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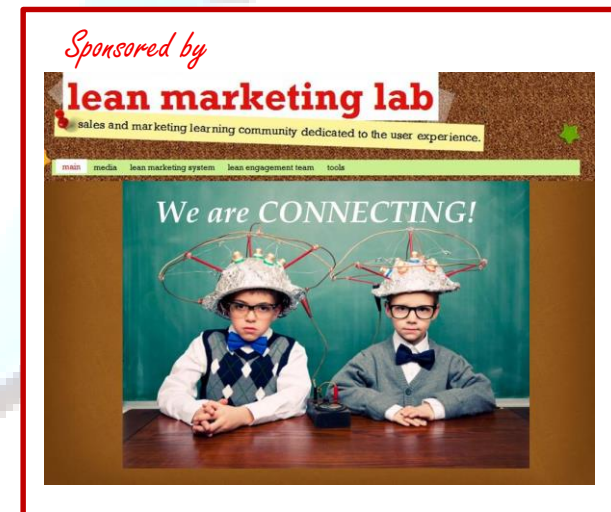
Implementing Lean Marketing Systems



7-Part Video Series on the Toyota Kata Guest was Brandon Brown

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Transcription of Interview

Joe: *Welcome everyone! This is Joe Dager, the host of the Business901 Podcast. With me today is Brandon Brown. He is an Associate for the W3 Group and delivers tangible and sustainable continuous improvement results as a Toyota Kata Coach and Lean Instructor. Since 2006, Brandon has been a Professor of Operations Management at the University of Arkansas in Fayetteville, teaching courses in the Industrial Engineering Department such as Lean Production, Leadership Principles, and Practices for the Master of Science in Operations Management Degree Program. Brandon is a Southeast Region Board Member for the Association for Manufacturing Excellence, also a Certified John Maxwell coach, a teacher, and speaker, and that's a first time guest on my program - a John Maxwell coach. Brandon, this is just really impressive because this is just what you are doing now. I hate to even mention the past. Welcome to the podcast!*

Brandon: Thanks, Joe. Thanks, I appreciate you having me on.

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Joe: *Where do you find the time for all this stuff? You must be a busy guy.*

Brandon: Yes, pretty busy. I've got a little bit of a low right now, so I've been able to do a little catch-up work with presentations and prepping for upcoming presentations and workshops. I was able to work it in, so it's great.

Joe: *What we came here to talk about today was Toyota Kata. You have a lot of experience in that, your W3 Group does, but let's just start with the basics. Let's start out with what is Kata?*

Brandon: A Kata if I could discuss briefly, just the basis of it, it's really a routine or I've heard it translated as a way of doing, a way of practicing in order to gain skill or to develop a skill. Many times it's used in the Martial Arts setting; many people will be familiar if they are Martial Arts -- or they've taken Taekwondo as a kid, you learn forms for blocking and kicking, and you practice them to both learn the proper form but also to teach your muscle memory and to get your brain to thinking in a pattern of learning that particular skill. We do it also in music.

My son is learning to play the violin and music teachers use it, and I don't think they even realize that it's a Kata. The first thing he taught my son in violin is how to hold the instrument properly, how to hold the bow and have him play all four strings with the proper bow angle

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to learn that. He then progressed one level up, and he taught him how to play the first clause notes by pressing his fingers onto the strings. And eventually, he's to the point of learning the next step of how to play a song. Now the teacher doesn't teach him the whole song; just like in Martial Arts, they don't teach you all 26 Kata's that are involved with Karate. The teacher in Music focuses on just the first bar and maybe it's the first 10 notes, and he wants him to repeat that over and over so his brain is learning, and his muscles are developing to the point where it's starting to become a habit, or a skill that seems natural.

So a Kata is a way of practicing, a way of doing a particular routine, and we really use it in many areas. But one thing that's really interesting from some of the research that Mike Rother has done when he wrote the book Toyota Kata is that what we're learning from Neuroscience is that even we as adults, we want to learn, or we seek to learn in a particular repetitive pattern. Our brains are tremendously adaptive organs that really as we learn a new skill, as we crack a Kata over and over again, we get new neural pathways that actually start to allow us to form a meta-habit so to speak; almost slip into the routine once we've mastered the particular skill into a metacognition.

Those terms are used around Neuroscience, and I can give you an example of how we as adults have turned something into a meta-habit, and we function under metacognition. At 14 or 16, 17-year-old, all of us learn to drive a car usually at that age, and you're really excited; the first form of independence, of going out into the world. But when you've first

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been in the car if you can think back to that time, it's pretty intimidating to a 14 to 16-year-old. You got the brake pedal, the steering pedal, the turn signal, the steering wheel, how you adjust the mirrors, the seat, and everything. And we as adults, 15 to 20 years later, we kind of slip-in to a metacognition. We drive and don't even think about how to operate the car. We react to the stoplights and the traffic, all while carrying on a conversation with someone next to us. We slip into that metacognition because we've mastered that particular skill. So that, in a nutshell, is a Kata in the way that it has developed how our brain learns a skill in repeated patterns.

Joe: *I think that's interesting because what jumps at me is video games. I mean because we seem to learn a very small portion of it and master a certain portion of it before we move ahead, and that continuous effort in breaking it down to the easy habits first, and then going on through more difficult parts of the program let's say or more difficult skill levels; is that a good description of a Kata?*

Brandon: Yes. How kids go and learn a particular game or adults that play games and what-not, what makes it interesting is that those controllers are built for the small hands of 7 to 13-year-olds, so I've never mastered the muscle memory of getting and making all those jumps, kicks, punches, and movements; but yes, you learn those. And if you watch a kid or an adult that plays video games, they're looking at the screen and doing all kinds of moves and their hands are moving, almost like someone typing. They can type without

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looking at a page.

Joe: *Well and I think about that a little bit because it allows them to master other games and other video games so much quicker because those movements are ingrained in their system. I mean even texting, they can text with the phone in their pocket while they're in school.*

Brandon: Exactly. Their muscles memories have adapted, they've got new neural pathways to function with their thumb and index finger, and that's exactly a transfer of a skill over to another area where it's useful.

Joe: *The popularity of Kata right now, is it just because Mike wrote a great book or why the focus, why now?*

Brandon: I think there are several points as the reason why Kata is popular now. If I could site an article that Dr. Liker and Mark Rother wrote for LEI a few years back. They cited a 2007 Industry Week Survey, and they found that only 2% of companies were able to achieve through their Lean program the objectives that they wanted to achieve. It went on to say that Shingo Prize committee members went back to former winners, and they found that very few of them were actually continuing to improve after they won the award. Most of them declined, either plateaued or declined in their continuous improvement efforts. So I

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think people are coming to look and ask the question, is Kata the next Lean thing? Is it the next step, the next evolution in Lean? Or are we deploying, implementing Lean tools incorrectly? I think that's one of the big questions.

They're coming to us, particularly with the W3 Group, seeking a way to sustain and align their organization. I think another reason is there's always been that age-old resistance to change by everybody. We've constantly battled that over the past 20 to 25 years within Lean, and Kata gives us a form for continuous improvement using the Improvement Kata and the Coaching Kata to overcome some of that resistance to change. People want something to hold on to; kind of like holding on to the railing on the subway or on a bus or something like that, and Kata gives them that comfort to be able to practice.

I heard John Shook one time say that Toyota Kata or the Improvement Kata and Coaching Kata, it's not the solution for cancer, it's a way to develop a solution for cancer. So a little bit of difference there in thinking that it's going to be like an injection and your Lean production system is cured, it's more like a daily vitamin that you're taking in order to keep up a healthy program.

Joe: *Well I'd have to ask you because you bring up the sustainability part and the change part, and you usually get -- let's say when you introduce Lean, you get a certain percentage of people that really buy into it. They become Lean advocates. They become Lean champions*

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within an organization. They love it! But there's a certain group saying, "Ah, we'll just wait until this fizzles out. It's just another change initiative. We'll hold our own; go with the flow and it will eventually die of like everything else..." Does Kata have a way of helping that other section, mesh that together somehow?

Brandon: Yes, really at the basis, the Kata methodology and what Mike covered at Toyota is the old world methodology of Kata and what Toyota does so well is align the organization from the top management all the way through to the process owner with this particular process. From the beginnings of taking their Value Stream Mapping, their KPI's, and their Hoshin Plan, and forming out of that the first step in developing challenges. Now everybody wants to strive toward and be a part of a winning team, so challenges are established at the very beginning of the process.

There's a slide or two that I could show you. One relates to how programs have failed; the other slide shows the Kata methodology of how cascading challenges can relate to the next level down in the organization.

Joe: *Do you want me to try to share screens here a little bit?*

Brandon: Sure. So I think a Lean conclusion overall with Toyota Kata and how it's different than how we have implemented continuous improvement in the past is what Mike has

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summarized in his online handbook. It starts with the Value Stream Map, but traditionally we were taught by either ex-Toyota that have become consultants or Lean consultants 20 years ago, the method is taking the Value Stream Map, doing a starburst or starbursting the map for opportunities, and then having what's called the Kaizen Blitz – a three to five day event that shows here in red next to the Learning to See book. Usually a Lean champion puts under that, they get this list of 25 action items, and then we return to 'business as usual' for the next few days, maybe the next 20 days here. And that Lean champion then is able to get four or five of the 25 things done, and it's 'business as usual,' it's pulled in different directions, but it comes to a point in time about 30 days later, it's time to attack the next starburst and have the next Kaizen event.

So you have another three to five day event and as we progress past that, another action item list is generated So now he has his original 20 items from the first event, and another 20 to 25, but the rest of the process owners and the rest of the company goes on as 'business as usual' and most of the time, the Lean champion is pulled into 'business as usual.' So at the part of Toyota Kata is maybe a flaw in our way of understanding the Toyota Production System. The Kaizen Blitz is a great tool Joe; don't get me wrong. It's a great tool for making rapid improvements, rearranging a layout and improving an area in a short amount of time. But if that's your only vehicle, then what Mike says and what we've concluded really at W3 is if we periodically conduct training events and only episodically or have these episodes of event-based improvement and the rest of the time it's 'business as usual,' then according to

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neural science, what we are actually practicing is 'business as usual.'

And I've talked to groups, I've done this before in past deployment processes prior to learning the Improvement Kata, Coaching Kata method and I've talked to the people on the floor and people that are actually practicing and this almost becomes calendar to them; almost like a Holiday calendar where there maybe 8 to 10 events playing and group and process A experiences an event on let's say Saint Patrick's Day, and then again around Halloween. And the rest of the time, they're not focused on daily continuous improvement, so they see it as episodes or episodically driven. What we need to do is shift away from staff-led episodic improvements and we need to let middle managers make the shift and carve out a slice of their work day to daily focus on continuous improvement.

Joe: *Said to be event driven, is it you're better off having smaller obstacles and including that smaller obstacle into a daily ritual and in trying to build from that. am I paraphrasing that correctly?*

Brandon: Yes and if I could also explain a little bit of the Improvement Kata methodology. The Improvement Kata has a pattern. We go through understanding the direction from those challenges that we've developed, then grasping the current condition that goes on in an operation or process area, we then envision the target condition that we want to achieve one week to two weeks out. How do we want the process to be operating in that short period of

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time frame as a target condition? We then attack the obstacles through the deeming cycle of PDCA toward that condition. And then so another way to look at it from an organizational standpoint is that the vision of the company is distant far out; it's 50 plus years. Every company wants to be the best, greatest, with the highest customer satisfaction, no complaints, our customers singing our praises, we have the best quality in our industry; all those far out, far-reaching direction givers, the true north that puts us in alignment. From that, we develop the challenges that are facing the business in the next six months to maybe two years out.

And as we go back then and look at the particular process area, we say what is the current condition of the processes operating. Number three, what is our next target condition one to two weeks out, and we identify the obstacles that are preventing us from reaching that particular target, and we only work on those obstacles that keep us from reaching the target condition. If 5s, which is a Lean tool is not directly helping us reach a target condition of meeting a customer demand or establishing a one problem piece flow, and then we're not going to work on 5s. We're going to work on and use those tools and those processes that specifically address those obstacles preventing us from reaching the target condition.

Joe: *I want to reach that target condition quickly. Can I run these obstacles in peril or do they have to be kind of step by step?*

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Brandon: Well, you focus on one obstacle at a time. It's kind of like the design of Experimental Philosophy. You don't want to change multiple variables at once because you won't really understand which one is contributing the most to the improvement. So we advise in this process to work on one obstacle at a time. We ask that maybe as you start to deploy this throughout the organization, that you look at other process areas that are focused on the same challenge or set of challenges, and their current condition or target condition may be different from process A. I've got another slide I can show you here Joe that would kind of explain that.

As you were asking about getting to the target condition quickly, we work on that one obstacle at a time until we're for sure over that. It's really related to this slide as far as how quickly an organization moves toward the challenge. This slide explains how we have a Process team A; they have their own target condition and successive target conditions that they're trying to reach. It's all guided by reaching this overall challenge for the organization and that challenge then comes again out from the initial development process of value stream mapping and setting that for the organization; so all three process teams are working towards successive target conditions in one to two week periods.

Joe: *So it's not like it's a company-wide obstacle. It's still obstacles are driven down from the challenge, down to the process team, departments, team leaders, individuals; is that true?*

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Brandon: Exactly. Those levels of the organization, the target conditions at one organization establish the challenge or the direction really for the next level bounds. So the organization might have strategic longer terms, Improvement Kata and Coaching Kata going on at a strategic level, it might be a three month to a six month type of a cycle for reaching a particular condition, but what at the organization level was being worked on then cascades down to the value stream level who has their own condition that they're trying to strive to reach and their own future state or current condition they're trying to reach. Maybe it's over the course of a particular month, and then that particular target condition from the value stream level translates down to the value stream loop level which actually becomes the direction given for the next level bound, and then cascades all the way down to the process level. So it's really what's key to sustainment and key to driving how Kata is deployed goes back to establishing alignment from the company's vision to a set of challenges and then throughout the organization, cascading those down to set directions. So everybody's in alignment focusing on challenges that the organization is trying to achieve.

Joe: *This reminds me a lot of how someone would take Hoshin and play catch ball and go through the process. Am I reading right? Is there a difference?*

Brandon: It's very similar to the Hoshin process and the connection between Hoshin and how we deploy Improvement Kata is very highly linked. Our process at W3 is to have that

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Value Stream Mapping session in challenge development, where we look at KPI's, we look at what the company's strategic objectives are, we look at the Value Stream Map, and where does a company want to go from a future standpoint, with a smaller team as high in the organization as we can get by forming an advanced group, a small group of four to six people that are working on and are responsible for the overall challenges for the organization. And yes the catch ball analogy is very similar to that. If the Value Stream managers, the supervisors, the process level, if they're not in agreement with those that are up above them, there needs to be communication, there needs to be an understanding. But ultimately, the direction giver is focusing on ways an organization is trying to achieve these particular challenges in the next year to two years out.

Joe: *So what I'm doing is I'm grabbing that obstacle and I'm creating PDCA cycle out of it to be able to reach a target, a stepping stone to that obstacle because – or am I defining an obstacle is like my – is there five, six obstacles as far as the challenges in each PDCA cycle that's concentrated on one obstacle at a time?*

Brandon: Each PDCA cycle is focused on one obstacle at a time but when it comes to the process, the value stream level area, there is a lot of things in this gray area where these red circles are at that are problems, wastes, opportunities at the Gemba. And we can go after these particular obstacles really in a simultaneous shotgun approach, but they may not necessarily be targeted toward a target condition we're trying to reach which is in alignment

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with the overall challenge. Many times when we go on a Gemba walk, we ask the question, 'what can we improve?' I'm a fan of Gemba walks from the standpoint of the awareness and identifying opportunities, but really 'what can we improve' is not really the right question. What we really should be asking is the question 'what should we improve?' We should only be working on those obstacles that are leading us down a path to the target condition like in the lower half of this slide. There are many things once we get to the target condition that may be wastes that are still out there but we have achieved the target condition and so we then set the next target condition one to two weeks out and look at the obstacles that are keeping us from reaching those, and you'll notice it's not a direct path. Going through the Improvement Kata and the PDCA cycles, we get new learnings. The PDCA cycle starts with a hypothesis, where we think that we would be able to achieve, our expectation is to achieve this. Now we go and do the 'do' and actually run the experiment to try and overcome the obstacle, and we study or check how that particular experiment or that change affected that obstacle. If we're able to overcome it, we're able to move forward along a path and attack the next obstacle. IF we haven't overcome that obstacle, then we look at another hypothesis or another factor that may be causing that obstacle to keep us from reaching the target condition.

Joe: *So we're really kind of – I think of the Theory of Constraints and the Herbie there. I'm finding little Herbie's in this process that are constraining me to reach that target condition, and I'm working on them and I may discover something different. I mean since it's not a*

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linear path, it's because as I proceed towards the target condition, I'm getting a little smarter and I see different things I didn't see maybe in that first third of that gray area.

Brandon: Exactly. The difference between the traditional methodology is kind of like playing industrial whack-a-mole in this troubleshooting picture here; like everybody could relate to that. They may have run A3 problem-solving and completed an A3 on a problem, and it has a birthday or an anniversary. We solved that problem four times now. What's different about Kata is we use the same thinking of A3 and PDCA, but it's much like this person in the maze; he can only see so far. Or in the center here where this eye -- you can only see so far and we call that a knowledge threshold and that's when we can't see any farther. He doesn't know whether to go left, continue down the hallway and go right, but he has to take a step. And once he gets there past that knowledge threshold, he could be surprised or she could be surprised by the findings of running an experiment, but that learning which is key to the PDCA cycle within Kata, that learning helps us formulate our next step or our next experiment that we want to conduct to overcome that obstacle.

Joe: *I have a lot of software development people on the Podcast and it sounds like a very iterative cycle that we take forth in whether we use it in a Kanban or whether we use it in Scrum, but it's somewhat as we're discovering things along our journey. I mean like you said, those knowledge thresholds, we're grabbing them, and we're combining them together. What happens if we get stumped and hit a brick wall? It's kind of like, well what do I do*

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next? Do I pick just another thing? I mean all of those red dots, all of the things we can improve and I'm not saying I'm going to pick the right ones and I'm going to chunk a few things off every time, but what happens if I really haven't reached my target condition? Is that what I kind of redefine and reevaluate – that target condition?

Brandon: Well we talk about the different types of experiments within PDCA. At the very basic, the least scientific is the 'Go and See,' gather data, gather more information. The next one is an exploratory experiment. Try something so that we can uncover new knowledge and we can learn something. And the last is testing a hypothesis where we think the process will react a certain way, and we're going to test whether actually our thought or our innovation will overcome that particular obstacle. Many times we have to step back to into that lowest form of going and seeing. If we're up against a brick wall on a particular obstacle, our suggestion is usually going and learning about the process by taking additional data. There's always process data and process analysis that can help us look at a particular obstacle from a different light; how it's affecting other parts of the process. And usually from there, you can gain either a new hypothesis or come up with a next experiment that you'd like to try. Many times, I've had clients in companies that I've worked with, shift over to another obstacle that they know is on the path and work on that for a few successive PDCA's and new information comes to light, they're able to see now how to overcome that first obstacle and design an experiment to be able to breakthrough.

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Joe: Can you tell me a little bit about the Coaching Kata and how that is different from the Improvement Kata?

Brandon: Yes, the Improvement Kata really has those four steps that I've talked about, those four routines: understanding the direction, grasping the current condition, establishing the next target condition, and moving toward the target condition with rapid PDCA's. All along that Improvement Kata process, there's a learner and a coaching relationship. The learner is responsible for the process area, and he or she is responsible for overcoming obstacles. The coach is in a guiding mode, as someone who has practiced the Improvement Kata in the past and has past experience with the methodology; they're competent to coach. And so in that process, once we have established the current condition, established a good target condition with the coach guiding them all along the way, there then becomes a point where we need to execute the PDCA step and the method of the coaching Kata is to use the five Toyota Kata questions that Mike has suggested in his book and in his handbook online.

Let's switch over to another slide here and go to that. So the five questions are asked at the point where we go through the Coaching Kata routine. It's what really fosters the pattern of scientific thinking in teaching people how to think scientifically about solving problems. So the coach will ask the learner in a one on one coaching session, usually at the beginning of the day at a predetermined time, the coach and learner meet in front of the storyboard that tells the story of the Kata that's going on and the coach asks, "What's the target condition?"

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And then the learner responds with kind of framing the target condition and what they're striving to achieve by a certain date, one week to two weeks out, possibly three weeks. And then the coach asks, once he understands the target condition, he asks the question or she asks the question, "What is the actual condition now?" And these are framing type questions to get the coach reoriented with the process and also to test the learner as far as their understanding and knowledge of the direction that they're going.

As a PDCA cycle is performed, the card is usually flipped over, and the reflection questions are asked. "What was your last step?" the coach would say. The learner would respond with what experiment or step that they've previously conducted. The coach wants to know what the expectation was so he or she asks, "What did you expect from that step?" The learner then explains what their anticipated outcome was going to be, and the coach replies with "What actually happened?" So it's just stepping them through the PDCA step and the learner reports on what actually happened. Either they refuted their hypothesis or they confirmed it or a new piece of data was revealed, a surprise may have happened in that particular experiment. And then finally the coach would ask, "What did you learn?" And our clients say that that's probably the most powerful and developmental part of the Improvement Kata, Coaching Kata is that person learning how to think scientifically and do better and better PDCA's as they're going forward.

The coach then turns the card back over and asks about the obstacles. There's usually a

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parking lot of obstacles of four to five or six obstacles that are preventing us from reaching the target condition and the coach asks, "What obstacles do you think are preventing you from reaching the target condition?" And the learner usually goes over all of the obstacles that they're facing; that field of obstacles that we had, the red circles around. He or she will read this from a learner standpoint. The coach asks, "Which one are you addressing now?" And that's another key pivotal point in the Coaching Kata to focus that learner on that particular obstacle. What the coach is thinking or what they're trying to do is get in line with how the learner is thinking and they're trying to validate, is the learner addressing one obstacle that's related to their PDCA step that then in turn is going to help them achieve the target condition.

The learner may be addressing an obstacle that the coach may find as off the map or ancillary to the PDCA experiment that there striving to reach, so the coach may ask a few follow-up questions there to try and get the person back into what we call the Kata corridor of learning and thinking scientifically. If there's not a specific reason they're addressing that particular obstacle related to the target condition, we may guide that particular learner to address a different obstacle that the data may be pointing us to a slightly different direction. Ultimately, the learner has to make that decision and he asks the fourth coaching question which is, "What is your next step or your next PDCA or experiment?" And the learner would then go to the PDCA form and describe what their next experiment is. The coach follows-up with "What do you expect?" Trying to find out if that learner has a hypothesis, is that learner

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running an exploratory experiment? Many times they may be trying to run the operation in the target condition or simulate the process being run in the target condition because by running it in the target condition, we find all the reasons why the process won't work. So within limits, within safety quality limits, we're not going to do anything that injures the worker or anyone in the area. We're not going to sacrifice quality by this, but we may have a few target condition parameters we want to try and run. That's a valid exploratory experiment that the learner may want to go through. The coach reacts up with the question by asking, "When can we go see what we've learned from taking that step?" And notice Joe that it doesn't say, "When can we go and see what your results were? When can we go and see where you've made the experiment a success?" Nowhere in that question is there a focus on someone meeting a predetermined set of objectives. It's when can we go and see what that learner has learned from executing that scientific PDCA cycle.

Joe: *We talk about Kata, and we talk about sustainability and I can see a Lean company on their journey attaching themselves to Kata. IS this a way to introduce Lean to a company that's maybe not practicing Lean yet? I mean I see some struggle here in that method. Could you tell me what the obstacle or challenge might be?*

Brandon: Well as I've mentioned, many people come to us that have some type of Lean program, and it's plateaued or it's declining, or the people aren't engaged. Other clients come to us who may be just starting their Lean journey. An interesting story I have with a

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company I worked with in Oklahoma, we had been practicing for about six years. They had a consultant, they brought him along and they worked 5S and they worked Kanban boards and everything and he just felt like there's something missing about Toyota being successful with being able to create the best people that make the best cars in the world, which is a famous quote. He felt there was something missing, and as he started to read the book and learned more about Kata, we did a deployment with him and established the challenges that are in direction with his company's vision. We established improvement Kata's in about four areas, and he began practicing along with coach practice. And he told me toward the end of the deployment, he said, "You know, I think we should have started with the Kata methodology and brought in the Lean tools as we needed them." He said, "By just learning the tool, we were focusing on trying to make the tool work and no necessarily trying to get us to our next target condition or closer to the challenges we were facing in that particular fiscal year."

Joe: *We go back to that change in behavior is that we have to have that target condition or that idea of strategy deployment of where we're going in the future and then we could do the Improvement and the Coaching Kata because we can start establishing the conditions and the conditions of success let's say.*

Brandon: Exactly and the switch in thinking when you're using the Improvement Kata is to a striving mode. We want that learner learning the scientific method of PDCA but always

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want them to be striving method. It's a motivational factor. We see it in the eyes of these learners as they conduct an experiment, and they learn something new, and they achieve these target conditions and start to achieve successive target conditions. We can see the inspiration and the fire in their belly, so to speak of wanting to continue to do more in a striving mode, rather than a reactive mode of saying, well we had this quality problem, let's try to drill down to the root cause of this quality problem and thinking we solved it, and it comes up again in another six months, so we keep solving that same particular one. It's put the learner in that case or the process owner in that case in a reactive mode, waiting for the next problem to come up, rather than being on the offense and striving toward a condition that we want to operate, which is better hopefully than what we have established as our current condition.

Joe: *Is there something that I didn't ask that you'd like to talk about?*

Brandon: Well a little bit about deployment and our methodology of how we deeply, because a question people come to us, they usually have either read the book or they've attended the seminar, they've become what we call 'aware' of the Improvement Kata and the Coaching Kata. So they ask then, how can we get started? How can we function as a learner and a coach and a second coach in this triad without having a base level of experience? Most companies don't start out with an experienced Kata coach already on staff. So what we do, we go into a company, and we develop that vision and challenge those

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challenge themes from the Value Stream Map and from their Hoshin and we start with the small group. We call them the 'Advanced Group.' It's not meant to mean that they are more advanced in Lean, or they are more advanced in particular Six Sigma area or something like that; it simply means Joe that they're going forward first. They're the first troops that hit the beach, so they were the first ones that are going to experience Kata.

So we focus on that four to six people that usually site leadership responsibility, then as we start to look at a particular for an Improvement Kata, we have a person from that advanced group or a couple of people from that advanced group, and maybe the supervisor, manager of that particular area, we bring them in as a process owner, and we start to establish on site the routine of the Coaching Kata and the Improvement Kata. The four routines that I've talked about for establishing the Improvement Kata and then get them actually practicing. It's kind of like -- take a sport like water skiing. You can read a book about water skiing, you can sit on the beach or by the lake and read that book, you can watch other people water ski, but until you get in the water, and you put on the skis, you don't really have an appreciation for what it takes to have the skill of water skiing. And that's an analogy that Bill Constantino, our founding partner has related to a lot of people.

So this advanced group then begins to coach each other with some external coaching periodically. We come back every couple of weeks for a day or two and help course direct and see if they've met the target condition and what's preventing them from meeting the

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target condition. We examine what the coaching is and where they may be flaws in the coaching. So we give that first coach and second coach learners some guidance. We do that for a period of about 20 days, 21 days. Again, how long does it take to form a habit? Usually 21 days. So we then rotate those learners out of a learner position into a coaching position and then maybe the coach into that learner position. So they get to experience what it's like to conduct a PDCA and to have failings that fail forward and what happens when they do an experiment, and they are achieving a success?

The most successful deployment Joe that I've experienced is when a CEO or a Vice President of Operations or Manufacturing has looked at this process, has looked at the – read the book, went to the seminar, maybe they've been doing a workshop, and they understand it and see it to the point that they say, "I need to be the learner first. I may be a Vice President, I may be able to work well with others, achieve goals, achieve results, but this is a methodology that I need to experience firsthand as a learner and conduct my own PDCA." And I've had Vice Presidents that went to their Engineering Manager or someone else saying, "You be my first coach. I'm going to run the experiment for these first 20 days, and then we're going to rotate those roles." So they get to experience that.

So we do that first 60 to 90 days in a coaching learner rotation type model, going an inch wide and a mile deep scenario of trying to build the skill set. Our next stage then is to bring it horizontally within the organization and bring in other middle managers to learn this

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process. So we now have established a base of four to six coaches that are at the first coach level that are capable of carrying on and teaching this method to other people, with us guiding periodically as external coaches along the way.

Joe: *That's great stuff, Brandon Brown. Tell me what's in store for you.*

Brandon: Next week, I'm at the Kata Summit. Mike Rother and Bill Constantino of the W3 Group have put together our first Annual Kata Summit whereas Mike calls us 'Kata geeks' are going to come together, and we're going to hear from other practitioners from other companies that are practicing the Improvement Kata and Coaching Kata. I'll be leading an Improvement Kata experience where people will get hands-on exposure in a four-hour workshop type format. From there, March and on until June, I pretty much got my calendar pretty full with either client engagements or workshops, conducting workshops for an organization called Association for Manufacturing Excellence where I'm a board member, to conducting workshops for W3, as well as doing other Continuous Improvement trainings pretty much through the rest of the summer.

Joe: *Oh that sounds pretty exciting. That Kata Summit isn't in Duluth, is it?*

Brandon: No. Mike and Bill were very strategic about picking the location, and they selected Fort Lauderdale, Florida for that particular summit. So we're going to get a little bit away

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from the snow and bad weather. We're hoping a lot of Bostonians want to escape the seven feet of snow that they've experienced and come down for a couple of days and learn a little bit more about Kata in a little warmer climate.

Joe: *That sounds pretty exciting. A great group of people and a great subject matter to tackle is the Toyota Kata, and the W3 Group is an outstanding group. So tell me, what's the best way for people to contact you and learn more about Toyota Kata? Where would you point them?*

Brandon: They can email me directly at brandon.brown@W3groupllc.com. They can go to our W3 Website and meet all of our practitioners on there and make contact. There's a lot of resources, a lot of presentations, a lot of information that they can self-educate themselves a little bit more, a little bit further about that. But they could feel free to email me and my cell phone is usually always on; it's 479 856 1919. I'm willing to take a call and discuss opportunities where companies feel that their pain might be where they might be able to improve.

Joe: *Heck, you even took my call, which I thank you very much. This Podcast will be available on the Business 901 iTunes store and the Business 901 Website. Thanks everyone for listening.*

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Brandon: Thanks, Joe! Someone told me in a Toyota Texas Manufacture Plant in San Antonio, where they make the Tacoma and the Tundra both, we asked them about Kata and they said, “Well we’ve read the book, we understand what the thinking behind that is but this is just the air we breathe, It’s just our culture...” They don’t call it Kata; they have a daily routine of focusing on continuous improvement and striving toward a target condition. An interesting fact is Kanban, Jidoka, Poka-yoke, all of those tools were solutions Toyota came up with to solve a specific problem they were facing, and they sometimes question us as to why would you take a tool that address our problem and try to blindly apply it toward your problem? You need to come up with a solution that addresses your problem, and Kata does that. Kata gives us the method for being able to think scientifically and come up without one tool. If we need to bring in a Lean tool, we bring it in. We bring it in out of the toolbox. But we focus on being able to think scientifically and PDCA towards a solution and come up with new and innovative solutions.

Yes, I’m presenting at the TWI, Lean HR Summit that Lean Frontiers is putting on in May. I’ll be conducting a Toyota Kata workshop on May the 13th. And I have a couple of client companies; the individual I spoke about in Oklahoma is going to present along with me and another company. So I’ve got a couple breakout sessions.

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Joseph T. Dager

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Phone: 260-918-0438

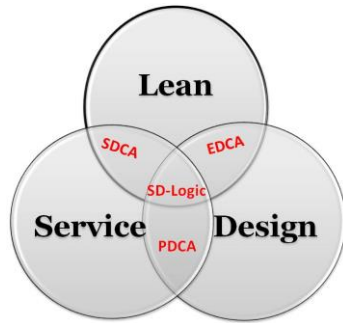
Skype: Biz901

Fax: 260-818-2022

Email: jtdager@business901.com

Website: <http://www.business901.com>

Twitter: [@business901](https://twitter.com/business901)



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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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