

THE RECORD

Published by the National Tooling and Machining Association

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pp 20-21

Proactively Identifying and Developing
Sales Leaders and Managers
pp 26-27

and so much more ...

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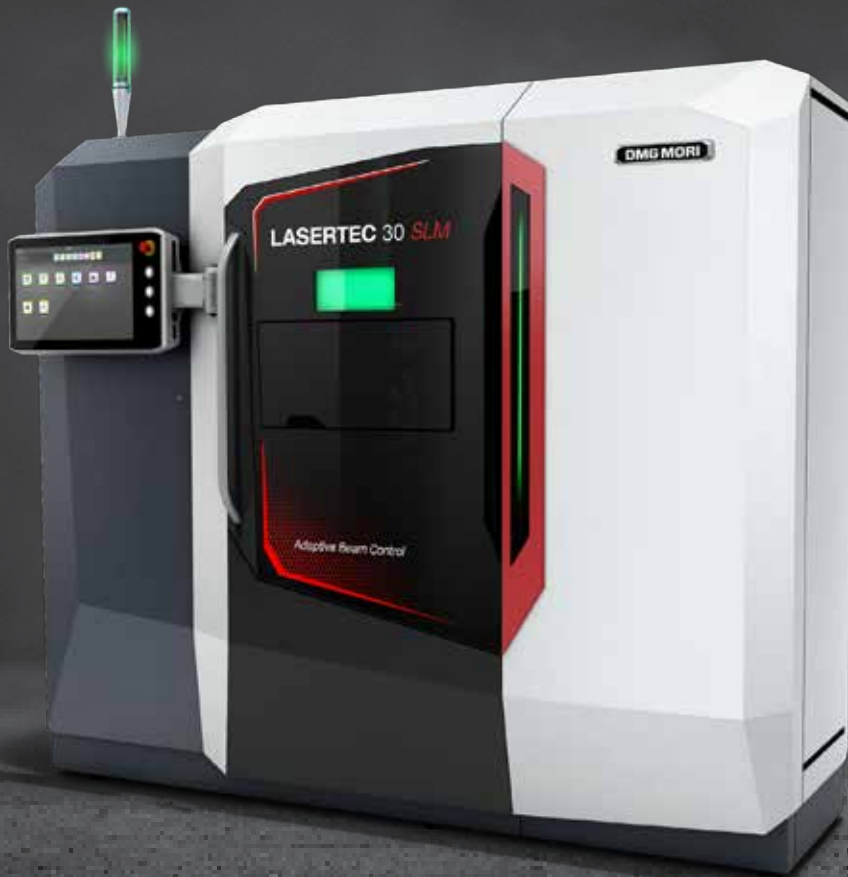
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SEND US YOUR STORY

Each issue of The Record will feature stories from members – and we want to hear from you. Send us stories of success, or those that fit the theme of the month's issue. The submission deadline is the first of the month prior to publication. Contact editor@ntma.org or call 800.248.6862.

FUTURE THEMES

November 2023: Workforce Development...
A Never Ending Focus

December 2023: The Value of Membership



UPCOMING NTMA EVENTS



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PRESIDENT'S UPDATE

Leadership Growth...Identify, Invest, Develop, and Grow.

This month's Record focus is on **Leadership Growth... Identify, Invest, Develop, and Grow**. What a timely focus considering the challenges we are facing in hiring new workers regardless of positions. We go from the great resignation, to remote workers not wanting to go back to the office, and with other subjects on the table such as 4-day work weeks. Top all that off with people who flat just don't want to work.

That said, what is one of the main things missing in all these different scenarios? I believe one of the great misses is that of **Leadership**. Unfortunately, we see similar lacks of leadership all around us including many of our governmental officials. They have important positions but lack the leadership to fulfill them. Many of them are great campaigners, but campaigning is not the leadership our country needs and the lack of leadership very well maybe the thing we suffer most from locally, statewide, and nationally.

I wonder sometimes as manufacturers, "do we have the same leadership challenges in our shops?" Do we as owners and managers lack leadership? Do we have people in our companies in positions of leadership, but whom may not know how to lead? That's a lot of questions for us to ask ourselves as the leaders of our organizations. The real question is, do we lack leaders, or do we lack in the area of cultivating/training leaders?

Growing up, and in my early career I remember people saying "people are born leaders". If that were true, no wonder we have such a shortage. Whereas I do believe there are those who are born natural leaders, I believe there are a lot more people born with leadership qualities that are waiting for their leadership qualities to be cultivated. If my premise is true, the problem with the lack of leaders is the lack of cultivation of those with leadership qualities, and not the lack of potential leaders.

Many times we reference that we as people develop at different ages. Again, whereas true, could it be that it took different amounts of time for people to run into people willing to help cultivate them into leaders? For me personally my leadership qualities laid dormant until a college professor my freshman year told me that "I was a diamond in the rough and he was going to make something of me". Honestly that was the beginning of my leadership opportunities in college, outside activities, industry, church, and eventually the beginning of my NTMA career. All because someone decided to invest in me and cultivate my leadership qualities. (Thank you to the late Joel Franke, Blinn College, Brenham, Texas) The main tool he used on me was that of instilling confidence. What tools are in your leadership development and growth tool box or tool shed? Remember each person may require

different tools to get to their leadership qualities that lay dormant and to bring those qualities to life.

So I ask us all, who are we cultivating? Personally I believe the commitment to cultivating leadership is an "anyone" and "anywhere" opportunity. Those for whom your paths cross. Logically it could be in your shop, might be in your neighborhood community, could be your church, could be your family, or it could be your friend's family members. As the good book says "the harvest is plentiful but the workers are few". The same could be true about people with leadership opportunities, there are plenty people with leadership qualities, but there are few willing to cultivate, mentor, and develop those qualities.

NTMA has been told by many of our members that they lack the time and experience to train or mentor potential leaders. It was those discussions that birthed NTMA's first Emerging Leaders Cohort in 2023, as well as our HR Retention & Recruiting Cohort both of which are currently in process. As a result of the need and the successes of these 2023 cohorts, NTMA will soon be announcing three additional cohorts for 2024 to help support you in cultivating potential leaders as well as improving yourself as a leader.

**YOU CAN HELP TODAY, SIMPLY
REFER A MEMBER TO NTMA.**

In closing, let me say that most all of us have needs for a skilled manufacturing workforce of machinist, engineers, and others, all of which require investment, effort, and commitment. Identifying, growing, and developing leaders will require the same amount of effort. The great news about all the effort invested in growing leaders is, that it could be the very thing that sets your company up for success for the next twenty years. Leaders or potential leaders exist in all workgroups, all positions, and all ages of your company. The real challenge is finding those people whose leadership qualities need and are ready to be cultivated.

I think the true result of your efforts would be defined as is the word leader; *"A leader inspires others to act while simultaneously directing the way that they act. They must be personable enough for others to follow their lead, and they must have the critical thinking skills to know the best way to use the resources at an organization's disposal."*

Let us all be thankful for those who have invested in us and take the responsibility to give back to our industry, our communities, and our country by investing and developing the leaders of today and tomorrow.

NTMA is equally committed to helping you developing tomorrow's leaders through our Cohort programs. Sign up those people in your organization who have the qualities that need developed to assure your company's leadership and NTMA's industry leadership for years to come.

**Let's move our industry forward together by
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Roger Atkins, President – NTMA

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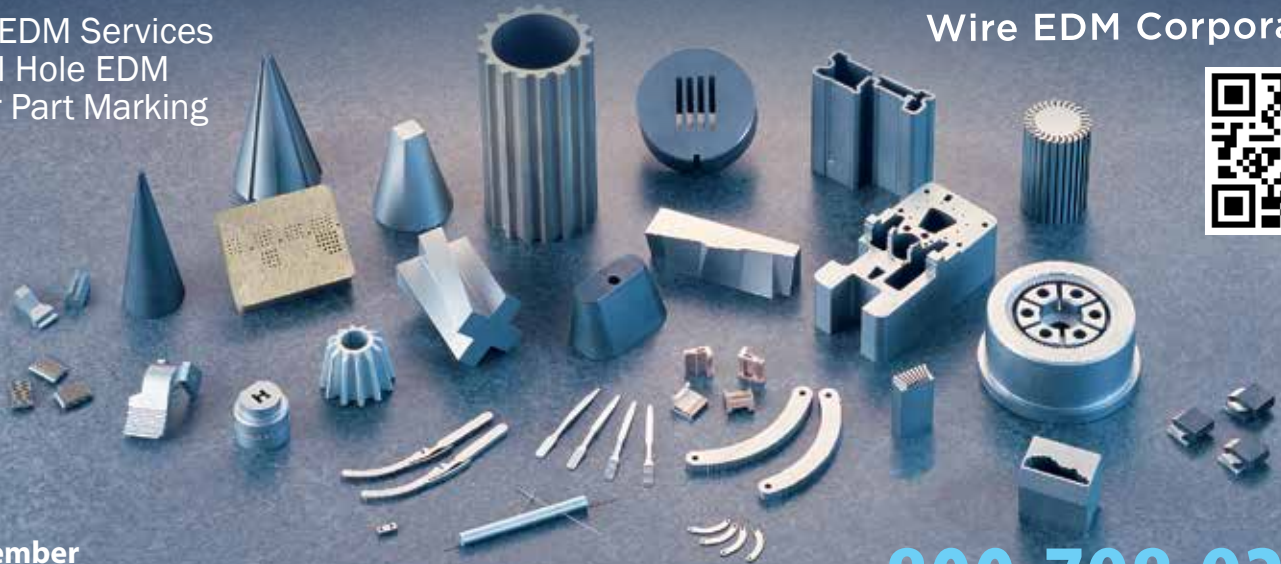
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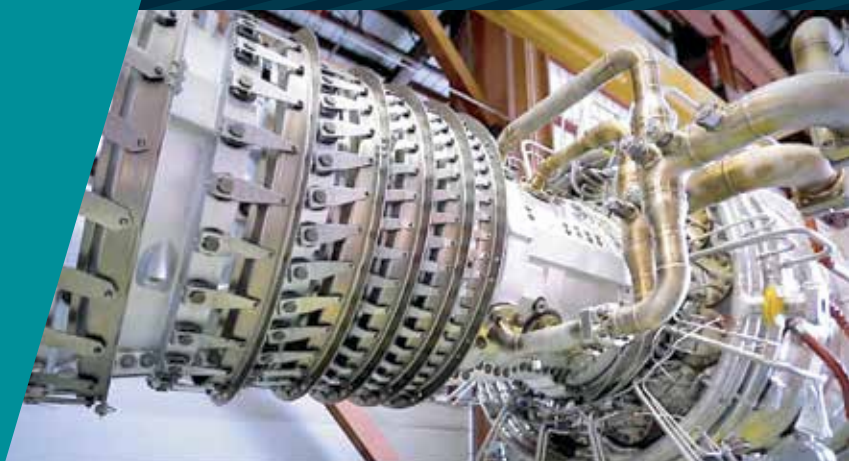
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HAPPY 75TH TO OBERG INDUSTRIES

By: Kevin Hartford, President of the Board, Pittsburgh Chapter NTMA/NTMF



This year marks 75 years of business for one of the Pittsburgh Chapter's oldest members: Oberg Industries. It's quite an impressive feat. Only 1% of companies ever make it to 75 years (only 20% of companies even make it 20 years). Don Oberg started his company in 1948 and set the bar very high for the precision manufacturing industry. Oberg's standard is world-renowned.

Oberg is the largest, privately held, precision metals shop in the world with a vast range of capabilities. They have diversified in 5 to 7 major markets including medical, energy aerospace and defense, and, of course, all things tool and die. That diversification continues. Oberg is currently involved in the electrical vehicle market, manufacturing the latest surgically assisted medical products (robotics) as well as adding capabilities (3D printing).

When I was growing up in Allegheny Township, PA many years ago, I had already heard of Oberg. The father of one of my best friends worked there for more than 40 years. When we were starting our company, Alle-Kiski Industries (AKI), I talked to another business owner and asked him about Oberg. His immediate response was, "Oberg, the granddaddy of us all!" His tone was one of admiration. Here are some quick stats on Oberg today.

OBERG HAS:

- More than 700 skilled employees across five advanced manufacturing facilities

- 450,000+ sq. ft. of manufacturing space
- \$50 million in capital/equipment investments over the last five years
- Five US-based manufacturing facilities with rapid access to capital
- ISO 9001:2015, ISO 13485:2016, and AS 9100 Rev. D-certified, ITAR and FDA-registered locations in Pittsburgh, Chicago, and Connecticut
- International sales and support
- 90 multi-axis machining centers
- 55 stamping presses

Rich Bartek is Oberg's CEO and has been with the company for 18 years. He is very proud of the precision manufacturer's culture. Their employees have an impressive length of service and vast experience in the manufacturing industry. They still have the "Culture of Perfection" that Don Oberg created decades ago. Along with their team approach and training program, their people are the primary reason for the company's decades of success. Today, Oberg is only invested in the United States. Bartek believes that "there is no need to invest in low-cost countries because we have the best workforce in the world right here in our backyard!"

Jim Hoffman, the general manager of Oberg Medical, echoes that sentiment. "People are the key to our 75 years of success. Collectively, we have the most talented workforce in precision manufacturing. We are a confident group that thrives on today's toughest

manufacturing challenges. When others shy away, our group is raising our hand to get involved. This is easier said than done, so you need a lot of talented people who work as a team, are innovators, and can execute with precision. That is our secret and always will be – people."

Oberg leverages a full-service model from engineering design to product. The company is process-driven and has invested heavily in the latest technology and automation. If you ever have an opportunity to tour the plant, you'll be quite impressed by their attention to detail and the cleanliness of their facilities.

However, with all the advanced technology and modern resources, Bartek says they do their best to keep it simple by doing what they say they're going to do and being responsive to their partners' needs. There is a "relentless focus on "quality and service."

The true legacy of Oberg over the years is how many companies "have spun out of Oberg." In fact, there is a list of them hanging in their offices. Currently, more than 50 companies are owned by those who began their careers at Oberg. That's a tremendous tribute to "The Granddaddy of Us All."

Happy 75th Oberg from your friends at the NTMA!



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CONTINUOUS INVESTMENT LEADS TO LONG-TERM SUCCESS FOR C&R MANUFACTURING

By: Andrea Wosel, C&R Manufacturing

C&R Manufacturing is celebrating its 44 years in business and has recently installed two new Okuma machining centers and a 5-axis waterjet machine. The precision manufacturing firm, which offers machining, welding, assembly and inspection, started out in the basement of Ron Wosel's home in 1979.

The Okumas include two Genos M660-V vertical machining centers which combine a large work table with intelligent cutting technology to cut large, complex parts. Investing in newer technology helps to improve productivity and reduce lead times.

A Flow Mach 500 waterjet system (10' x 6' cutting area) with a 5-axis head is also being installed. The waterjet can machine a wide variety of materials and parts with little to no workholding or clamping needed.

"We needed the additional equipment to improve our capacity and efficiency," stated Wosel. "We now have eleven pieces of Okuma equipment. We are pleased with the equipment and its capabilities."

C&R's 19 employees operate in a 32,000-sq.-ft. facility with an impressive array of CNC equipment, including mills, live tool lathes, horizontal machining centers with pallets, and 5-axis waterjet cutting. Wosel noted that the average tenure of the company's employees is 20 years.

"We have great employees that make our business efficient," commented Wosel. "An experienced crew can identify ways to be more efficient like reducing set-up times. On-time delivery is always a major focus for us. We are the top supplier (in quality and delivery)

for many of our customers, several who have been with us for 25-30 years."

About C&R Manufacturing

Located near Kansas City, C R Manufacturing supplies precision parts to various OEM manufacturers of equipment.



www.c-rmfg.com

NTMA ST. LOUIS CHAPTER WELCOMES SHELLI MCINTOSH AS CHAPTER EXECUTIVE

Shelli McIntosh is a new Chapter Executive at the NTMA St. Louis chapter. She has worked in the non-profit field for most of her adult life, finding it to be a good mix of challenging and rewarding. Her experience includes event planning on a budget, bookkeeping, designing, and advertising, all of which will serve her well as a Chapter Executive. She is also the Development Director of the Pregnancy Care Clinic in Salem, IL.

Shelli grew up in a small town and married her high school sweetheart. They are blessed with two boys and the best dog ever. They live in Southern Illinois, where her husband has been in the metal fabrication industry for more than 20 years. In her spare time, she enjoys reading, listening to audiobooks, trying not to kill her houseplants, camping (glamping), hiking, and cooking.

Shelli is working with the current Chapter Executive, Sally Safranski, throughout the fall and will take over as the Chapter's Chapter Executive on January 1st, 2024. She will be attending Engage2023, so look for her in Indianapolis and be sure to introduce yourself!



Shelli McIntosh, Chapter Exec. NTMA/Development Dir. PCC

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MIKE BOERGER, SENIOR LEAN ENGINEER, LEADS TRU-EDGE'S CONTINUOUS IMPROVEMENT INITIATIVES

By: Marc Steimer, President of Tru-Edge Grinding, an MSC Company.



Mike Boerger, Senior Lean Engineer



Since joining Tru-Edge (TE) 18 months ago, Mike Boerger, Senior Lean Engineer, has been responsible for prioritizing, identifying, and quantifying ways that our company, based in St. Henry, OH, can continually improve operations and remain a leading provider of cutting tool services. Mike earned a Black Belt Lean Engineer certification through the Michigan Manufacturing Technology Center.

Mike's development of our Lean engineering initiatives, combined with his energy, drive, and proven performance has been fantastic to experience. As a result of a Lean project that Mike spearheaded and which Frank Seger, our Director of Engineering oversaw, we have invested more than \$1.2 million to improve outside diameter (OD) grinding operations.

Our new OD grinding cell includes a Reinecker RS700 and a Roll-O-Matic SP30 that are supported by a closed-loop Ebbco filtration system. This setup exemplifies our long-standing commitment to minimizing waste through ongoing sustainability efforts and ensures that our customers receive tight tolerance special cutting tools. It also accelerates our pace for reducing lead times and providing best-in-class delivery while expanding our capacity to provide a greater volume of tooling to customers than ever before.

The first OD grinding cell goes online next month with the remainder scheduled for March 2024. The end result is decreased lead times for special cutting tools by a projected 12 to 15 working days!

A NONSTOP LEARNER

When Mike joined us, one of the first things he did was teach himself to use SolidWorks, a CAD system we use organization-wide. That skill has enabled Mike and our Lean Teams to design unique tool and die parts. One such project involved designing packaging plates used in the shipping and receiving area. These plates addressed the need to improve ergonomics while simultaneously reducing the time needed to sort and identify the thousands of tools we receive monthly for regrinding and sharpening.

One of Mike's other notable Lean projects is the organization of 5S (sort, set in order, shine, standardize, sustain) cabinets located in each CNC work cell where associates access precision measuring tools, hand tools, and fixturing parts. Using SolidWorks CAD, Mike also designed most of the in-house-printed 3D parts created specifically to hold those items.

Additionally, Mike has taken on the responsibility for the continued implementation of OSHA standards and practices across our facilities. Whether it's

related to his intensive coursework at a recent safety conference covering OSHA requirements, or his expanded responsibilities around safety company-wide, Mike continues to demonstrate a dedication to TE's principles.

At TE, our value proposition is "Our customers are trusted partners, working towards the common goals of quality, success, and innovation. We prioritize fair and honest business practices, centering our customer service around a hardworking team of caring associates." Every day, Mike exemplifies a commitment to learning so he can best serve team members (his internal customers) and external customers alike. Mike's energy, drive, and enthusiasm are making TE a better organization, and the results of his achievements are evidenced throughout our shop.

Thanks, Mike, for a job well done, and for everything you have planned to help us meet our long-term continuous improvement goals.

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ONE VOICE: FEDERAL GOVERNMENT ADVOCACY PROGRAM

As US manufacturing continues to navigate the unique challenges and changes brought on by the last year – and a change in administrations – it remains important to have a partner in advocacy. NTMA helps provide this support by working closely with the team at One Voice: the

combined federal government advocacy program representing small- and medium-sized business manufacturing in the US.

With regulations, policy, and shop safety all constantly evolving, One Voice has a wealth of fantastic resources, developed to help keep your shop informed and prepared for whatever comes next. In addition to ongoing COVID-19 response information – in line with any and all changes that our industry may need to know – the team at One Voice also provides informative policy webinars, news releases, educational materials, video recaps, and much more.

Don’t forget about the Talking With One Voice podcast – every episode, the One Voice advocacy

team breaks down how the latest news from Washington impacts manufacturing businesses across the country.

It’s yet another way your shop can get quick, concise information on everything from tax development to loans and even workforce development issues. You can send in your key questions to be answered by emailing onevoice@policyres.com. We hope you continue to utilize this key partner in One Voice – one that ensures that millions of manufacturers across the country have their voices heard.

Please visit www.metalworkingadvocate.org for more information.

A Paradox of Precision Manufacturing

By: Barbara Shea
Director of Content Marketing, Datanomix

In the world of precision manufacturing, where every micron matters, machine shops struggle to accurately measure their production performance because there are very few good tools available to help them.

1. Manually Data Gathering

Shops have developed a creative mixture of sticky notes, clipboards, tablets, and more to track every part of every machine for every shift. Then that data is analyzed using a spreadsheet – with the results posted for people to see. This method is very time consuming and can only show what happened. It cannot offer real-time insights into where to intervene right now.

2. Using ERP Data

Some shops with an ERP system rely on it for their production data. The problem is that the underlying numbers used to generate that data are estimates or averages. This method also only allows manufacturers to look back.

The best way to overcome the data gap around production performance is, not surprisingly, more accurate data. Machine monitoring software provides a way to connect directly to your CNC machines and pulls data from them which can be analyzed. Since not all machine monitoring solutions are the same, here are some tips on how to select the best one for your shop.

COMPARISON SHOP

There are several companies that offer various levels of machine monitoring – from simple on/off monitoring all the way up to a fully automated intelligent system that requires no operator input. If you are new to monitoring, be sure to look for companies with a robust onboarding process and ongoing customer support to ensure your experience is a good one.

DOES IT MAKE YOUR LIFE EASIER?

It's the software's job to make achieving revenue, profit, and improvement goals significantly easier. This means highlighting actionable insights that show you where to focus your efforts. Make sure the software has out-of-the-box reports, dashboards, and simple workflows that are aligned with the way you already work.

Look for things like an automated report delivered first thing in the morning that shows every part made on every machine over the past 24 hours to support your morning production meeting. Does it have an app that allows you access to your data, anytime and anywhere? Does it require operators to input data or someone on your team to sift through mountains of data to find actionable insights?

START SLOW AND GROW

Progress often requires overcoming resistance to change. Good monitoring software will provide you with a lot of insights into your production performance, which should be introduced over time,

rather than all at once. Ask about each solution's plan for training and customer success. If they don't have one, then the solution is probably either too simple or you will be on your own to figure it out. At Datanomix, we often suggest that new customers start by using just a few features, like TV mode, which broadcasts live production data, so everyone is on the same page. Even implementing this one feature delivers a significant jump in utilization rates. When you give good people accurate information, they can do great things. This gets everyone excited about using the software and helps create a culture of efficiency in your shop.

FOCUSED ON YOUR GOALS

If you are getting a monitoring system because you want to increase machine efficiency, then make sure you choose a company focused on supporting you to do that. Ask if they have a tiered product offer where you can start by focusing on one area and then add more features when you are ready so you don't pay for things you are not using. Also, ask about their product roadmap to make sure their vision aligns with yours. If they don't have a plan for their future, then how will they help you realize yours?

Machine monitoring, especially fully automated intelligent production monitoring, can be a real game changer for precision manufacturers. It can help manufacturers achieve their goals, like increasing machine utilization to maximize revenue, optimizing job performance to increase part profitability, or supporting them during their continuous improvement efforts.

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Event Schedule

Wednesday, October 18th

- 12:00PM-5:00PM** Registration
- 3:00PM-4:30PM** Trustees Roundtable
- 5:00PM-6:00PM** Happy Hour
- 6:00PM-8:30PM** Cornhole Tournament

Thursday, October 19th

- 7:30AM-5:00PM** Registration
- 7:30AM-8:00AM** Breakfast
- 8:00AM-5:00PM** Exhibit Tables
- 8:00AM-9:30AM** Conference Kickoff & Awards
- 9:30AM-9:50AM** Networking Break
- 9:50AM-10:50AM** Opening Keynote - Sam Goodwin
- 10:50AM-11:10AM** Networking Break
- 11:10AM-12:00PM** General Session 1 -
How Changing the Status Quo in
Recruiting can Work for You
- 12:00PM-1:30PM** Open Lunch & NTFM Meeting
- 1:30PM-2:30PM** Topic Specific Roundtables
- 2:30PM-2:50PM** Networking Break
- 2:50PM-3:50PM** General Session 2 -
Drive Focus, Empower Culture
and Grow the Bottom Line
- 4:00PM-5:30PM** Board of Trustees Meeting
- 5:30PM-6:30PM** EL Cohort Reception
- 6:30PM** Free Night to Explore Indianapolis

Friday, October 20th

- 7:30AM-5:00PM** Registration
- 7:30AM-8:00AM** Breakfast
- 8:00AM-5:00PM** Exhibit Tables
- 8:00AM-9:00AM** General Session - 3 Global Economic Outlook
- 9:00AM-12:00PM** Plant Tours - Major Tool & Machine
- 12:30PM-1:45PM** Luncheon & General Session - 4
Engaging Washington: Manufacturers Take Center Stage
- 2:00PM-3:15PM** Roundtables
- 3:15PM-3:35PM** Networking Break
- 3:35PM-5:00PM** Community Outreach Activity (Onsite)
- 5:00PM-6:00PM** PAC Cocktail Reception
- 7:00PM-10:00PM** Evening Event: Dallara Car Factory, 80s Theme

Saturday, October 21st

- 8:00AM-11:00AM** Registration
- 8:00AM-11:00AM** Exhibit Tables
- 8:00AM-8:30AM** Breakfast
- 8:30AM-9:30AM** General Session - 5
OSHA on the March: Regulating your Workplace
- 9:30AM-10:30AM** General Session - 6
Securing the Machine: Cybersecurity for the Shop
- 10:30AM-11:00AM** Networking Break
- 11:10AM-12:00PM** Closing Keynote -
From Physical to Virtual: Enhancing Tooling and Machining
Processes and Training with Extended Reality and Digital Twins

10 THINGS GREAT LEADERS WON'T DO

By: Daniel Carranco, Director of Continuous Improvement, Global Shop Solutions

Running a successful business requires intense focus on doing the right things at the right time. This is especially true for manufacturing leaders whose customers demand quality products delivered on time every time, often with short lead times. What you don't do can be just as important as what you do, sometimes even more so. One thing great leaders do is take note of what gets in the way of their success and stop doing it. Here are 10 things the best industry leaders try not to do.



1) RELY ON MANUAL PROCESSES

Manual processes act like anchors in your business, slowing down production times and increasing the chances for error. Important data gets lost or misfiled. Work order entry and job setup takes longer. Labor costs climb. Not that long ago, you couldn't get by without manual spreadsheets and the like. Now, there are many advantages of automating your processes, allowing you to:

- Reduce labor costs with BOM Compare
- Eliminate waste by automating inventory processes
- Reduce turnaround times with CAD Interface and Nesting Interface software
- Future-proof your business by improving your ability to forecast industry trends

Manual processes act like anchors on your business. With the Internet of Things (IoT) taking automation to a whole new level, you can't afford not to invest in it.

2) USE PAPER ON THE SHOP FLOOR

Going paperless on the shop floor used to be wishful thinking for manufacturers, but now it's a reality that can transform your business, starting with materials management. Moving materials and parts throughout the shop floor is faster and easier than ever. You can

produce reliable count verifications and updates, run cycle counts in real-time, and make on-the-fly adjustments to part and lot-bin counts – all without printing a single sheet of paper.

3) GUESS AT JOB COSTS

Guessing at job costing is like hoping there's water in the pool when you dive in. If you're wrong, the outcome can be painful. With Job Costing Accounting Software you can:

- Intimately know the cost breakdown for freight, labor, overhead, outside services, other, and material
- Get a time-lapse view of every part that has passed through your shop floor
- View old and new quantities, current transactions, and the cost for each
- Review complete up-to-date histories of finished goods costing at any time

4) PUT UP WITH SLOPPY INVENTORY MANAGEMENT

Few things are more frustrating than shipping late because materials aren't on available. Automating your inventory process lets you know what you have, how much, and where it is so you never run short of parts. Some of the many benefits include:

- Wireless data entry and barcode scanning
- Seamless integration of your material ordering system with inventory and usage
- Vendor material tracking to manage BOM buildup costs
- Up-to-date performance ratings on vendors, including pricing and on-time delivery rates
- Physical inventory counts in hours rather than days or weeks

5) LOSE CONTROL OF LABOR COSTS

Labor costs are typically one of the biggest items on the Profit and Loss statement. They are also one of the hardest to track with precision. Time on the job is inaccurately recorded. Overtime hours are poorly managed. Separating direct from indirect labor can be difficult. When you automate, these ongoing problems disappear.

- Workers electronically log onto jobs and job sequences without leaving their work stations
- EDI software eliminates the need for manual data entry in many areas
- Customizable dashboards let you analyze real-time data on the shop floor
- Barcoded work orders let you know what machinists are doing as they are doing it
- Direct and indirect labor can be tracked with remarkable precision

6) PURCHASE TOO MUCH OR TOO FAR IN ADVANCE

It wasn't long ago that most manufacturers kept a surplus in inventory – just in case. With today's just-in-time manufacturing, the cost of carrying excess inventory not only outweighs the benefits; it also puts you at a competitive disadvantage. With automated purchasing you can:

- Buy only what you need, when you need it
- Reduce labor costs related to purchasing
- Eliminate costly job/materials mismatches
- Easily consolidate orders to buy in quantity and get discount pricing
- Automatically order when parts fall below prescribed levels in inventory

THE COST OF CARRYING EXCESS INVENTORY OUTWEIGHS THE BENEFITS.

7) SKIMP ON TRAINING

The manufacturing industry never stops moving forward with new tools, new technologies, and new work processes. The only way to keep up is with ongoing training for employees. But when you're focused every day on getting quality products out the door on time, it can be easy to lose track of who had what training and when. With Global Shop Solutions Process Documentation and Training (PDT) application, you can:

- Record and document all processes for auditing, certification, and training
- Record and access libraries of training materials with one click
- Keep process improvement and training materials up to date while reducing the need for paper documentation
- Maintain all records needed to comply with quality certifications

8) MAKE DECISIONS BASED ON OLD DATA

Manufacturing success often comes down to how well you manage the data. And not just any data, but real-time, accurate data. With Global Shop Solutions Business Intelligence software and Key Performance

Indicators, you're working with information that is mere seconds behind what is happening on the shop floor. This enables you to:

- Access real-time data on virtually every aspect of your business
- Create custom graphs and reports displayed in the format of your choosing
- Review real-time management summaries to see what's really happening in your business
- Make better decisions based on financial, productivity, cost, vendor, and outside services reports

WITH RELIABLE REAL-TIME DATA, YOU CONTROL WHAT HAPPENS ON YOUR SHOP FLOOR AND IN YOUR BUSINESS.

9) KEEP SHOP FLOOR PERSONNEL GUESSING

One of the biggest sources of waste for manufacturers is employees standing around because they don't know what to work on next. You can continue posting shop floor schedules on the bulletin board and continue getting the same results. Or, you can use TrueView™ Data Display to show real-time labor, material, and production data on large screens around the shop floor. With TrueView, watch red time shrink overnight.

TrueView takes the guesswork out of what to work on next by pulling the latest information from your ERP system into a scrolling screen display. This lets shop floor personnel:

- View the latest work orders being completed on the shop floor
- See the total list of jobs in process left to be done in a defined date range
- Make sure the top priority work orders are completed on time
- See what work orders employees are currently clocked in on
- Eliminate confusion and guesswork

10) STOP GETTING BETTER

If customer needs didn't change, manufacturers could afford to rest on their laurels. But today's highly competitive markets demand continuous improvement

just to keep up, much less stay one step ahead of the competition. Shop Management software provides the tools your business needs to meet your customers' changing demands as they happen by enabling you to:

- Get detailed project information, from job costing and material review to variance reports and performance measurements
- Access accurate work center data and scheduling information, including load details, efficiency reports, and backlog reports
- Access scheduling information – from the master work order schedule to multi-level BOM scheduling – with the click of a button
- Manage labor performance from a single screen
- Track quality in real time so you can identify opportunities for improvement

The quickest way to fall behind in the manufacturing industry is to stop trying to improve. Great manufacturers strive to get better every day.

ABOUT THE AUTHOR

Daniel Carranco is the Director of the Continuous Improvement Team for Global Shop Solutions. He leads teams that deal with existing customer projects including consulting and custom development. With Global Shop Solutions for more than a decade, Carranco holds a master's degree in international business and is a frequent speaker to manufacturing executives and industry groups on maximizing ROI with ERP software.



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What Positions Client Growth Resources at the Pinnacle of Talent Acquisition?

By: Denise Mancuso, President - Client Growth Resources

As the CEO of Client Growth Resources, a Talent Acquisition Search Firm, I'd like to share seven distinct attributes that position us at the pinnacle of our field and set us apart from other firms.

1. Industry Expertise:

With years of experience in providing executive search services, we have accumulated profound knowledge across various industries, specifically manufacturing. This expertise allows us to understand specific roles and industries, allowing us to source candidates who have the right skills and who will fit into the company culture seamlessly.

2. Proven Track Record:

Our firm boasts a strong track record of successful placements, particularly in mid-to-senior-level executive roles. This history demonstrates our ability to deliver high-quality results consistently, instilling confidence in our clients.

3. Custom-Made Service:

We don't believe in a one-size-fits-all approach. Each client is unique, and we tailor our services to meet their specific needs. This personalized service ensures we can fill each role with the most suitable candidate.

4. Extensive Network:

Over the years, we've built an extensive network of potential candidates. This network, combined with our operational engagement with both active and passive candidates, allows us to source high-quality individuals quickly.

5. Commitment to Excellence:

At Client Growth Resources, we pride ourselves on our relentless commitment to excellence and the highest level of integrity. Every step of our process, from initial consultation to final placement and follow-up, is handled with the utmost professionalism and dedication.

6. Data-Driven Decisions:

We leverage data analytics to provide insights into your hiring process, helping you make informed decisions that align with your company's strategic goals.

7. Dedicated Support:

We believe in building relationships. A dedicated senior recruiter will be assigned to your company, ensuring consistent communication and personalized service.

In essence, what sets us apart is our unwavering commitment to delivering exceptional results for our clients, backed by our industry expertise, proven track record, tailored approach, and extensive network.



George F. Mancuso, CEO - Client Growth Resources

George F. Mancuso is the esteemed CEO of Client Growth Resources, a leading Talent Acquisition Recruiting firm known for its personalized service and meticulous attention to detail. With an illustrious career spanning almost four decades, George brings manufacturing industry-specific knowledge, strategic insights, and tailored solutions to his role.

Under his expert leadership, Client Growth Resources has consistently achieved impressive growth rates, thanks to its unique ability to recruit top-tier talent that drives business success for its clients. George's approach to recruiting is rooted firmly in data, cultural behavior, and using precise statistics to inform his decisions and strategies for the clients.

In addition to his role as CEO, George is a respected thought leader in the recruiting industry, often sharing his insights and knowledge at industry conferences and events. His clear calls to action and strategic language have made him a much sought-after speaker and consultant.

George prides himself on providing a personalized service to every client, focusing on their specific needs and objectives. Client Growth Resources is renowned for its exceptional commitment to service excellence, resulting in consistently high client satisfaction and unmatched loyalty. George F. Mancuso is not just a CEO; he is a strategic partner, an industry innovator, and a driving force behind the continued success and growth of Client Growth Resources, including its' clientele. Now, his team hopes to serve the NTMA membership in their Talent needs from hourly employees to the highest senior levels.



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Proactively Identifying and Developing Sales Leaders and Managers

By: Ed Marsh - Growth & Strategy Consultant



The Value of Strong Sales Leadership

When identifying good leadership skills, often you “know it when you see it.” Time spent in both the Army and working for businesses around the world has taught me that leadership is different from management. It can be taught, can’t be forced, and requires consistent and explicit effort.

Yet, too often, leaders are appointed by default, or based on attributes that don’t necessarily correlate with capability. Seniority and annual sales are examples of criteria that are often used to identify sales leadership candidates.

Sales leadership can be measured, leading to better outcomes.

Sales Leadership Language and Requirements

Let’s start with some definitions.

Leadership may not match the org chart. Dynamic leaders emerge despite not having the longest tenure, deepest technical expertise, or highest annual sales.

Common leadership roles in industrial sales include:

- Sales Reps acting as informal leaders, inspiring their colleagues with their behavior, vision, and performance.
- Sales Managers who manage a team of reps while also serving as strong leaders. This is a critical leadership role because there's no job more emotionally exhausting than being a sales rep.
- Sales VPs who manage several sales managers, as well as other employees from other departments such as sales operations, business development, quoting, etc.

The maximum effective span of control for most industrial sales managers is four to seven reps, and for sales VPs, it's three to five sales managers, plus a couple of sales others.

The measurable skills and competencies of successful Sales VPs and Sales Managers include various technical sales, management, and leadership qualities specific to each role. Here is a list of skills needed to be successful for a Sales Manager versus a Sales VP.

SALES MANAGER

- "Will to Manage," or having desire and commitment to sales management success, outlook, and responsibility for results.
- Sales Management DNA, or someone who doesn't need approval, has supportive personal beliefs, and is comfortable discussing money.
- Sales Management Tactical Competencies that include coaching, motivating, being accountable and holding others accountable, recruiting, pipeline management, relationship building, closing, understanding the sales process, team building, and embracing sales technology.

SALES VP

- "Will to Lead," or having commitment, desire, outlook, and responsibility in the context of leading at the organizational level.
- Sales Leadership DNA, with little need for

approval, strong supportive beliefs, and personal buying habits, able to avoid becoming emotionally involved.

- Leadership Competencies that include sales leadership, strategic thought, relationship building, talent management, motivating others, crisis resilience, boardroom presence, confidence, creativity, being accountable and holding others accountable, making difficult decisions, being open to new ideas, having a passion for the business, being persuasive and practical.

There's some clear overlap among all sales roles – after all, they're focused on sales. At the same time, there are distinct differences. For example, the difference between coaching a rep (as a sales manager) and coaching a sales manager (as a sales VP) is significant.

Therefore, to hire managers and VPs who will succeed, we need to hire them based on the skills that they will need to manage their responsibilities prospectively. Those are not necessarily represented in their historical performance which was built on different competencies.

The Normal (WRONG!) Way to Select Sales Leadership

How do most organizations select sales leaders? They promote the top performer.

Sometimes, randomly, that works. Often, though, it doesn't. The skills that powered their success in their last role are not the ones that will necessarily drive success in their new role. Laurence Peter's "Peter Principle" warns that people are sometimes promoted into roles for which they're ill-suited based on their success in earlier jobs.

This is especially common when a growing company creates a new sales management function to free up leadership to focus on running the business. This is a critical mistake because it initiates a negative cycle.

The company can't forego their top rep's sales, so they keep selling even as they take on the sales manager role and title. The sales piece is natural,

but management is not. And they've generally figured sales out on their own, without much coaching or training. So, they assume others can.

Therefore, they hold the manager title and the spot on the org chart, but don't really spend much time managing. They do some administrative coordination and advise on technology and pricing, but do very little roleplay, pipeline review, coaching on deal qualification, pre-call planning, post-call debriefing, etc.

Once a company realizes that the reps need more management skills, they have a problem. The new manager will be offended if they're stripped of that title and might even leave, taking potential to earn revenue with them. In the end, nobody really manages.

Ouch!

A Better Approach to Identifying Strong Sales Leaders

There is a better way.

We can quantify each individual's aptitudes and competencies at the outset. Internal and external candidates alike can be evaluated empirically with predictively accurate measures of their ability to perform required skills, and insight into the training that would be required to get them up to speed.

If the top sales rep is sales manager material, great. Have a frank conversation about how managing people is a sometimes frustrating and unpleasant task, have a plan for their revenue, make sure they're clear about what they're signing up for, and discuss how to unwind and regulate themselves if they're unhappy.

Start the process with an accurate, objective measure to ensure that the critical sales leadership roles are filled with folks who will excel.



Ed Marsh
Growth & Strategy Consultant



www.consiliumglobalbusinessadvisors.com

BIG DAISHOWA Tools for Schools Program a Big Success



BIG DAISHOWA issued nearly \$30,000 in tooling certificates to high schools, vocational schools, colleges and universities through its inaugural Tools for Schools program.

To give back to the local communities, BIG DAISHOWA customers selected a school of their choice to receive a tooling certificate valued at 20% of qualifying orders from November 2022 through January 2023. The certificates were redeemable for any BIG DAISHOWA product including best-in-class tool holders, boring tools, cutting tools, workholding products, and presetters.

“The Tools for Schools program is innovative,” explained Shannon Sweatman, CTO of Southern Manufacturing Technologies, Inc. (SMT) in Tampa, FL. “We were excited to participate because it’s a nice personal touch for our area, and another way for us to be involved in providing support to the industry. Thank you to BIG DAISHOWA for being good stewards of the industry.”

SMT chose Pinellas Technical College as a recipient of the BIG DAISHOWA tooling certificate. SMT has been a long-time partner with the college and currently has 12 employees going through their apprenticeship program. The company still employs an apprentice who went through the first class in the 1980s.

Through the Tools for Schools initiative, Tulsa Tech (Tulsa, OK) also was a recipient of a tooling certificate. “I just wanted to thank everyone for thinking of Tulsa Tech and our future machinists,” said Aaron Runk, instructor at Tulsa Tech. “Students have already started to use the tooling and it’s working great. BIG DAISHOWA’s tooling certificate allows Tulsa Tech to add another level of understanding for tool holding, and this will better prepare students for the world of work. Thank you again for your support.”

With the resounding success and positive impact of the initiative, BIG DAISHOWA will continue the program again this fall to bring even greater benefits to the industry.

“We are committed to workforce development. This program allows our customers to support local communities by providing their future workforce with the same tools they use in their shops,” explains Jack Burley, president and COO of BIG DAISHOWA. “By using BIG DAISHOWA tooling in school, students gain experience with the same tools they will use as future engineers and machinists.”

BIG DAISHOWA has long been a proponent of supporting students interested in manufacturing. As part of its efforts to address the skills gap and support workforce development, BIG DAISHOWA is a sponsor of Greater Chicago Advanced Manufacturing Partnership (GCAMP) and the TMA Precision Machining Competition, supports local robotics league competitions, participates as a student-friendly exhibitor at industry trade shows, hosts students at its headquarters, and has an internship program.

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GREAT LEADERS HAVE GREAT GAME PLANS

By: Johnny Hyde, EBITDA Growth Systems

October is a great time of year, and not just because of Manufacturing Day or because football is in full swing. After all, in our industry, every day is manufacturing day, right? No, October is great for a lot of reasons – from the crisp fall air and changing of the color of the leaves (especially our Colorado aspens) to local Oktoberfests, Halloween hijinks, and, of course, the World Series.

Metaphorically speaking, business leaders at most manufacturing companies this time of year are rounding third and heading for home in the hope of bringing home an operational, financial, and cultural victory once again.

There are many parallels between leading a manufacturing company and coaching a sports team. Even the language and terminology are interchangeable: leadership, owners, coaches, teammates, facilities, training, performance, playbook, blocking, and tackling – the list goes on and on.

No matter what stage your company is in, what you produce, or which players you have on your team, savvy leaders know the great game of business starts and ends with one vitally important strategy: a great game plan. When it comes to running a winning shop, you need a great business plan.

If your goal as a leader is not just to win the numbers game this year, but rather to build a culture of winning (a manufacturing dynasty, if you will), the value of strategy can't be overstated. A solid business plan is not only the best mechanism to formulate that strategy, but also to guide its tactical implementation and measure its effectiveness.

Here are our top five reasons why we believe a well-constructed business plan is essential to both short-term profitability and long-term success:

1. GOAL SETTING

If you don't know where you're going, any road will take you there – and fast. One of the most important benefits of a business plan is identifying where you want to go, what you want to accomplish, and how you're going to get there. Additionally, organizational goals help set the vision for the company so that the entire team understands the drivers to success, which leads into number two.

2. TEAM ALIGNMENT

We've all seen teams that are loaded with talented superstars struggle to win championships. (As Nuggets fans, we're looking at you, Lakers). Even well-intentioned motives and outstanding individual contributions can work in opposition to the greater goal when the players either don't understand the plan, fail to operate as a team, or choose to focus solely on their individual performance. Recruitment, training, coaching, skill positions, team management, and operational dynamics all depend on a solid plan in order to achieve success.

3. IMPLEMENTATION

Your business plan is comprised of five key components: Marketing, Sales, Finance, Operations, and Management. These fundamental planks contain both strategies and tactics associated with achieving the goals for the entire platform—in other words, everything your team needs to know in order to focus their time, energy, and talents to bring home whatever trophy your business hopes to win.

4. ACCOUNTABILITY

Even the best strategies are prone to failure if they lack accountability. A solid business plan spells out the who, what, where, when, why, and how associated with each strategic initiative and gives every buck a clear place to stop when it comes to results. Defining and communicating expectations is not only fair to the business, it's also essential for individuals to feel a sense of ownership and know whether or not they are performing at the level required for the entire team to succeed.

5. EVALUATE YOUR SUCCESS

Whether it's short-term victories like winning new customers and servicing key accounts or long-term goals like dominating your market or leading your industry segment, keeping score is an essential part of this game we call business. Scorecards are valuable tools to help you review performance in light of your goals, pressure test and/or adjust your strategy, optimize your roster, and set realistic objectives for growth going forward.

There are many other compelling reasons to have a solid business plan in place, but in our view these five rise to the top. Of course, your priorities are subject to change depending on your goals, where you are in your business leadership journey, and what issues your business is facing at any given time. Start-up funding is practically impossible without a solid business plan, while more established companies lean heavily on their plans in the areas of forecasting, thriving in a competitive environment, and talent recruitment and retention. Suffice it to say, the list is as long and as unique as your business.

Investing in the leaders of our industry is EBITDA Growth Systems is hosting our second annual "Double Your Value" Business Planning Summit on November 9 and 10 in our hometown, Golden, CO. This summit draws business owners in the advanced manufacturing space from across the country for a powerful two-day business planning workshop. NTMA members who attended last year gave our Business Planning Summit rave reviews. Featuring timely insights from leading industry experts and powerful, practical tools that significantly increase profit and double company value, participants learn the vital skills they need to develop, construct, and emerge from the workshop with a sound business plan to lead their company to victory – not just on Manufacturing Day, but on every manufacturing day of the year.



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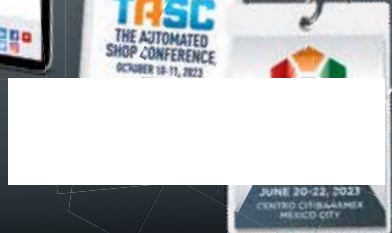
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ERC & NTMA: RECONSIDER YOUR ELIGIBILITY

Following recent federal updates unveiled in AM 2023-05, NTMA members should reexamine their eligibility for the Employee Retention Credit and take advantage of refunds that their business is entitled to. As an associate member of NTMA, alliantgroup is ready to help business owners navigate these updates and claim the maximum amount available while adhering to federal guidelines.

CHANGES TO ERC

There are two routes through which a business can qualify for ERC. The first route deals with what is known as a “full or partial suspension” of operations. If a business’s operations were directly impacted by a government mandate, forcing them to change, modify, or discontinue parts of their operations during that timeframe, they have a pathway to ERC qualification. As clarified by AM 2023-05, this pathway can include disruptions that arose due to supply chain issues, something many NTMA members have faced over the past three years. The secondary route concerns revenue decline, requiring businesses to demonstrate a certain percentage of decline based on a comparable quarter in 2019.

NTMA MEMBERS & ERC

NTMA members make ideal candidates for ERC for several reasons. To begin, many manufacturers have long supply chains, requiring them to source materials from a variety of places. During pandemic disruptions, many suppliers and manufacturers faced different levels of operational interference, naturally causing delays.

Businesses can now qualify via supply chain disruptions if they can demonstrate that government mandates impacted their supplier, causing the manufacturer to have to change their operations. AM 2023-05 has made the intent of the language clear, as it has laid out specific scenarios through which mandates impacting suppliers would cause the manufacturer to qualify, as well as scenarios that while impactful, do not qualify a business for ERC through supply chain issues.

WHAT DOES AND DOESN'T QUALIFY?

Just because a business experienced supply chain disruptions does not mean they automatically qualify. That business needs to be able to tie their supplier’s disruptions to a specific mandate. No one document or conversation will get you the final answer on if your business qualifies, which is why it is so important to partner with an ERC provider, as you will need support and lots of insight to substantiate your claim. One NTMA member experienced supply chain interruptions and decided to examine if they would qualify for ERC. When working with one provider, they were told that they do not qualify as their business was not directly impacted by government mandates. They went to alliantgroup for a second opinion, who was able to qualify them for 5 quarters using their database of qualifying mandates on behalf of their supplier.

In another case, a provider promised an NTMA member a huge refund through ERC after a brief consultation. Wanting a second opinion, that member contacted alliantgroup and asked them to review the original provider’s numbers and see if they came to the same conclusion. After reviewing the fact pattern and documents, alliantgroup concluded that this member does not qualify, sparing that business the headache of filing a false claim. Not all ERC providers can provide the same level of resources, so it’s important to choose wisely and go with the organization that will give you the correct answer, not just say you qualify regardless of circumstances.

BEWARE OF LESS REPUTABLE PROVIDERS

With the proliferation of ERC, there has been a mass influx of pop-up providers claiming to offer a fast route to ERC qualification. Many of these providers exist solely to profit off their clients’ claims, and do not spend the appropriate amount of time researching and substantiating their client’s eligibility. The credit has changed frequently since its inception, fluctuating in value, scope, and qualification, even as recently as AM 2023-05. If your provider cannot walk you through these changes, or is unaware of how the scope has expanded, then you should reconsider

working with that organization. These fly by night providers have caused businesses to overclaim, underclaim, or falsely claim, giving the credit a bad reputation and putting organizations in jeopardy with federal authorities. When considering ERC, it’s necessary to choose a reputable provider that has the resources and experience to guide your business through the process. Especially when utilizing mandates that impacted a supplier as opposed to the manufacturer itself, it’s important to document and substantiate exactly which mandates resulted in which outcomes.

WHY WORK WITH ALLIANTGROUP?

alliantgroup is prepared to help NTMA members navigate this update and claim ERC. With over 20 years of experience in the credits & incentives space, they understand the requirements that manufacturers must meet to successfully qualify. They have the expertise to research and defend ERC claims, with a team composed of former IRS commissioners, policy makers, and other industry professionals. They have worked with hundreds of NTMA members and helped deliver significant returns to each, working with the business every step of the way to document their claim. Coupled with their database of the 11,000 mandates that can be used to qualify a business for ERC, they will take the guesswork out the process, freeing you to continue focusing on your business and expanding your operations.

NTMA members have a new tool that can potentially deliver six figure returns to their business. Members should reexamine their eligibility for ERC and ensure they capitalize on the funding available, as there is limited time remaining to make this claim. alliantgroup’s team is ready to assist their fellow NTMA members in navigating the claims process. NTMA members still on the fence about ERC now have good reason to reconsider their eligibility and possibly receive impactful capital for their business.

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SMART(ER) SHOP, SEASON 2, NTMA APPROVED



“Smarter Shop” hosts Ryan Kelly of AMT and Adam Allard of Autodesk meet with Orion Beach and Alana Mongkhounsavath, also with Autodesk, to film an episode for Season Two on IMTS+. Photo credit: Philip Angert

Low-Cost Tech Solutions Deliver Priceless Results

Do you have problems with shop entrance tailgaters? Should you rent a robot? Are sticky notes your idea of shop communication? Take 10 minutes and find out how to address these issues and more by watching Season Two of “Smart(er) Shop,” an IMTS+ Original Series, brought to you by Autodesk, premiering October 26 on IMTS.com.

Smart(er) Shop features Ryan Kelly, the general manager for AMT’s San Francisco Tech Lab, and Adam Allard, the senior manager of technical environments at Autodesk, who oversees Autodesk Technology Centers across North America. Their mission is to provide low cost/easy-to-deploy tech and ideas that help small and medium-sized manufacturers and job shops improve operations.

Cybersecurity Tips From MXD

Because manufacturing is the target for nearly one-quarter of ransomware attacks, episode one features MxD, a digital manufacturing and cybersecurity institute based in Chicago. The MxD team highlights six security practices from its free cybersecurity playbook that anyone can implement. Learn how to

deal with tailgaters (someone riding your tail to enter a facility on your security badge), encrypted USBs, set up allow-listing software, and more. For shops pursuing Cybersecurity Maturity Model Certification (CMMC 2.0) to obtain defense contracts, this is a must-watch, two-part episode.

Rental Robots for Quality Control

Episode two takes the team to Topcon Position Systems, a leading global manufacturer of positioning systems for construction and agricultural equipment. Ryan and Adam learn that while human brains are great at recognizing patterns, they are lousy at concentrating on repetitive details, which create a vexing inspection problem. Using a “robots-as-a-service” solution from Rapid Robotics paired with an AI-driven vision system from Elementary, Topcon has eliminated a QC issue that plagues many manufacturers. The best part: The solution hits the company’s operating budget for about the daily cost of a lunch for two.

Connected Solutions

Filmed at the Autodesk Technology Center San Francisco at Pier 9 in San Francisco, episode three focuses on the benefits of a connected shop. The

Autodesk team demonstrates the productivity and quality benefits possible with CAD-CAM software featuring built-in (and free!) drivers for Haas, Mazak, and other CNCs. In an era where too many shops write post-processor information on a sticky note and pray for good outcomes after pressing the cycle start button, this episode drives home the benefits of a modern digital workflow. It also features a malicious penguin and channels Young Frankenstein to convey key points — you’ll just have to watch to appreciate the context.

Kelly and Allard offer up three budget-friendly, easy-to-implement ideas for small and medium-sized shops. Level up your operations without breaking the bank or a wizard’s degree in technology by tuning in October 26 to the premiere of Season Two of “Smart(er) Shop,” an IMTS+ Original Series, brought to you by Autodesk, on IMTS.com.



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