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Learning Kata in the Work Place

Guest was Tracy Defoe

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Learning Kata in the Workplace

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Transcription of Interview

Joe: *Welcome everyone. This is Joe Dager, the host of the Business901 podcast. With me today is Tracy Defoe. Tracy is the President and Chief Education Organizer of The Learning Factor Inc. A Vancouver-based organization dedicated to making business and labor smarter about learning through innovations in workplace education. She does this in a variety of ways, and one of her favorites is the Toyota Kata. Welcome Tracy and can you give me that elevator speech about The Learning Factor?*

Tracy: *Sure! Well, The Learning Factor is my professional home. I'm an adult educator who comes out of the university environment, and I'm interested mostly in how people and what they learn at work. So, it's the learning factor is something that I find interesting. I always say I only take on jobs that are too interesting to pass up.*

Joe: *You're a workplace consultant, and you connected up with Lean and eventually the Toyota Kata. Can you tell me how that happened?*

Tracy: *Yes, and that will actually give you a good idea of what I do. In the early 1990's, a manufacturing company called my university and said, we need some help with communication and ESL. So I went off and did some research there and designed a*

program to help them get their very first quality designation, in fact, it was a Ford Quality One, and they had worked for two years internally with their engineers to try to get this Ford Quality One, and it took me 9 weeks. So figure out that they sucked at teaching, and I had been helping that company ever since, and basically, I followed them on their Lean journey. So, not long after, they started formally trying to... You know, they got their ISO designation, I helped them with the learning there, and they started learning and teaching Lean. And they figured out that language teaching and culture teaching, my background is in language and culture, those are concepts. So I'm good at teaching concepts, and I went along with them and helped them unpack and teach Lean to their workforce, to their engineers, to their office people, and I designed a course for them which took Lean as concepts and was all based around questions. That course is called the TeamTime, and it's actually available through the Canadian Manufacturers and Exporters because the company share it with them.

Eventually, I came to kind of be a voice. This is way before Mike, who did his research, just for the interaction between the people is what's important. Of all the things you're learning in Lean, your boss, your supervisor, your Lean head, whatever is happening there, that's where the thinking is happening, and that's the learning. And so when I heard about Toyota Kata, and I was really fortunate that I had worked with some people who would come here to Vancouver, who were with Mike in Michigan, right away invited me in to learn about Toyota Kata very early on, I think maybe even before the book was fully out. And I just said, he agrees with me, he must be right, and I've been interested and trying to promote Toyota Kata ever since Mike wrote down that system and structure, that it is that coaching relationship, where people are working on improvements, but they're doing it in a human together, minds together kind of way.

Joe: *You made a statement at the very beginning, they have been working at it for a long*

time, and you went in there and were able to accomplish it in 9 weeks. Did you have your own system in place to do that? It seems rather quick that you had to have a system of your own when you walked in there.

Tracy: Well, my system is the best practice in adult learning. I just did a few days of research and I figure out the piece that they were stumbling on, which was partly a communication piece. It was partly a math piece because they had to be doing SPC and all the tracking, but they had to explain it. The way it worked, the auditor would come, and the individual worker had to explain what were they were learning with their charting for example. That's where they were falling apart, so people were mostly ESL, they couldn't explain, or they couldn't get through the part of poorly presenting their job description. So, I just out in place those pieces. It's kind of a funny story because I was working with another teacher and she had to review her Algebra in order to help teach the SPC. That was kind of fun. But, it didn't take long because they were close, but they had missed the language, the interaction part and basically helping people understand, when a stranger walks up to you, it's okay to say things, and it's okay if you don't know, we're going to figure it out and work on it together.

At the University of British Columbia where I did my ESL teaching in the first 11 or 12 years of my career, we used a method called context methodology. So we only deal with real, live conversation and talking to native speakers, and I used that method in that first one, which is we invited people in, and we taped them and then we studied the interactions on actual real tape; in those days, cassette tapes. So basically, we're teaching people learning strategies and interactive strategies, and that's why it was so fast.

Joe: *How does the Learning Factor, your company, your organization work with clients then? Is that the typical way, or do you do workshops, or do you just roll up your sleeves*

and grab a shovel and get involved?

Tracy: Well, all of the above I think is true. I do have some workshops that I have developed over the years, but it's way more fun for me to tackle a problem that no one knows the answer to. And so I frequently get asked to help people with something that's struggling or seems to be a real puzzle, and one of the things I like to do is figure out which parts, if any, are educational, so they're related to ideas and knowledge and how people act together, rather than training, like push this button and do this thing. So, I'm very interested in that part. And sometimes people hire me to fix their training. So, if you have a workshop that's really boring, I can probably make it sing; that's totally in my skills set. And often, people are tackling something, and they know it's complicated, or perhaps they believe that their workforce is troublesome, I'm very good with a resistant and difficult workforce. Like I said, I started as an ESL teacher and teaching communication literacy and adult basic ed., so I have a pretty big skill set to figure out what's going on. Those are some of those things. I'm very big on what I think of as peer instruction. I like to do some research and then leave something that people can continue to teach each other, rather than me coming back all the time.

Joe: *You seem to have attached yourself to Kata and let me just start, you said the company that you first was working with was practicing Lean and was along their Lean journey, and you went along with them.*

Tracy: Yes, that's right. That's how I learned, yes. In fact, it's kind of a funny story. They sent me to all the Lean training they were doing and their Lean Consortia. I came back and said, wow, can I really fix that training, there was so much waste in the training. And they said, well we don't want you to. We did not ask you to fix our training. We want you to help us implement it. And I said, well, these are the same things. That is one of the

Learning Factor's missions; I'm really trying to get rid of waste in the training room and in the workshops. Where people are waiting or doing something, they're not engaged in, or maybe sitting through something that already know. I'm really interested in taking that challenge on, right into the instructional relationship.

Joe: *Did the Kata training come later, or is it Kata and Lean one and the same to you, or was that kind of a more Kata deeper learning of Lean?*

Tracy: What Mike Rother likes to say is that Kata and Lean play well together, right? And I tell people, and I think you probably wrote my blog post about people who were Lean experts sitting on the sidelines, waiting to see what's going to happen with Kata, partly because I think they were so surprised to learn there might be something they didn't already know. Kata is about the relationship between somebody who is working in the company, in some value stream, or perhaps a team lead, or even a manager, and they're the person they report to. So it's about that internal relationship and the coached person, whoever the coached person is, acting in a sort of Socratic question asking why. So there are two parts that happen with the Kata that plays well with Tracy and one of them is, I've always known that my job is to study the people. I try to teach managers to observe and listen to what people are telling them because they will tell you what they know. If you listen, they're trying to tell you the edge of what they know.

You can be so much more effective as a manager if you can figure out what Dave thinks is going on with Lean, is a little different than what Mary thinks is going on with Lean, and you have to treat it differently because they're at different spots. I think the Kata has sort of shown the light back on to the management structure within the company and said, you have a role here too. It's not all just layout, and Kanban, and 5S. You're supposed to be developing people into problem-solvers and to think. That was always my goal, anyway, so

that's why I jumped on Kata. I think it is a skill that people need if they're going to get Lean to work in their company and not just continually fall back to the previous and always regress to where they were before.

Joe: *In a lean company, what are some of the roadblocks of implementing Kata? Is it one and the same? Should it just happen? Or does Lean create some roadblocks in itself?*

Tracy: I think, part of it is the ownership issue. Like a lot of companies that would consider themselves pretty Lean or even Six Sigma Lean, they have a team of people who kind of own Lean. They do the training; maybe they're called continuous improvement manager, or there's a team of people who own the tools and bring them in when people need them; whereas, Kata is disruptive of that. Kata says the people there think and do what they can do, and that's okay and that not everybody starts with 5S. You start with your problem, and you're challenging your company. And so basically, the stumbling block is people think they know how to roll it out and how to do it and what everybody needs, but in fact, that may be leading them on...what is the term they're calling it? Like a 'waste safari,' looking to find exotic waste, but not focusing on the exact things they need to do to get to the next step that that team or that value stream or that company needs to be at.

I think Kata really takes that Laser beam and says, that was all great, but you know what, this is what's going to get you farther. I'm always surprised, and maybe you are too, Joe, to meet companies who have been a long time on the Lean journey but are saying things like, well we're not really sure how it hits the bottom-line, but we know we're making improvements. We say, well, you're probably doing that wrong. You should know, right? You should be able to see. So just tidying up might not get you more profit. You got to do stuff that is pulling all the way through to where your company has to be.

Joe: *I've always seen that, especially on a Six Sigma project, where someone will reduce the workflow or reduce the workspace, and they want to take credit for we're only using 2/3 of the building now, and this other third is empty. And it's like, well, okay, but what's the value of that, of the third being empty?*

Tracy: The difference really and this is important maybe for your listeners who are just hearing the word Kata, Kata is a routine, and it's a structured pattern that you practice, in order to have an effective teaching relationship inside, with the people who report to you. So you get them to run their own Lean projects if you will, and you just coach them through. You ask them the question, what's going on now? What's your current condition? What's the target we want to be at in two weeks? As you talk to them, you hear how they're thinking, and you ask them questions to move them along. But one of the biggest challenges actually for most supervisors, or managers, and directors is not to tell people their brilliant ideas of what needs to be done. And by the way, that is the hardest part about my job. I have to start over and over again with people and ask them questions and very seldom do I get to just say, look, just do this, this will work. No, no. They don't learn it until they discover it and do it.

So the brilliant part about the Kata is that it lays out a method and a routine, and if you follow the routine, you can learn it by yourself. I mean it takes some discipline in doing it, but it's not rocket science. It is asking before telling. It's observing, before doing it yourself and it is actually strengthening up that team, to be problem solvers. And not problem solvers of the every day, you should have done it anyway thing. It's things that you don't actually know how you will achieve together. That's super exciting. For somebody like me who is like... I mean, you sound like a life-long learner, with the way you were telling me of what you've learned from the podcast, and me, I love going to workplaces because I learn so much. I know how everything is made, and I know lots and lots about systems and how

people work together in a lot of industries. But the Kata, actually doing that Kata every day, getting up, going to my board and thinking about where am I at now, what am I doing next, that's crack. That is learning crack. I mean, my brain is so excited, and I'm bouncing out of bed in the morning to see what might happen today. So, that's the other thing that I think that's really great about the Kata, if you're doing it right, it's beyond engaging. It's enthralling.

Joe: *Well, you make it sound like just about everybody needs to coach someone, that it has to be spread out. But can everybody be a specialist? I mean does this go back to I need these black belts and green belts running around? Do I need a certification? Who can be a coach and how do you apply that in an organization or is there just designated people there that are the coaches?*

Tracy: Well, you got to start small, right? You don't want to create a lot of chaos, so you start at one place. On the Toyota Kata Website, Mike Rother, and his group, there's a whole book on how to get started and different ways people have done it that have worked. But eventually, where you want to get to is that there's no such thing as a specialist. It's like this is how we manage people. This is how the executive deals with their teams, and this is how the teams deal with the managers, and this is how the managers develop their reports. Whether those are supervisors or team leaders, this is a piece of that relationship is that we spend that time together every day or every week, where okay let's say you report to me, Joe, and if we actually took 10 minutes a day where I listen to you, tell me about this current state of your project or your work, and where you want to be with it, and what you're thinking you like to try tomorrow, and this is how you're going to measure and observe it, and then I come back tomorrow and I do it again, and under the Kata, I get to encourage you, and lesson you, and ask you questions, and guide you, but I don't get to offer you my smarter idea or give you my experience or anything. I mean, how

many people get that kind of positive relationship minute with their boss, ever?

I think that's one of the ways that Kata is teaching managers the value of just being supportive and not being critical or too busy or whatever, but just physically being there and asking the questions, being interested, caring about the answers. A lot of people who do their Gemba walk and ask questions in front of the storyboard, look as if they know the answer, and they mentally have checked out and gone on before it is answered. People know that if you're listening, if you're helping, if you're supporting, if you're criticizing in your head, and Kata doesn't let you do that, though.

Joe: *Reflecting on raising my kids is that I probably did not give them enough positive strokes versus what was constructive criticism at the time. I tried to help them or challenge them to do better. Does Kata help with that appreciative inquiry type thinking?*

Tracy: That's actually part of the basis of it is the coaching Kata puts some constraints on the coach to not tell, and you don't even have to give positive strokes. You can't be negative or give ideas, right? it's funny that you should say that about how it made you think of your family because it makes everyone think of their family, their spouse, their dog, their relationship with their kid's soccer coach. There're a million places where we interact with people and offer them our wisdom and our emotion and our whatever, in a maybe not entirely positive or constructive way. If you've been reading any of the Kata blogs or looked at things from the Kata summit, you'll see there are presentations by people who have applied the pattern of the Kata and the habit, the structure of the question to all kinds of things in their own lives.

There's the Kata Kid Series where you can see how somebody is using that with their kids, and there's a story of a guy whose family got into a really scary situation with a birth of a

baby who they knew was going to need a lot of surgeries and how paralyzing that was for the family, and then they realized, he said he could Kata it. They could pick the thing they can control and work on and just move along that way.

I'm actually really excited about the Kata in the classroom endeavor that Mike Rother has started to try to get the improvement Kata pattern into schools for teachers, because I actually think if kids learned how to break down a problem and take a single step and measure how they're doing, that could help a lot with anxiety. But that's just my opinion. I see a lot of people who are anxious and kids who are anxious, who don't know how to break down the scary parts of the world and say what could I do and what's in my control, where do I want to be a little bit down the road?

That's a bit off topic, but I told you, I started out studying culture. People learn their work culture mostly by the direct interactions with the person they report to. Once you introduce the Kata into a work culture, you're actually changing the way people interact. Even if 90% of the time, they're interacting in the old way, this little 10% of the week, when they interact in this way, it gives people a different model of how to be a manager, how to be a team member, which is to be interested in the other person, listen to what they're saying, look at the data together, and don't give them the idea that's smarter than theirs, but let them discover the way forward. That's the place; that's the magic part, people change their behavior.

Joe: *To do this, do we have to change the structure of an organization at all? I mean are typical structures able to adapt to this type of thinking?*

Tracy: Yes. You just follow the structure. So, if you already have team members, team leads, or supervisors, managers, then you just sue that. From the top down, the exec.

coaches the managers, and then the managers coach the supervisors, and everybody's working on their own piece of the company, and that's partly how you get synergy. If you're a manager, your success comes from the success with the people who report to you and this way, instead of telling them what to do and have them all maybe not understand it, they figure out how to meet what helps your goal together. I mean, you listen to them obviously and help. So it helps if you're a good listener, right? And if you're not a good listener, then it's going to take some discipline to do 10 minutes of listening a day or a week, or however many minutes you end up doing. There's a lot of videos and stuff on the web if people who are listening want to look further.

Joe: *Can anyone be a good Kata coach? I mean, what do you have to do to be one?*

Tracy: Yes, I think anybody can do it. It may take more effort for some people, depending on the pattern they've been practicing up until now. I mean the reason why the Kata is a pattern is to build a new habit, and the new habit will help change your habitual thinking patterns too. What's your default thought when somebody tells you about a problem, is it to tell them the answer or is it to ask them a few questions to lead them in a way that they may find the answer, but it will be slower for them, but it will stick better. So yes, I think everybody could do it. It helps if you're a good listener, right? And if you're not a good listener, then it's going to take some discipline to do 10 minutes of listening a day or a week, or however many minutes you end up doing. For now, I guess people are getting training in it, but once your boss teaches you this way, then it'll be natural. It will be actually how we work together. That's the whole point.

Joe: *It's the way we do things around here, right?*

Tracy: Yes, right. How easy or hard it is for an organization to adapt depends on their

current culture actually. Do you have one on ones? Do you ever give people positive encouragement? Do you listen? Do you ask questions? I mean for me, it made so much sense with what everything I've been telling people forever, but I'm not a manager; I'm a teacher, so my role is to teach and coach and encourage. I don't actually ever get to yell at or punish anybody. I can only encourage and ask questions.

Joe: *We think of Kata being used in Lean companies a lot. Is it either or harder for let's say a non-Lean company, just a traditional company to start with Kata and can it be done?*

Tracy: It can certainly be done, especially if the people at the top learned it or had to do it. I mentioned in my blog, Hal Froelich in Washington State, at Cascade DAFO, who's an excellent Lean guy, took over that company and didn't teach them anything except Kata. They practiced Kata every day. They didn't know about 5S. They just knew that they figured out they had to clean up. They didn't know about spaghetti diagrams, but they studied the way that products load to their area of the plant. So, it certainly can be done. I've also seen Lean Six Sigma companies and one of course that comes to mind in Canada is Sigma Point in Quebec, where they were already Lean Six Sigma, and they figured out which piece if what was driving their improvement, which piece was missing and the Kata fit that piece, and it was that personal coaching g, the everyday improvement and the way to structure and measure whether or not managers were mentoring and developing their reports. So, across the range, I think lots and lots of different companies can do it. But, again to quote Mike, he always said it's not for everybody because not everybody actually wants to change this much.

Joe : *You do believe that you end up changing when you start implementing Kata?*

Tracy: Absolutely. You're going to change your own thinking about other people. I mean,

do you secretly think that everyone who reports to you is a brilliant natural learner and explorer? I mean, what you'll start to see is that maybe, if you change yourself, it changes other people, and the relationship will change, If you consistently make this focus on improvement and listening and get that coaching relationship going, it will change the culture of your organization too and no doubt for the better. If you think of your first boss and what was your first boss like, and how much did they let you explore, and try, and fail, and ask you to be accountable for that, that's where you're learning probably your default culture and my first real professional work was at the university with a group of people who thought I had a lot of potential, and they gave me a lot of leeway, a lot of coaching. They would come and watch me and ask questions, and every single Friday, I had to account, we had a whole group, everybody did it, what I've been doing, what challenges were they facing, how was I thinking about, what success had I had, and what support could the group give me. There's no manufacturer that works that way, but it's a great way to realize that your whole professional life, you are a learner. Yes, you're accountable for what you do, but you're also accountable for new knowledge and sharing with people what you learned.

Joe: *Do you ever see any resistance from people that say, I just want to go and do my job.*

Tracy: Well actually, more likely, the resistance that I mostly see, and I'm not saying everybody should do it, it's like saying you should eat healthy and you should try not to sit at your chair all the time. I see lots of people who think that they know what they're doing just fine. That's what you see. You see people who think that it's okay. And that's fine, they could do that, but I think there will come a time when they realize they haven't really engaged their people, that their improvements are not daily, they may not even be monthly, and that they're periodic improvements that tend to be hard to sustain. My

favorite Lean book actually is Imai's book, Gemba Kaizen. In the first 50 pages of that book., he lays out how as a plant manager for Toyota, during the time they were developing the Toyota way, the challenge of not just plan-do-check-act, but plan-do-sustain-act and how hard it is to make it a process improvement and then attain it every single day thereafter. And so I think people who think they're okay, know that they struggle with sustaining and know that they struggle with periodic things or periodic implement, and also with the systems that go into place but never get kept up. Why don't they get kept up? Why do you put in a Kanban that doesn't work later? Why do people do PPM boxes or preventive maintenance systems but don't get kept up? Well, because there's no real ownership or understanding from that frontline supervisor what's that about. They didn't put it in place. It got put in place for them, and they don't keep it up.

I think companies that think they're doing great with Lean, still struggle with all that stuff, and as other people have success, they might think, maybe this relationship and the kind of shared daily work between the coach and the learner or the mentee and the mentor as some people say, maybe that's the piece we could put in place and be systematic about it, and the whole system lays out in Toyota Kata. It just lays out the pattern, the rules if you will, the rules of the game, and gives you those tools to do that, without necessarily needing a lot of help.

Joe: *That makes great sense. What's upcoming for you?*

Tracy: Well, you mentioned how I'm passionate about Kata and realized that it lays on a lot of good adult education. I am trying to do what I can to spread the word here. I'm working with a company that does Kata locally, to get going a kind of local Toyota Kata network, a learning network for people who want to get together, so we're going to have our first Kata practitioner's day in September of this year. The date is not quite yet set. I'm

also working on something that you might be interested in, which isn't about Kata, but it's a job certification program for manufacturing jobs that don't have a designation, all the way from a manufacturing plant manager, supervisor, team lead, machine operator, assembler, storekeeper, and material handler, and I'm working on that for the Canadian manufacturers and exporters. It's a partnership with them and the Canadian Labor Congress. It's a really big project, but I've been working on that just as a consultant for a couple of years and it's just about done. And the American Manufacturers, it's not the AME, but one of the American organizations that also has a certification has kind of signed on with some sort of memo of agreement, so it may end up being available in America too. And it's a PALR, you learned it on the job and you've used this system to get a certification to show basically a portable skill, or some companies would use it so they can show their shareholder for a fact their workforce and managers know what they're doing. That's called Cert Work Plus, and you can find it on the Web. I'm doing that, and I'm always doing some writing. I'm also like you; I'm trying to share, I'm starting to write.

I don't know about you, I have signed so many confidentiality agreements, that I can barely talk about my work in public. In fact for many of my clients, I tell them I'm really flattered that you think what your company does. I am a bit of a secret weapon, in terms of industrial advantage, so I have clients who I just know they don't ever tell their competitor that I'm fixing their training, and I'm doing work and doing some research in their place. I don't generally talk very much about my clients and I certainly seldom name names.

Joe: *I'm always very impressed when someone asks me the same one like I could really take something from them of value if I was that smart to be able to pass it on.*

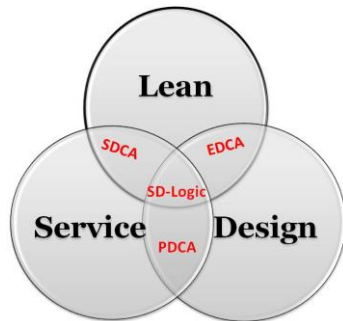
Tracy: One of my clients and I can just say this in a general way, the National Research

Council of Canada, who are scientists making new technologies and I always tell them, if abducted by aliens, your technology is safe with me because the part I do for them are around communication and things like that. Yes, I come in contact with knowledge, but I honestly can't; I could never explain it.

Joe: *What's the best way for someone to contact you and learn more about the Learning Factor and Tracy?*

Tracy: Well, I think thelearningfactor.com is an easy place to find me on the web. You can email me from there. Somebody told me recently, because of the way my name is spelled, Tracy with no 'e' and Defoe, like Danielle Defoe, there aren't very many people with that name, so I Google pretty well. I'm pretty easy to Google too. The other thing I'm doing and I'll just plug is, you may know Dave Hogg, he's kind of the grandfather of Lean Consortia in Canada and recently retired from Ontario and moved here to British Columbia, so I am doing some writing for his newsletter, his E-newsletter which is called Accelerating the Journey. So, that's some of the stuff I'm doing in the next little while.

Joe: *That's awesome. I would like to thank you, Tracy, and thank all the listeners. This podcast would be available on the Business901 blog and also the Business901 iTunes store. Thanks everyone for listening.*



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Joe Dager is President of Business901, a firm specializing in bringing the continuous improvement process to the sales and marketing arena. He takes his process thinking of over thirty years in marketing within a wide variety of industries and applies it through Lean Marketing and Lean Service Design.

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