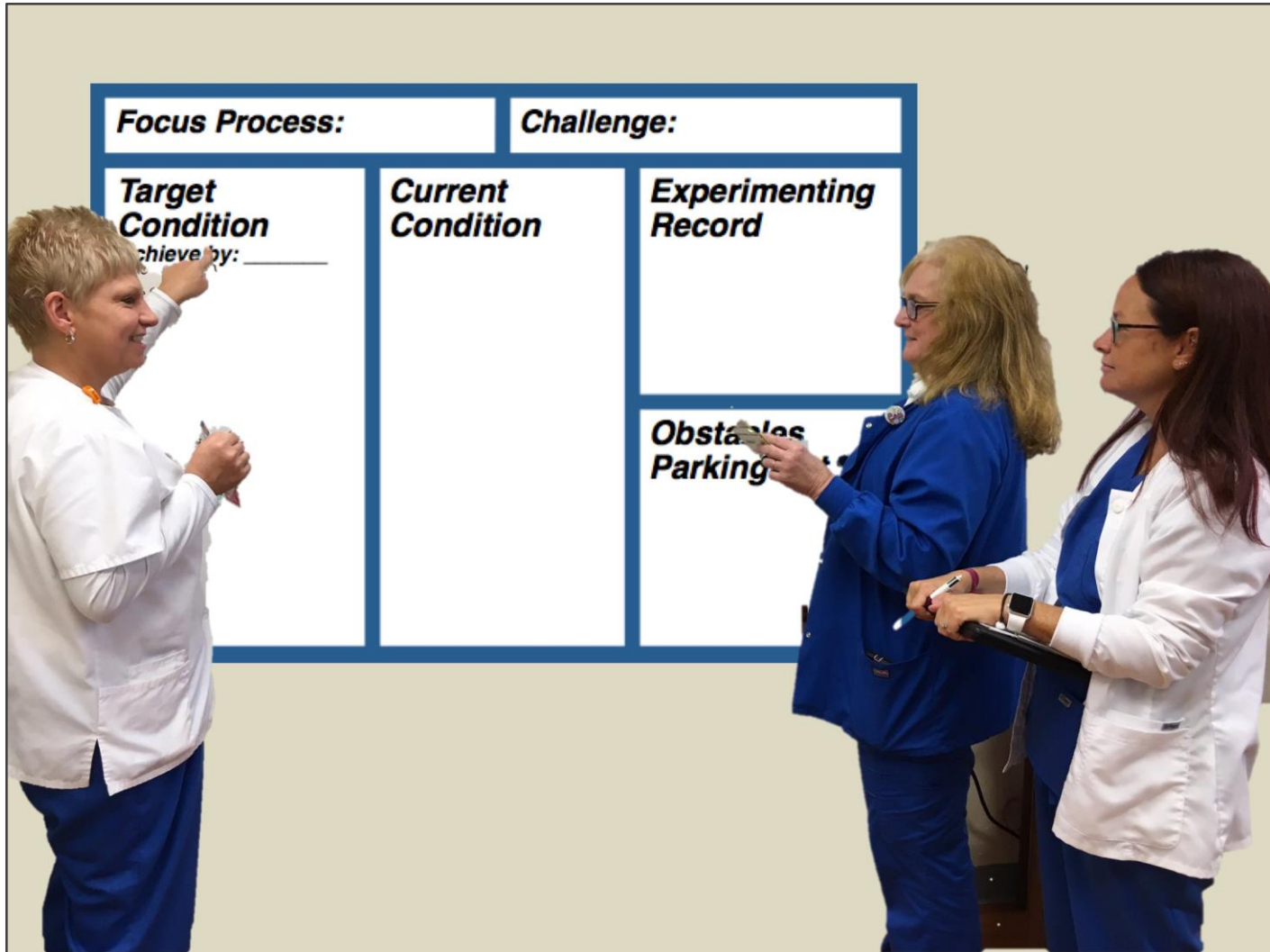


# IOE 591 Group Project

## Coaching a Student Team - Requirements



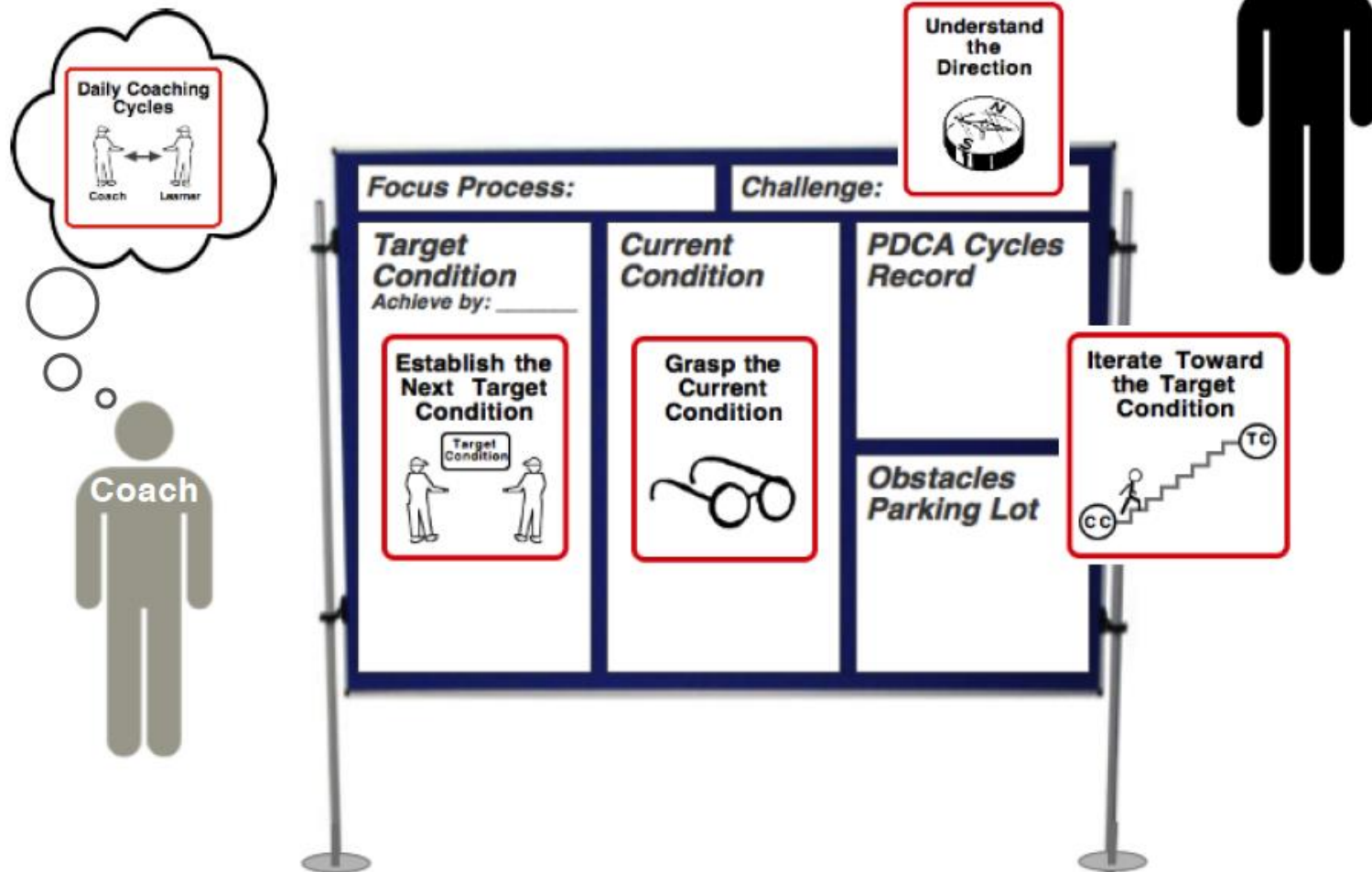
# For Coaches to Student Teams:

## What to look for in your initial visit(s) to team site

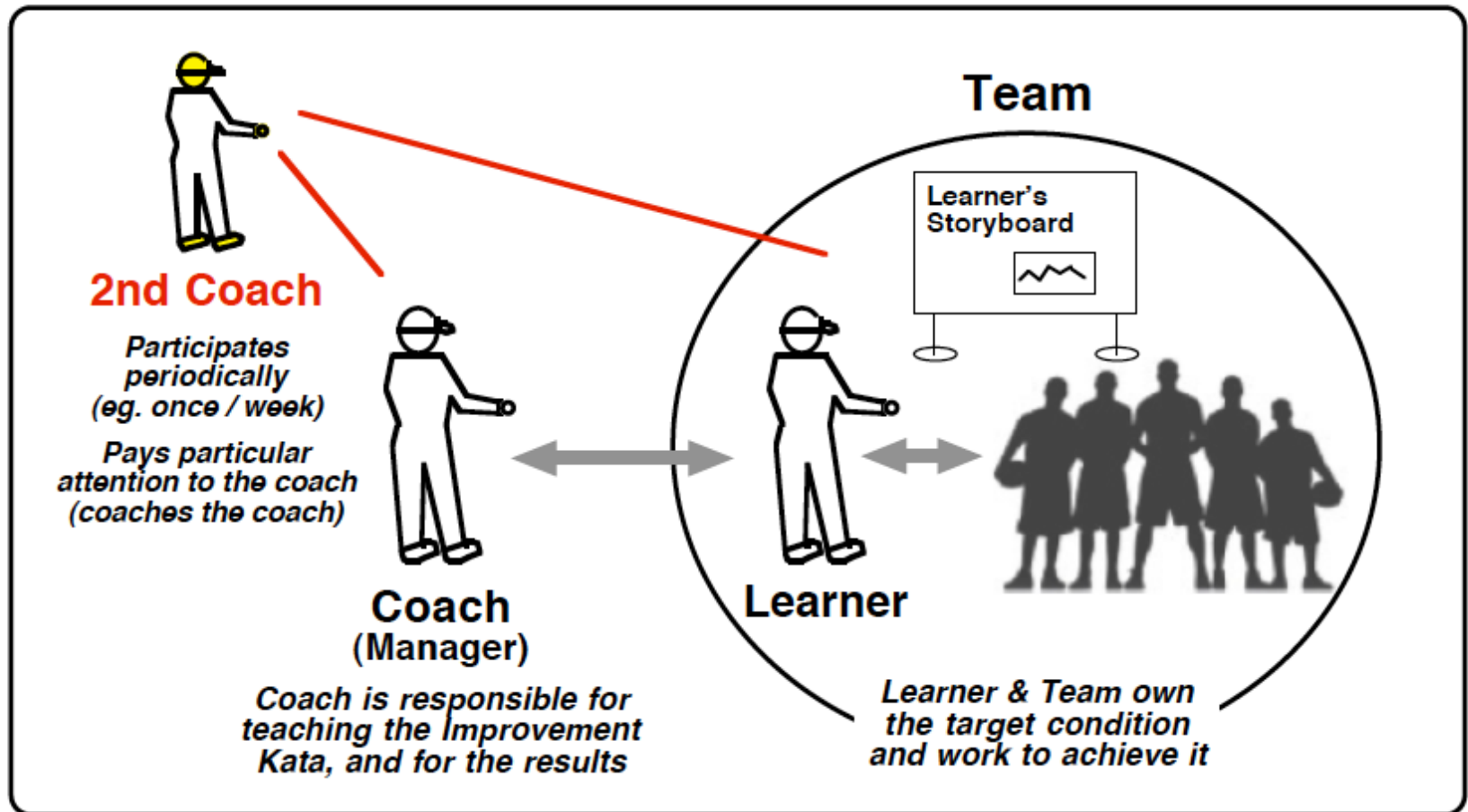
- Is organization onboard and willing to put time and effort into learning and using the improvement process?
- Is there a clear “learner” onsite who will be leading the project?
- Is there a clear challenge statement established that matters to the organization?
- Do the students do a good job of explaining the improvement and coaching kata to orient those at the project site?
- Is there a place to post the storyboard and to hold regular meetings (at least weekly) at the storyboard.
- Is the project scoped out effectively to work toward the challenge, including opportunities to run a number of experiments following PDCA?
- Does the student team have a leader and is there a clear point of contact at the client site?

# Check to see that a storyboard is properly set up and used in coaching cycles at least weekly

## THE ROUTINES THE LEARNER PRACTICES

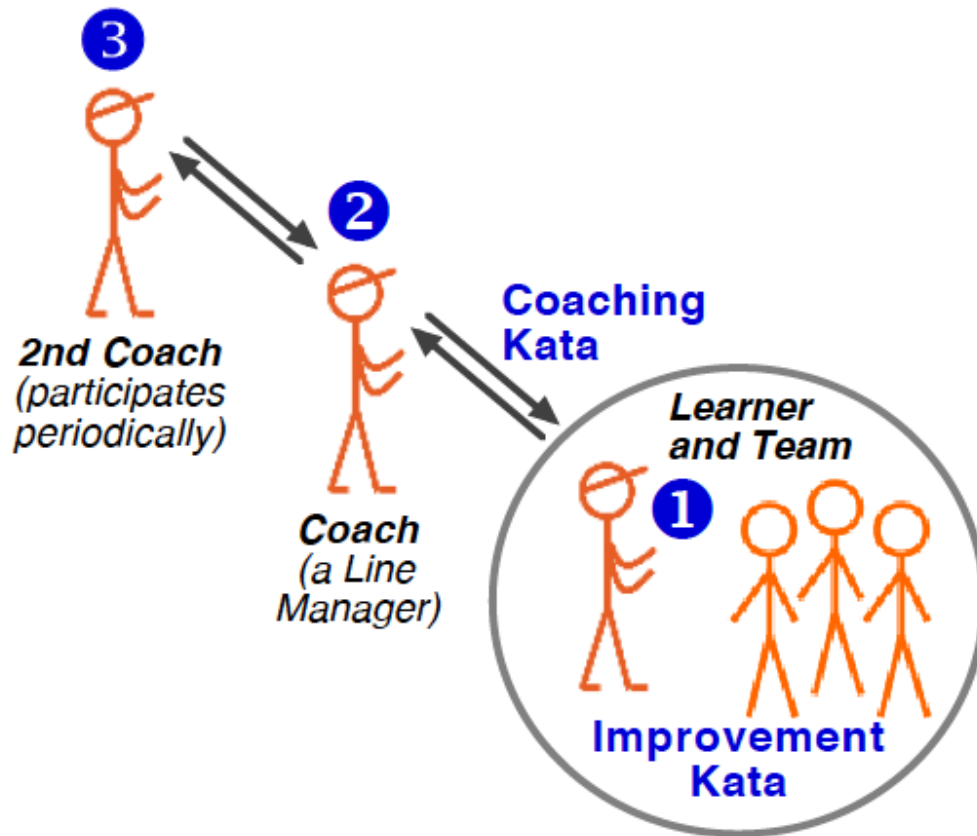


# THE 2nd COACH



**The 2nd Coach ensures that a Coach is teaching/coaching the Improvement Kata correctly, by observing the Coach's coaching cycles and giving feedback to the Coach**

# Coach and Learner Roles



**Learner and Team (The Process Owners):**  
Apply the Improvement Kata to establish and work toward the target condition. Learner conducts experiments with PDCA and develops solutions to obstacles, in daily dialog with the coach and the process operators.

**Coach / Manager (The Teacher):**  
Conducts coaching cycles daily using the 5 questions. Ensures the learner is working toward the target condition scientifically according to the Improvement Kata pattern. The coach's job is to develop the learner by guiding the learner on Improvement Kata procedure, not to improve the process.

**2nd Coach (Coaches the Coach):**  
Periodically observes coaching cycles between the coach and the learner. Helps the coach/manager develop his or her coaching skills. Ensures that the team's target condition ties in to a larger challenge, such as a future-state value stream design.

# THE FIVE-QUESTION CARD USED BY THE COACH

(2<sup>nd</sup> coach watches and gives feedback to coach afterward)

## 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 PDCA / experiment) What do you expect?
- 5) When can we go and see what we **Have Learned** from taking that step?

\*You'll often work on the same obstacle for several PDCA cycles

## Back of card - Reflection Section

### Reflect on the Last Step Taken

Because you don't actually know what the result of a step will be!

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

----->  
*Return*

Card is turned over to reflect on the last step / experiment





# WHO USES WHAT FORMS

**TARGET CONDITION FORM**

Process:  Date:

1. CURRENT CONDITION

2. TARGET CONDITION

3. REASON FOR TARGET

4. OUTCOME EXPECTED

**Current Condition Target Condition Form**



**COACHING CYCLE OBSERVATION FORM**

Process:  Change:  Date:  Month:

1. Learner's response

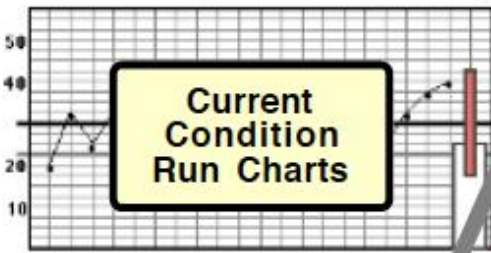
2. Coach's next question

3. AND COACH'S NAME

4. No. of times / Coach's name used

5. Month / Division / Year / Month / Day

**Coaching Cycle Observation Form**



**COACHING CYCLE PLAN / TRACKING**

File:  From:  To:

Time:  /  /

Target:  Success:  Failure:

**Coaching Cycle Plan / Tracking**

**OBSTACLES**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Obstacle Parking Lot**

**PDCA CYCLES RECORD**

Step	What you did	Result	What We Learned

**PDCA Cycles Record -- Key Form --**

**COACHING KATA**

**The Five Questions**

1. What is the target condition?

2. How do you know you are there?

3. How do you know when you are there?

4. How do you know when you are not there?

5. How do you know when you are not there?

**The Five Questions -- Key Form --**

<b>COACHING CYCLE OBSERVATIONS</b>		<b>Process:</b>
		<b>Date:</b>
<b>Coach:</b>		<b>Learner:</b>
		<b>Start/End:</b>
<b>Question</b>	<b>COACH</b>	<b>LEARNER</b>
<i>Review Challenge</i>		
<i>Q1: Target condition?</i>		
<i>Q2: Actual condition now?</i>		
<i>Reflect: PDCA Cycles Record</i>		
<i>Q3: Obstacles? Which one?</i>		
<i>Q4: Next step? PDCA Record</i>		
<i>Q5: When see what learned?</i>		
What is the knowledge threshold?		Impressions:
Key point(s) for this Coach to practice next:		Next coaching cycle:





# GIVING FEEDBACK TO THE COACH

## Feedback guidelines, 2nd Coach --> Coach

Give feedback to the Coach *after* the coaching cycle. Ask if they prefer feedback with the Learner present or in private.

**1) Ask the Coach for their impressions of the coaching cycle:**

- How do you think the coaching cycle went?
- Is the Learner working at their Threshold of Knowledge? How can you tell?
- What did you want to pay particular attention to in this coaching cycle?

**2) Give your feedback on the coaching cycle, but do not make value judgements. Focus on concrete observations you made.**

- I observe that...

**3) What is the Coach concentrating on for the next coaching cycle?**

- What do you want to pay particular attention to in the next coaching cycle with this Learner? (Just one point please!)
- How do you hope this will influence the Learner?

Questions by Bernd Mittelhuber

**Agree on the date & time for next coaching cycle to be observed**