

# Business901

Podcast Transcription

Implementing Lean Marketing Systems



## Using the 7 Kata

## Guest was Conrad Soltero

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### **Transcription of Interview**

**Joe Dager:** *Welcome everyone. This is Joe Dager, the host of the Business901 Podcast. With me today is Conrad Soltero. He works at the Texas Manufacturing and Assistance Center or TMAC as we'll call it and is a Shingo prize examiner. For the last 20 years, he has provided industry with a wide array of management and workforce development services. He has been published in various media outlets and the principle author of the award-winning book, The 7 Kata, co-authored with Patrick Boutier. Conrad and Patrick are both certified through the TWI Institute as a trainer in Job Instructions, Job Relations, Job Methods, Problem Solving and Job Safety. Conrad, I would like to welcome you and could you start out and tell me about your role at TMAC?*

**Conrad Soltero:** *Hi. Well, thanks for having me, Joe. I really appreciate it. Yeah, I work as a Field Engineer with the Texas Manufacturing and Assistance Center. I've been doing that for 20 years. I cut my keep out there originally in the Quality Management system. I've worked in basically all of the major quality management systems and 97 are funding agency started a foray into the Lean efforts to get Lean spread out through the United States. So, I guess I've been working in Lean since then. I've also done some training and some projects in Six Sigma and I'm a certified black belt.*

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**Joe:** *Certified black belt's nice but I'm amazed, okay, that you completed all the courses of TWI. There must be only a handful of people that have done that.*

**Conrad:** Well, that's right, Joe. It's exactly probably a handful, 5 or maybe 6 of us nationally that have done this. After a couple of years of working in Lean, I saw a lot of backslide with my customers and wanted to know, what is that secret sauce that Toyota's been using? I started doing some investigation and coincidentally at the same time, TDO, one of our partners up in New York was also doing the same thing and really by 2003 had brought in Pat Graupp to be the Master Trainer for the TWI Institute. But, long story short, it's taken most of the early 2000s to get through all 5 courses. First, you have to take the course and then you take the Train the Trainer and then go out and practice. So, it's been a tenuous but a really fulfilling experience.

**Joe:** *I'm actually very impressed. I didn't realize Patrick had done it too and I'm just very impressed because I know what a monumental effort that actually is. That leads us into the book you wrote, *The 7 Kata*, which combines the whole essence of Toyota Kata, TWI and Lean training together. And, in fact, that trio seems to be a rather hot topic in today's Lean world. How has your book been received? It's been out for a couple of years now.*

**Conrad:** I think it's been received rather well. It did win the Shingo prize. And, for me, being a Shingo examiner, I know the criteria that, or what it has to go through to be qualified just for the award and basically it's a committee of Lean experts that goes through it. And, if there's a criticism, the criticism on the book is you need to know a lot about Lean to read the book and understand it to be able to tie it in. But, with the average

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reader that I've met in conferences that have actually read the book, I've gotten some good feedback and some thank yous on it. So, I'm pretty pleased with it.

**Joe:** *You have to know a little bit about TWI, a little bit about Kata. It's not the beginning book, right?*

**Conrad:** That's correct, Joe.

**Joe:** *I would think that. But could it be the book you start with and then break down to what you want to learn and drill down?*

**Conrad:** It kind of has that effect that once you do have a cursory knowledge in Lean and understand TWI, maybe have taken the course, not necessarily taught them and maybe familiarize yourself with the improvement in the Problem Solving Kata. It does go into the details on each of those. And so, I think it does the handy job of both being comprehensive before it needs to be being very specific.

**Joe:** *What have you learned from publishing the book? I mean if you would re-write it today, would you add an eighth Kata?*

**Conrad:** You know, I've thought about that and really no. I mean, you know, I think this goes to Jeff Liker's books on Toyota and what he's done is he's divided Kaizen into Improvement Kaizen and Maintenance Kaizen. I find each of those skills both with TWI in the Kata as either being an Improvement Kaizen or Kata and a Maintenance Kaizen or a

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Kata. And so, really the 3 types of skills you need are improvement, problem solving and standardization. I think those 7 Kata do that in spades. They really cover those 3 areas. In problem solving for example, there's a whole chapter on Toyota problem solving, practical problem solving as they call it and the TWI Job Relations course and content is also about problem solving but it's specific to human relations which there are some nuances and differences. I think if there's a good job of assigning each of these into those types of Kaizen, those two types of Kaizen and I can't really think of, more skills that a manager would need besides those 7.

**Joe:** *One of the areas and it's the most popular of all TWI programs, Job Instructions. I think you take a little different bend on it rather than just thinking of it for the worker because you talk about how it plays a role of developing leaders. Can you expound on that for me?*

**Conrad:** I've just developed recently a training program on Lean leadership and you can find that under my name in SlideShare and what it really talks about is how leaders at Toyota really need to become teachers. In fact, if you go back to some of Jeffrey Liker's books, for example, Toyota Way or Toyota Talent, teaches that in principle number 9. Teaching is the most highly valued skill of leaders and leaders have to deeply understand the work to teach and coach others. So, there's one kind of citation on why teaching is so important to leadership. Secondly, there's a quote from Atsushi Niimi, he was asked about his greatest challenge from trying to teach the Toyota way to his American Managers. How he responded was to say that they want to be managers not teachers which to him was a bad thing. He explained that every manager at Toyota must be a teacher developing

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exceptional people is Toyota's number one priority. So, being a teacher is really, I think, as a manager or a leader in a Lean system is key and I think the first step. It's not holistic but the first step towards being a good teacher is to be an excellent instructor. So, you know, after that you become a teacher by really starting to practice the Kata. So, both practicing the Job Instruction training on the job with one-on-one instruction and kind of spring boarding off of that into the improvement Kata can really make you the leader that Lean really mandates.

**Joe:** *Lean leaders need to have some type of practical expertise. Could I go so far on saying that?*

**Conrad:** Well, they have to, absolutely. First of all, they have to have total knowledge of their content or their specific work. From that, how do you get her to cross and how do you understand it in order to promulgate it to the masses and how to manage people. So, yes, you have to really have those two skills, that skill of instruction and then what's really interesting is the cognitive science behind the skill of improvement that really, can really fortify that effort to become a great leader.

**Joe:** *How do you think Kata helps in spreading knowledge through an organization?*

**Conrad:** It's really about two things here. We're talking about really tacit knowledge and explicit knowledge. For you to get your big bang for the buck is on the tacit knowledge side, we're very good in the industry at documenting all that explicit knowledge. What we're very poor at is really understanding the constraints of our colleagues in

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management. If I'm an engineer, understanding HR's, the HR Manager's constraints or accounting constraints or any other area in the company's constraints. It's really important for me in order to make proper decisions and knowledgeable decision. What Improvement Kata does is create a mechanism so the dissemination of this tacit knowledge through the understanding of other people's constraints and I think that's really important in how it really affects the behavioral mechanics or as I like to say the organizational dynamics within that organization.

**Joe:** *How do I actually capture that? How do I document it? What would be an example of how to take that knowledge and make it visible or usable?*

**Conrad:** We really haven't nailed it down because Tacit knowledge by definition isn't something that you're really going to document. What it does is gives appreciation. The way it is done is when you're doing your Kata, your 15-minute daily Kata as a manager, you have this target condition and instead of going and making a decision on how to get to the target decision, you run experiments. These experiments may actually be an implementation, you're trying something or maybe just speaking with other people. What I found in coaching this is that by going out and talking with other people and just asking them why they do things a certain way and how what I do affects them and that kind of interaction really gives me a deep sense of what's going on in the organization. I always hear, "I didn't realize that" or "I didn't know that until I spoke to the person specifically about that and without telling them what I wanted." Because, once you tell someone what you want, they'll respond in sometimes a negative way by putting up a wall and saying, "Well, this person just wants this and wants that." When they really believe you're

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interested in what they're doing and what their constraints are, that's when they really open up to you and I think that's the dynamic that we've been missing so long.

What I like to say is this. You're Kaizen event or your rapid improvement event is about improvement and, oh, by the way, you may learn something. What I like to say about the Kata is, Kata is about learning something and, oh, by the way, you may make an improvement and you eventually will make that improvement. It's really about learning and it's not so much about improvement. What you learn is just incredible, and again, it's on the tacit knowledge side.

If you want to talk about the documentation, I would go back to Job Instruction and actually producing that job breakdown sheet. That carries a lot of explicit information that everyone needs to know in order to perform those jobs correctly.

**Joe:** *And so, that's some of the dynamics that are between Kata and TWI is something just like that, right?*

**Conrad:** That's exactly it. They work off each other. Absolutely.

**Joe:** *We're living in this agile world. That's on everybody's tip of everyone's tongue. The practice of Lean and practice of Kata, is that making it more that way? I mean is that a good way to learn agility and adaptability?*

**Conrad:** Oh, I think it's probably the only way that I've discovered, Mike Rother in Toyota



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Kata really nailed down that adaptability end of it. He refers to a book named Talent Code by Daniel Coyle and in that book you really understand how practice, what will practice makes in adaptability. You go back to Rother's Toyota Kata and he really spells out how the daily practice of the Kata is going to make a person adaptable and he talks about, you know, how people become expert in their jobs through focused practice. It really is about practice and that practice really leads to adaptability which is so important in Lean because if people aren't adaptable and they start pushing back, you're going to either end up with chaos or at best end up where you're already at. So, you spend all these resources trying to get better and without that adaptability, well, I bet you're going to find yourself maybe a little better but probably in the same place. So, adaptability is a crucial dynamic in implementing Lean.

**Joe:** *It maske me think of something because I'm this old guy sitting here and I can see kids learning things in the way they pick up things and going to the Talent code of how they wrap, I think it's myelin or whatever in the wraps they make and which I highly recommend that book and also they have a follow up to that book, like 52 Tips or Practice Steps to it too. They're both excellent. I'm an old guy, is my myelin still wrapping? Do you have to treat the generations a little differently and can Lean and Kata help me with that?*

**Conrad:** So, you're talking about the old dog new tricks... I think the book does make an excellent point that, cognitive plasticity is still available to us all, as long as we have our senses and we're open to it, I think that that's really not a problem.

**Joe:** *Both those books, The Talent Code, Kata and even your book and especially TWI, of*

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*course, it's that learn by doing approach is that could only take so much instructions and so many PowerPoints then it comes back, you got to do it.*

**Conrad:** That's right. That's right. It's about the practice and it's about doing it. You're right.

**Joe:** *When I think about Lean and I think about Kata, we have control of the situation within our own four walls, let's say, that internal focus. Can this help in bringing that message in from the outside world? Can it help us in that collaborative world we're talking about or is it something that is just internal to the organization?*

**Conrad:** No, I think, any organization is the microcosm of the outside or the social system where it's at. And, I think, Toyota has done an excellent job trying to understand, using scientific method, using PDCA, trying to understand markets, trying to understand that outside world in order fit or ducktail into it. I think once you learn how to really understand your own organization, understanding the outside world is just the next logical step. And so, I think not so much Lean tools that are going to get you there but, absolutely, Kata and starting with TWI, with Kata though especially learning your markets, learning your customers, your suppliers, understanding constraints that everyone has really gives you more empathy and more understanding of the outside world.

**Joe:** *I've seen Lean manufacturing take hold and, you know, the 5 core principles of waste and value streams and what have been the roadblocks of getting the Kata thinking into organizations and particularly manufacturing organizations that have practiced Lean and*

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*looked at Lean as a process maybe but maybe not as a thinking process.*

**Conrad:** The Lean tools are robust and work well and what I've seen kind of 2 dynamics. One is when leadership really becomes students of Lean then you really have a fighting chance. I think that's typically what's happened here in the United States, even the west, is that some organizations have really taken the bull by the horns from the very top and have been able to really use the tools of Lean . However, sometimes and really in my experience, usually Leadership is saying "My midlevel managers and my workers, my value adders, they really need to understand Lean more." And, vice versa, people at the bottom are looking up saying, you know, those people really need to understand how to manage. You get that cross arm point code of arms where everyone's blaming everyone else and I think this a really, the Kata's really a great way to breakthrough that obstacle. I hate to say it. It's still an uphill battle. You're not always going to get leadership involved sometimes. Sometimes they really just need to have better reports coming to them saying what a great mechanism, what a great tool Kata is for them to really start appreciating it.

**Joe:** *Do you think Kata and Kata thinking is in its infancy or do you think it's matured in kind of, you know, I don't want to say phasing out or old, but do you think it's an infancy and ready to take hold more so within the industry?*

**Conrad:** Oh, it's in its infancy still. I mean I go into, well, I'm new to this Central Texas market. And so, I've gone to companies over and over again to all these different companies and they all know about Lean and they've all hired their Lean consultants that have value stream mapping and putting in cells and TPM and 5S and all that kind of things

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and they're all doing that and I mention Kata and even TWI, I get that blank stare. And, I think of probably a good 60 or so companies I've visited with here in Central Texas, it was music to my ear when I sat down with a CEO and he said, you know, "We want to go Lean. What do you know about Kata?" I was just, I was dumbfounded but delighted. So, yeah, it's in its infancy.

I had a call from another company here in Austin. Someone gave them my book, from a manufacturing association, one of the managers there. And, they went up to, I think somewhere up in Utah to see what they were doing. When they went up there, they saw that they were doing Kata and they got Kata preached at them and they came back and said, "Oh, yeah, yeah, you know about Kata don't you?" And so, sometimes, you know, it's that Messiah syndrome or effect where you can't know if you're too close to a situation that, again, it's in its infancy. I don't even think it's in its adolescence yet. There's still a lot of work to be done here nationally and internationally to get this kind of management system on track.

**Joe:** *Should Kata be left to the CI champion?*

**Conrad:** No. Kata is to be performed by anybody overseeing the work of others 15 minutes daily, every day that they're onsite.

**Joe:** *So, it's a very holistic approach then?*

**Conrad:** I mean it's for everyone. This is not to be parsed out to certain individuals

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because how can my HR Manager understand my accountant's constraint if only the engineers or the Quality Manager's practicing Kata. They'll never understand that. Hence, you're still going to have these kind of obstacles within the organization. So, yes, every single manager really needs to practice this daily.

**Joe:** *Conrad, you talk about that 15 minutes of Kata a day, okay. Could you just kind of give me a quick summary of what that is?*

**Conrad:** Sure, it's just factual practice of the Kata. Going and taking, cutting 15 minutes out of your day, a part of your leader standard work is, as David Mann would say, putting that on your list of To Dos for that day and actually finding some time to go out and continue your PDCA cycle, your Kata, your improvement efforts that's ongoing and that should be done daily, every day. Every day you show up as I said. That's really all it is, 15 minutes. I mean we can get into how that's done but basically when I'm coaching it, I pull out my iPhone and I say, "Okay, start." I hit that start button on the timer and at 15 minutes I hit the stop button and I say, "Okay, that's it for today. Let's take it up tomorrow." You really get incredible momentum doing that. We all have to work in our business. This gives us a chance to spend 15 minutes today working on the business and what I like to say is, "If you don't have 15 minutes, you're either in too much chaos or you're not telling the truth." Because, I see people speaking at, down at the water fountain every day, at the water cooler. So, everyone's got the time and they should spend 15 minutes a day working on the business.

**Joe:** *I think that's interesting because I think of a daily meeting. It's the first thing I think*

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*of. But, a daily meeting is very tactical and here you are taking that 15 minutes and of everybody gets 15 minutes to work on the company every day, it's pretty powerful at the end of the year isn't it?*

**Conrad:** Oh, the synergism is incredible. I mean you get people ending up on the same solutions and congratulating each other and patting each other on the back. You just cannot fathom the dynamics that start occurring when everyone starts doing it.

**Joe:** *What's upcoming for you?*

**Conrad:** I'm still very interested in trying to get both TWI and Kata into this market, get people familiar with it, get people understanding it fully which is the hardest task. So, all I can say is I am just going to keep on, you know, pounding the pavement and knocking on doors and doing projects up here. But, I got to tell you, with every project that I do Kata in, I learned something new, some new nuance, facet of it that I really didn't see before. And so, it's exciting and I'm looking forward to it but that's what's up with me.

**Joe:** *Conrad, what's the best way for someone to contact you. I know the book is available on Amazon, The 7 Kata published by productivity press. But, what's the best way for someone to contact you directly and maybe is there any other secrets to find out more about the book?*

**Conrad:** Probably, I'm putting up a website as we speak and it's going to be 7Katadojo.com and you'll be able to contact me there or you can contact through my

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employer at Southwest Research Institute and my e-mail is csoltero, so that's all one word, csoltero@swri.org.

**Joe:** Conrad, I would like to thank you very much and I enjoyed the book tremendously. It's one of those ones in my Kindle that stays on my carousel, okay, all the time, so.

**Conrad:** Oh, I appreciate that, Joe.

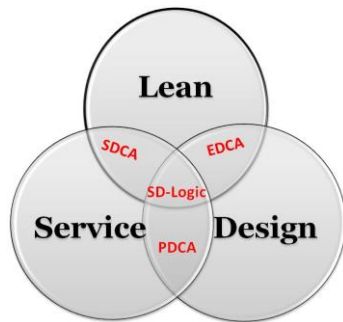
**Joe:** I'd like to thank you. And, this podcast will be available on the Business901 iTunes store and the Business901 website.

**Conrad:** Well, thank you and I appreciate your time and the opportunity you've granted.

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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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