would require somebody to have said no, and nobody has said no. It is just not moving.

If that is roughly where you are, you are in the right document and you do not need to have read anything else to follow it.

Here is the short version of what is usually wrong. A pilot needs two things that have nothing to do with technology: a number on this year's plan that it is supposed to move, and a named person whose year is measurably worse if it does not. Miss either one and the pilot does not fail. It drifts, because nothing in the building is pulling on it.

Almost every stalled pilot I see is missing both, and the paperwork covered it.

What this paper is for

There is a short diagnostic that tests for those two things. Six questions, askable in an afternoon, before anybody writes code. They are published in full and free, and there is a link at the end of this paper. You do not need them to read on and you do not need to have used them.

This paper is the part that comes after, because all six questions return a name and the name is often somebody who did not ask for it. Asking is the easy half. What follows is the half that takes more than an afternoon.

> No survey figures appear anywhere in this paper. The illustration is a composite, assembled from more than one engagement, and it is labelled as such. The mechanics are real. The numbers are there to make the arithmetic checkable, not to prove anything.

01

Two pilots, one company

> This is a composite. It is assembled from more than one engagement and no single company is being described. The numbers are illustrative. The mechanics are not.

A specialist building products distributor. Around £180m of revenue, six hundred staff, family owned with a minority institutional stake. Two AI pilots inside fourteen months. Same company, same appetite, same head of data running both, and in the second case the same vendor.

One of them is still causing problems. The other one is in the budget.

Part one. The pilot nobody stopped

The first one started the way most of them start, which is to say it started well.

Steve, the operations director, had sat through a demo of a document assistant that could answer technical product questions from the manufacturer spec sheets. The branches field those questions constantly. Adhesive coverage rates, substrate compatibility, curing times. The technical helpdesk was two people and a phone queue, and everyone in the business had a story about waiting on hold to find out whether a product could go on a damp screed.

Steve was not doing anything cynical. He watched a demo, recognised a genuine irritation, and moved. He got £120,000 from the transformation budget, which existed and had money in it, and he asked Marcus, the head of data, to run it.

Nobody asked which line on the plan would move. If they had, the honest answer was that the technical helpdesk did not appear on the plan. It was a cost of about £70,000 a year sitting inside a branch operations line that nobody reviewed, and no one had ever set a target against it.

Nobody asked who had been trying to fix it before. The answer was nobody, in the sense that mattered. Everyone complained about the helpdesk. Complaining is not the same as spending. There was no contractor, no overtime, no spreadsheet somebody maintained at home. The business had already priced the problem and the price was zero.

The build took eleven weeks and it worked. That is the part people find hardest to believe. It ingested four hundred spec sheets, it answered questions correctly most of the time, and the two branch managers who trialled it liked it.

Then the pilot period ended.

There was no decision. There was no meeting where anybody said this has earned its place, here is the budget line, here is who owns it now. There was also no meeting where anybody killed it. Steve had moved on to a depot consolidation by then, which was on the plan and did have a number against it, so his attention went where his objectives were. That was rational.

The two branch managers kept using it, because it was genuinely useful to them. Somebody put a link to it on the intranet. Within six months a third of the branch network was using it to answer customer questions, and nobody had approved that, because nobody had approved anything.

Eleven months after the demo, a customer was quoted a coverage rate for an adhesive that had been reformulated. The spec sheet in the system was the old one. The installation failed, the customer claimed, and it cost about £40,000 to settle plus a relationship that had taken nine years to build.

Marcus found out from the warranty claims report.

> **The pilot eventually did land on a number that somebody owned. It landed on warranty claims, in the wrong direction, eleven months late, and the first person to see it was not on the programme.**

What the six would have caught

Run backwards, the pilot fails at five of them and it fails at the first one.

- **Which line moves, and by how much.** No line. The helpdesk cost sat inside an unmanaged operations line with no target. That alone was a stop.
- **Who was already trying.** Nobody. Complaint without spend. The problem was real as an irritation and unfunded as a problem, and the £120,000 figure was built backwards from the demo.
- **Value or learning.** Nobody asked. If asked, the answer would have been "both", which means neither.

- **Whose year is worse.** Steve's name was on the funding and no name was on the outcome. When his objectives moved, the pilot had nothing holding it.
- **Who signs it into production.** Nobody, which is why it went into production anyway. This is the question that catches the pilot that works, and this pilot worked.
- **Whose budget picks it up.** The transformation line, which has no year two. Everybody knew that except the people running it.

Any one of those, asked out loud in the first fortnight, ends this differently. Not one of them needed a consultant, a workshop or a single line of code.

Part two. The pilot that shipped

Fourteen months later Marcus had a second proposal on his desk, and this time he asked the six before he asked for anything else.

The proposal was credit control. Chase overdue invoices, prioritise the queue, draft the follow-ups.

Which line on this year's plan moves if this works, and by how much? Days sales outstanding. Fifty-eight days against a target of fifty-four. The target already existed, it was already in Jonathan's objectives as finance director, and it had been missed two years running. Marcus did not invent the figure. He got it from Jonathan's objectives, which is where figures should come from.

Who was already trying to move that line, and what were they using? Three people in credit control, a shared inbox, and a spreadsheet one of them rebuilt every Monday morning. One of them

had been doing it on Sunday evenings for two years. That was the answer that made Marcus confident. He was not proposing a capability. He was offering to make a fight somebody was already losing cheaper.

Value or learning? Value, unambiguously, and it went in the funding paper in those words before the money moved.

If this doesn't work, whose year is measurably worse? This is where it nearly came apart.

Marcus went to Jonathan and did not ask him to sponsor anything. He asked which of Jonathan's numbers this should move and whether he would want it if it did.

Jonathan said days sales outstanding, obviously, and then said something more useful. The reason DSO was stuck was not chasing speed. It was that a third of the overdue balance sat behind disputed delivery notes, and no amount of faster chasing moves a disputed invoice. If the thing could read the proof of delivery images and match them to the disputed lines, that would move his number. The chasing would not.

> **The pilot changed shape in the first conversation, before anybody built anything, because the person whose year it was said the original version would not have worked. He was right.**

It would have been a well-run pilot pointed at the wrong half of the problem, and it would have produced a technically successful result that moved nothing.

Same name on question one and question four. Jonathan.

Who signs this into production, and what do they need to see to sign? Claire, the CFO. When Marcus first asked what she needed to see, she said she would know it when she saw it, which is not a bar. So he asked the other half. What would you need to see to shut this down?

That she could answer immediately. If it has not held four days for two consecutive months by the end of March, stop it, because by then we will be into the year end and I am not carrying an unproven process through audit.

Both endings, in a diary, before the build.

When the pilot money runs out, whose budget picks it up? The proposal had it coming from the transformation line again, which is how the first one ended. Marcus took it out and asked Jonathan directly. Jonathan agreed to carry the run cost in the finance function from April, on the condition that the March bar was met, and he agreed it in writing before the build started rather than after.

That is the answer that only happens when questions one and four are genuinely true. Nobody agrees to carry a cost for something that does not move their own number.

The build took nine weeks. It was less technically impressive than the first pilot.

DSO came down to fifty-four days by the end of February and held through March. On £180m of revenue that is a little under two million pounds of working capital that stopped sitting in other people's bank accounts. Claire signed it in on the second of April. The run cost sits in the finance function budget where Jonathan put it.

Nobody wrote it up. There was no case study and no internal announcement, because from the outside it looked like the finance director hitting a target he had been chasing for two years, which is exactly what it was.

What was actually different

Same company. Same head of data. Same board, same year, same risk appetite, same vendor on the second one as the first. The second pilot was less technically ambitious than the first and the first one worked better on the day it was demonstrated.

The difference was six questions, asked out loud, in order, before the money moved. They took one afternoon and two conversations, one of which was uncomfortable for about ninety seconds.

And notice what the questions actually did. They did not judge the technology. They did not produce a score, a maturity rating or a governance framework. They changed the shape of the pilot in the first week, on the word of the one person whose year depended on it, and they put a name against both endings before anybody could get attached to the thing.

The first pilot is still running, incidentally. Nobody has ever ended it.

If the first half of that is recognisable

The questions above are free and you can ask them yourself. What makes them hard is not asking. It is that Finance calls it a cost problem, Operations calls it a process problem and the AI team calls it a data problem, everybody is partly right, and the meeting ends with an action to align offline.

Three accounts of one problem do not resolve by meeting again. What resolves them is somebody who can hold all three in the room without belonging to any of them, and get to the one sentence all three will sign. That is most of what I am brought in to do, and section 07 sets out the other two cases where it applies.

You do not need to finish this paper first. Send me a few lines about your pilot and the point at which it stopped moving. One conversation, no charge. **troy@serteam.co.uk**

02

When the named executive says no

You asked question four. You got a name. You went to them and they said no.

Start here, because it is the thing nobody says out loud: a no in week one is the cheapest outcome available to you. It costs a coffee. The same no in month nine costs the programme, the credibility of whoever sponsored it, and usually the next one as well.

There are four of them and they are not the same.

"That isn't my number."

You have the wrong executive. This is the best no in the set and it is the most common. It is also entirely recoverable, because they will almost always tell you whose number it actually is. Ask them. People are far more willing to name a colleague's number than to adopt one.

Go to the name they give you and ask question four again. If the second person says the same thing, the number has no owner, which is a finding about the organisation rather than about your pilot.

"Yes, but not that."

The redirect, and the most valuable answer in the whole instrument. They own the number, they want it moved, and they are telling you the version in front of them will not move it.

Believe them. They know which half of their own problem is the expensive half and you do not. This is what happened to Jonathan and the disputed delivery notes in section 01, and it is the single most useful thing that can happen to a pilot, because it happens before anybody has built anything or got attached to a design.

Change the pilot. Do not defend the original scope on the grounds that it is already scoped.

"Not this year."

The real no, and the one to take at face value. It means the problem is not expensive enough to them to be worth their exposure this year. That is a legitimate position and it is usually correct.

The temptation is to hear this as an objection to be handled. It is not. It is a price signal. If the person who carries the number will not take on twelve months of public exposure to move it, the number is not hurting enough, and no amount of enthusiasm from outside their function changes that arithmetic.

Two things to do. Ask whether there is a smaller version they would carry, because sometimes there is. And write down that you asked and they declined, because the next person to propose this deserves to know it was offered and refused rather than never raised.

"Sounds interesting, send me something."

The silent no, and the only one that wastes real time, because it looks like progress and can be reported as progress for months.

It is almost never a yes, and the exception has a recognisable shape. A real yes asks for something **specific**, for a named person, by a date. "Send me the one-pager for Thursday's exec" is a yes with a deadline attached. "Send me something" is a no with manners.

Busy executives do delegate and do ask for written material, so the distinction matters. Test it by narrowing rather than by guessing: ask what they want it to cover and who else will read it. A yes answers both in one line. A no goes vague.

Treat it as a no and say so politely. "I'll take that as a no for this year, and I'd rather know now than in March." You will occasionally be wrong and they will correct you, which is a better outcome than nine months of a deck sitting in somebody's inbox.

The one move that makes all four worse

Escalating above them.

Taking a no to their boss converts a decision into a compliance exercise. What you get back is a mandated pilot with a resentful owner, which is worse than no pilot at all, because the person whose year is supposed to be better now has a reason to want it to fail quietly. You have technically acquired an owner and actually acquired an opponent.

The whole point of question four is to find somebody whose self-interest does the work. Self interest cannot be issued from above.

One exception, and it is narrow. If the no was "I would, but I have nothing to put on it this quarter", that is a resourcing answer rather than a judgement, and their boss can genuinely change it. Ask for it as a resourcing question and let it be asked rather than mandated. Every other no is a preference, and preferences do not survive being overruled.

03

When the answer is a blank

Nobody can name a line. You have asked twice, in two different rooms, and what comes back is a pause and then a change of subject.

A blank is not one thing. Three of them look identical in the meeting and need completely different responses.

The blank that is a recall failure

The line exists, it is managed, and nobody in the room happens to carry the figure in their head. This is common and it is the easy one.

Do not accept a number produced in the meeting. Go to whoever owns the plan and take the figure from their reporting pack. If the figure that comes back is different from the one somebody half-remembered, which it usually is, you have just avoided building against a number that was never real.

The blank that is genuine

There is no line, because the work has never been counted. Most operational processes in most mid-market companies are here. Nobody is hiding anything. The thing simply is not measured, because measuring it was never worth anybody's time.

The instinct is to create a KPI. Do not. A new corporate metric needs defining, agreeing, socialising and then carrying by somebody into next year's objectives, and you have just turned a nine-week pilot into an eighteen-month governance project.

Find the smallest thing that is already counted somewhere by somebody for an unrelated reason. Invoices keyed. Tickets closed. Calls abandoned. Days from receipt to posting. Credit notes raised. Somebody, somewhere, already counts something adjacent to this, usually for a reason that has nothing to do with performance.

If genuinely nothing is counted, count it yourself for four weeks before you build anything. Four weeks of somebody ticking a sheet is cheaper than any pilot, and at the end of it question one has an answer and a baseline. Teams resist this because it feels like a delay. It is the opposite. It is the only thing that makes the result defensible in month five.

The blank that is political

The hardest one. Somebody in the room knows the number and will not say it, because saying it out loud puts it on the record and makes somebody accountable for it.

You will know this one by the shape of the silence. Recall failures produce apologetic noise and an offer to go and find out. Political blanks produce a clean subject change and nobody follows up.

You cannot fix this from inside the pilot and you should stop trying. What you can do is put the finding in writing, without blame and without naming anybody, in the one sentence that survives being

forwarded: **we were unable to identify a line on this year's plan that this work is intended to move.**

That sentence is the deliverable. It is worth more than the pilot would have been.

The legitimate exit from a blank

A blank does not have to mean stop. It means stop pretending.

Go to question three and answer it honestly. If this is learning, say so in the funding paper, name the person who is measured on capability this year, and set the bar as capability rather than impact. That is a real purchase and it survives a review, because when somebody asks what impact it made you have the receipt showing that impact was never what was bought.

What does not survive a review is a blank dressed as a value case.

04

The first thirty days of a borrowed number

You have a name and a number and neither of them is yours. Borrowing is the right model, and it fails in a specific and avoidable way, which is that the loan is never actually made. Everyone leaves the room believing something different.

What follows is what the first month looks like when it works. It is deliberately small. If it reads as underwhelming, that is the point.

Week one. Write the sentence and send it

One sentence, in an email, to the executive whose number it is:

> **If this works, days sales outstanding moves from 58 to 54 by 31 March, and Jonathan owns that.**

Ask them to reply confirming it, or correcting it. The reply is the loan. Without it you have a conversation, and conversations do not survive a reorganisation, a promotion or a bad quarter.

Roughly a third of the time the reply corrects the figure or the date. That correction is the most valuable email you will get in the whole pilot and it arrives in week one, for free.

Week one. Take the baseline from their pack, not yours

Whatever number appears in their own monthly reporting is the number that counts, including its flaws. If they measure DSO on a three-month rolling basis and you measure it month end, you will spend month four arguing about measurement instead of results, and you will lose, because it is their number.

Copy their definition exactly. Write it down. If their definition is bad, say so once, then use it anyway.

Week two. Get the stop condition in writing

Ask the signatory what they would need to see to shut it down. Not what they need to see to approve it, which produces an expectation rather than a bar. The inverse question produces a date and a threshold, because people find it much easier to describe failure than to commit to success.

Put the date in the diary while you are in the room. An ending that is not in a calendar is not an ending.

Weeks three and four. One check-in, already booked

Fifteen minutes, in the diary, with the number owner and nobody else. Not a steering group. The agenda is one question: is the baseline still what we said it was.

Things that should not happen in the first thirty days: a new dashboard, a steering committee, a second use case, a communications plan, or anyone outside the two functions involved being asked for an opinion. Every one of those is a way of widening before anything has moved, and widening before the first result is how a borrowed number quietly becomes nobody's number again.

The day thirty tell

One signal tells you whether the loan was real.

> **Has the executive asked you about it, unprompted, without you booking the meeting?**

If they have, the number is genuinely theirs and the pilot has an owner. If you have chased every interaction, you have a polite sponsor rather than an exposed owner, and you are back at question four with thirty days of useful evidence that you were not before.

The honest caveat: some executives run everything through a chief of staff or a direct report and chase nothing personally. If that is how they work, the test is whether their office chased, not whether they typed it themselves. What you are looking for is whether the number has a pull on somebody. Not whether a particular person is the one who sends emails.

05

The honest hard case

There is one objection to all of this that is correct, and it deserves answering rather than handling.

Sometimes the value is real and it is genuinely not isolable. The work makes twenty people's days better in ways that show up nowhere, or it removes a risk that was never quantified, or it improves something that moves for nine other reasons at the same time. Demanding a line and a figure for that is not rigour. It is a way of never doing anything that is not already counted.

This is where a lot of mid-market companies actually are, and pretending otherwise would make this paper a piece of theatre.

Two things are true at once.

The first is that a smaller number you can defend beats a larger one you have to argue for every quarter. If the full benefit is eight things and only one of them is checkable, build the case on the one and let the other seven be upside you mention and do not claim. Attribution arguments are lost slowly, by attrition, in years two and three, and they are lost by the person who has to win them every quarter.

The second is that the isolability problem is real but it is much rarer than it is claimed. Most of the time "you can't really measure it" means nobody has tried for four weeks. The genuine cases have a particular shape: the benefit is distributed across many people, each individual effect is small, and the aggregate is real. The false cases have a different shape: one team, one process, and a reluctance to write the current state down.

The test is cheap. Ask what it would take to measure it. If the answer is a research project, it may be genuinely hard. If the answer is a spreadsheet and a month, it is not hard, it is uncomfortable.

06

The seventh question

What is running in this business that nobody approved?

This is the best single question in the set and it is deliberately outside the six. The six are for the pilot you are about to fund. This one is for the pilots you have already had, and it tests something different: not

whether a pilot was designed properly, but what happened to the ones that were not.

Ask whoever already sees the invoices, the vendor list and the access requests. Once a month, in a meeting that already exists.

Do not appoint anybody to go and find out. Appoint someone and all you have done is create a witness. The person you want has the information already and is not currently being asked for it.

They will have an answer for you the first time you ask. Then run questions one and four on everything the list returns, and expect most of it to fail both. That is not a crisis. It is a backlog, and a backlog with names against it is a completely different object from a backlog without.

07

Where somebody outside changes the outcome

Everything up to here you can do yourself, and most of it you should. The questions are free, they need no permission, and asking them is not the hard part.

The hard part is what happens when the answers disagree with each other. Three situations account for almost all of it, and all three have the same shape: the obstacle is not information, it is that everybody in the room has a stake in the answer.

Three functions, three different accounts of the same problem

Finance says it is a cost problem. Operations says it is a process problem. The AI team says it is a data problem. Everybody is partly right, nobody is wrong enough to concede, and the meeting ends with an action to align offline.

What is needed is not another opinion. It is somebody who can hold all three accounts in the same room without belonging to any of them, and get to the single sentence all three will actually sign. That sentence is the deliverable. It is usually one line long and it usually takes two sessions.

Nobody will take the name

Question four comes back blank, not because nobody knows whose number it is, but because saying it puts somebody on the hook in front of their peers.

Inside the organisation, whoever asks has a stake in the answer, and everybody can see what it is. From outside, the question costs nothing to ask. It still costs something to answer, because the exposure that made it hard to say is real and does not disappear because a stranger asked. What changes is that the answer is no longer a move in somebody's internal position. "I went and asked them" is a different act when the person asking has nothing to gain from the reply.

The answer means reversing something already committed

The scope was announced. The vendor was chosen. The board saw a slide with a date on it. The six questions now say the pilot is pointed at the wrong half of the problem, which is Jonathan and the disputed delivery notes in section 01.

Changing it means somebody was wrong in public. That is the most expensive sentence in any organisation, and it is very rarely said by a person whose career sits inside it. An outsider can put it on the table as a finding rather than an accusation, and can absorb the part nobody wants attributed to them.

When you do not need me

Three things, and it has to be all three rather than any of them.

- Your functions tell the **same story** about what the problem is.
- Somebody has put their **name against the number** without being chased for it.
- You can state the **next decision** and who makes it.

Any one of those on its own is not enough, and the combinations are the trap. A named owner with three competing accounts of the problem owns the wrong thing. Perfect agreement with no name moves nothing. Both of those, with no next decision identified, is a well-understood pilot that still is not going anywhere.

If you have all three, the analysis in this paper is all you need and the work is yours. That happens often enough that I will say so on the call rather than after the invoice.

Your pilot has stalled and nobody can say why

Bring it as it stands. You do not need to have asked the six questions first, and you do not need to have got anywhere with them if you have.

One conversation, no charge. We work through three things:

- **Where it is actually stuck**, which is usually not where the status report says it is.
- **Which decision has to happen next**, stated as a decision rather than a workstream.
- **Who has to make it**, and what you would need to confirm that.

Some of that will be settled in the hour and some of it will come back as a short list of things to go and verify, usually two or three questions put to named people. Either way you leave with it written down, whether or not we go any further.

If there is work after that I can help with, I will tell you what it looks like and what it costs. If you do not need me, I will tell you that instead.

Email me a few lines about the pilot and the point at which it stopped moving.

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The six questions themselves, in full and free, with every branch: Six questions to ask before you fund another AI pilot.