ASTERION SOLUTIONS

FREE RESOURCE

Getting a technical project through in a small shop

The three-role guide: the one who carries it, the one who decides, the ones who use it.

Written for small manufacturers: machine shops, mechanical subcontracting, fabrication.

SME — Project

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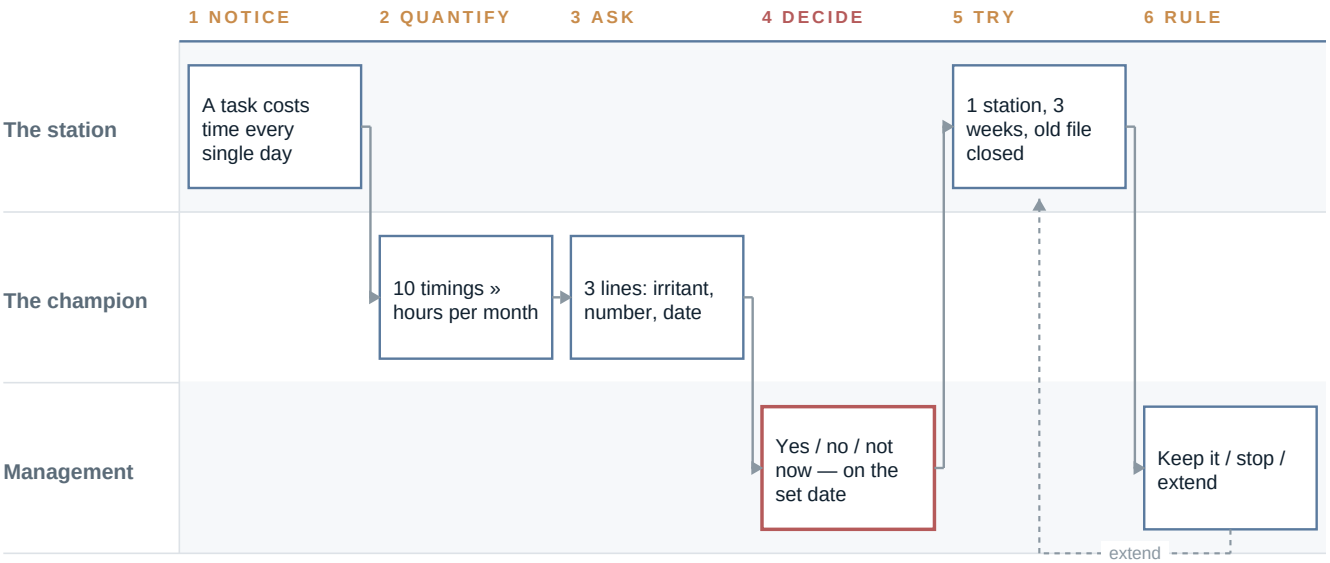
FREE RESOURCE

When a technical project fails in a shop, the tool gets the blame. That is almost always wrong. What fails is the conversation between three people: the one carrying the request, the one deciding, and the ones who will actually work with it.

This guide gives each of them their part. Three checklists — one per role — a trial canvas to fill in, and the **month-three** review that nobody ever runs. Print it and leave it on the table: it is written to be read by all three at once.

The path of a request, and where it dies



Phase 4, outlined in red: this is where almost everything stops. Not through a refusal — through a deferral. The ball changes lane, and nobody picks it up. The two safeguards in this guide aim at exactly that point: a decision date, and a stopping condition stated in advance by the champion.

1 If you are carrying the request

The champion

- [ ] Time the exasperating task **ten times**, and write down all ten. Not an estimate: ten measurements.
- [ ] Multiply by the monthly volume. You have just converted an irritation into **hours** — the only unit an owner handles every day.
- [ ] Set a numeric target: how far that time must drop for the trial to count as a success.
- [ ] Shrink the scope to one workstation and three weeks. A small trial is hard to refuse.
- [ ] State the stopping condition **yourself**: "if the time has not dropped by a third, we stop and I will say so".
- [ ] Propose a decision date, and ask for an answer on that date — not for immediate approval.
- [ ] Three lines, not twenty pages: the irritant, the number, the date.
- [ ] Talk about **our problem**, never **my project**. The second can be refused at no cost; the first cannot.

> **The business-case trap.** A twenty-page document will not be read, and its length says "project" when what gets through is "trial". The more you argue, the more you confirm that the decision is heavy.

2 If you are the one deciding

Management

- [ ] Answer **explicitly**: yes, no, or not now — with the reason. A "we'll see" paralyses more than a refusal.
- [ ] Name yourself sponsor: someone has to be the person accountability runs to, and it is not the champion.
- [ ] Authorize a reversible trial, not a commitment. The question is not "am I buying", it is "am I trying this for three weeks".
- [ ] Require the baseline measurement **before** the trial. Without it no gain will be demonstrable, and you will be funding an impression.
- [ ] Accept that the first number will be bad. **Nothing has been corrected yet**: a rework rate that appears is not a rate that is rising.
- [ ] Free up time, not just budget: "on top of everything else" is the surest way to make a trial fail.
- [ ] Set the decision date and keep it, even if the answer is no. A date kept is what makes the next request possible.
- [ ] Count the requests that came from the floor this year. If the count is zero, **that is not a good sign**.

> **Silence is not agreement.** When a reasonable request evaporates three times, the person carrying it stops proposing. She stays, she works well, and on the day you want a change, she listens to you politely and does not move.

3 If you are going to use it

The workstation

- [ ] Say straight away what is worse than before. That is what a trial is for; waiting until the end helps nobody.
- [ ] Do not keep the old file going in secret. **Two systems in parallel** means double the work and trust in neither.
- [ ] Flag whatever is slower, even if the rest is better: three clicks too many are enough to make a tool be abandoned.
- [ ] Know who you talk to when it jams, and how fast you get an answer. Without that, people work around it.
- [ ] The measurement is about **the task**, not the person. If that is not clear, insist it be said out loud.
- [ ] Ask what happens at the end of the trial: who decides, and when you will be told.

> **The secret double entry.** It is the most reliable symptom of a failing project, and the quietest one: everybody fills in the new tool because they must, and keeps the old one because they trust it.

4 The baseline log

10 timings, before asking for anything

- [ ] Time the same task ten times, on ordinary cases — not the easiest, not the worst.
- [ ] Note who did it: two people do not take the same time, and the gap is information.
- [ ] Keep this sheet: it will be re-measured identically at the end of the trial.

No.	Date	Who	Case measured (part, job, station)	Time (min)
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

Total / 10 = your baseline. Multiplied by the monthly volume it becomes hours — the only unit that clears the ceiling. Ten measurements are enough: this is not a study, it is a show of good faith.

5 The bounded-trial canvas

Fill in together

- [ ] The irritant, in one sentence, in the words of the person who lives it: _____
- [ ] Baseline (average of 10 timings): _____ min × monthly volume: _____ = _____ h
- [ ] Target: bring it down to _____ min, i.e. _____ h saved per month
- [ ] Scope: one workstation — which one: _____ Duration: _____ weeks
- [ ] Stopping condition, stated by the champion: _____
- [ ] Roles — champion: _____ sponsor: _____ pilot station: _____
- [ ] Decision date: ____ / ____ / _____ Who decides: _____
- [ ] Decision taken on ____ / ____ / _____: continue / stop / extend until ____ / ____

> **One page, signed by all three.** This is not bureaucracy: it is what stops the trial from ending without anyone ever ruling on it. The last line is the most important in the document.

6 The month-three review

Day 30, then day 90

- [ ] Is the old file still in use? Look at the **date of its last entry**, not at the answer you are given.
- [ ] Is the intended gain measured, with the same timings as at the start? A declared gain does not count.
- [ ] Has anyone quietly given up? Look for the station that has reported nothing for a month.
- [ ] What is still slower than before, and is it fixable or structural?
- [ ] Is the removed task really removed, or merely moved onto somebody else?

Checkpoint	Date	Time (min)	Gap vs baseline	Old file?	Decision / note
Baseline					
Week 1					
Week 2					
Week 3					
Day 30					
Day 60					
Day 90					

> **A rollout does not succeed on training day.** It succeeds on the day someone dares to delete the old file. That act is almost never planned — put it in the calendar, with a name beside it.

THE COLD TEST

The 3 questions that settle most disagreements

Ask them together, out loud, before discussing tools. None of them requires technical knowledge.

1 **"How much time, every month, does the task everyone complains about actually cost?"**

In most shops nobody knows that figure. Until it exists, the discussion remains a matter of temperaments — and the most cautious person always wins, not the most right.

2 **"What is the last request from the floor that got a real no, with a reason?"**

If nobody can name one, it is not that none were refused: it is that they were all deferred. Deferral is a refusal that will not own itself.

3 **"On exactly what date do we decide?"**

A trial with no decision date does not end: it stretches until everyone has stopped believing in it. The date matters more than the duration.

The real subject: making the decision possible

A technical project in a small company almost never fails on the technology. It fails because nobody has what they need to decide: the champion has no number, the owner has no bounded risk, and the workstation has no guarantee about what is being measured.

Provide those three things — a number, a reversible trial, a measurement aimed at the task — and most of the blockage dissolves on its own. **The rest was never resistance to change.**

ASTERION SOLUTIONS

We build trade-specific software for small manufacturers in Quebec: inspection reports, quality management, instrument control. The goal is never to add paperwork — it is for the proof to be the automatic by-product of work done well.