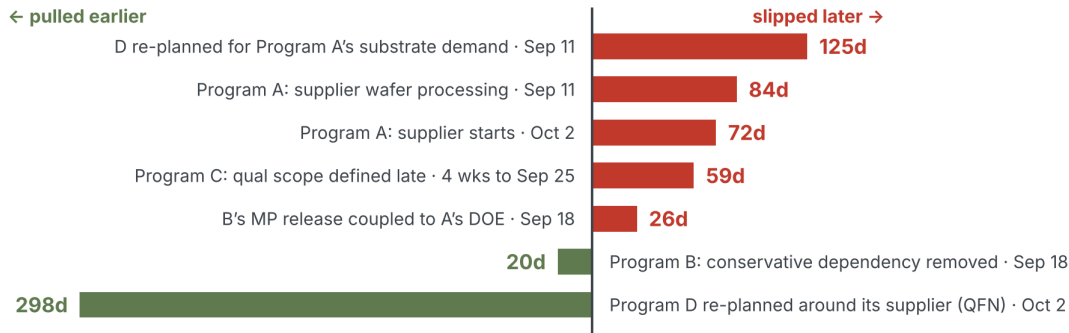


What causes delay?

Update to the Aug 14 systemic interrupts field analysis · the five repeating causes of delay across a four-program NPI portfolio · Aug 15 - Oct 28

The largest schedule moves since Aug 14, and what the record says caused them



Dates are the weekly workbook refresh that recorded each forecast move. Four of the five slips trace to a supplier or a cross-program dependency; every recovery - here and in October - came from removing one.

Since the Aug 14 analysis

- **One supplier is the portfolio's gate.** "The number one gating item for all of these programs... is what we're facing at [the supplier]" (deep dive, Oct 1). The GM went to the supplier's CEO: 3-5-week turns committed; substrates pulled in a week.
- **The ejector pin is still open.** Named in June; on Oct 27 it is still holding a supplier panel build.
- **Cost of delay is now in the room.** Program D modeled live Sep 3: \$800K/day lost profit with share loss. Program C priced Oct 1: \$114K/day lost revenue. Program B: "I haven't shared enough."
- **Pull-ins are spreading.** Program C landed 3 weeks (Oct 8); Program B dropped a cross-program gate (Oct 6); Program D's QFN pivot holds at months net. All by removal.

#	Cause of delay	Impact	The fix, and where it stands
1	Supplier dependencies own the critical path <i>carries forward interrupts 1 + 2</i>	One supplier in 7 of 13 milestone causes, three programs; "every vendor we've worked with... fully loaded." One program holds the two worst gaps; ~\$490M at \$3.4M/day, directional.	Dated, costed escalation; get on the ground at the supplier. Moving: the GM to the supplier's CEO, daily WIP reports, interrupts workshop with the sponsor.
2	Development work scheduled as if it were NPI <i>new since Aug 14</i>	Packaging was planned as NPI - a finished design into manufacturing - though it is development; no learning cycles were planned. ~3 months ~ \$300M.	Learning cycles now in Program A's schedule, full qual in LC2; packaging development moved into the GM's organization (Oct 8). In motion.
3	Shared supply and key people split program-by-program <i>carries forward interrupt 5</i>	"[Program C] resources are double dipping... [A] is the priority. There is no resources" (Oct 8). One engineer on several critical paths; D slipped 125 days for A's demand.	Weekly portfolio view of shared supply and key people; fund the nine unfunded seats. Escalated to program leadership; still open.
4	Re-baselining substitutes for recovery <i>carries forward interrupts 3 + 4</i>	Targets moved 307 days net outward; one milestone "improved" 81 days with its forecast unmoved. Exposure still grew 555 → 869 days, ~4 a week per milestone.	Every target move through the Product Boss with customer impact stated. Program A's out-of-bounds notice next month is the mechanism working.
5	Slips without causes, actions without deadlines <i>carries forward interrupts 6 + 7</i>	"No change" logged against 39-42-day slips; causes arrive by email. Nine actions overdue on one milestone, the oldest dated Jun 22.	Cause, owner and date on every move; cost of delay as the decision clock - D modeled it, C priced it, B "hasn't shared enough."

In one sentence: the delay is concentrated where the company meets its suppliers and where the programs meet each other - the fixes are dated, costed escalation; learning cycles in the plan; and one portfolio view of what the programs share.

Interrupt numbers: reference list on page 2.

The seven systemic interrupts

Reference for the interrupt numbers cited on page 1 · as identified in the Aug 14 analysis, with where each stands today

#	Interrupt	As found in the Aug 14 analysis	Where it stands now, and the cause that carries it
1	One tooling item throttles two programs	A single supplier tooling item named as the critical-path driver in six meetings across two programs; managed program-by-program, no cross-program owner, no cost-of-delay case.	Open. On Oct 27 the item is still holding a supplier panel build. Carried into cause 1.
2	Escalation stalls at the supplier boundary	Inside the company, teams act and report; at the supplier boundary, actions sat open for weeks and the cost-of-delay model went uncited in every refresh.	Moving. The GM took it to the supplier's CEO; daily WIP reports stood up; cost of delay now cited live. Carried into cause 1.
3	The pull-in mindset lives in one program	Program A proposed pull-ins fluently; Program C recorded slips diligently but proposed none in 50 minutes, and framed added padding as prudence.	Spreading. Program C landed a 3-week pull-in Oct 8; Program B removed a sample gate Oct 6. Carried into cause 4.
4	The facilitation gap repeats at every review tier	Presenters reverted to slide decks, could not answer from the live schedule, and did not lead with critical path - at the refresh tier and at Product Boss reviews alike.	Narrowing. Weekly refreshes renamed "Refresh and Pull-in"; Program A is filing a formal out-of-bounds. Carried into cause 4.
5	Shared resources allocated bilaterally, no arbitration	Wafers, fab slots, supplier queues and key specialists split ad hoc inside single-program meetings; "one person, ten responsibilities" at the organizational level.	Hardest-confirmed this window: "double dipping... there is no resources" (Oct 8). Escalated; open. Carried into cause 3.
6	Administrative latency sits on the critical path	Export approvals, tooling POs, customs holds and build requests queued behind travel - individually trivial, collectively a recurring critical-path tax.	Still visible: submitted EBRs wait four weeks; customs cleared "after the flight had left." Carried into cause 5.
7	Silent moves make the written record unexplainable	One program carried no cause on 94% of its moves; a formal supplier 8D appeared only in the workbook; the log ran 134 slips to 59 pull-ins.	"No change" against 39-42-day slips persists; causes still arrive by email. Carried into cause 5.

— All seven remain live. They roll up into the five causes on page 1; cause 2 - development scheduled as NPI - is new since Aug 14.