

Improving the Usefulness of Your Toyota Kata Storyboard | 072

Welcome to Lean Leadership for Ops Managers, the podcast for leaders in Ops Management who want to spark improvement, foster engagement, and boost problem solving - AND still get their day job done. Here's your host, Leadership Trainer, Lean Enthusiast, and Spy Thriller Junkie, Jamie V. Parker.

[00:00:30] How would I even use a physical board if my coach is thousands of miles away? That's right. It's Kata time again on the podcast and what we're talking about today is that debate, that question, "Do I make a physical storyboard or do I use a digital storyboard?" Oh, my goodness.

Well, I'm going to share with you my experiences, some of my lessons learned, and why there's a specific board that works best for me. I have participated in two different eight week challenges as the learner in a learning group, as the learner with the a girl geeks, right? So it's an opportunity for me to learn and practice Improvement Kata. I'm the learner and I have a coach. And one of the things I learned is that typically we think of the Toyota Kata as those four steps, right?

- 1: You understand the challenge or direction
- 2: You're going to grasp the current condition.
- 3: You establish the next target condition
- 4: you experiment your way toward the target condition

Those are the four basic steps, but actually within the Improvement Kata, as it's designed by Mike Rother, there are seven Starter Kata now. Two of the starter kata are for the coach, and those are the five questions and the daily coaching cycles. That means there are five different starter kata that the learner goes through and learns, right? So here there are kind of starter kata within the overall steps. So here are the five different starter kata that the learner focuses on.

- [00:02:14] 1. The learner storyboard number
2. The steps of process analysis
 3. The steps to establishing a target condition number
 4. The obstacle parking lot
 5. The experiment record

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Now today we're talking about that first Starter Kata, the learners storyboard. Now, if you haven't seen a picture of the learner storyboard, you can head to our show notes processplusresults.com/podcast to see a visual image of the learner storyboard. And you also can always go to Mike Rather's website and get all of the free resources that he provides as well.

So the storyboard has different sections right along the top. You have the focus, process, and the challenge. Then there are three columns underneath that. The left column is the target condition. The middle column is the current condition. The right column has the experimenting record on top and the obstacles parking lot on the bottom.

And when I first started my very first learning group as a learner in the Kata Girl Geeks, one of the decisions I had to make was how am I going to make my storyboard? And to be honest, it was a no brainer. Like, of course, I'm going to use Mural, right? Like, of course I'm making a digital board, right? I mean, number one, my coach is virtual, right? I live in Denver, my coach lives out in the Midwest. Why would I even try a physical board? Plus, I travel.

[00:03:46] I travel for work. I travel to visit family. I'm not going to drag a big old board around. And while I usually work in my home office, you know, sometimes I like to work from the, you know, table outside, on the patio or from the basement den. Do I really want this thing to be stuck in one room? I mean, to me, it was just a no brainer, right? I'm using Mural. I know Mural. I have an account, I know how to use it. And Gemma Jones, who is just absolutely fantastic, has a great Kata storyboard template that she had provided to me so I could use that. It was perfect. No brainer, right?

So I jumped all in with my mural board and there were some things that worked well. But there are a few things that didn't work quite as well as I was expecting. So first, sometimes it was a little difficult to navigate the digital board, like moving the digital board around from section to section. During the coaching conversation, right? That's not a deal breaker. It was just kind of a little bit of a nag like it's kind of annoying, but OK, all good now.

Then what happened is that my coach highly encouraged me, like multiple times to manually draw out my block diagrams and to manually graph out my metrics. And I resisted. At first I was like, OK, I heard you,

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but I didn't do it right, she said, "I suggest that you do this. I encourage you to try this." And I just wouldn't do it. But after several times, I'm like, OK, fine. And so I would get pencil and paper, and I would draw up my block diagram. I would get pencil and paper, and I would manually graph my metrics. And it really was. It really was helpful, right? Like, I actually liked doing it manually.

But now it was a problem because now I've got to take a picture and then upload it to the mural board and like, I could do it. It wasn't hard, but it was just another little drag, right? Like, Oh, now this is kind of annoying. Now it's annoying to update the mural board. And then the third thing happened, and this was kind of the final straw.

This was the thing that put me over the edge of considering trying a physical board. And so it's all about the experiment record. So the experiment record, you know, there's like those questions at the top right. So you've got the left hand side and then the right hand side, and the right hand side, the two questions are what actually happened and what did you learn? And what I would do is I would answer those questions and I would just answer like on little sticky notes, right? And it would be sticky. And then a second sticky note Thursday, getting more sticky. And there's all these sticky notes. And it was kind of a hot mess, right?

And I'd learned from Tracy Defoe that there were supposed to be a thread that carried all the way across the row of the experiment record so that it's a logical flow so that the answers make sense based off of what I expected to happen. And that just wasn't the case. Now I could have fixed this just using Mural, but I found just having all of that extra space having like this, you know, like huge board and just empty space. And it was just too much. There was too much temptation to add a second sticky or to add a third sticky or to add a fourth sticky.

So could I have fixed this on mural? Sure, I could have. But considering that I was having this challenge, my coach said, Hey, maybe you should try a physical board. And so that's what we did when we finished, you know, we finished the next target condition we were working on. Once we got to that point, I switched to a physical board and it was awesome. I mean, it was probably. Only a week into it, when I was telling Andrea and Tracy that I'm a physical board convert, I absolutely loved it, right?

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I'm just going to walk you through, why did I love it? So first up, it was easier to update and I could, you know, use my pencil and paper and then just, you know, tape on new sheets or make changes or erase whatever I needed to do.

[00:07:55] And so that was great. Now, using the physical board also made it easier for me to learn and follow all all five of the learner Starter Kata, right? Because now there are forms that walk you through it as it was intended. So for the experiment record, now I have the constraint of space, so now I have to narrow my answers. Now I have to just see the thread going through. And so it was easier for me to follow the worksheet. There's a worksheet that's a Current Condition Target Condition form. Well, it's a lot easier to follow the Starter Kata steps for me when I had that form, like I thought it was the dumbest form ever.

Like, why would I ever use this form until I used it, like three or four times, I was like, Oh, now this makes sense, right? And so I think it just gave me a better learning experience. I could learn the Starter Kata better by using the physical board. Now, the physical board also made it really obvious for me to see the gap between my current operating pattern and my target operating pattern.

So if you remember back in episodes 54 and 55, I talked about how your current condition and your current operating pattern are dynamic. You update them as the operating pattern changes day to day. So that was one of my big learnings from my first learning group.

Well, in my second learning group, one of my big learnings that my coach Jennifer really helped me to understand is that when I'm identifying obstacles, when I'm selecting obstacles, when I'm determining next steps, what I'm really doing is I'm comparing what is my current condition versus my target condition? What is different about my current operating pattern compared to my target operating pattern? What is standing in the way of getting those to match right? And that tells me where I need to focus.

So my brain has all the ideas, but by focusing, they're focusing on figuring out what are the obstacles that are preventing those from matching. Now it's walking me through to decide, what should I improve? Not what can I improve? And there was something about having those that physical board with the two block diagrams right next to each other where it just made it easier for me to visually see the differences. Now I'm sure it's possible to see on Mural. It's just easier for me.

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And then lastly, there is something about physically standing up and pointing to the board as I answer the questions and as I read my answers, that changes the experience compared to navigating a mural board. Like, I don't understand the psychology of it. I don't understand or know the physiology behind it, like I don't even know how to really explain it, but it's different.

It's like my brain processed the details differently when I was using the physical board. When I'm standing up and reading and looking and touching the physical board, it's like my brain processed the details differently. And also like the bigger picture, right? Or maybe it just helped me process more wholly. I'm not sure, but I could feel it in a way that I could not feel it when I was using a digital board.

So I know that's squishy. And it's not really like this hard look. Here's what happened. Let's look at the data. It's squishy, but it felt different. And so those are kind of those four big wins that made me love the physical board. It makes the physical board the right storyboard format. For me, it's easier to update the board manually with pencil and paper. It's easier to learn all seven of the Starter Kata. It's easier to improve and improve what I should improve by comparing the target condition in the current condition. And it gave me a better physical, mental and emotional experience.

All right, so now that you know why I love a physical cardboard, I just want to talk through a couple of the logistics because what usually happens is once I tell someone that I'm a physical cardboard convert, I usually get questions about how right I mean, my first contact coach was in the Midwest. My second contact coach was in is in the Pacific Northwest. I'm in Denver, right? So our coaching is virtual, so they can't see the board.

[00:12:27] They can't, they can't read my experiment record. So how do I do it? Well, there are lots of ways that you could do this. I'm just going to tell you what I do. And first, I want you to know that I use a three panel board, you know, like the ones that kids use for science fairs. That's what I'm using. You don't have to, but that's what I'm using. And so that's what I use for my my board and I'm taping stuff up to it, right? I got scotch tape and I just tape over and tape over it. And that's that's how I do my board.

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Now I have a stand up desk, and so what I'll do is I've got a little flip chart thing and I put my board on the flip chart in front of the desk. That way I can stand up and I got the camera on Zoom. We zoom. So we've got the camera. So so you can see me standing up. But I also want to give my coach an opportunity to see what I'm doing, like to see the details.

So the way I do it is I take pictures and I send them to her in advance. I know, like, really creative, right? Like, I go to my board after I've updated it. So after I've taken my next step, after I've updated the experiment record in the obstacle parking lot and all that. And I take my phone and I take pictures and I take pictures in the order in which the questions will be asked, right? So typically at the beginning, I will take pictures of the challenge and the focus process.

[00:13:51] But once I get a couple of weeks in, I stop taking pictures of that because my coach knows it and I know it. But you know, we'll start with the target condition. So I take pictures of the target condition form and the target operating pattern, the block diagram. And then I say, Well, what's your current condition now? And so I take pictures of the current condition metrics and like outcome performance metrics or graphs and the current operating pattern and say, what was your last step and would you expect to happen? So I take a picture of that left side of the experiment record.

After that, the question is going to be, well, what actually happened and what did you learn? So I take a picture of the right side. Then the question is about obstacles. So I take a picture of my obstacle parking lot. Then the next question is about what's your next step? What do you plan as your next step? What do you expect to happen? So I take a picture of the left side of the experiment record of those questions. And so like it actually, you know, is super simple. And I just take the pictures in order and then I select them all. And then I hit email and I email them to my coach.

[00:14:52] And so it takes more time for me to explain what I do than to actually do it. Like, I know the pattern so well. I know the order that everything's going to be asked. In fact, by the way, it's asked in the order that it's on the board. And so I can take the questions or take all the pictures and send them in like a minute. Like, I take the pictures I hit, you know, or hit email and it takes me like a minute to send her those pictures.

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So now my coach has them. She's still standing up. She's on Zoom, she's standing up, I'm at my board. We're having that conversation. She's now really focused on what I'm saying and hearing what I say. But as needed, she can look at the pictures as we go. So if she wants to dig into something more detail, if she wants to see the graph to to better understand it, then she has it. And that's what I do, right? It's pretty basic, but that's how I handle it.

Now, I also have traveled quite a bit while doing these Kata learning groups. Right, so what do I do then? Now again, I'm sure there are plenty of ways to do it, but I'm going to tell you what I do. What I do is I take all of my active sheets that are on my three panel board and I take them down right. I fold the tape back and I take them down.

[00:16:12] I put them in a two pocket folder. I have a two pocket folder that says KGG, Kata Girl Geeks on it, and I will put them in my folder and I typically put them in the order. The same order that I would have in the picture, right? Like the same order that you would ask questions about, because that's just now my brain thinks in that way. So then when I get to where I'm going, I figure out a way to put them back up. And I've done it three different ways.

So one thing I've done is I bought a new three panel board at my destination, so I was at my brother's house. I'm like, Here, let me get. Actually, I got my mom to do it. My mom was lovely and went and bought me a three panel board, so I had a new board and I just put it back up there, right? And then I just put the board on a dining room chair and, you know, we did it that way.

The other thing I've done this was interesting is I bought another three panel board at my house and then I cut it into pieces and then put the pieces in my suitcase. And when I got to where I was going, I used packaging tape, which I had because I was, you know, training. So I had a lot of supplies. So I used packaging tape to put the board pieces back together.

[00:17:20] So now I had a three panel board again and I put it on the hotel bed while the well, my laptop was on the desk, right? So that worked. And then another thing I did is I also just one of my trips. I take them directly to the wall using blue tape. So instead of getting a board, I just found a place. This was in the kitchen.

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Actually, I was at an Airbnb and there's a kitchen that had a very small counter height table. So I put my laptop on that and then the wall behind it, I use blue tape, so it wouldn't damage and put my things up there, right? All three of these have worked at my brother's house in a hotel room at an Airbnb.

I've even had a coaching cycle at an airport, right? So in that case, I had my sheets and my two pocket folder and I just went through them right. I took one out and then took the next one out and took the next one out. They were right there in order. So it's been honestly pretty simple to take this on the road. And so travel isn't really an obstacle that I couldn't overcome, and that's how I do my travel.

Now here's a thing I do not know whether a physical or digital board would work best for you. In fact, I don't even know if I will always use a physical board or maybe in the future I try a digital board again.

[00:18:40] But for right now, the physical board is what works best for me. Right, and the reason it works best for me is because it's easier to update the board manually with pencil and paper. It's easier to learn and execute all seven of the Starter Kata. It's easier to improve, not just what I can improve, but what I should improve by focusing and seeing the comparison of the target condition to the current condition. And it gives me a better physical, mental and emotional experience.

So that's why a physical Kata storyboard works for me. What about for you? What factors would you consider when deciding whether to use a physical or a virtual digital visual management tool? How would you know if it were working as intended or what the unintended impacts were? How would you decide? I would love to hear your thoughts and your experiences with a physical board versus a digital board.

All right. So that ends this conversation, but I want you to know we're heading into the holidays and we have three great guests joining us, Adam Lawrence, we'll talk about sustaining improvements. Kyle Comf is going to share his experience iterating his way through his own visual work board like his own Kanban board. And then Jeff Krzanich, author of Untapped Talent, is going to kick off the New Year with a fantastic discussion about how second chance hiring can be good for business. All right. I'll see you soon. Until next time.

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