Kata Coaching Experiential

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KataMatters
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Rev 3.0
**Kata**

*Kata*: structured routine

*Improvement Kata*: practice routine used to imbed a scientific pattern of acting and thinking

*Coaching Kata*: practice routine used to teach the scientific pattern of working and thinking

Practicing these Kata to internalize the routines leads to creating new thought patterns and mindset.
Improvement Kata and Coaching Kata

Improvement Kata

Coaching Kata

ASK THE 5 TK QUESTIONS AT EACH STEP

1. What is the Target Condition?
2. What is the Actual Condition now?
3. What Obstacles do you think are preventing you from reaching the target condition? Which *ONE* are you addressing now?
4. What is your Next Step (next experiment)? What do you Expect?
5. How quickly can we go and see what we Have Learned from taking that step?

Content Based on Toyota Kata Mike Rother
## The Roles

<table>
<thead>
<tr>
<th>Learner</th>
<th>Coach</th>
<th>2nd Coach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop the skill by following a routine. Learning the Improvement Kata and learning about their own process.</td>
<td>Develop the learner’s skill by following a questioning routine and giving procedural course correction if needed.</td>
<td>Develop the coach’s skill through corrective and constructive feedback. Teaching the coach to see.</td>
</tr>
</tbody>
</table>

Content Based on Toyota Kata Mike Rother
The Relationships

Learner
Natural process owner

Coach
Vested interest in developing skill in the learner
And improving the process

2nd Coach
Vested interest in developing skill in the coach
And improving the process

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Developing Meta-Routine

A meta-routine or kata for **all levels** and **all areas** of an organization.

Coaching Kata deployed in all levels ion develops a catch-ball routine along chain of accountability.

Content Based on Toyota Kata Mike Rother
What It Looks Like

- **Coach**
- **2nd Coach**
- **Learner**

Content Based on Toyota Kata Mike Rother
The Tactical Roles for LEARNER (Pg. 1) – Feedback from Class Exercise

- Facilitate experiment
- ID obstacles
- Know process
- Go see
- Willing / open minded
- Execute
- Involve others
- Accountable for the process / outcome
- Know PDCA
- Define CC
- Set TC
- Identify obstacles
- Experiment
- Reflect & learn
- Engage team members
- Update their story board

- Lead daily experiments
- Collect data on current state & experiments
- Adjust practice based on feedback
- Engaging & sharing learning with team
- Board update
  - Complete PDCA
  - Reflect
  - Plan next step
  - Obstacles
    - Identify new
    - Update existing
    - Parking lot
- Willing to learn
- Only answer the questions asked
- Consult team
- Prepared
- Daily
- Know challenge / TC

Content Based on Toyota Kata Mike Rother
The Tactical Roles for LEARNER (Pg. 2)  
– Feedback from Class Exercise

• Make experiments  
• Learn the DATA pattern  
• Don’t be afraid of obstacles  
• Learn about operational process  
• Identify & select obstacles  
• Identify target condition  
• Do PDCA  
• Do actions  
• Reflect on what happens  
• Learn  
• Open minded  
• Be ready  
• Management commitment  
• Deep understanding of current state  
• Set next TC content  
• Committed

Content Based on Toyota Kata Mike Rother
### The Tactical Role for COACH (Pg. 1)

#### – Feedback from Class Exercise

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
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<tbody>
<tr>
<td>Accountable for the process / outcome</td>
<td>Don’t give answers</td>
</tr>
<tr>
<td>Develop learner</td>
<td>Open ended questions</td>
</tr>
<tr>
<td>Active listener</td>
<td>Follow the pattern</td>
</tr>
<tr>
<td>Go see</td>
<td>Be comfortable with silence (letting people think)</td>
</tr>
<tr>
<td>Follow KATA process</td>
<td>Daily prioritization</td>
</tr>
<tr>
<td>Know PDCA</td>
<td>Let people learn through success and failure</td>
</tr>
<tr>
<td>Willing to learn</td>
<td>Encouragement</td>
</tr>
<tr>
<td>Coach daily</td>
<td>Determine knowledge threshold of learner / observing what they say and do</td>
</tr>
<tr>
<td>Develop learner</td>
<td>Committed to teach</td>
</tr>
<tr>
<td>Ask clarifying questions</td>
<td>Teach not tell</td>
</tr>
<tr>
<td>Responsible for results</td>
<td>Ask good questions</td>
</tr>
<tr>
<td>OK to fail “culture”</td>
<td>Ask the 5 questions</td>
</tr>
<tr>
<td>Self efficiency of the learner</td>
<td>Follow the process</td>
</tr>
<tr>
<td>Not give solutions</td>
<td></td>
</tr>
<tr>
<td>Knowledge threshold of the learner</td>
<td></td>
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</tbody>
</table>
Make sure challenge is meaningful to TC (and) is aligned to challenge
Understand learners threshold of knowledge
Good TC with proper scope
  • Not too far
  • Not too close
Daily
Know when to go & see w/ the learner
Keep PDCA small / quick
Develop skill of learner
Don’t give solutions
Provide questions to draw out learner
Stick to the 5 coaching questions

Keep on tack toward challenge
Develop schedule + time for practice
Listen
Ask right questions in right order
Course correct
  • Procedure
  • Not content
Set TC date
Reflect on TC with learner
The Tactical Role for 2\textsuperscript{nd} COACH – Feedback from Class Exercise

- Accountable for the process / outcome
- Develop the coach
- Attend coaching sessions with some regularity
- Provide Feedback
- Have coaching experience
- Not act as coach
- Focus on role
- Private feedback
- Follow same open ended question approach
- Determine knowledge threshold of coach by observing what they say and do
- Teach the coach (away from learner)

- Develop skills of coach
- Develop schedule of + time for practice
- Guide coach
- Positive Influence
- Set challenge content + date
Desired Pattern of Practice

Practice Pattern

To Imbed New Behavior

The Work Day

- Work Day
- Learning and Striving
- Troubleshooting

Content Based on Toyota Kata Mike Rother
What has Science taught us about practice?

Precise

Frequent but Short Bursts

Deliberate or intentional

Meta-cognition

METACOGNITION = 
*Thinking about how you think*  
i.e., analyzing your own cognitive processes
What has Science taught us about practice? – Feed Back from Class Exercise

- Developing muscle memory
- Repetition (short intervals)
- Bad practice
- Struggle
- Purpose (creating habit / skill)
- Positive feeling (success / wins)
- Follow the evidence

- Ignition
- Awkward at first
- Practice makes permanent
- Practice improves efficiency
- Practice enable us to focus on the game
- Builds habits
What has Science taught us about practice? – Feed Back from Class Exercise

- Rewires thought patterns
- Discourages assumptions
- Gain expertise
- Practice make permanent
- Creates a situational muscle memory
- Repetition creates a habit (21d)
- Practice permanent

- Helps us recognize our own bias
- Situation comes back to muscle memory (paths)
- Make decisions based on facts / data vs. opinion
- Creates a new or altered behavior
- Improves knowledge base
What has Science taught us about practice? – Feed Back from Class Exercise

- Ok to fail as long as there is learning
- Perfect practice makes perfect
- Without Improvement you get atrophy
- 21 – 30 continuous days to develop a habit
- Practice will change your brain
- Use it or lose it
- Develop new neural pathways

- Frequent is good, otherwise doesn't stick (no new habit is formed)
- Perfect practice make perfect
- Self-efficacy motivated practice
- Builds neural pathways which uses less energy
- Old habits die hard (are prevalent) need corrective / positive feedback
The Desired Mindset

Learner

• Willing to learn through failure
• Be brave

Coach

• Be vulnerable
• Pull best from learner instead of pushing
• Looks at coaching as opportunity for mutual development
• Willing to listen more than talks

2nd Coach
If you are not willing to learn, no one can help you.

If you are determined to learn, no one can stop you.

- Zig Ziglar
Mindset perspective from LEARNER – Feed Back from Class Exercise

- Failure is acceptable
- Intent to learn
- Willingness to experiment
- Creative
- Empathy
- Willingness to discover
- Team orientated
- Willing to say; “I don’t know”
- Invested in (the) process
- Comfortable not knowing
- Willing to experiment (and fail)
- Self reflection
- Improvement minded
- Creative
- More curious than certain

- Understanding the challenge (current / target conditions)
- Completed PDSA cycle
- Point and read
- Willing to take risks
- Identifying all obstacles
- Gathering current condition
- Humble – curiosity
- Courageous
- Engaging
- Learn
- Open minded
- Committed / patient
- Curious / willing to learn
- Positive / open minded

Content Based on Toyota Kata Mike Rother
Mindset perspective from COACH – Feed Back from Class Exercise

- Willing to let the learner fail
- Not providing solutions
- Guide to next step
- Trust the process
- Empathy
- Patient listener
- Invested in learner
- Listening for “gold”
- Grit
- Serves to improve the learner
- Willing to allow failures
- Strategic purpose
- Patient
- Adaptable
- Engagement
- Proficient at starter KATA
- Give procedural guidance as opposed to contextual guidance
- Find the knowledge threshold
- Catch + correct
- Be patient
- Ensure there’s “real” learning
- Obstacles focused on target condition
- Emotionally intelligent
- Patient
- Striving
- Pure desire to see others succeed
- Open minded
- Learn
- Committed / patient
- Curious
- Disciplined
- Empathetic
Mindset perspective from 2\textsuperscript{nd} COACH – Feed Back from Class Exercise

• Ensure alignment with challenge
• Allow failure
• Empathy
• Patient listener
• Invested in coach
• Long-term vision (people / organization)
• Serves to improve the coach
• Critical
• Adaptable
• Oversee the process
• Patient
• Long term mentality
• Desire to see others succeed
• Open minded
• Learn
• Committed / patient
• See the big picture
• Curious
• Patient
The Scripts

Coach

Learner

2nd Coach

COACHING CYCLE OBSERVATIONS

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What is the knowledge threshold? Impressions:

Key point(s) for this Coach to practice next: Next coaching cycle.

Content Based on Toyota Kata Mike Rother
**Storyboard - converting Vision to Action**

### Iterative Process

**Focus Process:**

<table>
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<th>Focus Process:</th>
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</thead>
<tbody>
<tr>
<td>Target Condition</td>
<td>Establish Date: Achieve By Date:</td>
</tr>
<tr>
<td>Actual Condition Now</td>
<td>PDCA Cycles Record</td>
</tr>
<tr>
<td>Obstacles Parking Lot</td>
<td></td>
</tr>
</tbody>
</table>

"I wish to do something great and wonderful, but I must start by doing the little things like they were Great and Wonderful"

- Albert Einstein according to Forbes

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Content Based on Toyota Kata Mike Rother
<table>
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<th>Focus Process:</th>
<th>Challenge: (Data Set)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Condition</td>
<td>PDCA Cycles Record</td>
</tr>
<tr>
<td>Establish Date: Achieve By Date:</td>
<td></td>
</tr>
</tbody>
</table>

Think Global

Act Local

Learner's Storyboard

Rev 1.0

Content Based on Toyota Kata Mike Rother
Challenge – Key Characteristics

Vision
• Top of the funnel
• Decades or Centuries
• Aspirational
• Destination not Journey
• Customer Facing

Challenge
• First step of the funnel
• Time based in terms of years or month – specific achieve by date.
• Measurable – we will know for certain we have achieved
• Many challenges to achieve Vision
• Destination not Journey
• Customer Facing

Content Based on Toyota Kata Mike Rother
Challenge

• It’s about Achieving not Doing

By describing the doing you put your blinders on, this is common approach. Our brain fills in the blank and shoot through our threshold of knowledge.
Challenge

• Often times best described as Multi – Faceted Objectives
Challenge – Key Characteristics

Challenge

- Nothing more than a hypothesis that we will be closer to the Vision

Scientific Thinking
<table>
<thead>
<tr>
<th><strong>Vision</strong></th>
<th><strong>Challenge</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ideally “very” long term</td>
<td>Outcome metrics</td>
</tr>
<tr>
<td>Provides direction</td>
<td>Due Date</td>
</tr>
<tr>
<td>Inspiring</td>
<td>Concrete</td>
</tr>
<tr>
<td>Provides guiding principles</td>
<td>Impact bottom / top line</td>
</tr>
<tr>
<td>Benefits “greater good”</td>
<td>Specific</td>
</tr>
<tr>
<td></td>
<td>Aligns with vision</td>
</tr>
<tr>
<td></td>
<td>Provides rallying point</td>
</tr>
<tr>
<td></td>
<td>Months or 1 year out</td>
</tr>
<tr>
<td></td>
<td>Comes from top of Co.</td>
</tr>
<tr>
<td></td>
<td>Unclear path to it</td>
</tr>
<tr>
<td></td>
<td>Benefits the company</td>
</tr>
<tr>
<td></td>
<td>+ Tied to the customer</td>
</tr>
</tbody>
</table>
Focus Process - Key Characteristics

Focus Process
• Next step in the funnel
• Many Focus Processes to achieve Challenge
  • From Value Stream level, Value Stream Loop, Process, to Process Step
• Must relate and align to the Challenge
• But we it is difficult to learn, see and measure the impact of our experiments if our focus is too broad.
• Selecting a Focus Process set us up in a “Learning Lab”.

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Focus Process – Key Characteristics Feedback from Class Exercise

Focus Process Selection

- Track time / plan cycle time / good measurement
- Low cost / no cost solutions
- Pace setter / unstable process
- Learning Lab
Current Condition - Key Characteristics

Current Condition

• Grasp current condition - As it relates to the Challenge
  • We don’t have to know everything about our current condition, just enough to set target condition
• Initial process analysis – mini kata – builds capability with practice
  1. Outcome metric
  2. Current Pattern – way of doing
     1. Pattern
     2. Characteristics
     3. Process metric
     4. Capacity
     5. Resources actual and calculated as required
Current Condition - Key Characteristics

Current Condition

- Understand variation in process
  - Customer feel variation not average

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Current Condition

- Last step reflection part of Current Condition

Reflect on the Last Step Taken

Because you don’t actually know what the result of a step will be!

1) What did you plan as your Last Step?
2) What did you Expect?
3) What Actually Happened?
4) What did you Learn?

Return to Question 3
Current Condition – Key Characteristics Feedback from Class Exercise

Current Condition

1. Process steps related to target condition / challenge
2. Metric for each step of process
3. Process flow document
Target Condition - Key Characteristics

- Next step in the funnel
- Dates in terms of Days, Weeks, Months – as close in as possible
- What will we strive to achieve
- Not how we will achieve it

Elements of a Mature Target Condition
- Desired Pattern of Work
- Process Characteristics
- Process Metric
- Outcome Metric

Content Based on Toyota Kata Mike Rother
Target Condition - Key Characteristics

Process Metric
• Typically related to the desired pattern of work
• In the moment measurement – do it measure it

Outcome Metric
• Mathematically (logically) linked to process metric
• Mathematically (logically) linked to Challenge
• Measured/determined after the fact, over-time

Getting closer to action, but we don’t PDCA to achieve Target Condition directly, we PDCA to overcome Obstacles
Target Condition

- Able to demonstrate how the TC is on path toward the challenge / informed by a deep understanding of the current condition
- Process metrics that relate to an outcome metric
- Desired path of work preferably visually expressed with a due date
TCₙ → TCₙ₊₁ Kata (Next Target Condition)

Learner and Coach reflect on last Target Condition
  – Did we achieve Target Condition?
  – What did we learn about setting Target Conditions?
  – What did we learn while striving for this Target Condition?

Learner and Coach reflect on Vision and Challenge
  – Did we make progress?

Grasp Current Condition
  – Time to practice Process Analysis

Coach sets next Target Condition date
Learner proposes next Target Condition
Coach approves or works with Learner to develop acceptable Target Condition
Learner lists obstacles to new Target Condition
Determines which one to address
Obstacles - Key Characteristics

What obstacles do you think are preventing you from reaching your target condition?

• Obstacles need to be linked to the Target Condition
• Obstacles should be precise, detail
• Current hypothesis – obstacles are not nouns.
  • Obstacles are not people.
  • Obstacles are not things
• Obstacles reflect the manifestation (effect) of a noun.
• Obstacle should be lead to a hypothesis
• Obstacle should be measurable
• Obstacles should be against the pattern of work not a metric – this is hard!
Obstacles - Key Characteristics

Next Step in the Funnel, Which One!

• This is not a pareto – biggest bang for the buck decision

• Select obstacle within your control

• Within the routine current pattern of work
Obstacles – Key Characteristics Feedback from Class Exercise

**Obstacles**

- Well defined
- Something that would prevent reaching target condition
- Shouldn’t be an action item / solution
PDCA – Plan, Do, Check, Act

• PDCA should be linked to the Obstacle
• Specific details of step
• Specific details on how step will be measured
• The more scientific the better, make prediction, explain hypothesis
• What do you expect to happen and to learn

THREE KINDS OF PDCA EXPERIMENTS
The following hierarchy goes from less to more scientific

1) Go and See
   Direct observation and data collection, without changing anything, to learn more about a process or situation.

2) Exploratory Experiment
   Introducing a change in a process to see, via direct observation, how the process reacts. Done to help better understand the process.
   Example: Try to run a process as specified in the target condition, to see where it fails and build your obstacles parking lot. Often this is the first experiment.

3) Testing a Hypothesis
   Introducing a change, ideally in only a single factor, together with a prediction of what you expect to happen.
Go and Teach tends to be a common PDCA step on Novice boards

- Change to experiment
- Learn what to teach
- Learn how to teach
- Then execute and move on to next Target Condition
PDCA– Key Characteristics Feedback from Class Exercise

**PDCA**

- Address specific obstacle
- Answer truly unknown experiment (not a “just do it” list)
- The learning is specific to the expectation
- Should expose the next obstacle
- Single experiment at one time
The Scripts

Coach

Learner

The Five Questions
1) What is the Target Condition?
2) What is the Actual Condition Now?
3) What Obstacles do you think are preventing you from reaching the target condition? Which “one” are you addressing now?
4) What is your Next Step? (Next experiment: What do you expect?)
5) How quickly can we go and see what we have learned from taking that step?

Reflect on the Last Step Taken
Because you don’t actually know what the result of a step will be:
1) What did you plan as your Last Step?
2) What did you Expect?
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4) What did you Learn?

COACHING CYCLE OBSERVATIONS

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<tr>
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<th>Learner:</th>
<th>Start/End:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question</td>
<td>Learner</td>
<td>COACH</td>
</tr>
<tr>
<td>Review Challenge</td>
<td></td>
<td></td>
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What is the knowledge threshold? | Impressions:

Key point(s) for this Coach to practice next: | Next coaching cycle:
### Learner’s Storyboard Quality Checklist

**Focus Process:** Describe the process the learner is learning about and striving to improve to move performance closer to the Challenge.

**Target Condition**
- TC must align with Challenge
- Establish Date: Achieve By Date:
  1. A desired pattern of work in the form of a block diagram with times. (Steps, sequence and time).
  2. Process Characteristics
  3. Process Metric Value learner predicts the desired pattern will achieve, this should mathematically/logically relate to Outcome Metric.
  4. Outcome Metric Value learner predicts the desired pattern will achieve

**Challenge:** Describe the Challenge achieve by date and what the learner is striving to achieve.

**Actual Condition Now**
- CC should include
  1. A description of the current pattern of work with times {Steps, Sequence and Times} modified as changes have occurred over time.
  2. Process Characteristics
  3. Current and up to date Process Metric Chart(s)
  4. Current and up to date Outcome Metric Chart(s)

**PDCA Cycles Record**
- PDCA Cycles Record any other pertinent information, pictures, etc...
- PDCA should address a specific Obstacle to achieving the TC

**Obstacles Parking Lot**
- Obstacles listed, Indicating the one learner is addressing.
- Obstacles should be specific not vague, nor should solutions or lack of solutions be listed.
- Obstacles need to relate to TC

**IK and CK Information**
- Up to date PDCA Coaching Cycle Tracking Record

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Content Based on Toyota Kata Mike Rother
The Five Questions

1) What is the Target Condition?
2) What is the Actual Condition now?

---(Turn Card Over)------------------------>

3) What Obstacles do you think are preventing you from reaching the target condition?
   Which *one* are you addressing now?
4) What is your Next Step?
   (Next experiment) What do you expect?
5) How quickly can we go and see what we Have Learned from taking that step?

*You’ll often work on the same obstacle for several PDCA cycles

Reflect on the Last Step Taken

Because you don’t actually know what the result of a step will be!

1) What did you plan as your Last Step?
2) What did you Expect?
3) What Actually Happened?
4) What did you Learn?

--------------------------------------------------------------->

Return to Question 3
### Clarifying Questions - Exercise

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<tbody>
<tr>
<td><strong>Target Condition</strong></td>
<td>Asks questions to see how the learner is thinking not to lead them in a desired direction unless all other avenues have been exhausted</td>
</tr>
<tr>
<td><strong>Current Condition</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Reflection</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Obstacles</strong></td>
<td></td>
</tr>
<tr>
<td><strong>PDSA</strong></td>
<td></td>
</tr>
<tr>
<td><strong>How Soon?</strong></td>
<td>Use Let’s Go and Learn together</td>
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### Giving Feedback to Coach

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<td>Key point(s) for this Coach to practice next:</td>
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<td>Next coaching cycle:</td>
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#### WHAT’S THE THRESHOLD OF KNOWLEDGE?

It’s the point at which you have no facts & data and start guessing

<table>
<thead>
<tr>
<th>Condition</th>
<th>Uncertainty / Learning Zone</th>
<th>Limit of what you currently know</th>
<th>The Goal</th>
</tr>
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<tbody>
<tr>
<td>Now</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Knowledge Threshold</td>
<td><img src="image" alt="Diagram" /></td>
<td><img src="image" alt="Diagram" /></td>
<td><img src="image" alt="Diagram" /></td>
</tr>
</tbody>
</table>

Where you are | Limit of what you currently know | The Goal
---|---|---

Are the learner and coach practicing the desired pattern of work?

Is their practice a daily (frequent) routing imbedded in their day

---

Content Based on Toyota Kata Mike Rother
Building Coaching Capacity

- Practice coaching
- Able to Do it
- Able to Coach it
- Able to Teach it

Content Based on Toyota Kata Mike Rother
Skill Acquisition

Assessment Tool for Kata Skill
This is about skill not people

Dreyfus Model of Skill Acquisition
five levels of progress in learning a skill with coaching

Use the tool to determine what needs to be practiced to increase skill

1. Novice
   - Start with awareness
2. Advance Beginner
   - Build your own skill
3. Competent
   - Able to Do
   - Able to Coach
   - Able to Teach at Proficient
4. Proficient
   - Able to Teach
   - Able to Coach
5. Expert
   - And then you can teach
   - So then you can coach...

Building Skill

Content Based on Toyota Kata Mike Rother
<table>
<thead>
<tr>
<th>Level</th>
<th>Characteristics</th>
<th>Standard of Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Novice</td>
<td>Adherence to rules</td>
<td>Unlikely to be satisfactory unless closely supervised</td>
</tr>
<tr>
<td></td>
<td>Specific rules for specific circumstances</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No modifiers, no discretionary judgment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Does not feel responsible for other than following the rules</td>
<td></td>
</tr>
<tr>
<td>Advance Beginner</td>
<td>Actions based on attributes or aspects</td>
<td>Straightforward tasks completed to an acceptable standard</td>
</tr>
<tr>
<td></td>
<td>Situational perception still limited</td>
<td></td>
</tr>
<tr>
<td></td>
<td>All aspects given equal importance</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Does not accept personal responsibility</td>
<td></td>
</tr>
<tr>
<td>Competent</td>
<td>Copes with crowdedness</td>
<td>Fit for purpose, though may lack refinement</td>
</tr>
<tr>
<td></td>
<td>Sees actions partially in terms of long term goals</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Has standardized and routinized procedures</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sorts information based on relevance</td>
<td></td>
</tr>
<tr>
<td>Proficient</td>
<td>Well practiced demonstrating competent skill in a multitude of settings</td>
<td>Fit for purpose, though may lack refinement</td>
</tr>
</tbody>
</table>

Content Based on Toyota Kata Mike Rother
Why a coach, 2\textsuperscript{nd} coach must understand Skill Level

Characteristics of a Novice/Advance Beginners

- Coach must recognize the speed at which learner’s can accept course corrections
- Too many things to work on at once confuses Novice
- Too large of a change, frustrates Novice
- Recognize when a Novice needs “Coaching/Teaching” outside of the Coaching Kata
## Skill Assessment Tools

### Learner Skill Assessment

<table>
<thead>
<tr>
<th>Category</th>
<th>N/R</th>
<th>1 - Notice</th>
<th>2 - Advanced Beginner</th>
<th>3 - Competent</th>
<th>4 - Proficient</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leadering Challenges &amp; Methods</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.0</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.0</td>
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<td>0.0</td>
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<td>0.0</td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>0.0</td>
</tr>
</tbody>
</table>

### A COACHING KATA SKILL-LEVEL SCALE

<table>
<thead>
<tr>
<th>Stage</th>
<th>Description</th>
<th>Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Novice</td>
<td>-</td>
</tr>
<tr>
<td>2</td>
<td>Beginner</td>
<td>-</td>
</tr>
<tr>
<td>3</td>
<td>Expert</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>-</td>
</tr>
</tbody>
</table>

### Coach:

- Intuitive grasp of coaching based on deep, practiced understanding
- Direct, yet supportive
- Coaching conversations are natural; learner doesn’t notice being coached
- Sought after for coaching advice

### Autonomy

-公布了 Regarding learners’ gaps or weaknesses
- User coaching guide: adapts to the situation, asks meaningful questions
- Ability to access learners’ preferred learning style (auditory, visual, kinesthetic)
- 2nd Coach capability

### Assessment & Planning

- Ramp up to reveal, did not know existed
- Is an instructional designer and is effective in teaching
- Coaching embedded in normal daily work
- 2nd Coach needed periodically

### Target Condition Details

- Clearly delivered, no other issues
- Clear dualistic role coaching, no other issues
- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach

### Category Score (weaving in scores in category)

- Effective goal setting and delivery of feedback
- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach

### Category Score (weaving in scores in category)

- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach
- Learner needs a more structured approach

### Content Based on Toyota Kata Mike Rother
Skill is Situational

- Changes in
  - Focus Process
  - Environment
  - Challenge

- Demonstrated skills fluctuate

Skill Development is not linear
Let’s Practice Novice to Competent Storyboards

<table>
<thead>
<tr>
<th>Novice</th>
<th>Competent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Focus Process:</strong></td>
<td><strong>Challenge:</strong></td>
</tr>
<tr>
<td>Target Condition</td>
<td>(Date by)</td>
</tr>
<tr>
<td>Establish Date:</td>
<td>Achieve By Date:</td>
</tr>
<tr>
<td>Actual Condition Now</td>
<td>PDCA Cycles Record</td>
</tr>
<tr>
<td>Obstacles Parking Lot</td>
<td></td>
</tr>
</tbody>
</table>
Let's Practice – 4 Novice Storyboards Ideas to Convert to Competent

<table>
<thead>
<tr>
<th>Focus Process: Time /Payroll Verification</th>
<th>Challenge: Reduce time/payroll verification to 5 hrs/payroll to allow for attrition without backfilling open position</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target Condition</strong></td>
<td></td>
</tr>
<tr>
<td>Establish Date: 8/14/2016</td>
<td></td>
</tr>
<tr>
<td>Achieve By Date: 9/14/2016</td>
<td></td>
</tr>
<tr>
<td>Train supervisors and managers on</td>
<td></td>
</tr>
<tr>
<td>expectations</td>
<td></td>
</tr>
<tr>
<td>24 hour turnaround time</td>
<td></td>
</tr>
<tr>
<td>10% compliance</td>
<td></td>
</tr>
<tr>
<td><strong>Actual Condition Now</strong></td>
<td></td>
</tr>
<tr>
<td>20 Departments</td>
<td></td>
</tr>
<tr>
<td>500 time validations to do HR</td>
<td></td>
</tr>
<tr>
<td>spending 40 hrs/week verifying</td>
<td></td>
</tr>
<tr>
<td>Report generated every 2 weeks</td>
<td></td>
</tr>
<tr>
<td><strong>PDCA Cycles Record</strong></td>
<td></td>
</tr>
<tr>
<td>Next step: training session with all</td>
<td></td>
</tr>
<tr>
<td>supervisors and managers</td>
<td></td>
</tr>
<tr>
<td>Expect: to understand the expectations</td>
<td></td>
</tr>
<tr>
<td><strong>Obstacles Parking Lot</strong></td>
<td></td>
</tr>
<tr>
<td>• Supervisor turnaround time</td>
<td></td>
</tr>
<tr>
<td>• Chasing down mgrs/supervisors</td>
<td></td>
</tr>
<tr>
<td>out of town</td>
<td></td>
</tr>
<tr>
<td>• New person in HR doing the job</td>
<td></td>
</tr>
</tbody>
</table>
# Let’s Practice – 4 Novice Storyboards Ideas to Convert to Competent

<table>
<thead>
<tr>
<th>Focus Process: New Med Education</th>
<th>Challenge: By Sept 30, 2017 achieve pt satisfaction score =&gt; 90% ile</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target Condition</strong></td>
<td><strong>Actual Condition Now</strong></td>
</tr>
<tr>
<td>Establish Date: 2/14/2017</td>
<td>Current condition: 70% ile for Dec 2016, Jan report due 2/15</td>
</tr>
<tr>
<td>Achieve By Date: 2/28/2017</td>
<td>12 Nurses on 2 shifts plus 5 PRN</td>
</tr>
<tr>
<td>Train nurses on script and</td>
<td>Nurse manager meets all pts to discuss med education</td>
</tr>
<tr>
<td>100% compliance</td>
<td>New script created to education pt on new meds</td>
</tr>
<tr>
<td>100% score pts understanding meds with nurse manager and pt</td>
<td>Med information in EPIC computer system</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PDCA Cycles Record</th>
<th>Obstacles Parking Lot</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next step: training session with all nurses to new script</td>
<td>- Nurses on 2 shifts</td>
</tr>
<tr>
<td>Expect: to understand the expectations</td>
<td>- PRN not in for weeks at a time</td>
</tr>
<tr>
<td></td>
<td>- Head nurse position open on one of two shifts</td>
</tr>
</tbody>
</table>

Learner’s Storyboard

Rev 1.0

Content Based on Toyota Kata Mike Rother
Let’s Practice – 4 Novice Storyboards Ideas to Convert to Competent

<table>
<thead>
<tr>
<th>Focus Process: Stamping Operation</th>
<th>Challenge: YE 2016 reduce stamping scrap from 5% to 1.0%</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Target Condition</strong></td>
<td></td>
</tr>
<tr>
<td>Establish Date: 8/14/2016</td>
<td></td>
</tr>
<tr>
<td>Achieve By Date: 9/14/2016</td>
<td></td>
</tr>
<tr>
<td>Have supplier x material analysis</td>
<td></td>
</tr>
<tr>
<td>complete, updates specifications</td>
<td></td>
</tr>
<tr>
<td>and educate supplier.</td>
<td></td>
</tr>
<tr>
<td>Parts meet all functional and</td>
<td></td>
</tr>
<tr>
<td>durability requirements</td>
<td></td>
</tr>
<tr>
<td><strong>Actual Condition Now</strong></td>
<td></td>
</tr>
<tr>
<td>Stamping Department</td>
<td></td>
</tr>
<tr>
<td>Scrap rate:</td>
<td></td>
</tr>
<tr>
<td>July 2016</td>
<td></td>
</tr>
<tr>
<td>2.5 % supplier material one lot</td>
<td></td>
</tr>
<tr>
<td>of material</td>
<td></td>
</tr>
<tr>
<td>Reject</td>
<td></td>
</tr>
<tr>
<td>1.5 % blemishes</td>
<td></td>
</tr>
<tr>
<td>1.0 % set up scrap</td>
<td></td>
</tr>
<tr>
<td>Each set up creates 3-5 pcs</td>
<td></td>
</tr>
<tr>
<td>Of scrap per die set. Each press</td>
<td></td>
</tr>
<tr>
<td>has 3 dies sets.</td>
<td></td>
</tr>
<tr>
<td>20 machines.</td>
<td></td>
</tr>
<tr>
<td>Production per press 5,000 pcs/</td>
<td></td>
</tr>
<tr>
<td>shift 1 shift per day.</td>
<td></td>
</tr>
<tr>
<td><strong>PDCA Cycles Record</strong></td>
<td></td>
</tr>
<tr>
<td>Next step:</td>
<td></td>
</tr>
<tr>
<td>complete lab analysis of sample</td>
<td></td>
</tr>
<tr>
<td>parts</td>
<td></td>
</tr>
<tr>
<td>Expect: to understand what</td>
<td></td>
</tr>
<tr>
<td>specs need to be</td>
<td></td>
</tr>
<tr>
<td><strong>Obstacles Parking Lot</strong></td>
<td></td>
</tr>
<tr>
<td>• We do not know complete</td>
<td></td>
</tr>
<tr>
<td>chemical analysis</td>
<td></td>
</tr>
<tr>
<td>• We don’t know status of customer</td>
<td></td>
</tr>
<tr>
<td>change request</td>
<td></td>
</tr>
<tr>
<td>• Need Chief engineer</td>
<td></td>
</tr>
</tbody>
</table>

Learner’s Storyboard

Rev 1.0

Content Based on Toyota Kata Mike Rother
Let’s Practice – 4 Novice Storyboards Ideas to Convert to Competent

**Focus**
Process: Prepare mentoring program

**Challenge:** By 9/2018 move retention rate from 77% to 90% by implementing an effective freshman mentoring program.

**Target Condition**
Establish Date: 2/14/2017
Achieve By Date: 4/1/2017

Have mentor program designed and 20 mentors trained ready to assign students at freshman orientation.

**Actual Condition Now**
- No mentoring program
- We don’t know why student withdraw

Retention FA to FA

**PDCA Cycles Record**
Next step: study mentoring program at other peer colleges.
Expect to understand effective mentoring program

**Obstacles Parking Lot**
- We do not know what other mentoring programs are out there
- What is the national benchmark
- We need to ask our students what their needs
- Who will be mentors
- No mentor expectations or training
- How will mentoring program with with academic early alert program and tutoring program

Learner’s Storyboard
Rev 1.0
Thank you for your time and input

Hope You Learned as much as I did this afternoon.

Thank You!

Good Luck on your experiments.

Kata, kata, kata…..

Beth Carrington