Kaizen
Techniques That Really Work

**Kevin Ferguson,
Kaizen Series Leader**
2021 - White Paper

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Abstract:
Kaizen means 'change for the good'

Simple strategies can transform you and your organization through continuous improvement.

When I have a tough day, or even a whole year, it helps me to remember what my high school swim coach used to say: "The days that feel the hardest are the days when you are making the most progress."

Her words remind me that if we have to use extra strength to get through difficult challenges, we benefit by gaining skills that can make a difference in our lives. It may only be a small shift in perception or change in how we do things, but these adjustments, born out of struggle, can add up to significant wins.

Perhaps it was that coach's example that led to my recent interest in the concept of Kaizen. "Kai" means change and "zen" means good, or "change for the good." The process of continuous analysis and improvement was popularized by the Toyota Production System in Japan, where they encouraged employees to suggest ideas to solve common problems and improve processes.

While the model is not a quick fix for all challenges, it can lead to significant and consistent improvement and growth over time.

What seemed like an impossible plan was ultimately achieved in a series of small steps.

My Kaizen journey began in earnest when some colleagues and I took on the challenge of introducing the Kaizen mindset of continuous improvement to our software development team.

We designed a year-long roadmap to dig into a new topic each month that would bring benefit to our organization. There were three topics we found most helpful over the course of the year. The techniques associated with each topic were also what helped me to carry through with the Kaizen project itself:

- Cultivating motivation: Foster an idea and the incentive to begin
- Setting high quality goals: Translate the idea into a project
- Organizing priorities: Create the space to carry out the plan

What seemed like an impossible plan when we first started was ultimately achieved in a series of small steps. These steps resulted in monthly presentations to my team, blog posts on the topics above, and finally, this white paper.

My hope is that sharing these strategies will in turn inspire you to share them with others and carry on the process of improvement and transformation at your own organization.

Step 1:
Cultivating Motivation

How to harness your intrinsic sense of purpose.

We all know motivation when we see it in others. The colleague that goes the extra mile (or two) not only completing her project, but also piloting a new technique in the process. Or the co-worker who finishes the report by deadline, and finds time to take his kids skiing on Friday afternoon as well.

Are they superheroes who walk among us and make everyone else look much more fallible? It turns out, probably not, they have simply learned to employ some powerful techniques that we can all use to cultivate our intrinsic sense of purpose.

Gallup's 2020 State of the Workplace statistics [1]:

36%
of employees are engaged in the workplace

14%
of employees are disengaged in the workplace

21%
more profitability realized in companies with a highly engaged workforce

We can learn to maximize the motivation we have available to accomplish big goals, and minimize the motivation needed to get the job done.

So how do we harness motivation to our advantage? It's a two-fold process. First, we maximize the motivation we have inherently available by cultivating its sources. Then we minimize the amount of motivation needed to get the job done with goal setting and organizing strategies that capture our time, energy, and attention. It helps to start with an understanding of what motivation is, and how it works.

The traditional view is that motivation is the precursor to action. Build up enough motivation and you'll move onto action. Where does that motivation come from? Presumably, it comes from a good idea. Some of them lead to motivation and if you get enough of that motivation it turns into an action.

In the stair-step model, you simply have to climb up that first step of getting a good idea. If the idea is big enough, it leads to the second step of finding motivation. Enough motivation leads to the third step of taking action. But, why wait for that perfect idea, why not just get started today, this instant?

With the cycle model of motivation, you can begin with any of the three steps. It could be a good idea, if you have one, or you can start with generating some motivation, and let the idea come from that. You can even initiate with the action. One technique that I learned from the film, Finding Forrester, is the practice of sitting down to write even if you don't know what you want to say. You simply start writing before you have an idea or any motivation, and write whatever comes to mind. If the writing starts to form into something (the idea), you go with it.

When you understand how to use these models to your advantage, motivation can become self generating, or intrinsic. Most businesses are fundamentally built on the concept of extrinsic or incentive-based motivation, ie, if you give people something, they will support you. Intrinsic motivation, on the other hand, is derived from within. When motivation is generated internally, there's less need for external or extrinsic motivators.

14%
who have goals
are 10 times more successful than those without goals.
–Harvard Business Study [2]

Autonomy, mastery, and purpose are the three primary drivers of intrinsic motivation.

Rather than external drivers like money, praise from others, or rewards and penalties, the three primary drivers of intrinsic motivation are autonomy, mastery, and purpose.

- Autonomy is the desire to direct our own lives.
- Mastery is the goal to continually improve at something that matters.
- Purpose is the desire to do things in service of something larger than ourselves.

Of these three intrinsic motives, purpose is usually the strongest. Purpose is often seen as a catch 22 – either we work at a non-profit saving the world for a meager paycheck, or we get a well-paying job doing something we don't care about.

Some may think of work as a paycheck that covers living expenses and allows enough free time to pursue a more meaningful purpose. However, in actuality, it's possible to find an underlying purpose in any type of work. While it may not always be a total match with that of your organization's purpose, it can help our motivation to seek out potential compatibilities.

When we understand how intrinsic motivation works, and how to cultivate it, it's easier to find a purpose for ourselves.

In an ideal world, you can find a high level of overlap between your individual and your organization's beliefs and purpose. Simon Sinek, author of Start With Why, How Great Leaders Inspire Everyone to Take Action, has defined an organization's or individual's purpose, cause, or beliefs as its "Why." He proposes that understanding and recognizing the connection between your Why and your company's Why, to whatever extent it might be, can increase your feeling of purpose, job success, and perhaps even life satisfaction.

Indeed, I found my motivation for the Kaizen project was increased when I kept my purpose in mind, that of fostering an environment where people feel inspired to bring forth their best qualities to mutually benefit themselves and the organization. I found the aspect of my day-to-day work that resonates most with this personal Why is finding ways to help my software development teams move from a collection of individuals to a cohesive force that utilizes the best characteristics of every member. As a developer, this was not always something I was tasked to do, but now as a manager, it's a primary part of my job description.

On the days where my focus is working with and helping my teams, and the days when my teams succeed beyond expectations, the work feels effortless and at the same time worthy of the intense effort I put into it. Knowing those days will come makes it easier to find the motivation to get through the harder days in between.

When we understand how intrinsic motivation works, and how to cultivate it, it's easier to find a purpose for ourselves. However, inspiring our team and employees is much harder. We can't transfer our motivation to others just as we can't slip on someone else's shoe and expect the right fit. But we can encourage an environment where people are free to explore their own motivation.

43%
more productivity
in offices with engaged employees.
–Hay Group [3]

We can encourage an environment where people are free to explore their own drivers of motivation.

With a little extra effort, we can also guide others in their search, knowing that helping them to find their drivers will benefit both the individual and the organization.

We have found the following steps helpful in the effort to encourage employees to find an intrinsic connection to their work:

- Embody and demonstrate the principles of motivation.
- Teach intrinsic motivation approaches and techniques and avoid extrinsic motivation approaches when possible.
- Create a safe environment for motivation (including the ability to try and sometimes fail).
- Coach others to help them identify their personal purpose and how it fits with the organization's needs.

What's important is knowing that everyone has the capability to find their own unique motivation. Whether the goal is a project like the Kaizen series, or a software deliverable, it will be most successful when the motivation is derived from a sense of greater purpose.

Step 2: Setting High Quality Goals

Goals help us to prioritize and find perspective.

Once we know how to generate motivation, it helps to have some tools to harness it. This is where goal setting comes into play. Goals help us prioritize. They show us what we can discard, and where we can dive deeper. They give us perspective.

One thing became clear when we began the Kaizen initiative: being able to set goals and achieve them would help us gage results. We decided to make goal setting our first topic and research best practices, as well as reflect with others on successful techniques from the past.

Harvard Business Study statistics: [4]

3%
of population have goals written down

14%
have a plan in mind, but no written goals

3%
with written goals are 3 times more successful than 14% with unwritten goals

High-quality goals are more successful when they are equally inspiring and achievable, rather than too much of one without the other.

We found the following strategies supported our goal setting efforts:

1) First, define high-quality goals.
For high-quality goals to be successful, they should be both inspiring and achievable. Too much of one without the other is a recipe for a goal that isn't likely to see success, no matter how good our intentions are.

The technique we like to use here is breaking a big goal down into achievable parts. When we say a "big goal," we mean what Jim Collins and Jerry Porras called a BHAG (Big, Hairy, Audacious Goal) in their book Built to Last: Successful Habits of Visionary Companies. The BHAG is where you find your inspiration. These are goals where the value is apparent, the outcome is compelling, and the idea is a little scary. My BHAG, for instance: set up a Kaizen program at my company. Big goals are life changing, but if they aren't achievable using the steps that follow, they will be less likely to find success.

2) Next, match your goals to values.
Having high-quality goals is a good first step, but to really make a goal last for the long haul, we'll want to dig a little deeper into why the goal is important.

By identifying why our goals are important to us, we give ourselves a better chance at weathering the resistance when we face the decision to give up or to keep going. An effective method for uncovering why our goals are important to us is to match goals to values.

As noted in the introduction, the concept of Kaizen resonated for me, partly because it reinforced my belief in my swim coach's words, and also because it provided values and guiding principles that could help me and my company to be more effective.

3) Now, align your systems to goals.
The next step is to find the systems that make your goals automatic. This can happen once you have a high-quality goal and you've beefed it up by matching it to your values.

40%
more achieved
when actionable tasks are set for goals.
−Gail Matthews' Goal Research [5]

The key is to use existing behaviors to modify or replace existing systems.

Charles Duhigg advocates using existing habits to trigger new behaviors, as outlined in his book, <u>The Power of Habit: Why We Do What We Do in Life and Business</u>. Looking over your typical day, both your home life and your work life, you can probably identify some keystone events that happen every day. You wake up and get out of bed, you drive somewhere or you log into your computer, you eat lunch, you finish your work day, and so on. Each are points where you can concisely inject new behaviors that support your goals. We call these repeated behavior systems.

If setting up the Kaizen series is the goal, blocking out time in my calendar to work on it every day is a system. The problem with systems, which is also one of the great things about them, is they are only as good the results they deliver. I may block out the time, but will I really use it?

The key is to use existing behaviors to modify or replace existing systems with systems that not only achieve desired goals, but provide many more related benefits as well.

As the momentum builds, we start to see positive results from our achievable goals. All of a sudden the inspirational goals seem more realistic.

For the goal of setting up the Kaizen series, my systems began to look something like this:

- Set the alarm for an hour earlier to do research on the topic I'll be presenting next.
- On the drive to daycare, listen to a podcast on the topic.
- Upon arriving at my desk, take a couple minutes before checking mail and logging into Slack to create a bullet plan for the day so I can get my other work done in a timely manner.
- Use some of my lunch break to review the work I did that morning.
- Read books on the topic at night.

4) Put it all into action.
To get started, I recommend making changes that are easy at first.

90%
of people
perform better with relevant and challenging goals.
–Locke and Latham [6]

For me, establishing a nightly reading habit in place of an extra episode on Netflix was easier when I started with a book that was interesting and easy to read. I didn't chose something difficult and technical because I was trying to give myself the best shot at changing the momentum. Once I had the new habit going pretty well, it was easier to introduce less tantalizing books.

As the momentum builds, we start to see positive results from our achievable goals. All of a sudden the inspirational goals seem more realistic. This leads to more commitment to the systems we've put in place. Soon, we find a virtuous cycle has formed around our goal. To put it all together, here's my BHAG broken down into the parts outlined in this section:

- Inspirational goal: Set up Kaizen presentation series
- Achievable goal: Present one topic a month to my team this year
- System: Research and read daily so it becomes a habit
- Today's action: Outline content for the first presentation (1 hour)
- This week's action: Review sources, read, and listen to podcasts on the topic (8 hours)
- This month's action: Present the topic to my team (1 hour)

Effective goal setting helps you to do less by focusing efforts on what you want to achieve.

5) Finally, let go of what you don't need to do anymore.
Two of the biggest misconceptions about goal setting are that it will make more work, or lead to disappointment about not being able to achieve everything you hoped. The irony we've found is that effective goal setting helps you to do less by focusing your efforts on what you really want to achieve. When unrealistic expectations are removed, the disappointment of not achieving everything can also be let go.

Say we had five things we hoped to get done today, but only had time for three. How do we decide which three? Do the rest get added to that perpetual to-do list? This is where a well-defined set of goals can help us let go of some items. If they aren't contributing to the Big Goal, you can drop them from the list. When the Big Goal is really important, we can stop worrying about that list of Never-Going-To-Do items. It's not a list of failures, it's a list of noble sacrifices to a greater cause that aligns with our values and is worthy of our energy.

And now, onwards to organization, another strategy for making the most of the motivation available to us.

Step 3:
Organizing Priorities

Organization helps us prioritize our time.

Most of us are struggling to keep up. This means the important things in our lives, the meaningful things, are being pushed aside, relegated to later, and ultimately left undone. Organizing allows us to take more control. It gives us tools to allocate our time more intentionally. When we can drop the least important things on our list, we can eventually use that space, and that extra time, to rebalance and spend more time doing the things that are really important to us.

There are many techniques that promise to help us add more organization to our life and our work.

NAPO survey statistics [7]:

91%
said they would be more efficient if their workspace was better organized

28%
said better organization would save over an hour per day

27%
said better organization would save 31 to 60 minutes each day

The simple act of identifying your to-dos for the day will start the ball rolling.

While each of us will find certain tools more or less useful, it's worth giving them a try to see which are the most helpful. First, I'd like to break down the common components these tools attempt to address. They are:

- Planning: When will I do the research for the next Kaizen topic?
- Prioritizing: What research is most important to do now?
- Estimating: How much time do I need to do the research?
- Tracking: How much time did it actually take?
- Reducing distraction: What can I let go of to get this done?
- Tapping into natural productivity cycles: When am I most likely to do this work?

These components each align with some organizational tools that can support our goals.

1) Planning: Keep a To-Do list
Something as simple as a To-Do list is a good starting point. The simple act of identifying your to-dos for the day will start the ball rolling. A list of intended actions gives us a plan to follow for the day. If we get distracted, we simply return to the list for the next task.

Avoid the lack-of-accountability trap: Make it the norm that items on your to-do list are done in a timely manner.

Will things come up that supersede items on our to-do list? Sure, but having something to look at to compare with the urgent things that come in puts us in the natural mode of prioritizing. And if all we do is cross off the items we complete for the day, we still have a good start to tracking our time and effort. Some helpful reminders:

- Avoid the infinite to-do list: If it's unlikely an item is actually going to get done today or this week, don't add it.
- Make it a habit: Writing your plan for the day can become part of a routine you already do, for instance, every morning as you drink your tea or coffee you outline your to-dos for the day.
- Avoid the lack-of-accountability trap: Make it the norm that items on your to-do list are done in a timely manner.

2) Prioritizing: Bullet Journal Method

The Bullet Journal Method stems from an annotation technique developed by Ryder Carrol in the early 2010s. It's an easy way to identify and record tasks, notes, and events, as well as organize to-dos for daily, monthly, and future action. It takes a holistic view of managing priorities, and is a good option if your biggest challenges are around prioritization and tracking. While fairly free form, but still organized and indexed, the format can be great for keeping up with life as it happens. A journal is usually broken down into the following structure:

- Index
- Future
- Monthly
- Weekly (optional)
- Daily
- Custom collections (projects)

It then uses the following basic annotations to keep track of tasks:
· Incomplete
x Complete
> Migrated
< Scheduled
Irrelevant
– Notes
○ Events

This method provides a basic structure, but is highly flexible to adapt to whatever works best for you.

64%
of workers
feel most productive from 8am to 12 noon.
–*Wrike Survey* [8]

Kanban has become popular with teams looking to embrace high throughput.

3) Estimating & tracking: Kanban

When you're ready to apply some industrial strength organization to your days and weeks, look no farther than Kanban. Invented in Japan by Toyota for car manufacturing in the 1950s, Kanban has become a popular Agile methodology for teams looking to embrace high throughput in areas as diverse as software development, medicine, and education. Kanban also works well in combination with the other techniques mentioned in this section. The principles in a nutshell:

- Reduce work-in-progress: Focus on one thing at a time, through to completion.
- Optimize for cycle time: Continually improve processes to reduce how long it takes to go from to-do to done.
- Focus on quality delivery: Make sure time spent is well-spent.

Kanban can help ensure you spend your time as usefully as possible, as well as find ways to improve how you use your time.

Instead of continually shifting from one task to another, we can get into the mental state of flow that allows us to become hyper efficient.

4) Reducing distraction: The Pomodoro Technique

Developed by Francesco Cirillo in the late 1980s, the Pomodoro Technique has a cool-sounding name that evokes images of classical Italian painters and engineers solving the mysteries of time. It's actually a simple technique and the name is similarly straight forward. "Pomodoro" is the Italian word for tomato, and refers to the common kitchen timer in the form of that vegetable. The Pomodoro Technique blocks time into units, 25 minutes of active, undistracted focus, followed by five minutes of deliberate rest. After four units, or pomodori, take a longer break.

What benefits would we expect from using the Pomodoro Technique? The most obvious is focus. Instead of continually shifting from one task to another, we can get into the mental state of flow that allows us to become hyper efficient.

40%
of the workday
wasted by office workers who were not trained in organizing skills.
−Wall Street Journal [9]

We may also find a disciplined mental rest can help to improve overall focus. Another benefit is that when we break up daily tasks into distinct pomodoro, we can estimate and track our time in these convenient blocks.

5) Tapping into natural productivity cycles: Getting Things Done

Pioneered by David Allen in the early 2000s, Getting Things Done (GTD) is a time-tested technique that uses consolidation techniques to prioritize requests. We often receive input on the things we need to do from a variety of sources: Slack, email, phone calls, texts, applications, and so forth. With GTD, you stockpile all these sources into a consolidated "inbox" to keep track of everything. Rather than getting distracted by urgent requests, you funnel each incoming task into a defined process that informs you about what is most productive do next.

GTD helps maintain a list of tasks for any circumstance. If we're stuck on an airplane without WiFi there are items we can do. It also provides a cultivated set of next steps for everything you want to get done. You don't need to go fishing for a new task and possibly get distracted, you just pick up the next available action item in your pipeline.

Conclusion:
Do less, to do more of what matters

Creating a plan will help you make better decisions about how to spend the time you have.

As I found on this Kaizen journey, no amount of goal setting and organizing will get the job done without a foundation of intrinsic motivation. Motivation gets the ball rolling, and goal setting and organizing keep it going to the end. When you have a better picture of everything you need (and want) to do, you can start collecting real data on how you spend your time. You'll find the problem isn't that you aren't doing enough, it's that you're doing too much. All the planning in the world won't give you more than 24 hours in a day.

So why go to all the trouble? Because creating a plan and knowing realistically how much you can do will help you make better decisions about how to spend the time you have. The key to getting your goals done is less about managing what you do, and more about being deliberate about what you don't do.

Setting goals and becoming better organized, with the tools mentioned here and others, will help you make informed decisions about how to use your day to do the things that really matter. Then you can relax and enjoy the rewards. ✛

Sources

1 - Gallup 2020 State of the Workplace

2 - Harvard Business Study

3 - Hay Group

4 - Harvard Business Study

5 - Gail Matthews' Goal Research

6 - Locke and Latham

7 - NAPO

8 - Wrike Survey

9 - Wall Street Journal

Author
Kevin Ferguson is a veteran software engineer and
web developer and Director of Software
Development at Portland Webworks.

Portland Webworks
5 Milk Street, Portland, ME 04101
(207) 773-6600
portlandwebworks.com