Adopting Kata Coaching for Innovation, Continuous Improvement & Value

Fortune Buchholz
Hands on Agile
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"Coaching is The Way"

"What many organizations struggle with is finding innovative ways to identify and drive toward solutions. How often do you tell your teams what to do versus empowering them to come up with solutions?"

(People & Organizational Performance Practice, McKinsey report Jan. '22, https://www.mckinsey.com/capabilities/people-and-organizational-performance/our-insights/if-were-all-so-busy-why-isnt-anything-getting-done)

"Coaching is The Way"

"While they may solve the immediate need to "get stuff done," *bureaucracies and micromanagement are a recipe for disaster.* *They slow down the organizational response to the market and* *customers, prevent leaders from focusing on strategic priorities,* *and harm employee engagement.* ***Our research suggests key*** ***success factors in winning organizations are*** ***empowering and spending more time on high-quality*** ***coaching interactions."***

Such Coachings, Much Wow

- Great professional & personal coaching methods abound:
    - GROW: Goal, Reality, Options, Way Forward
    - OSKAR: Outcome, Scale, Know-how, Affirm & Action, Review
    - STEPPA: Subject, Target, Emotions, Perception, Plan, Act
    - CLEAR: Contract, Listen, Explore, Action, Review
    - ACL or Action-Centered Leadership: Task Achievement, Team Formation & Management, Personal Development
    - Emotional Intelligence, Positive Intelligence
    - Motivational Interviewing
    - Personal Construct Coaching
    - And so many more....

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What's the Goal Here?

- But we're not coaching just to coach!
  - What method **best fulfils** McKinsey's *"finding innovative ways to identify and drive toward solutions?"*

- What are we all trying to achieve in any organization?
  - Setting clear, inspirational goals
  - Visualising & limiting Work in Progress
  - Shortening feedback loops
  - Creating a culture of continuous learning, experiment & improvement for innovation
  - Discovering & delivering customer value early

- **Kata** supports all these goals **in a way no other coaching method does**.

Current Coaching Fails on Value

- **The Liberators** recently did an empirical study on value delivery, finding:

    - Scrum Masters spend most of their time on facilitation & mentoring/coaching.

    - **Coaching/mentoring by Scrum Masters do not seem to build a better understanding of value in teams**.

    - The data suggest that Scrum Masters are more effective when they **balance** a process-based perspective with a value-based perspective.

- Toyota Kata is the **humanistic value-based delivery coaching** we need to include in our repertoire for our teams to succeed & for us to keep our jobs.

https://medium.com/the-liberators/in-depth-are-scrum-masters-sufficiently-focused-on-valuable-outcomes-7b51c4403869

What Does Kata Mean?

- **Kata** is a term from **martial arts**, meaning the **basic practice movements** for tai chi, karate, aikido, etc.

- **Yoga poses** like the Sun Salutation are also a kind of Kata

- Kata is basically **Brain Yoga to improve our thinking**

  - Just as you deliberately practice yoga poses every day for strength & flexibility, **we practice Kata daily for brain strength & flexibility**

  - The goal is to **practice deliberate scientific thinking for innovation & continuous improvement,** developing a **meta-skill** that makes **all work better**

Why Kata?

- Reflecting back on these other common coaching methods:

  - **Are they explicitly driving scientific thinking & behaviour for measurable improvement?**

  - **Are they explicitly aimed at building individuals & teams into innovative leaders?**

  - **Are they each flexible enough to use for business leaders, teams & personal development?**

  - **Do they explicitly create a learning organization?**

  - **Is their process brief & relatively easy to learn?**

  - **Are they self-documenting?**

What's the Origin of Kata?

- Kata is often called '*Toyota Kata,*' because it's the method used by Toyota to develop people & solve business problems

- Toyota is famous throughout the business world for:

    - its **top-to-bottom coaching culture** focused on **growing employees' skills** in a virtuous cycle of **coaching-as-management**

    - the **Lean methodology** that emphasizes **continuous learning to deliver better customer value in a humanistic way**

    - **Kaizen**, or **continuous improvement in all business areas**, **based on empirical data** collection

- US academic **Mike Rother** studied this coaching culture for 6 years, resulting in a series of books

    - Rother discovered that Kata coaching is the '**secret sauce**' to Toyota's success

    - And that companies **adopting Lean methods without the coaching experienced subpar results**

- Today **Kata coaching has spread** throughout global manufacturing, education, healthcare & the technology sector

- **Any business that needs to create a learning culture & continuous improvement** is ripe for Kata

Kata, a Scientific Thinking Habit
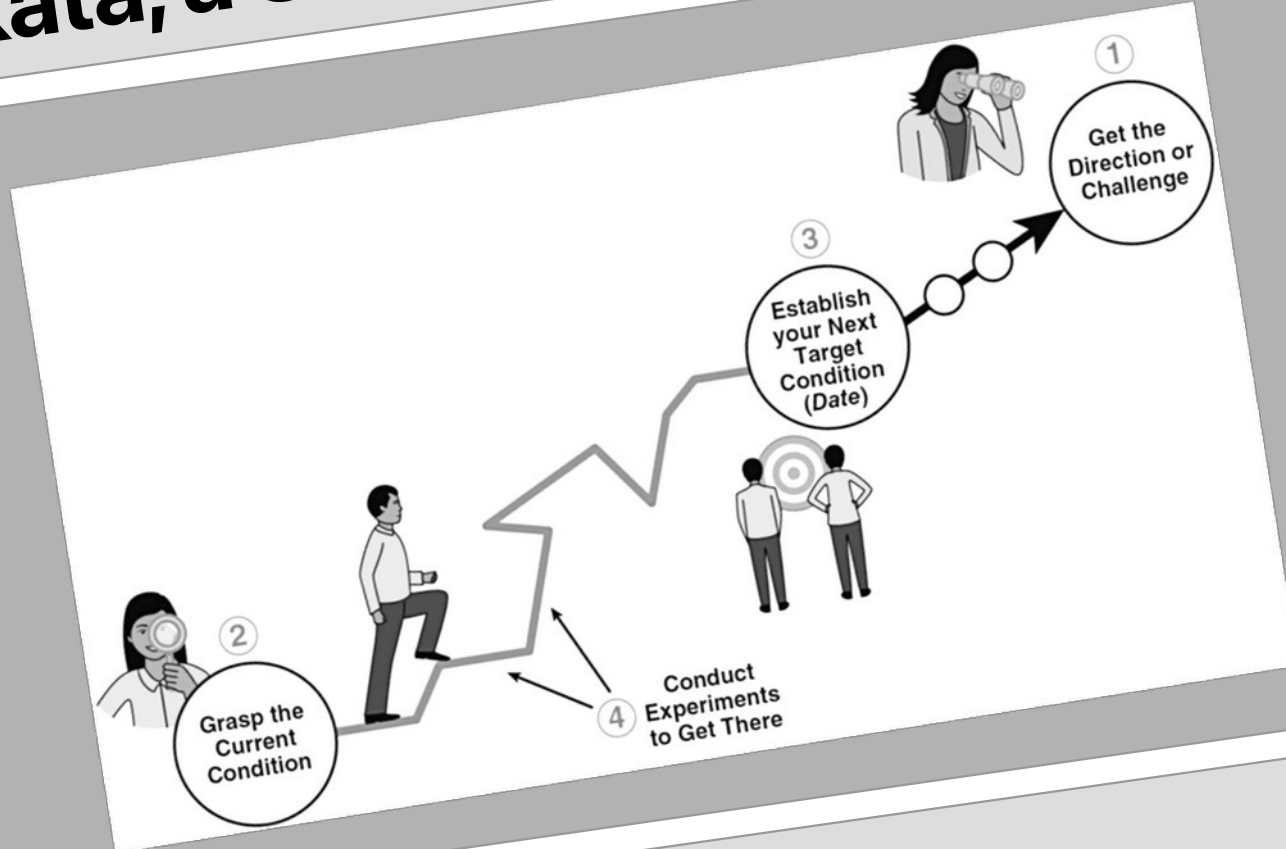
1) The Challenge is a short outcome-oriented statement of what we intend to achieve.
2) We gather data to understand what's actually happening, not what we believe is happening.
3) We make a hypothesis on the first step to take us towards achieving the Challenge.
   We state a prediction for our expected outcome.
   We state when we will "go & see" the output of that step.
4) We do that experiment, collect the resulting data & examine it in the next coaching cycle with our coach.
   We ask: did we see what we expected?
   And we reflect: What did we learn?
   Do we take another iterative step or do we need to rethink our direction?

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Daily Kata Coaching Cycle

- A light-weight **15-minute** daily coaching cycle based on short, sharp experiments, data & a **Lean canvas in Miro** for the experimental record.

- The coach's **5-question card** serves to structure the conversation, as the coachee notes the results on their **Lean canvas**. Deepening questions can be added.

Scenario 1

- **Problem Solving:** Automated customer response emails sent out with garbled text, resulting in a flood of customer complaints.

- **Assumption**: Customer Comms team targeted the database as the cause, filing a support ticket to DB team. DB team found no issues. Comms insisted they try again. Impasse, blame & accusations, which escalated to manager level. Responses had to be disabled & a customer notice posted on the website.

- **Resolution:** A Sr. Dev on my near-shore platform team was asked to investigate. We gathered a small group to think the issue through with a quick block diagram, an Ishikawa fishbone & the 5 Whys. Two possible root causes were ID'd; one was chosen as most likely. Kata process began that afternoon. Issue solved within 36 hours after 2 experiments. Storyboard made documenting the fix simple & light-weight

Scenario 2

- **Innovation:** A 5-person Windows Scrum team was given a new epic by the Portfolio Business team. One of the Feature requirements from the customer specifically required setting up, configuring & monitoring Docker in the cloud, which the team didn't know. Uncertain how to proceed, they declared a 1-week learning Spike.

- **Learning:** The team found a 24-hour online course, which 3 of them took individually. The other 2 continued with Sprint work. The 3 met the next Monday to look at the Feature and map out how to apply their new knowledge. Working with the Product Owner and BA, they created several user stories to describe their work, and estimated the work. A Senior Dev took point on these stories, pairing with an experienced Dev to complete the work.

- **Experimenting:** The pair used Kata to think through & note their learning during the process, taking the time to handle their obstacles.

- **Outcome:** The feature was minimally complete during the planned PI / Obeya Planning timebox.
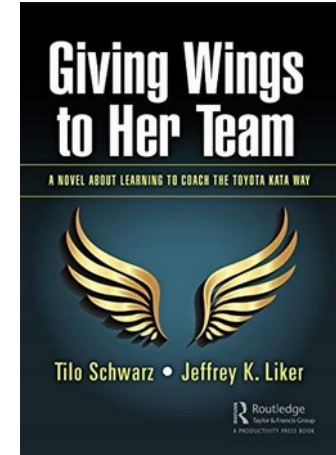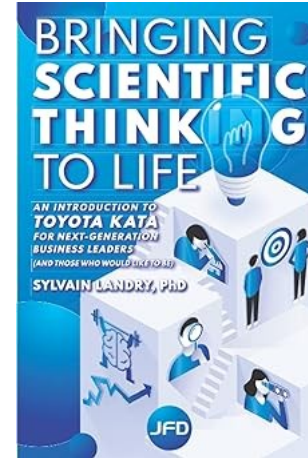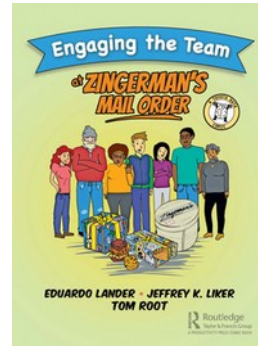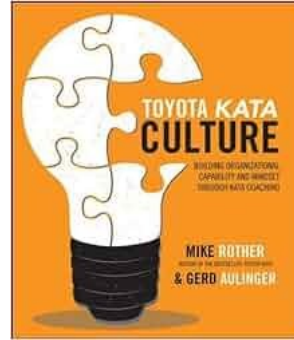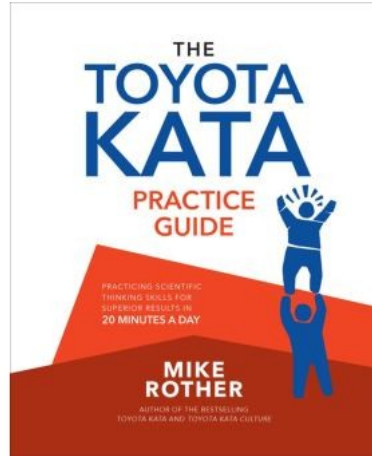
Scenario 3

- **Learning New Techniques & Fostering Growth Mindset:** New IT Project Manager struggled to engage her groups in meetings & project activities. "I'm just a terrible facilitator."

- **OSKAR Coaching:** "I'm just a..." is often a sign of a fixed mindset. What know-how did she need? She identified facilitation techniques as the skill she wanted to acquire, but her obstacle was that the departmental had no remaining training budget. She asked me to shift stance to mentoring & suggest options. I offered a meetup, a lower-cost Scrum.org community course, a free LinkedIn course, & the Liberating Structures.

- **Kata Follow-Through:** Reading about the Liberating Structures delighted her. Using Kata, she experimented with a number of the Liberating Structures to bring engagement to her sessions. After 3 weeks she had successfully incorporated 6 Liberating Structures into her meetings & reported greater confidence in facilitating. A quick Teams poll of her group showed they enjoyed the new meeting formats & activities. "I can do this," she said.

Learn Kata

- Kata is now **widely taught around the world** by volunteers

  - Many Kata coaches today are **women**; it's **a growing coaching career open to all**

- **Join your local kata school – they are free or low-cost**:

  - Directory of global Kata schools: https://www.kata-school.org/

  - Just for women: https://www.linkedin.com/company/kata-girl-geeks/

Kata Resources

Agile creates the space to innovate; Kata is a vaulting pole lofting teams & individuals above the bars along their way to making those ideas real.