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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**
>
> You do not need to finish this before saying so. 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

Where somebody outside changes the outcome

The six questions are free and you can ask them yourself. Asking is not the hard part. The hard part is what happens when the answers disagree with each other, and three situations account for almost all of it. 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 accounts of one problem

Finance calls it a cost problem. Operations calls it a process problem. The AI team calls it 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 room without belonging to any of them, and get to the one sentence all three will sign.

Nobody will take the name

The question of whose number this is comes back blank, not because nobody knows, but because saying it puts somebody on the hook in front of their peers. The exposure is real and it does not disappear because an outsider asks. What changes is that the answer stops being a move in somebody's internal position.

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. Changing it now means somebody was wrong in public, which is the most expensive sentence in any organisation and 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.

When you do not need me

Three things, and it has to be all three.

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

Any one on its own is not enough. A named owner with three competing accounts owns the wrong thing. Perfect agreement with no name moves nothing. If you have all three, the work is yours, and I will say so on the call rather than after the invoice.

03

What is in the full paper

This is the short version, for the person deciding whether any of it applies. The full paper is for whoever ends up doing the work, and it carries four things this one does not.

- **What to do when the named executive says no.** Four kinds of no, which one you have, and the one move that makes all of them worse.
- **What to do when the answer is a blank.** Three kinds of blank, and the one that cannot be fixed from inside the pilot.
- **The first thirty days of a borrowed number.** Week by week, and the single signal at day thirty that tells you whether the loan was real.
- **The seventh question**, for the pilots you have already had rather than the one you are about to fund.

Both are ungated. Nothing to fill in.

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.