You Have To Be a Player Before You Can Be a Coach

This article discusses a key obstacle to developing a continuous improvement culture

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The end of a calendar year is always reason for reflection for me. As I reflect on this past year, there is a key observation that I wish to share. It involves <u>proper</u> process improvement and problem solving practice. During delivery of various courses, I have a growing concern about the problem solving and process improvement abilities exhibited by participants who profess to be 'Lean Practitioners', 'Black Belts', and other titles that relate to Continuous Improvement (CI). These are individuals who have CI responsibilities within their organizations, roles that often involve the development of problem solving and process improvement abilities in others.

This issue has been apparent during delivery of workshops such as the University of Michigan's *Kata for Daily Improvement*, for which I am a co-instructor. It is offered four times each year, and is typically sold out, with on average 50% of the class consisting of the aforementioned CI professionals. During the program, two routines are covered: the Improvement Kata and the Coaching Kata. The Improvement Kata (IK) is a routine for proper practice of Plan-do-Check-Act (PDCA) - the time-tested improvement methodology from W. Edwards Deming. The Coaching Kata (CK), as developed by Mike Rother, is a routine to develop process improvement abilities in others. The workshop involves a simulation that gives the participants the opportunity to practice both routines. Participants will systematically identify desired changes to the simulation, make those changes through a series of 'experiments', and assess the effect of those changes (in other words, practice the Improvement Kata). The participants can then use those experiences to practice the Coaching Kata.

The simulation, and the workshop in general, has generated strong emotional responses from particular attendees. More specifically, the CI professionals who participate in the class will state at the beginning of the workshop that the reason for attending is to learn about the Coaching Kata, with the presumption that they are already experts in the Improvement Kata. We always respond that we must still focus on the IK in class and the simulation throughout the first day, and that will set us up to practice the CK on day 2. We ask for their patience as we go through the 'process'. The simulation involves the batch assembly of a simple product through four workstations. Raw Material supply, material handling, daily delivery to a customer, and varying demand are also part of the simulation. Quality, delivery, cost, profit and loss,

and other performance metrics are captured. It all sounds simple enough, though performance can really vary between groups.

The concern to which I mentioned arises in the participants' practice of the Improvement Kata. The 'seasoned' CI folks will immediately jump to solutions such as implementing some form of 'cellular manufacturing' and 'one piece flow'. Others will insist on establishing some form of 'pull/kanban' system. They already have solutions, which they are looking to implement in the simulation. However, they have not yet understood the direction of the simulated business, nor have they grasped current conditions through direct observation and data collection. In general, we will allow the participants to implement any change they'd like, as long as they display the proper thinking. Implementing 'cells' because "that is what we do in Lean" is not proper thinking, or practice. What does the data gathered to help understand current conditions show? What specific problem is being addressed? How can hypotheses be quickly and simply tested, before making widespread changes? How do the proposed changes align with the direction of business? Important questions all, the responses to which give a peek into the thinking of the practitioner.

Therein lies the issue. CI is not simply 'check the boxes' of lean concepts that have been implemented (or not) in an organization. The key is the proper thinking and practice to solve problems and improve processes. If people develop solid improvement skills, they will be better equipped to handle whatever challenges come along in the future. As a result, the probability for long-term success of an organization increases—if that organization consists of strong problem solvers and process improvers.

Strong emotions arise when we push back on the participants and suggest alternative approaches. Confusion and even anger (yes anger) can arise. One participant actually began to yell out of frustration in front of the entire class. In private afterwards, the individual, a 9-year CI practitioner in his organization, admitted to me that he was really yelling at himself. He came to the realization that he had been improperly practicing CI for all those years. I commended him on this reflection, suggested that he look forward, not back, and to not beat himself up.

The lack of proper practice can give rise to other issues. On another occasion, a group of participants from the same organization confided to me that they realized through the class that their predisposition to 'Lean' solutions was undermining long term effectiveness of changes made. For example, people were not sustaining changes made in processes. The participants attributed this in large part to the directive approach they had taken, rather than the 'thoughtful' approach espoused in the workshop. How can someone coach others on process improvement, if there are key flaws in his or her own practice?

During a recent offering of the UM *Kata for Daily Improvement* workshop, we ran two simulations simultaneously (as is common when we have large groups). One group was insistent on quickly implementing an assembly 'cell', which required significant changes to the simulation layout. There was no holding them back. The group with whom I was working wanted to do similarly. However, I kept asking them to explain the

logic behind the proposed change. I would review with them the current condition data, and the targets that they identified. "Help me connect the dots and I'll let you do anything", I would say. When they could not, they would concede and make other, less dramatic changes. As the workshop progressed, my group would look over at the other and point out "they're making layout changes, why can't we?" Nevertheless, I was able to keep them following the prescribed approach. Toward the end of the workshop (and still no layout changes), I instructed them to go over to the other group and look at their factory performance. They came back and said, "They're still not making money, and we are!" They were surprised by this. I responded, "I cannot give you a better example, of why proper practice is so important, and most effective." I have great hope that at least some of them will take this experience, reflect on their past CI practices, and make changes as appropriate.

I encounter similar concerns with the practice of Continuous Improvement when teaching the A3 improvement methodology. A3 storyboards provide a clear picture of the thinking of the storyboard's author. As with Kata, there is an element of 'coaching' that should be part of the methodology. CI professionals participating in the workshop will inform me of their experience with the approach. I say that they still must initiate an A3 for the class, or they can use one that had been recently created back in their organizations. They can then see how it is used to coach others. Often, what is shown demonstrates improper CI practice. Confusion between problem, cause, countermeasure, and goal/target is quite common. Also often apparent is a predisposition for a countermeasure without first defining the problem or goal/target. Once again, I must ask how can someone coach others when their own practice is questionable?

The principles of Continuous Improvement can be applied to the practice of Continuous Improvement. We should all regularly reflect on our own approach and identify our 'gaps' from proper practice. Do we understand the defined direction of the organization and are we aligning our improvements with it? Are we jumping to solutions or countermeasures before grasping current conditions? Are we 'checking' our biases throughout the process? Are we setting goals or targets before identifying countermeasures? Are we performing simple (and safe) experiments before making significant changes? Are we objectively assessing the effectiveness of experiments conducted through data? Are we practicing the full PDCA cycle?

When gaps in our practice are identified, we can work to close them. When we have achieved sufficient skill, we can then teach them to others. This is not to say one must be an 'expert' in order to be a coach. But we must have sufficient experience in proper practice. How else can we identify 'gaps' in the practice of others? That is why it is so important to be a CI player before you can be a CI coach.

Best Regards,
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