Chapter 2

GUIDELINES FOR PRACTICING
How to practice the Improvement Kata and Coaching Kata
IT TAKES PRACTICE TO ACQUIRE NEW SKILLS AND MINDSET

The Improvement Kata and Coaching Kata are an approach for teaching scientific thinking. Scientific thinking is a skill-based ability and acquiring it is like learning a sport, a musical instrument or a language. You can read a book about it, you can attend a seminar, etc., but you actually acquire scientific skill through practice.

This Handbook is about skills that get internalized in your brain’s automatic systems as a sort of habit. To develop this automatic system the focus is on training through practical activity. You can’t just pull out old thinking and replace it with new thinking. Something new grows, and eventually it replaces the old.

The goal of practicing the routines of the Improvement Kata and Coaching Kata is to internalize and understand their scientific pattern so you can apply it in many different situations without thought or hesitation. Eventually both Learners and Coaches should react this way in many situations every day.

Before we get going let’s talk a little about practicing.
THERE’S A LEARNING PROGRESSION

Able to TEACH it
Can instruct, coach and counsel others in practicing the skill pattern

Able to DO it
Can successfully apply the skill pattern in a real environment

Aware of it
Have basic knowledge from books, websites, seminars, workshops, etc.

At this point you understand the ‘why’ behind the skill pattern and can teach others

Skill development and mindset change begin here, when you start applying the new skill pattern yourself

Concepts and knowledge alone generally won’t change your ability and thinking

In short, you first practice and learn the Improvement Kata pattern yourself, before you can teach (coach) it to others
4 INGREDIENTS FOR LEARNING A NEW SKILL

As we know from sports and music, with the following ingredients you can start to rewire your brain & acquire new skills and habits.

1. **PRACTICE**
   - Daily
   - Repetition

2. **KATA**
   - Structured routine to practice
   - Structured routines so a beginner can practice fundamentals

3. **COACHING**
   - Corrective feedback
   - Feedback to ensure the Learner practices the correct patterns

4. **MASTERY**
   - Overcoming obstacles
   - Interest and motivation on the part of the Learner
THIS IS ABOUT SOMETHING CALLED “DELIBERATE PRACTICE”

Deliberate practice is not just repetitions, but practice that follows a pattern of:

Action -> Feedback -> Adjustment -> and Action Again

Ingredients

1. PRACTICE Daily
2. KATA Structured routine to practice
3. COACHING Corrective feedback
4. MASTERY Overcoming obstacles
DELIBERATE PRACTICE

- It’s practice designed specifically to improve performance over time.

- It’s practice that involves continual evaluation of your weaknesses and targeting specific weaknesses, rather than repeatedly doing what you already know how to do.

- It’s practice that requires a coach. Observation and specific feedback on your current performance is critical to understanding what to work on and acquiring new skill.

- It’s practice where you don’t move on to the next part of the routine you’re trying to learn until you master the part you’re currently working on.
GET BETTER BY WORKING ON THE ERRORS

Practice is practice right? Nope. How well you master the Improvement Kata pattern depends a lot on how you practice, not just repeating the steps of the Improvement Kata a large number of times.

Practice aimed at remedying specific weaknesses is more important than raw number of hours. To make satisfying progress in practicing the kata explained in this Handbook you should:

(A) Regularly seek to understand your current weaknesses, through feedback from your coach
(B) Target certain ones (you can’t work on everything at once!)
(C) Invent specific tasks in your practice to address that targeted deficiency

Understanding and working on your errors “scaffolds” future performance by showing you what to concentrate on and practice next. It gradually gets easier.

Address your mistakes as they occur. You and your coach should identify the error, and then rehearse that part until it’s corrected. Only then proceed to the next segment.

An amateur trains until he gets it right.
A professional trains until he can’t get it wrong. ~ Unknown
THIS = PRACTICING IN THE “LEARNING ZONE”

As your skill and comfort zone expand, keep revising your practice in order to stretch yourself beyond that zone

A key part of your IK/CK practicing is that it should lie in your learning zone. As shown in the diagram below, your learning zone is skills and abilities that lie just beyond the comfort zone of your current abilities.

No real learning takes place when you practice activities in your comfort zone, since these are skills and activities you've already mastered and can easily do.

Similarly, attempting to practice skills that fall in the panic zone is unproductive because you haven't yet acquired the prerequisites for those skills.

**LEARNING ZONE**

These are skills and activities one step beyond those the Learner can already do comfortably and correctly. In this zone the Learner is pushing beyond his/her current abilities.

Comfort Zone

These are skills and activities the Learner already knows how to do. Your brain is the master of this zone. There is no need for change.

Your Coach should design practice tasks slightly beyond your current capabilities

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What this means for the Coach:
FOCUS AND GIVE SPECIFIC FEEDBACK

The Coach could give all sorts of feedback to each Learner, but if the Learner doesn’t focus on improving a specific part of their practice then it becomes less ‘deliberate practice’ and more just repetition.

Feedback is essential to deliberate practice but it should be specific, purposeful feedback. The Coach’s feedback should involve a corrective adjustment; i.e., specific behavioral actions that need to be undertaken to achieve the next, specific practice goal.

“You need to draw better block diagrams,” is poor feedback.
“Practice drawing block diagrams to show the flow of work, not the physical layout of the process,” is good feedback.

Observe or question the Learner —> Compare what you see and hear to the desired way of working (specified by the kata) —> Give feedback and a specific next practice goal —> Repeat

Note that although you’re developing team and organizational capability, the coaching is done one-on-one. One Coach can coach several Learners, but will do so one Learner at a time.
What this means for the Learner: ENJOY THE LEARNING PROCESS

In order to move beyond the plateaus you’ll inevitably reach, you need to be motivated enough to tackle your mistakes.

It's not that the best IK/CK practitioners make fewer errors, it's that when errors occur they’re not afraid to work on correcting them.

Struggle is a predictable part of the learning process and progress over time is what’s important, not any particular win or loss. The best IK/CK practitioners derive motivation from their desire to master the IK/CK activity and the periodic feeling that one is getting better at it.

In fact, once you have some proficiency in the IK/CK, the obstacles and uncertainty you face can become the activity’s very appeal.
THE LEARNER SHOULD HAVE OR DEVELOP A POSITIVE EMOTION ABOUT PRACTICING

Mastery experience is a powerful source of self efficacy. The Learner should periodically be thinking "I am getting better," so s/he has the positive emotions about practice that are required for practicing to get better.
THE LEARNER’S MOTIVATION IS IMPORTANT

*I think I’m getting better*

How do you internalize a thinking and behavior pattern like the Improvement Kata? Brain research is clear: To develop new habits you need to practice new routines and experience a periodic sense of mastering them. The Learner's emotions play a significant role. *You gotta wanna*, otherwise a new pattern won't imprint no matter how much you practice it.

However, you can't make someone commit by telling them to commit. Either the Learner comes into it already interested and wanting to learn, or that kind of positive emotion has to develop as they begin practicing, through gaining some mastery.

It’s the responsibility of the Coach to give the Learner procedural guidance that makes the Learner periodically (not constantly) feel a sense of progress:

---> The Learner should experience successes in overcoming obstacles to learning the Improvement Kata pattern.

---> The Learner should experience successes in overcoming obstacles and achieving a challenging target condition through applying the Improvement Kata pattern.
START YOUR PRACTICE USING KATA

Whenever you learn a new skill you’re a beginner in that area, which means starting with some repetitious exercises.

KATA
Structured routine to practice

PRACTICE
Daily

COACHING
Corrective feedback

MASTERY
Overcoming obstacles
KATA MAKE IT EASIER FOR US TO ADOPT A NEW WAY OF WORKING

Most beginners acquire new skills better when they start with some structured routines to practice. This is especially true if you want to develop a shared set of skills and common mindset across a team or organization.

There have been many calls for applying greater scientific thinking in business, politics, education and daily life, but concepts that don't come with concrete practice routines are by themselves unlikely to lead to change. They may be good ideas, but they lack a way of operationalizing them, which makes them, "Concepts without a Kata."

This Handbook provides Starter Kata for each of the four steps of the scientific Improvement Kata model and for teaching (Coaching) IK practice. Once you've practiced these starter routines enough to internalize their patterns and understand the 'why' behind them, you can build on that foundation and adjust your practice to suit your organization's situation and purpose.
THE ROLE OF KATA

(1) Kata help beginners start to acquire a new skill by providing step-by-step routines to practice. Think of them as “Starter Kata.” The beginner's thinking is conditioned in a new way by the pattern of the Kata.

(2) Kata give the Coach a way to gage the Learner’s performance (a point of comparison) and provide corrective feedback.

(3) Kata give you a way of developing a common mode of thinking and acting across a team or organization, by providing shared routines to teach and practice.

(4) Perhaps most important, Kata are an effective way to translate principles & concepts into something teachable!

Principles & concepts are a good start, but alone they don’t change your habits.

Change comes from repeated experiences with a new pattern.

The Goal: CHANGE BEHAVIOR AND THINKING
To create new habits, skills and culture in your team or organization.
KATA PRACTICE GETS FLEXIBLE AS YOU GET MORE SKILLFUL

Your use of each Kata will tend to go through these three stages*

STAGE 1: FOLLOW (Practice the Kata exactly)

As a beginner you try to execute the practice routines without modification, so you can absorb their fundamental patterns. This may feel awkward at the start but as you go through repetitions it should become more flowing. Concentrate on how to do the task, without worrying too much about the underlying theory.

STAGE 2: DETACH (Personalize your practice)

Once you've acquired the basic patterns you can branch out. Don't think the goal is to stay with the rigid forms of Stage 1, because then your practice will become too formulaic. Once the basic forms have been absorbed into "muscle memory" and can be executed successfully ("proficiency" level) you can start to make modifications to your practice. You now appreciate and use Kata because you understand the technical wisdom -- the why -- within them, and can thus start to adapt the patterns to different situations. Remember, knowledge ≠ understanding.

STAGE 3: FLUENCY (Intuitive operating)

At this stage you've absorbed the patterns of the Kata to such an advanced level that you can be creative and unhindered -- spontaneous and efficient -- while still working within the principles. You don't have to focus consciously on basics anymore, which makes you quicker and frees brain capacity for handling a greater range of situational inputs. At this stage you create your own approaches (within the principles) and can readily adapt what you've learned to individual circumstances.

*Real life doesn’t pass through such discrete stages, but it’s a useful way to depict the progression.
The first stage of practicing a new pattern is to *do it as described*. Try to copy the pattern exactly; to replicate the routine in a deliberately precise way. The pattern may feel wrong or unnatural, but resist the temptation to change it at this point. That feeling is a normal part of learning something new!

We often dislike going through this deliberate phase at the beginning. It seems slow or illogical and we think it’s not working. This is a mistake that can lock you into your current skillset. Once the pattern enters your unconscious and becomes more habitual it will get faster, smoother and easier. Think of your early practice as *going slow to get fast*.

As your proficiency increases you’ll come to understand the purpose behind the steps. At that point you can be more open and develop your own style, so long as it continues to incorporate the purpose.
TWO ERROR MODES!

THE “PERMANENT BEGINNER”
A person unwilling to start with structured practice routines.

This person wants to be skilled or to Coach right away, or to change the Kata pattern. They resist taking the time and effort to internalize the Kata’s pattern through practice, thinking they know better.

Everyone does not need to become an Expert in the skill; some proficiency is sufficient for most people. But anytime anyone is learning a new skill they’re a beginner in that area and probably need to start with some structured practice.

THE “IMPLEMENTER”
A person who rigidly sticks with a structured practice routine permanently or too long.

This person mistakenly tries to apply and deploy the Improvement Kata practice routines as a turn-key problem-solving methodology. The IK is a set of practice routines for developing a pattern of thinking.

The practice routines of the Improvement Kata and Coaching Kata are part of a skill-development process. They are initial practice techniques (“Starter Kata”) to help you develop the habit of approaching problems, goals and challenges in a scientific way.
THE PROGRESSION OF IK/CK PRACTICE

DEMONSTRATED STAGE 2 PROFICIENCY in the Improvement Kata is ideally required to begin to practice coaching. The Coach needs to have personal experience with applying the Improvement Kata before s/he can coach the Improvement Kata.

STAGE 3: FLUENCY (intuitive operating)
STAGE 2: DETACH (Personalize your practice)
STAGE 1: FOLLOW (Practice the Kata exactly)

STAGE 3: Able to TEACH it
Practice the Coaching Kata on real goals

STAGE 2: Able to DO it
Practice the Improvement Kata on real goals

STAGE 1: AWARE of it
Read books and websites, take seminars, workshops, courses
Every organization is unique, and each ultimately requires slightly different practice routines.

However, the first stage of your practicing is to try to do the routines presented here exactly. If you practice daily and gain proficiency you’ll absorb the scientific logic behind these routines. Then, at that point, you can adapt them to your situation.

By initially setting limits on practice improvisation you’ll acquire a sense for the essence, which then equips you to apply the Improvement Kata pattern to diverse situations skillfully.
HOW LONG DO YOU HAVE TO PRACTICE EACH KATA EXACTLY BEFORE YOU CAN START TO VARY IT’S ROUTINE?

The answer to this question depends on each Learner’s progress. The idea is to reach “proficient” level before significantly varying the routine.

In general this may take 2 months of daily practice for each Kata. Of course, you will be practicing several Kata in that time.

One guideline is that a Learner will need to work on at least three successive Target Conditions and conduct at least 25 experimenting cycles to establish basic competency with the Improvement Kata pattern.

Beyond this initial practicing, whenever you want to train another beginner or want to refresh some basics, you go back to the Kata again.
THIS HANDBOOK PROVIDES PRACTICE ROUTINES FOR THE STEPS OF IMPROVEMENT KATA AND COACHING KATA

IMPROVEMENT KATA

Understand the Direction
Grasp the Current Condition
Establish the Next Target Condition
Iterate Toward the Target Condition

COACHING KATA

‘Planning’ Coaching Cycles

‘Executing’ Coaching Cycles

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Guidelines for Practicing
NOTE THE DISTINCTION

The scientific pattern of the four steps of the Improvement Kata is a universal model.

Coached practice of the specific practice routines (Kata) for each step is how you start to operationalize and internalize that pattern.

The practice routines for the Improvement Kata & Coaching Kata are teaching routines to shift your underlying thought patterns. The idea is that as the scientific pattern of thinking becomes more habitual, you can move in the direction of “this is just how I think and do things.”
WHERE YOU’LL FIND THE KATA INSTRUCTIONS

A Kata for Setting the Challenge (Step 1)

A Kata for Grasping the Current Condition (Step 2)

A Kata for Establishing a Target Condition (Step 3)

A Kata for Iterating to the Target Condition (Step 4)

A Kata for Coaching
① **Understand the Direction.** The Improvement Kata pattern operates with an overarching sense of direction or goal. Understanding the “challenge” is important because your practicing should be related to the real-world business needs and objectives of your organization. Improvement Kata / Coaching Kata practice is more effective when it involves meeting actual challenges and goals. These are not theoretical exercises.

② **Grasp the Current Condition.** Once the direction coming from the level above you is understood, you need to develop an understanding of the current (starting) condition at your level and process. Where are you today?

You’ll practice this by following a systematic series of five steps called Process Analysis. Process Analysis is a routine or kata that allows anyone to quickly grasp the key characteristics of a process that define its capability and current pattern of work. The analysis is conducted through direct observation and simple, pencil & paper analysis tools.
③ **Establish the Next Target Condition.** Once the Current Condition is adequately understood, you develop a descriptive next Target Condition for your process, which includes a specified achieve-by date. Where do you want to be next on the way to the longer-term challenge? The Target Condition is an objective that will stretch you and require experimentation, discovery and new learning in order to be achieved.

④ **Iterate Toward the Target Condition.** In this step you conduct experiments against obstacles to gain further knowledge and improve the process in the direction of the Target Condition. You’ll practice by using a pencil & paper tool to plan, record and reflect on each experiment as you strive to reach the Target Condition on time.

⑤ **Daily Coaching Cycles** come into play as the Learner works iteratively toward the Target condition. This is a systematic routine for a structured dialog between the Coach and Learner, whereby the Coach provides procedural guidance and corrects the Learner's practice as necessary.
CONCLUSION

EVENTUALLY YOUR ORGANIZATION CAN DEVELOP ITS OWN IMPROVEMENT KATA

Once enough people in your organization become proficient in the routines of the Improvement Kata (a ‘critical mass’) you can either stick with using the practice routines in this Handbook for teaching beginners in your organization, or evolve from them your own Kata for teaching beginners.

The key is to first reach to a point where enough people understand the scientific pattern of the Improvement Kata deeply. Then you will be in a good position to make decisions about exactly what Kata to use for practice in your organization.

The basic pattern and scientific approach of the Improvement Kata should always remain, however. Make it your own, but the basic core should be recognizable.
YOUR NEXT STEP

As a next step it’s a good idea to familiarize yourself with the contents of this Handbook, by going over the whole Handbook.

Then move back to Part II and follow the instructions to begin the practice / learning process for each step of the Improvement Kata.
WHAT WILL BE YOUR PATH?

For practicing and internalizing the routines of the Improvement Kata and Coaching Kata

How much practice will be required depends on how you practice (see the Practice Tips at the end of this chapter) and your predispositions.

You have an opportunity! The never-ending need for improvement and evolution gives you and your team a perfect opportunity to keep honing your skills. The elegant trick is that while you're practicing the Improvement Kata you're applying it to real goals, always to the best of the current level of your and your team’s abilities.
• Nine Guidelines for Deliberate Practice
• Skills Assessment
NINE GUIDELINES FOR DELIBERATE PRACTICE

1) Get an Overview of What You’re Trying to Learn
2) Get a Coach for Corrective Inputs
3) Be Enthusiastic About Practicing
4) Break the Skill Pattern into Pieces, and Practice Only One or Two Pieces at a Time
5) Adopt Some ‘Beginner Mindset’
6) Deliberately Follow the Prescribed Pattern Exactly at First
7) Practice a Little Every Day
8) Practice on Something Real
9) Practice at the Edge of Your Capability

These guidelines are based on *The Talent Code* by Daniel Coyle, *Talent is Overrated* by Geoff Colvin, *Human Memory: Theory and Practice* by Alan Baddeley and the Bjork Learning and Forgetting Lab at UCLA.
<table>
<thead>
<tr>
<th>Practice Guideline</th>
<th>Details</th>
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<tbody>
<tr>
<td>1) <strong>Get an Overview of What You’re Trying to Learn</strong></td>
<td>• Get a picture of the parts of the Improvement Kata and how they come together as a whole in correct performance of the skill.</td>
</tr>
<tr>
<td></td>
<td>• Explain the coaching method to the Learner beforehand, so s/he can understand what is taking place.</td>
</tr>
<tr>
<td>2) <strong>Get a Coach for Corrective Inputs</strong></td>
<td>• You’ll need periodic input and guidance from someone who observes you, detects your errors and gives you advice on how to correct them.</td>
</tr>
<tr>
<td></td>
<td>• An experienced Improvement Kata coach may or may not be available. If not, grab someone else who is practicing the Improvement Kata and coach one another.</td>
</tr>
<tr>
<td></td>
<td>• Once you master the Improvement Kata you can coach others.</td>
</tr>
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<td></td>
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</table>
| **3) Be Enthusiastic about Practicing** | • If you can develop passion for what you’re learning it will help you devote yourself to practicing the Improvement Kata pattern even when it presents difficulties.  
  • It’s normal that there will be plateaus when it seems like you aren’t making progress. Take a break for a few days or go back to some basics. Listen to your coach for advice. |
| **4) Break the Skill Pattern into Pieces, and Practice Only One or Two Pieces at a Time** | • Kata are usually practiced in pieces, until the whole sequence is learned. This is called *chunking*.  
  • Do not try to master too many chunks at once. The Coach should determine what the learner is ready to practice next. |
<table>
<thead>
<tr>
<th>5) <strong>Adopt Some ‘Beginner Mindset’</strong></th>
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</thead>
</table>
| Caution! The more you are already familiar with a topic, the less you may be open to learning something new about it. Closing your mind in this way can condemn you to remaining only a beginner in the new skill area.  

A first step for any Learner is to acknowledge that whenever we want to adopt a new way of thinking and acting, for a while we’re going to be a beginner in that particular area. Without resigning our ego to starting with some practice we’re destined to remain at beginner level.  

Once you’ve internalized the desired pattern you can refine your own interpretations and don’t need to practice the Kata exactly any more. The resulting capability and habits are the goal, not the Kata itself.  

The Kata don’t go away entirely though. Just like professional athletes and musicians, even advanced students periodically practice some basics under guidance of a coach. It's like keeping a tool sharp. |
The first stage of practicing is to try to copy the pattern exactly; to replicate the kata in a deliberately precise way. The pattern may feel wrong or unnatural at first, but resist the temptation to change it at this time.

Initial practicing* is deliberate and uses your conscious mind, which is slow. Once the pattern enters your unconscious and becomes a normal, habitual way of working it gets faster, smoother and easier. Think of your early practice as *going slow to get fast*.

We often dislike going through this deliberate phase at the beginning, and its slowness can lead us to think it's not working. That's a mistake that can lock you into your current skillset.

As your proficiency increases you'll see the purpose behind the steps. At that point you can be more open and develop your own style, as long as it continues to incorporate the purpose, and coach others.

* Have beginners practice on processes that are easy to understand and where it is easy to see how to apply the Improvement Kata pattern.

This is like training in music and sports, where beginners don’t start on a difficult piece.
7) **Practice a Little Every Day**

Make practicing part of normal daily work, not a special event.

Note: This may lead you to shift emphasis away from periodic training or improvement efforts led by Lean staff, trainers or consultants, to daily practice and improvement that’s coached by your line managers. That’s a healthy development!

According to neuroscience, to develop new habits and maintain them it’s generally better to train for a short time frequently than in massed training sessions. Many skills are best learned when practice sessions are short and frequent.

A key to teaching these skills is to teach them as an everyday occurrence; not as part of a curriculum, but as a daily routine using what people are normally doing to help them learn and apply the skills. Be sure to make practicing the Improvement Kata part of every workday.
<table>
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<tr>
<th>8) Practice on Something Real</th>
<th><img src="image" alt="Diagram" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Combine training &amp; doing by practicing on real goals.</td>
<td>In sports and music, training and performance are typically separated. But this is not financially workable in business.</td>
</tr>
<tr>
<td></td>
<td>In the model of practice presented in this Handbook, the Learner does two things simultaneously: Strives for a real target condition + practices the pattern of the Improvement Kata.</td>
</tr>
<tr>
<td></td>
<td>Improvement Kata practice is more likely to generate mindset change when the Learner is striving for a <em>real</em> Challenge and Target Condition, because the Learner is focusing on something meaningful and their emotions are involved.</td>
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<tr>
<td><img src="image" alt="Not this" /></td>
<td><strong>Not this</strong></td>
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<tr>
<td><img src="image" alt="Diagram" /></td>
<td><strong>Doing</strong></td>
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<tr>
<td><img src="image" alt="Diagram" /></td>
<td><strong>Doing &amp; Training</strong></td>
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<tr>
<td><strong>But this</strong></td>
<td><em>(combined)</em></td>
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</tbody>
</table>
9) **Practice at the Edge of Your Capability**

- Learning a skill requires making small errors and then working to correct those points.
- Target those aspects of the skill pattern that currently give you the most difficulty. Deliberate practice aimed at remedying weaknesses is a better predictor of expertise than raw number of hours.

“When most people practice, they focus on the things they already know how to do. Deliberate practice is different. It entails considerable, specific, and sustained efforts to do something you can’t do well—or even at all. Research across domains shows that it is only by working at what you can’t do that you turn into the expert you want to become.”


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The difficulty-level of the next Target Condition should be just a bit beyond the Learner’s current skill level.
SKILLS ASSESSMENT
### AN IMPROVEMENT KATA SKILL-LEVEL SCALE

Note that this scale measures Improvement Kata skill level or degree of habit formation, not the person.

You can use this proficiency scale to help assess a Learner’s growth and readiness to Coach. It’s a guideline to give you behaviors to look for as Learners develop their capability.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Level</th>
<th>Description</th>
<th>Standard of Work</th>
<th>Autonomy</th>
</tr>
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<tbody>
<tr>
<td>3</td>
<td>Expert</td>
<td>No longer relies on rules / guidelines / maxims. Grasp of situations &amp; decision making intuitive. Vision of what is possible.</td>
<td>Excellence achieved with relative ease</td>
<td>Able to take responsibility for going beyond existing standards and creating own interpretations</td>
</tr>
<tr>
<td>2</td>
<td>Proficient</td>
<td>Has unconscious understanding and applies the IK routine more on “auto pilot.” Deviates from the strict kata to fit the situation. Sees what's most important in a situation. High degree of self-efficacy with the IK pattern.</td>
<td>Fully acceptable standard achieved routinely</td>
<td>Able to take full responsibility for own work, and coach others</td>
</tr>
<tr>
<td></td>
<td>Competent</td>
<td>Has standardized and routinized procedures. Sees actions partially in terms of LT goals. Can prioritize.</td>
<td>Fit for purpose, though may lack refinement</td>
<td>Able to achieve most tasks using own judgement</td>
</tr>
<tr>
<td>1</td>
<td>Advanced Beginner</td>
<td>Actions are based on the kata. Situational perception still limited. All aspects are given equal importance.</td>
<td>Straightforward tasks likely to be completed to an acceptable standard</td>
<td>Able to achieve some steps using own judgement, but coaching needed for overall task</td>
</tr>
<tr>
<td></td>
<td>Novice</td>
<td>Strict adherence to the Kata. Little situational perception &amp; discretionary judgement. Has to purposely concentrate on the IK routine. Low self-efficacy in applying the IK routine.</td>
<td>Unlikely to be satisfactory unless closely coached</td>
<td>Needs close coaching and instruction</td>
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Scale adapted from the Dreyfus Model of Skill Acquisition
FROM NOVICE TO PROFICIENT

You don’t need to reach ‘Expert’ level with the Improvement Kata

Generally you’re practicing in order to get from ‘Novice’ level to ‘Proficient’ level. Not everyone reaches ‘Expert’ level, and you can be fully capable without it.

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<td>Competent</td>
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Guidelines for Practicing
A PLANNING & ASSESSMENT FORM FOR IMPROVEMENT KATA SKILL

Coach and Learner together can use the form on the next page to plan and track the Improvement Kata skill development of the Learner over periods of time.

How the form might be used:

- For any kata the Learner is practicing indicate the current skill level with a filled-in circle and the date.
- For any kata the Learner is practicing indicate the next target skill level with an open circle and the target date.

The form becomes a bar chart from left to right.

Determining a person’s overall skill level is, of course, a somewhat subjective judgement. It’s also not the most important factor in getting more skillful.

More important than an overall skill-level assessment is that in their daily coaching cycles the Coach and Learner decide on what small aspect(s) of the kata pattern the Learner should work on improving next.
## STAGE 1 PRACTICING

<table>
<thead>
<tr>
<th>Description</th>
<th>Novice</th>
<th>Advanced Beginner</th>
<th>Coach:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner:</td>
<td></td>
<td></td>
<td>Coach:</td>
</tr>
<tr>
<td>STAGE 1 PRACTICING</td>
<td></td>
<td></td>
<td>Coach:</td>
</tr>
<tr>
<td>Standard of Work</td>
<td>Unlikely to be satisfactory unless closely coached</td>
<td>Straightforward tasks likely to be completed to an acceptable standard</td>
<td>Fit for purpose, though may lack refinement</td>
</tr>
<tr>
<td>Autonomy</td>
<td>Needs close coaching and instruction</td>
<td>Able to achieve some steps using own judgement, but coaching needed for overall task</td>
<td>Able to achieve most tasks using own judgement</td>
</tr>
</tbody>
</table>

## STAGE 2 PRACTICING

<table>
<thead>
<tr>
<th>Description</th>
<th>Novice</th>
<th>Advanced Beginner</th>
<th>Coach:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner:</td>
<td></td>
<td></td>
<td>Coach:</td>
</tr>
<tr>
<td>STAGE 2 PRACTICING</td>
<td></td>
<td></td>
<td>Coach:</td>
</tr>
<tr>
<td>Standard of Work</td>
<td>Has standardized and routinized procedures</td>
<td>Sees actions partially in terms of long term goals</td>
<td>Can prioritize</td>
</tr>
<tr>
<td>Autonomy</td>
<td>Can prioritize</td>
<td>Able to achieve most tasks using own judgement</td>
<td>Able to take full responsibility for own work, and coach others</td>
</tr>
</tbody>
</table>

## STAGE 3

<table>
<thead>
<tr>
<th>Description</th>
<th>Novice</th>
<th>Advanced Beginner</th>
<th>Coach:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learner:</td>
<td></td>
<td></td>
<td>Coach:</td>
</tr>
<tr>
<td>STAGE 3</td>
<td>Unconscious understanding. Applies IK on ‘auto pilot.’</td>
<td>Sees what’s most important &amp; fits actions to situation. High self-efficacy with IK.</td>
<td>No longer relies on rules / guidelines / maxims</td>
</tr>
<tr>
<td>Standard of Work</td>
<td>Excellence achieved with relative ease</td>
<td>Grasp of situations &amp; decision making intuitive</td>
<td>Vision of what is possible</td>
</tr>
</tbody>
</table>

## Not everyone reaches this level

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Guidelines for Practicing
## A COACHING KATA SKILL-LEVEL SCALE

<table>
<thead>
<tr>
<th>Stage</th>
<th>Level</th>
<th>Description</th>
<th>Autonomy</th>
<th>Assessment &amp; Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td><strong>Expert</strong></td>
<td>• Intuitive grasp of coaching based on deep, practiced understanding</td>
<td>2nd Coach needed</td>
<td>Not everyone reaches this level</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Direct, yet supportive</td>
<td>occasionally</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Coaching conversations are natural; learner doesn’t notice being coached</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sought after for coaching advice</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td><strong>Proficient</strong></td>
<td>• Clear perception of learner’s gaps or weaknesses</td>
<td>2nd Coach needed</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Uses coaching to guide: adapts to the situation, asks meaningful questions</td>
<td>periodically</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Ability to assess learners preferred learning style (auditory, visual, kinesthetic)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 2nd Coach capability</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td><strong>Competent</strong></td>
<td>• Capable of sensing learners uncertainty level and knowledge threshold</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Consistently coaches learner with a repeatable pattern</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Coaching embedded in normal daily work</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Advanced Beginner</strong></td>
<td>• Narrow &quot;development perception&quot;; recognizes need for 2nd coach</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Becoming comfortable providing feedback to learner</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Beginning to observe and listen more (vs. talk and advise)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Asks some probing questions to gain insight</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Novice</strong></td>
<td>• Rigidity in asking questions / uses closed ended questions</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Lack of discipline to follow a pattern and recognize its importance</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Focuses on results (command and control)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Not able to hear and identify when learner has hit a Threshold of Knowledge</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can use this proficiency scale to help assess a Coach’s growth and readiness to be a 2nd Coach. It’s a guideline to give you behaviors to look for as Coaches develop their capability. It’s also helpful in focusing conversations with Coaches about their perceived versus actual capability.

**Most important is that the Coach and their 2nd Coach decide on what small aspect(s) of the Coaching Kata the Coach should work on improving next.**

Scale by Yvonne Muir, Jennifer Ayers & Julie Simmons