This File Contains Four Key Tools for Practicing the IK & CK Patterns:

- Learner's Storyboard Format
- Five-Question Card (for the Coach)
- Obstacle Parking Lot (for the Learner)
- PDCA Cycles Record (for the Learner)

For detailed instructions please refer to the online Improvement Kata Handbook at the Toyota Kata Website under:
http://www-personal.umich.edu/~mrother/Materials_to_Download.html
A NOTE ABOUT "KATA"

Kata are structured routines that you practice deliberately, especially at the beginning, so their pattern becomes a habit and leaves you with new abilities. Kata are a way of learning fundamental skills that you can build on. The word comes from the martial arts, where Kata are used to train combatants in fundamental moves. But the idea of a Kata can be applied in a much broader sense. The Improvement Kata and Coaching Kata are for training managers and leaders in a new way of doing their jobs.

At first you should try to practice each Kata exactly as described, until its pattern becomes somewhat automatic and habitual for you. That can take several months of practice. When you reach that point and have learned through practice to understand the "why" behind that Kata's routine, then you can start to deviate from it by evolving your own version or style of the pattern... as long as its core principles remain intact.

Practice Kata to Find Your Way. No one can show you precisely how your management system should look and function. That would be impossible since each organization has unique characteristics and exists in unique conditions. Developing an organization's managerial system is not about copying the tools and techniques that another organization has come up with, which would be jumping to solutions. You can and should start with some already-existing basics, like in sports and music, but then it's an iterative process of trial and adjustment.

The routines of the Improvement Kata and Coaching Kata help you develop and build your own 21st Century management approach via a well-proven set of "Starter Kata" to practice daily. They come from the Toyota Kata research and have been used for practice at thousands of organizations around the world. Begin with the Starter Kata and then, as you gain skill and understanding, add to or adjust them to fit your situation as needed. Then you’ll be developing your own way.

Best wishes for your practicing!

Mike Rother
The Learner's Storyboard
Start with this board format

Focus Process:  Challenge:
Target Condition  Actual Condition Now
Achieve by: ______
PDCA Cycles Record
Obstacles Parking Lot
<table>
<thead>
<tr>
<th>Focus Process:</th>
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<td><strong>Target Condition</strong>&lt;br&gt;Achieve by:</td>
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Five Question Card + PDCA Cycles Record

The Five Coaching Kata Questions (Coach) and the PDCA Cycles Record (Learner) must be used together, in daily Coaching Cycles at the Learner's storyboard. Follow these Kata exactly until you can internalize their patterns.

**The Five Questions**

1. What is the Target Condition?
2. What is the Actual Condition now?
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?

*You’ll often work on the same obstacle with several experiments*

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

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**Used by the Coach**

**Used by the Learner**
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?

*You’ll often work on the same obstacle with several experiments
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

Reflect on the Last Step Taken
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As your coaching abilities grow it is natural to evolve your own coaching style, which includes adding to the fundamental Five 'Starter Kata' Coaching Kata Questions. Of course, any additional questions you come up with should be consistent with the principles and intention of the Starter Kata (which should always remain at the core of this routine).

Begin with the starter 5 Question Card shown on the previous pages, and after you do several coaching cycles and get used to that card you can start adding notes and additional clarifying questions. Here's one technique you can use... make yourself a folding card as shown below. The folded card fits in your pocket, but has space on the unfolded right-hand side to jot down notes and test your own clarifying questions. Here are some example notes and clarifying questions to consider and to try, simply as thought starters.

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### The Starter-Kata Coaching Questions

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**Example notes & clarifying questions**

- Is the target condition connected to the challenge?
- What do you want to be happening? • No verbs!
- Measureable? • Not 'lack of something' • Achieve-by date?
- Numbers, not opinions. • Can you show me? • How do you know? • How did you get the data? • Is there a run chart?
- What was being tested?
- Is the PDCA Cycles Record filled in?
- Was this written down? • Just read it!
- Only facts & numbers. • Are the numbers written down? • Is there a run chart? • What is different than expected?
- Did the Learner really reflect on this?
- Is the Obstacles Parking Lot up-to-date?
- True obstacles (variation), not action items or lack of a perceived solution.
- Where does this problem occur? • Can you show me?
- When does this problem occur?
- What is the current knowledge threshold?
- Did what was learned in the last experiment frame this one?
- Is expectation written down? • Please read it.
- What numerical outcome do you expect?
- How will you measure it?
- How many cycles do you plan to measure?
- Strive for cheap and fast experiments
- Can we run this experiment today? Right now?
- When is the next coaching cycle?
- Accompany the Learner if necessary.

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The underlying principles of the Five Coaching Kata Questions should remain!
Obstacle Parking Lot

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### Layout of the PDCA Cycles Record

- **One obstacle per form**: Whenever the Learner starts working on a new obstacle, s/he should start a new PDCA Cycles Record.

- **Each row = one experiment against the current obstacle**: This is the obstacle to the target condition, that you are currently working on.

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#### Last Experiment

#### Next Experiment

It usually takes a series of experiments in order to overcome an obstacle.
The **prediction side** and the **evidence side**

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The prediction side (LEFT) is where you plan the next experiment and predict the outcome.

The evidence side (RIGHT) is where you record what actually happened, compare that with the prediction and record what you learned.
How to use the PDCA Cycles Record

The pattern of the form repeats with each experiment. Each row = one experiment.

In a coaching cycle the Learner reads the form from left to right, in response to the Coach's questions.
THE SCIENTIFIC LEARNING CYCLE IS EMBEDDED IN THE PDCA CYCLES RECORD

To make the cycle easy to operationalize & practice

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**PREDICTION**

**EVIDENCE**

**EVALUATE**

**ACTION**

[Diagram showing the PDCA cycles record with the cycle broken down into sections for prediction, evidence, and evaluation.]
ASK THE FIVE QUESTIONS AT EACH STEP!

Rapid Experiments

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5-Question Coaching Dialog

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