Toyota Kata Fundamentals for the Kata Curious | 086

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.

[00:00:29] I was so excited to be the closing keynote at Kata Con 8 in Jekyll Island recently, and while I was there, I was able to interview a couple of folks. So in April we have three episodes we're bringing you about Kata. That's right. You get a bonus episode this month.

But first, before I tell you what's happening in the next two episodes, let me tell you why we're talking about what we're talking about today. You see, last year I was talking to a listener and he said, Jamie, I love your podcast. It's my favorite. Love listening to it. But I have to tell you, he said, when you did the Kata episodes, I was lost. You see this Ops Executive, the COO, he knows PDCA and A3, but he hadn't explored Toyota Kata. He hadn't read the book, he hadn't gone to training class or a workshop.

So when I jumped into those episodes, talking about all the nuances about, you know, my grasping the current condition and the PDCA records and my storyboard and all the little details, it really kind of left him less inclined to explore Kata because it kind of showed that there was some complexity to it, right? It's not just easy necessarily to do. So those episodes, which I'll link to in the show notes in case you missed them, they are great for folks who have already started practicing Improvement Kata, Coaching Kata and want support, or maybe just want to know that you're not alone and all your crazy feelings that you have about it.

[00:02:00] But if you haven't started practicing and you're just exploring or you're just sort of curious, then those episodes might not be super effective. And that's why I want to give you an overview of Kata and share with you my perspective on how Kata fits into the improvement frameworks that you may already know. Because next week you get to hear a discussion I had with Mike Rather, author of Toyota Kata when we were at Kata Con and then the week after that, I'm talking coaching courage in Kata with Susan Clancy, who did live coaching cycles at Kata Con.

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And so I want to make sure you have a little bit more context before we get to those episodes in case this is something that, you know, is new to you or you haven't fully explored yet, and that's totally appropriate. If you haven't, so don't think you're behind. All right. So let's talk the basics of Toyota Kata.

Now, when you think about Toyota, what we've seen is that a lot of organizations have gone and tried to copy the elements that they have seen Toyota do. Right. So, you know, the things on the surface that you can see and that wasn't yielding the same results. And so the idea is, hey, there is something happening in the unseen because we can't just go copy.

[00:03:17] So Mike set out as a researcher, Mike set out to research and answer really two primary questions. First, what are the unseen managerial routines and thinking that lie behind Toyota's success with continuous improvement and adaptation? And then second, how can other companies develop similar routines and thinking in their organizations?

So the goal was to go beyond anything at the surface level, the things, right, but in the tools, right, beyond that and really get more to the thinking and the unseen to understand what's driving some of that success. Now, the foundation, from my perspective, so these are my words, but in my perspective, but I think the foundational elements, the two big things of Toyota Kata.

Our number one scientific thinking. Right. It's the way we think, the scientific thinking skills and capabilities. And then number two, it's the power of routines or of deliberate practice. In fact, Kata the word Kata is not unique to this kind of I don't even want to call it a methodology, but this approach here that's described in the Toyota Kata book, Kata is actually a Japanese word that really just kind of means that that routine or the set of practice moves, particularly as it relates to like martial arts. So you probably hear about Kata in martial arts where it'll be a set of moves.

[00:04:53] Here's this routine of moves that you do to practice and you have this deliberate practice of these Kata, and that's how you progress through in the martial arts. And really it kind of goes back to any sort of skill you're using, right? Or you're learning if you're learning to play a musical instrument or play a sport or do whatever it is, you have this deliberate practice of the fundamental elements.

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And in problem solving, the fundamental element is scientific thinking, right? So if you're brand new to this, there's there can be a lot of complexity or can seem like there's a lot of complexity. But what you should know is that there are really four high level steps or phases to Toyota Kata, as it's described by Mike.

Number one is to understand the direction or challenge. This is, you know, typically in an organization, we're looking at something that's 1 to 3 years out. It's typically set by senior leadership and it's aligned with the strategic goals and plans that have been set. And so that's, number one, understand the direction or challenge because we have to know where we're trying to go.

Then we have step two, which is to grasp the current condition. This is where are we now, what's happening now, but particularly as it relates to whatever focused process we're working on. So while we understand the direction or challenge that's often set by leadership, you know, if I'm in a department trying to practice this type of improvement thinking, I'm going to select a focused process that's in my span of influence, my span of control, where I can actually have an impact.

And so what is that process focus as it relates to the direction or challenge? Now I want to grasp the current condition of that process focus. So for the process I'm focusing on what is the current condition? What's happening now? And we have to grasp the current condition before we go to step three. Sometimes those get reversed, but we always grasp the current condition first.

Then we go to step three, which is to establish the next target condition. So while the challenge might be a year out, my next target condition might be two weeks out, it might be three weeks out. This is something this is a smaller step. Not not even a step. I don't even want to call it a step. But this is a smaller time frame of where do I want to get to next? What is my next target condition? And the thing that's really important about target conditions, it's not just a target with the outcome you want, right? Like the result you want on your quality metric or the result you want for your reduction of defects or whatever it is.

[00:07:44] Right, your productivity. We want to achieve this productivity target that that outcome is just one part of it. It's a next target condition, meaning we're also defining what are some of the process

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characteristics, how will that process operate? So understand the direction or challenge. Grasp the current condition. Establish the next target condition.

And then we go to step four, which is where we experiment toward the next target condition. So we're doing PDCA cycles, experiments, cycles toward the next target condition. And then either when we achieve the next target condition or when we get to the achieve by date, that date that's two weeks out, for example, then we kind of go back and we start that process over again and we go back to step one and then two and then three and then four and then one and two and three and four. Because we're experimenting toward the next target condition, well, then we're going to have to set a new next target condition, all of that.

Okay. So this is a high level what it is. And what you heard probably has some similarities to other problem solving methodologies that you might use in your own work. Right. So in general, it is kind of a big PDCA cycle, right, plan, do, check act. In addition to the micro PDCA cycles that happen with experimentation in general, it does really kind of align with A3, it does kind of align with Eight Step, right, where you grasp the current condition before you set your future state target, for example.

[00:09:19] So there's a lot of commonality in problem solving. But there are a couple of differences in my from my perspective, in my opinion, with the Kata approach that aren't really well captured in A3 or Eight Step. So specifically, and I'll put an image of this in the show notes remember processplusresults.com/podcast.

So in Mike's book when he describes this, he talks about kind of your where you are now and then that future state or the next target condition or the challenge. Let's actually kind of use the challenge. But here's, here's where I am now, right on like the left side. Here's the future that I'm trying to get to. And then we have this gap in between that is common.

Any time we're talking about problem solving, we're talking about the gap between where we are now and where we want to be. And then in this image that you're going to see at the website, there's a like an oval between those two and it has lots of different dots in it. And each dot is an obstacle or a problem that is standing between where we are now and where we want to be.

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[00:10:33] It is in that big gap. What usually happens is now we've got all of those obstacles, all of those things they're standing in the way and we start going after problem solving and we just start picking off the ones that we can solve, the obstacles we can remove, or the problems we can solve. But what's different really about this Kata idea is that you don't know which obstacles you actually need to remove until you start to reveal the path forward.

Because if you think about this left side and this right side and all those dots in the middle, you don't have to remove every single one of them to get to the right side. You can get to the right side by only removing some of them. The question is which ones are in your way?

And so the path to get to the future state, you uncover it as you go and a lot of problem solving methodologies, I feel like I say methodologies again, it's probably the wrong word, but approach is the way we do problem solving. Typically, I feel like a lot of times we're trying to figure out the whole path at the very beginning, right?

And then we're trying to go implement all of the action steps to get there. And the reality is, we don't know that yet. Scientific thinking recognizes when we're jumping to conclusions, when we're making assumptions, and it holds us back and says, Whoa, wait a minute. I don't know that yet. That is that is me jumping to conclusions. That is me making assumptions. I don't know that yet. Let me slow down.

And so, again, go to the go to the show notes. So to see this image, I know it's kind of hard to explain it over audio, but this is really to me, one of the critical differences here is that instead of asking what obstacles can we remove, we ask what obstacles should we remove? What obstacle do we need to remove in order to move forward.

Instead of asking, what can we improve, we're looking at what should we improve, what do we need to improve? And so recognizing what we know versus what we don't know and uncovering the path as you go versus trying to chart the entire path at the beginning or chart the entire path in, you know, step three or four or five. Right.

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So that's one of the first differences that I think that just stood out to me so, so well when I really got in and started practicing this is, how different that is to typical problem solving. The other thing is recognizing that as we're uncovering the path, we're setting shorter next target conditions. So again, I think a lot of times in problem solving, we're trying to solve the whole problem all at once, this big problem all at once, which is why we end up with this really long action plan in this big formal change management thing.

[00:13:39] And here in Kata, we're doing more iterative learning and iterative actions and iterative PDCA cycles in a shorter time frame. Two weeks, three weeks to your next target condition, another two weeks to your next target condition, another two weeks to your next target condition. And you might have six or seven next target conditions before you are even close to your challenge, right? Maybe you'll have 12 or 15. Maybe. Maybe you only have three. If it's a smaller challenge, maybe you end up with three next target conditions.

But we're not trying to like do it all at once and have this long implementation plan, we're really trying to learn. And so, again, I'll put an image in our show notes where you'll be able to see these multiple next target conditions along the path toward the challenge.

So these are some of the similarities is it's still we still have to understand the direction of the challenge, where we going. This is like what problem are we trying to solve? We're grasping the current condition. Same thing you would do in any other problem solving effort. You've got to know where you are. You've got to define that. You've got to recognize what is your data. You've got to go observe, you've got to process map, whatever it is that you're doing to grasp that current condition.

Then you're setting your future state, your establishing your next target condition, and then you're experimenting through PDCA. So lots of similarities. Two biggest differences I think are the fact that we are uncovering the path as we go and that we're working more iterative cycles. And what that does is that all takes us back to the foundation: scientific thinking. What do I predict is going to happen? What do I expect? What is my hypothesis? What actually happened? What did I learn now? What is my next step as a result?

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So really building the habit and the capability of scientific thinking and that we do that through routines, through deliberate practice routine. So that's the basics.

Now, what will happen is next week we're going to talk a little bit with Mike about some of his perspectives on Kata. What he has to say to someone who's Kata curious what he thinks about the rigidity of the structure and whether we need the structure or don't need the structure. And then after that, I'm going to tell you a little bit about how I use the foundational elements here with clients. Even if we never use the word Kata, even if we never have a storyboard. So you'll get to hear both of those next week. Until then.