




# What are you striving to achieve?

90 min Learning Session  
Skip Steward and Beth Carrington

Lean Enterprise Institute 

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## Introduction

- I'm Skip Steward, Vice President and Chief Improvement Officer at Baptist Memorial Health Care
- I'm Beth Carrington, Kata Master Coach, LEI Faculty and President of Carrington Consulting
- Today will discuss the power and effectiveness of asking a very simple but elegant question,

*“What are you striving to achieve?”*

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## Our experience

- We will discuss and share examples on how this question can drive organizational strategy, strategies that lead to action on a daily basis.
- Understanding the answer to this simple question gives people leaders and team members momentum to move forward.
- When coupled with **scientific thinking**, people leaders and teams can focus and experiment their way forward, effectively utilizing the tools of Continuous Improvement and Lean Management.



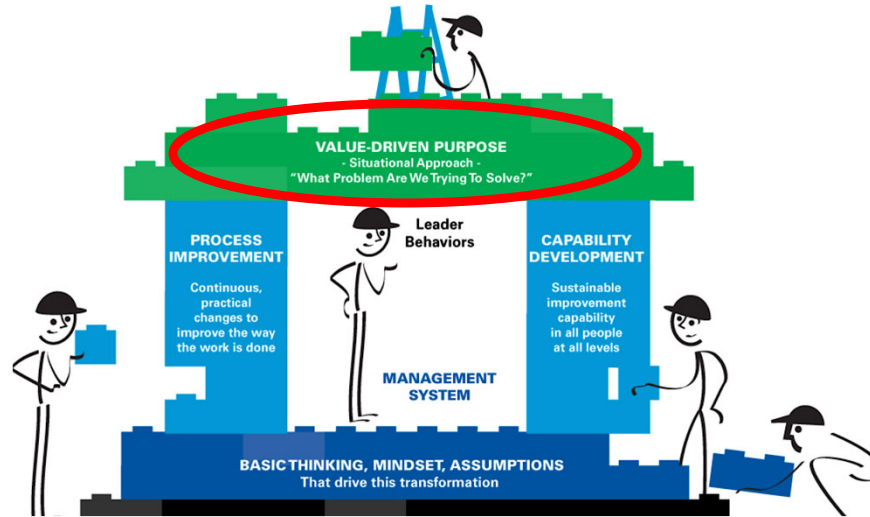
## Baptist Memorial Health Care - Strategic Planning

- Right Care
- Right Time
- Right Place
- Right Cost

How do your strategic conversations around the four “Rights” shape your organizations transformation and day-to-day role of people leaders?

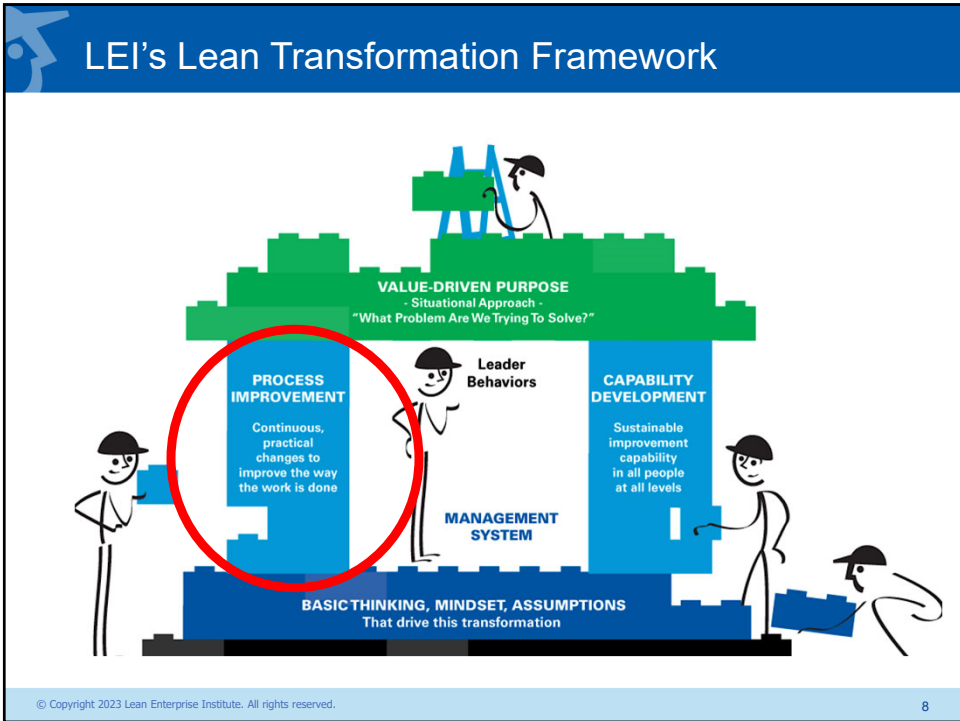
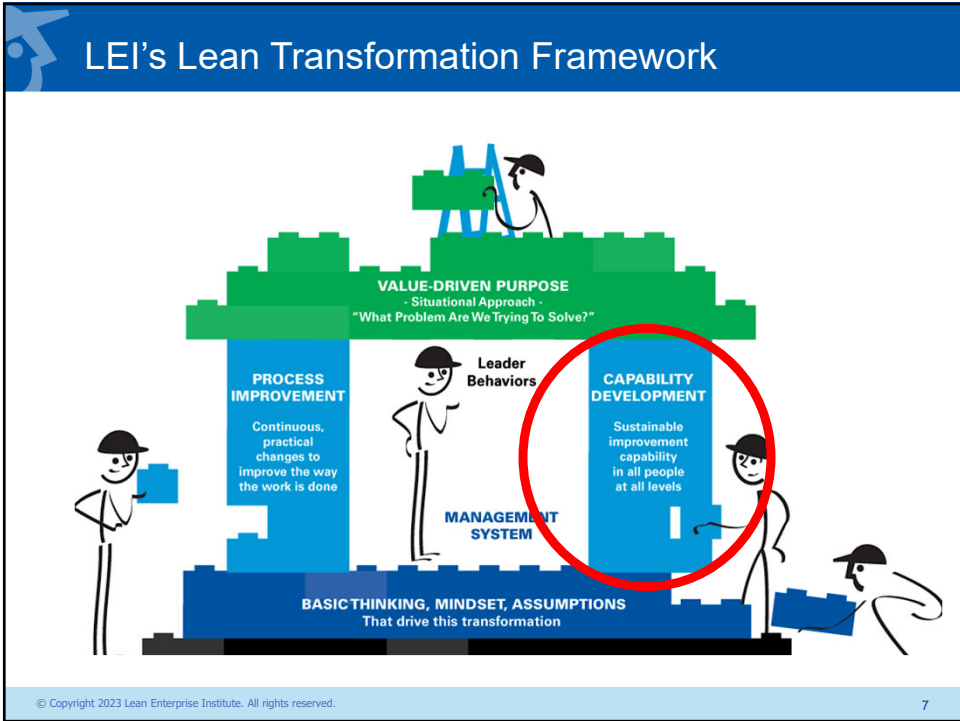


# LEI's Lean Transformation Framework

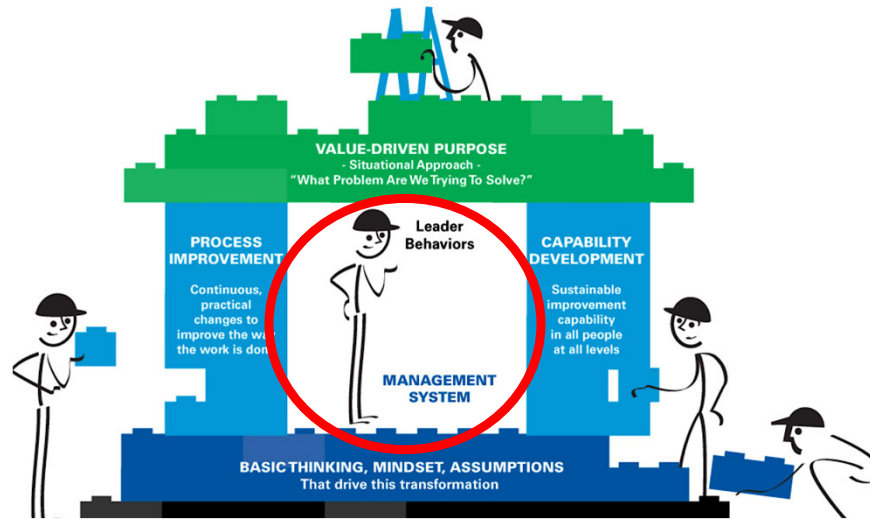


# LEI's Lean Transformation Framework





## LEI's Lean Transformation Framework



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## With Purpose or An Objective to Pursue

- Leaders can become coaches
  - Not to a solution
  - But rather to an objective to achieve

*“What are you striving to achieve?”*

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# Where to begin?

Think of a funnel.  
Frame your objectives.

Context  
Vision  
Challenge  
Focus

Once you have this...  
now the fun can begin.



Worksheet

Learner (Name & Title) \_\_\_\_\_  
Coach: (Name & Title) \_\_\_\_\_  
2<sup>nd</sup> Coach: (Name & Title) \_\_\_\_\_

Revision: # \_\_\_\_\_  
Date: \_\_/\_\_/\_\_

Context

Direction (Vision)

Challenge

Focus





## Context

- The interrelated conditions in which something exists or occurs. The environment or setting.
- The situation within which something exists or happens and that can help explain it.
- To understand an issue it must first be situated in its context.

Why is this important?



## Direction (Vision)

- An idea or mental image of something.

“Imagination”

“Creativity”

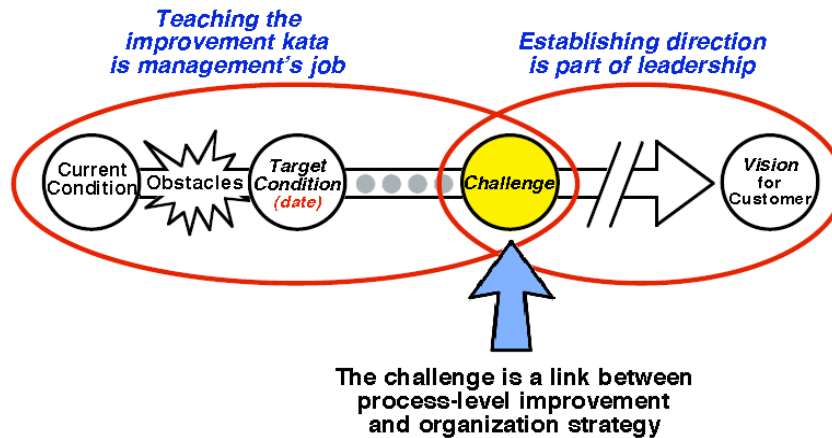
“Ingenuity”

- An ability to imagine how an entity or person could develop in the future and to plan for it.

Design your future!



## Linkage of daily behavior and strategy



PDCA 3.0  
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## Challenge

*Something that needs great mental or physical effort in order to be done successfully and, therefore, tests a person's ability.*

*Characteristics of a great challenge!*

- Time based typically 6 months to 3 years
- Describe what you are trying to achieve not how you are trying to achieve it, not what you are going to do
- Concrete objective
- Metric or measurement based
- Easy to measure, team will know if it was a great day/shift/hour/event
- Can be stated as a TO – FROM statement
- Multi-faceted, e.g. may include safety, quality, constraints, person challenges or objectives
- Great Challenges break organizational assumptions
- Challenge is realized through achieving iterative Target Conditions

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## Focus

A starting point, an aspect to focus energy, attention, experimentation to learn and improve.

Prevents –  
Random actions, disjointed and unverified.

The specific portion, area or process steps to which the learner is focusing.

It will be an smaller portion of the entire Challenge process, value stream or value stream loop.



## Now connect the “Tools” of lean or CI

- Connect many tools of Continuous Improvement/Lean Management to this important question.
  - Whether the tool is TWI – JI, JR, JM or JS
  - Kanban, Andon
  - Or a trifecta of Lean Management: Strategy Deployment, Daily Management and Kata Practice.

*“What are you striving to achieve?”*

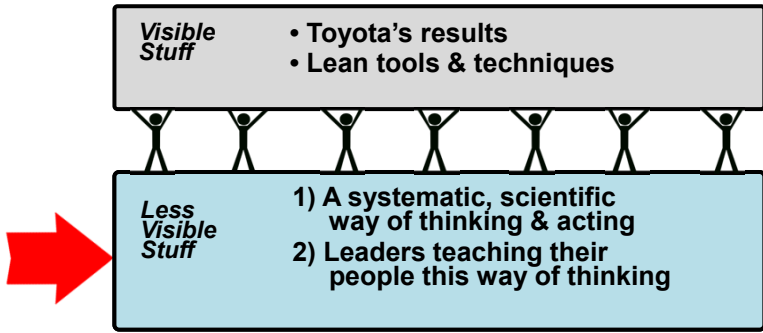


# Improvement Kata and Coaching Kata are about Developing Greater Scientific Thinking

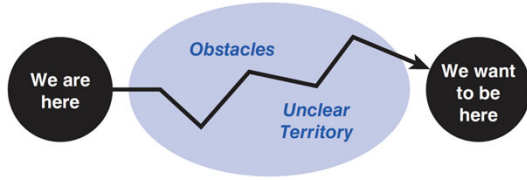
Improvement Kata is a practice routine for enhancing any team's scientific thinking

Coaching Kata is a teaching routine for scientific thinking

## Scientific thinking is a less visible but vital part of Lean



# Learning how to move forward....



Scientific thinking means acknowledging that our existing comprehension is always incomplete and possibly incorrect.

Perhaps the root of scientific thinking is recognizing that any idea you have needs to be tested.

And, it means when things go differently than expected you use that new information to learn & adjust.



## Scientific Thinking as a Key Concept

Scientific thinking is curiosity about a situation we never fully understand, but we want to take the next step to understand a little better.

It's a continuous comparison...  
between what you predict will happen, seeing what actually happens, and adjusting your understanding and actions based on what you learned from the difference.

Wash, rinse, repeat...



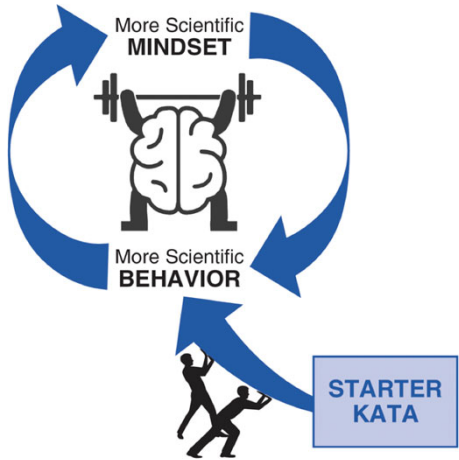
## Purposeful Practice


Scientific thinking is not our natural, default mode.


Our brain tends to quickly reach conclusions.

However, anyone can learn to think and react more scientifically by practicing the simple routines of the Improvement Kata and Coaching Kata.


That's the goal of Toyota Kata ... an ability to apply a scientific mindset to everyday human affairs.



 National Geographic Photograph



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 Practice Model = Improvement Kata

A routine to practice to develop skill in scientific thinking..... a thought process

Practiced to form a new habit....setting a new default mode.

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## Teaching Model = Coaching Kata

Coaching a person in their Improvement Kata routine, practicing to develop skill in **teaching** scientific thinking.....

Just like




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## Kata

A way of doing...

A routine to practice...



Let's try one...





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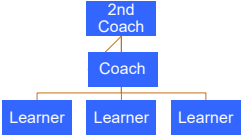
## Kata Roles

### Learner




Natural process owner  
Works with the team in the process  
Learns and improves through experimentation

### Coach

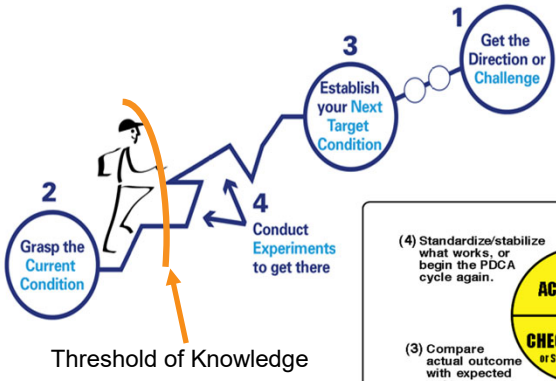



Manager of the learner (coaching along the chain of command)  
Develops skill in the learner to achieve results



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## Improvement Kata the 4 Routines





(4) Standardize/stabilize what works, or begin the PDCA cycle again.

(3) Compare actual outcome with expected outcome.

(1) Define what you expect to do and to happen. This is the hypothesis or prediction.

(2) Test the hypothesis, ie. try to run the process according to plan. Observe closely.

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# Coaching Kata

## Framework for scientific thinking

**The Five Questions**

1) What is the **Target Condition**?

2) What is the **Actual Condition** now?  
*----- Turn Card Over ----->*

3) What **Obstacles** do you think are preventing you from reaching the target condition?  
 Which **"ONE"** are you addressing now?

4) What is your **Next Step** (next experiment)?  
 What do you **Expect**?

5) How quickly can we go and see what we **Have Learned** from taking that step?

KATA Matters

**Reflect on the Last Step Taken**  
 Because you don't actually know what the result of a step will be!

- 1) What did you plan as your **Last Step**?
- 2) What did you **Expect**?
- 3) What **Actually Happened**?
- 4) What did you **Learn**?

*Return to question 3----->*

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# Learner's Storyboard

### KATA Matters

Learner:	Coach:	2nd Coach:														
Focus:	Challenge:															
Target Condition: Set Date: _____ Achieve by Date: _____	Actual Condition Now Date: _____	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="2">Obstacle Parking Lot</th> </tr> <tr> <td>Obstacle</td> <td>Priority</td> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="2">KATA Matters Learning Record</th> </tr> <tr> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> </tr> </table>	Obstacle Parking Lot		Obstacle	Priority					KATA Matters Learning Record					
Obstacle Parking Lot																
Obstacle	Priority															
KATA Matters Learning Record																
Process Characteristics:	Process Parameters:	Process Metrics:														
Equipment/Material:																

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<b>Vision:</b>																						
<b>Focus:</b>	<b>Challenge:</b>																					
<b>Target Condition</b>	<b>Actual Condition Now</b>	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th colspan="2" style="text-align: left;">Step</th> <th style="font-size: 8px;">What do you intend?</th> <th style="font-size: 8px;">What Happened</th> <th style="font-size: 8px;">What We Learned</th> </tr> <tr> <td style="width: 15%;"></td> <td style="width: 15%;"></td> <td style="width: 15%;"></td> <td style="width: 15%;"></td> <td style="width: 15%;"></td> </tr> <tr> <td colspan="2" style="text-align: center; font-size: 8px;">Do a Cycle Consider the Experiment</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	Step		What do you intend?	What Happened	What We Learned						Do a Cycle Consider the Experiment									
Step		What do you intend?	What Happened	What We Learned																		
Do a Cycle Consider the Experiment																						
<b>Obstacle Parking Lot</b>																						

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<p><b>Vision:</b> IDEAL STATE a person/department/business is striving to achieve</p> <ul style="list-style-type: none"> <li>✓ In the long term future, often principle based</li> <li>✓ Ideally stated as a desired condition</li> <li>✓ Not constrained by current capabilities</li> <li>✓ Creates shared aim so people see themselves as part of the group/team</li> <li>✓ Must be relevant to learner, coach, customers, leadership, members and/or other stakeholders</li> <li>✓ Vision is realized through achieving iterative Challenges</li> </ul> <p><b>Focus Process:</b></p> <ul style="list-style-type: none"> <li>✓ The specific portion, area or process steps to which the learner is focusing. It will be an smaller portion of the entire Challenge process, value stream or value stream loop.</li> </ul> <p><b>Target Condition:</b></p> <ul style="list-style-type: none"> <li>✓ Typically 1 week – 3 months – <b>2 weeks preferred</b></li> <li>✓ Described as iterative target patterns of activity/work that will be measured with process and outcome metrics, in alignment with Challenge.</li> </ul>	<p><b>Challenge:</b> An objective the learner is striving to achieve in alignment with the Vision</p> <ul style="list-style-type: none"> <li>✓ Time based typically 6 months to 3 years</li> <li>✓ Describe what you are trying to achieve not how you are trying to achieve it, not what you are going to do</li> <li>✓ Concrete objective</li> <li>✓ Metric or measurement based</li> <li>✓ Easy to measure, team will know if it was a great day/shift/hour/event</li> <li>✓ Can be stated as a TO – FROM statement</li> <li>✓ Multi-faceted, e.g. may include safety, quality, constraints, person challenges or objectives</li> <li>✓ Must be relevant to learner, coach</li> <li>✓ Challenge is realized through achieving iterative Target Conditions</li> </ul> <p><b>PDCA Cycles Record</b></p> <ul style="list-style-type: none"> <li>✓ Iterative steps or experiments to be taken to overcome an obstacle</li> </ul> <p><b>List of obstacles</b> preventing you from achieving your target condition</p>
--	---





### Process Metric

Metric:	Start Date and Time:																														
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	

### Outcome Metric

Metric:	Start Date and Time:																														
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	



## Obstacle Parking Lot

Obstacle List

How to Measure

1.			
2.			
3.			
4.			
5.			

### PDCA CYCLES RECORD (Each row = one experiment)

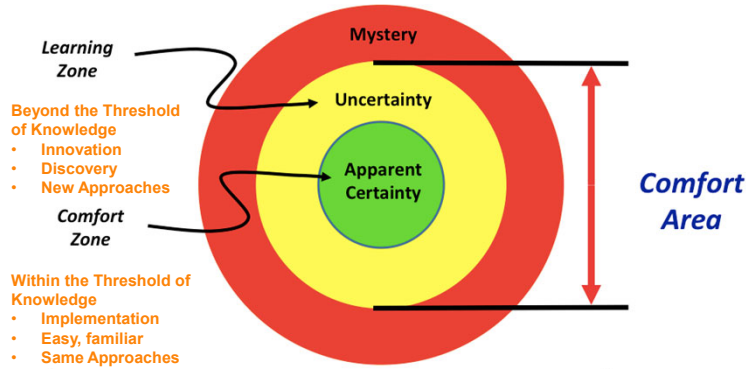
<b>Date:</b>		<b>Process Metric</b>	
<b>Process:</b>			
Step	What do you expect?	What Happened	What We Learned

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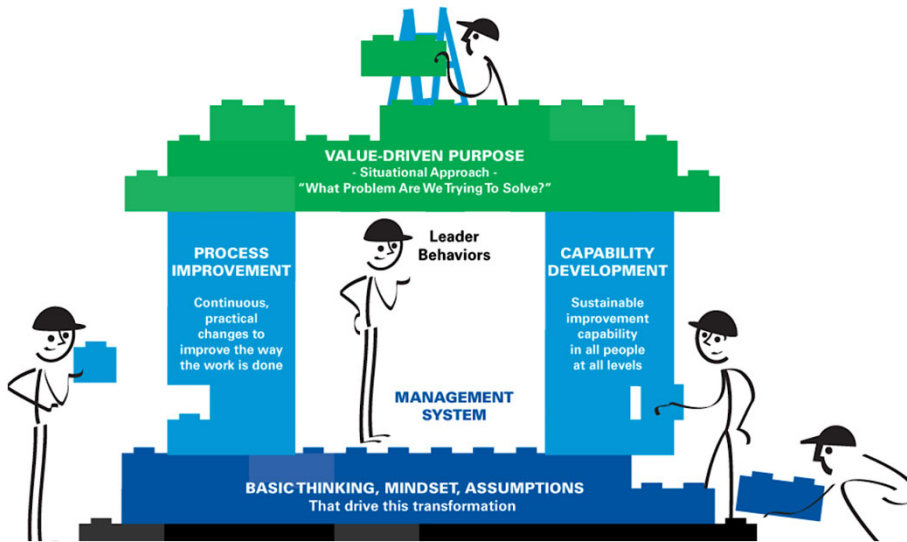
# Kata is a Teaching Model for an Adaptive Mindset

Practicing to operate in two zones simultaneously:  
**Apparent Certainty Zone + Uncertainty Zone**



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# LEI's Lean Transformation Framework



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## Open Discussion

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## Think long and hard...

- Not about what you are going to do, but rather

*“What are you striving to achieve?”*

*Thank You!*

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