

Improvement and coaching kata

Define a near-term operating condition, test one obstacle with a prediction and use a failed prediction to choose the next experiment.



The reminder did not create an owner

Fictional service team: learner Jo is improving request intake with coach Eva. The challenge is fewer requests waiting without a responsible receiver. In a six-request observation, four had a named receiver at handoff and two did not. Jo's near-term target is that each request in the next agreed trial has a named receiver before leaving intake.

Your role and the reference condition

Improvement learner owning the experiment and coach supporting the reasoning.

Normal: The target describes the desired operating pattern and the next review horizon, not merely a distant performance number.

Gap: The receiving role is not always explicit at handoff.

Work within these conditions

1. Use a bounded fictional trial, not an unapproved change to a live service.
2. One small trial provides learning under its conditions; it does not establish permanent success.

Fictional teaching case. Supplied observations support the exercise; proposed actions are not verified customer results.

See how the method works

When the direction is clear but the route is uncertain, practice learning in small steps. Understand the challenge, observe the current process and describe a near-term target condition. Select one obstacle and state what you predict will happen in the next safe test. Compare the actual result with the prediction and choose the next step from what was learned. The coach helps the learner think clearly rather than prescribing a hidden preferred answer. A target condition describes how the process should operate; it is not merely a list of actions. Keep the learning cycle connected to customer and process needs.



Connected method map: Challenge, Current condition, Target condition, Next experiment, Learn. Every authored connection is shown with a numbered arrow and named legend.

Follow the evidence and decisions

Inspect the supplied case inputs

Learning item	Supplied record
Current observation	4 of 6 named receivers; 2 missing
Near-term target	Named receiver before every trial handoff
Chosen obstacle	Sender cannot see receiving responsibility
Trial 1	Add a visible receiver field for six synthetic requests
Prediction	All six will name a receiver
Illustrative result	Four named; two fields left blank because role was unclear

01 / Describe current work

Jo records when receiver identity becomes known and which two handoffs lack it, rather than describing the team as poor at communication.

Why: A current condition grounded in work gives the next test something specific to change.

Evidence / check: Six-request record shows identity at the actual handoff.

02 / Select one obstacle

Jo focuses on visibility of receiving responsibility and predicts that a receiver field will produce six named handoffs. Eva asks what result would challenge that belief.

Why: A prediction exposes the learner's model before the outcome is known.

Evidence / check: Trial 1 scope, change and expected six-of-six result are written first.

03 / Compare expected and actual

The fictional result is four named and two blank. Jo examines the two cases and finds that the field existed but role ownership was unresolved.

Why: The failed prediction distinguishes a display problem from a responsibility problem.

Evidence / check: Record the discrepancy without retrospectively lowering the prediction.

04 / Choose the next test from learning

Jo proposes a second bounded test in which a receiving counterpart agrees responsibility before handoff. The coach asks how this addresses the newly understood obstacle and when they can observe it.

Why: The next experiment follows evidence, not a demand to make the first idea look successful.

Evidence / check: Trial 2 plan names counterpart, cases, prediction and review; its future result remains blank.

Completed experiment learning strip

Cycle	Prediction / actual	Learning / next step
Current	4 of 6 receivers named	Two handoffs lack identity
Trial 1: receiver field	Predict 6 of 6; actual 4 of 6	Field alone does not resolve role
Observe blanks	Both have unclear receiving responsibility	Test role agreement
Trial 2 planned	Agree counterpart before handoff	Result not yet observed

A test improves the count by hiding cases

A proposed second trial excludes all requests with unclear receiving roles and achieves six named receivers among six included requests.

Decision

Report the exclusion and its limitation. Do not claim the original obstacle resolved; design a safe test that actually addresses the unclear-role cases.

Reasoning

Changing the population can make the count improve without changing the process that caused the gap.

What would change the decision?

Retain inclusion rules and excluded-case reasons beside the result.

Practise with a changed case

A checklist and a different obstacle

New fictional intake team wants every trial request to contain a usable due date. Five of eight initially do. A checklist is predicted to make all eight complete. The trial produces six usable dates; the other two customers have not supplied one.

Stage	Count / fact
Current	5 of 8 usable dates
Prediction	8 of 8 after checklist
Actual	6 of 8
Remaining 2	Customer date not supplied

Your task

1. Write the prediction/actual gap and what was learned.
2. Propose a next bounded experiment addressing the remaining obstacle.
3. State one tempting but unsupported success claim.

Use the next page to record your reasoning before reading the answer.

Your practice worksheet

A checklist and a different obstacle

Challenge / target condition

Current evidence

Obstacle and prediction

Actual result / learning

Next experiment and review point

Complete your reasoning before turning to the answer. Use the separate learner workbook for group practice.

Check your reasoning and transfer it

1. The prediction missed by two cases: six, not eight, had usable dates. The checklist did not create missing customer information.
2. A next test could trial an agreed clarification request and receiving responsibility for the two missing-date conditions, with a prediction about obtaining or explicitly resolving the date before handoff.
3. Do not claim a permanent improvement from one eight-case trial or treat blank fields as usable dates to meet the count.

Suggested completed record

Record field	Suggested entry
Prediction / actual	8 of 8 versus 6 of 8
Learning	Customer information is still missing
Next test	Bounded clarification/ownership process
Unproven	Long-term success and broader applicability

Plausible wrong turns

1. The coach should not supply a preferred solution disguised as a question.
2. A failed prediction can be useful learning, not a reason to rewrite the record.

Evidence of a sound answer

1. Keep prediction and actual separate.
2. Connect the next test to a learned obstacle.
3. Specify scope, evidence and a review point.

Take the learning back to work

Commitment	Agreed follow-through
Owner	Improvement learner with an identified coach and process owner
Record	Current/target condition and experiment learning record
Review	At the agreed next observation after each bounded test
Verification evidence	Prediction, actual, inclusion conditions and resulting knowledge
If unresolved	Revisit the obstacle or observation method; keep the target and local authority visible while adapting the next test.

Help someone else apply the method

Prepare

1. Prediction/result cards
2. Blank experiment record
3. Learner/coach roles

Minutes	Activity and coaching prompt
5	Set operating target What should happen at each handoff?
7	Reveal failed prediction What changed in your understanding?
9	Practice due-date case How does your next test address the actual obstacle?
5	Debrief scope What does this small test not establish?

Debrief

1. Ask for the learner's prediction before showing results.
2. Challenge a trial that excludes the very cases it should teach about.

Individual or remote practice

Cover the actual column, write a prediction, then compare and choose a next test before reading the answer.

Connect the method and check its boundaries

Before application

1. Specific process
2. Coach supports scientific thinking

Outside this lesson

1. Target condition is not a task list
2. Coach supplies guidance, not predetermined solution

LEI: Kata

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Challenge, current condition, target condition, experiments and coaching

Method reference; original OPEX scenario and diagram are synthetic teaching content, not source case results.

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