CONCEPT

Hoshin Kanri: Policy Deployment and Strategy Alignment with the X-Matrix

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Technical depth: Practitioner · **Practical mode:** Case study

Introduction

Most organisations have a strategy, yet departments still pursue dozens of disconnected targets and initiatives that compete for the same people. Objectives are cascaded downwards without negotiation, reviews happen once a year and nobody can show how daily work links to the breakthrough goals. This Core Concept course equips managers to deploy strategy with Hoshin Kanri, turning a few vital objectives into aligned priorities, owners and monthly reviews. Participants apply each tool to case material from several sectors and leave with a Hoshin X-Matrix and Deployment Plan for their own unit.

Course Objectives

- Diagnose where strategy fails to reach departmental objectives and daily work in an organisation
- Apply Hoshin Kanri, the X-Matrix and catchball to align breakthrough objectives, annual goals and improvement priorities
- Build cascade matrices, A3 reports and bowling charts that connect unit plans to organisational objectives
- Run monthly Hoshin reviews that detect off-track targets and agree countermeasures based on root causes
- Distinguish breakthrough objectives from daily management so that initiatives match available capacity
- Produce a Hoshin X-Matrix and Deployment Plan ready for review with senior management

Target Audience

- Department and function managers accountable for delivering their share of organisational objectives
- Strategy and planning managers who coordinate annual planning and performance reviews
- Operational excellence and continuous improvement managers leading Lean or quality programmes
- Performance management managers responsible for KPI frameworks and scorecards
- Programme and portfolio managers who align improvement initiatives with strategic priorities
- Quality managers responsible for setting and monitoring quality objectives

Course Outline

Day 1: Strategy Execution Gaps and Hoshin Foundations

- Strategy Execution Gap Diagnosis with an Objectives Cascade Audit
- Hoshin Kanri Principles: The Vital Few Breakthrough Objectives
- Hoshin Kanri Seven-Step Planning Process Overview
- Current Planning Cycle Review Against PDCA
- Breakthrough Objectives Versus Daily Management of Business Fundamentals

Day 2: Alignment Frameworks and Models

- X-Matrix Structure: Breakthrough Objectives, Annual Objectives, Priorities and Metrics
- Catchball Process for Two-Way Negotiation of Targets and Resources
- Balanced Scorecard and Strategy Map Linkage to Hoshin Objectives
- OKRs Compared with Hoshin Objectives: Cadence, Ambition and Ownership
- ISO 9001 Clause 6.2 Quality Objectives and ISO 9004 Deployment Guidance

Day 3: Building and Cascading the Plan

- X-Matrix Build: Correlation Symbols and Accountable Owners
- Second- and Third-Level Cascade Matrices for Departments and Teams
- A3 Strategy Reports for Improvement Priorities
- Bowling Chart Design for Monthly Target Tracking
- Leading and Lagging Indicator Selection with a KPI Tree

Day 4: Reviews, Problems and Countermeasures

- Monthly Hoshin Review Meeting Agenda and Countermeasure Reports
- Root Cause Analysis of Missed Targets Using 5 Whys and the Ishikawa Diagram
- Initiative Overload Check with a Resource Capacity Heat Map
- Annual Hansei Reflection and Plan Reset
- Common Deployment Failures: Too Many Objectives and Target-Only Cascades

Day 5: Case Work and the Hoshin Deployment Plan

- Manufacturing Case Study: Rebuilding an Overloaded X-Matrix
- Healthcare Network Case Study: Catchball Across Clinical and Support Units
- X-Matrix Build for the Participant’s Unit
- Hoshin Deployment Plan and Monthly Review Calendar Drafting
- Peer Catchball Session and Plan Defence

Skills You Will Gain

- Strategy Deployment
- Objective Prioritisation
- Catchball Facilitation
- X-Matrix Construction
- KPI Cascade Design
- Performance Review Leadership
- Countermeasure Planning
- A3 Problem Solving

Why Attend This Course

- Return to work with a Hoshin X-Matrix and Deployment Plan for your unit, already tested in a peer catchball session
- Cut the list of competing initiatives to the few that move the strategy and defend that choice
- Turn monthly reviews from status reporting into decisions on countermeasures
- Compare strategy deployment practice with managers from other sectors and countries

Conclusion

Strategy is delivered only when a few clear objectives reach every unit, are agreed rather than imposed and are reviewed often enough to correct course. This course moves from diagnosing execution gaps, through the X-Matrix, catchball and the models that connect objectives to measures, to the reviews and root cause work that keep deployment on track. The final day turns that practice into a Hoshin X-Matrix and Deployment Plan that participants take back to their senior management for agreement.