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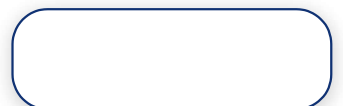
Hoshin Planning & the X Matrix

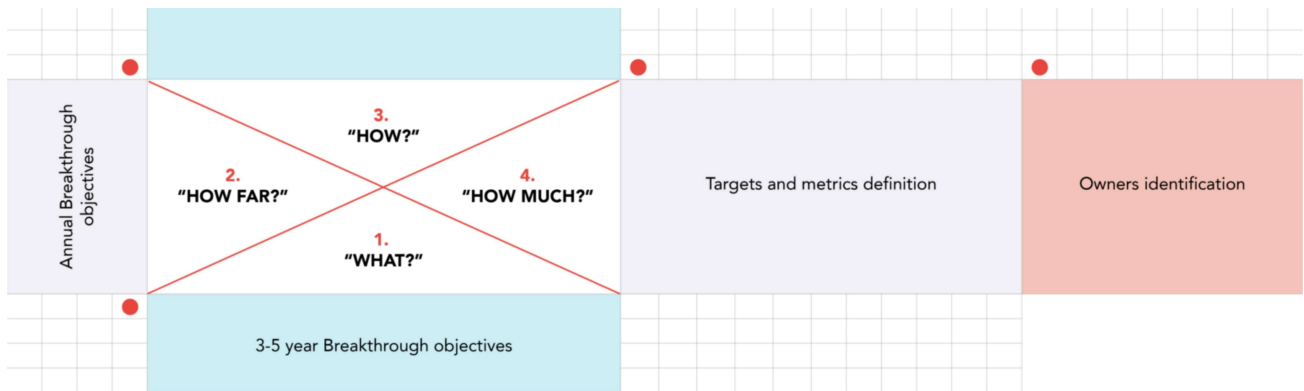


Hoshin Planning

Hoshin Planning, also known as Policy Deployment or [Strategy Deployment](#), is a methodology for implementing an organisational strategy and ensuring the alignment of all employees involved.

[Hoshin Planning](#) defines breakthrough objectives for the next 3 to 5 years based on the organisation's strategic priorities. This is confirmed by the data gathered from the voice of the customer and the Enterprise Value Stream Analysis. These breakthrough objectives are then transformed into annual objectives and organised into a one-page 'X Matrix' that will be deployed into every level of the organisation.





X Matrix

The construction of the Matrix entails the answer to 5 key questions:

1. "What do you want to achieve in 3 to 5 years?"
2. "How far do you want to go in the first year? "
3. "How are you going to do it?"
4. "How will you measure success?"
5. "Who is responsible?"

Split into four segments (in order of planning: South, West, East, North), each quadrant focuses on a specific part of the operation: South, 3 to 5 Year Breakthrough; West, 1 Year Breakthrough; East, Targets; and North, Improvement Priorities.

To visualise your organisation's problems, we must **STRETCH** its improvement objectives. The benefits being that it creates an assurance to deliver commitment and that it breaks internal concepts wide open.

To define the organisational objectives (the X Matrix quadrants), a five-step **Critical Thinking Process** approach (one for each quadrant and one for resource allocation) is required to promote discussion and alignment. Being constantly challenged to commit to disruptive goals, the company must ask itself what processes will prevent it from achieving its desired results. Each step comes with checkpoints required for its successful completion, from a change represented in customer perspective to the employees' ability to apply the right KAIZEN™ tools.

All of this will create the **Level 1 X Matrix (L1)**. Following this, we can move onto the **Level 2 X Matrix (L2)**. To build L2, 'Catchball' is implemented. This is a negotiation technique where leaders exchange ideas for the level of management below them until a consensus is reached. Departmental heads then repeat this process for their team leaders, and so on, until objectives have been agreed across the organisation.

- Alignment and focus
- Quantified objectives
- Well-defined duration (intensive days)
- Preparation Work
- GEMBA
- Immediate implementation
- KAIZEN™ tools (standard methodology)
- Application of countermeasures for a quick correction of deviations
- Results follow-up and financial impact calculation

Ready to start your KAIZEN™ transformation?

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This KAIZEN™ method allows teams to stay focused on what they must do to carry out the Action Plan as quickly as possible, removing time wasted trying to identify the perfect solution. This is the difference between planning and implementing.

After Hoshin Planning comes Hoshin Review, the next step of the **Strat to Action** process. This step includes the Roadmap implementation, as well as a monthly review of the Hoshin process.

[Access the "Strat to Action" event replay](#)

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