Hoshin Kanri

Strategy Implementation

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Author's Note

I asked one question to a handful of employees across various levels and functions in an organization, starting from the CEO – 'What is your company's strategy?' I was startled to learn that nearly everyone had their own version of the company's strategy. Some were close and others way apart from the originally conceived strategy. This might sound like an aberration and communication issue to you. I beg to present that this is merely a symptom of an underlying problem in the organization. When different functions and roles in the organization perceive strategy differently, that in itself is the starting point for an implementation failure.

While strategy formulation is traditionally driven by well devised and tested methods, it is widely accepted that there is lack of definitive method for strategy implementation.

I have put together an e-book titled "Hoshin Kanri: Strategy Implementation". The purpose of this book is to provide necessary knowledge and insights for a leader who has to steward strategy implementation in his/her organization. I can assure you that it will be a good starting point. From my experience, I can observe that Hoshin Kanri fills that gap in strategy implementation by providing an robust method to deal with complex scenarios.

Further Assistance

I would be happy to talk to you regarding:

- Evaluating existing strategy implementation practices in your organization
- Guiding in annual strategy offsite
- Facilitating Goals & Strategies cascade vertically & horizontally
- Build cross functional ownership and accountability
- Hoshin Kanri Deployment
- Coaching on Execution Excellence to build strong second level teams for execution

All the best!

Nilakantasrinivasan (Neil)

Contents

Introduction

Strategy is a key element to any organization or individual's success. Traditionally, Small & Medium Businesses have been deprived of a good strategic document. I have usually observed that founders' vision becomes their strategy. As the organizations grow, their course is governed by several factors other than the strategy itself. Believe me, it's very common!

With large corporations, the story is very different. A robust and well thought through strategy is crafted by the best brains with the help of extensive analytics, in-depth market research, detailed understanding customer behavior, economic conditions, financial barriers, global trends, etc. The problem is actually with execution of the strategy. Complexity arising out of geographical spread, cultural diversity, multiple leadership styles, incentive programs, corporate dynamics, communication barrier etc., play against effective execution.

While these are prevalent in large corporations, several small & medium businesses haven't been spared.

Consider the following facts about Business Strategy:

- While 80% of organizations have 3 year 'Goals' they hardly have any defined strategy!
- 80% of all organizations that have well-defined strategies fail to execute them well.
- Less than 5% of employees understand an organization's business strategy.
- 60% of organizations don't link strategy and budgeting.
- Large enterprises are no way better than the smaller ones. In fact, most large enterprises have a well-crafted business strategy, but they fail in Execution!

Source: Large Research Organizations & Consulting firms such as Wharton, Renaissance Consulting, etc

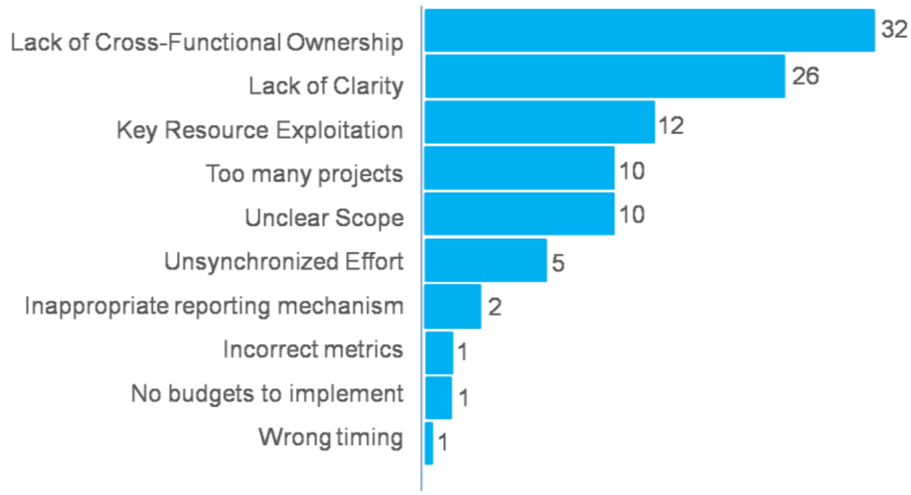
Remember, unless your strategy isn't grossly wrong, mostly strategies would yield equally good results as long as implementation is seamless.

Rolls-Royce and Ford have completely different strategies and both of them are successful. Think about it.

No matter how great your strategy is, it wouldn't make any difference, as long as it is not implemented well.

Need for Structured Approach for Strategy Execution

We researched about the reasons behind issues associated with Strategy Execution. We talked to business leaders and professionals who are in-charge for strategy.



Here are the top 10 challenges in strategy implementation in the order of significance.

1. Lack of 'Individual Ownership & Joint Accountability' for organization goals
2. Non-synchronized effort between leaders/functions in applying a strategy
3. Budgetary planning, strategic planning & performance planning non-synchronized
4. Leaders give great talks on prioritization, but they don't prioritize strategic initiatives
5. Strategic Initiatives aren't scoped well – punctuated with long duration & unrealistic goals
6. Too many strategic initiatives run concurrently leading to strategic fatigue
7. Most strategic initiatives bet on the same best guys around leading naturally to under performance
8. Strategic Initiatives evolve from a wish list rather than from environment scanning
9. No quantitative measures of success for strategic initiatives
10. No systematic mechanism to adapt strategy to changes in external & internal environments

This may be a good time to reflect about the challenges your organization faces with regard to strategy implementation and what countermeasures have worked and what hasn't?

Common Practices for Strategy Implementation

Practices for Strategy Implementation varies vastly. Most organizations learn over a period of time that they need a structured approach for implementation. Even large enterprises have learnt over time that emphasis given for strategy development and hype around it isn't carried to execution. So, broadly speaking, there are structured approach to implementation and unstructured approach to implementation.

Among the structured approach following are some of the most common approaches:

- **KPIs**

  Most organizations define goals and then it is aligned to the Key Performance Indicators across levels in the organizations. This works fantastically well if you are not a growing organization. If things are in steady state, this is more than enough for you.

- **Balanced Scorecard**

  In this approach, a strategy map is created and metrics are grouped under 4 different themes and deployed. The advantage of this approach is that organizations will have a balanced approach towards Customers, Financials, Internal Processes, Learning & Development. In the absence of this balanced approach, usually focus is acutely on Financial results.

- **Hoshin Kanri**

  Hoshin Kanri is a Japanese method for strategy formulation, cascading and implementation. It has several advantages over the above approaches. In this book, we will cover extensively on Hoshin Kanri.

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Strategic Planning Process

Evaluate Your Strategic Planning Process

I'm sure your organization has a strategic planning process in place. And if you are responsible for this process, or if you are one of the key stakeholders in strategic planning and policy deployment, this note will help you examine and assess the impact of your organization's strategic planning process. In simple words, you will understand the measures of success for strategic planning process.

Here are 6 ways to find out if your organization's strategic planning process is doing its job!

Strategic planning process in most organizations is synonymous with annual goal setting exercise. While these two activities have certain common threads; strategic planning process isn't restricted to just goal setting.

Strategic planning process is essentially meant to stir the organization towards its long term goals. To be more specific; strategic planning process should help organizations to better organize themselves to:

- Establish priorities on what organization will accomplish in the future
- Force organizations to make choices on what they will do, and what they will not do
- Draw the entire organization, together, around a single game plan for execution
- Depict a broad outline that shows where resources will get allocated

Thus a strategic planning process is iterative and cyclical (occurring yearly).

In my experience, the following are some of the key measures of success for a strategic planning process:

- **Reliable**

  It is important to ensure timely completion of some of the key deliverables, such as: agreement on organization goals, identification of strategies, commencement of strategic initiatives, inputs to budgetary planning, assignment of targets to individuals, etc. These are all very time critical, and any delay can result in misalignment. It can even render the whole process counter-productive. Thus, timely completion is one of the most important measures of success for any strategic planning process.

- ## Buy-in from Leaders

  While ownership of the organizational strategy and its deployment resides with top leaders; there should be acceptance among senior and mid-level leaders to: strategic goals, assumptions, etc. Each leader must own organizational goals, including their accomplishments and failures. Several goals may require shared responsibility among functional/business heads, apart from overall ownership. Level of participation and engagement from leaders is a good measure of their buy-in

- ## Integrated Plan

  A good strategic plan should sync with financial planning process. If we end-up with budgeted revenue or cost figures that don't align with specific strategies; or if we have no budgets allocated for strategic initiatives, then that's a clear indication of misalignment.

- ## Visionary Goals

  The strategic planning process should facilitate a strong linkage between the organization's core purpose of existence; its guiding principles; and a compelling desire for a positive future; all looking beyond just "money-making". All these require quality leadership time and bandwidth. A quick review of the nature of goals, targets, underlying purpose, etc., can reveal its effectiveness.

- ## Flexible

  Because the process involves several functions and leaders; it is likely that the tasks may not happen as per schedule. It is also likely that leaders will bring in their personal style to deployment. The governance of strategic planning, thus, should accommodate such variations, while maintaining the overall approach. Inflexibility in planning process show up during execution. Unrealistic goals, lack of ownership for failures, finger-pointing, delays in reporting performance, etc., are signs of inflexibility.

- ## Deployment to Employees

  Effective implementation of a strategic plan resides in how well we can cascade these goals to various functions, and further on to individual employees. At least, if significant roles have their performance goals and incentives linked to strategic goals; then, it is a good indication of a well cascaded plan.

Each of the 6 measures of success would help you assess the effectiveness of the strategic planning process in your organization. However, if you wish to improve its efficacy & effectiveness, then you can take up our exclusive free on-line survey to access where you stand and what needs to be improved.

Elements of a Good Strategic Plan

If you are new to Strategic Planning and want to familiarize yourself on what a strategic plan is and how to go about preparing one, then this section will be useful.

Strategic plans are prepared at different levels using different approaches, but the ones mentioned below are 5 important elements of a good strategic plan.

Traditionally, strategic plans are considered to be complex and bulky reports that runs to pages. But that isn't necessarily true. However, it is true that there is lot of work that goes into creating an organization's strategic plan. But a good strategic plan can just be a one-document containing the following elements:

- **Business Goals**

  Business goals are the organizational level goals that are closely tied to the organization's vision and mission. It reflects the aspirations of the organization and their commitment to their customers, shareholders and employees. Usually organizational goals are restricted to not more than 5 and preferably just 3. Each of these goals are quantifiable measures with agreed targets for next 3 years. Not all goals are equally important, so it would be a good idea to arrange them in the order of importance.

  If your organization feels that all the goals are equally important, then there is no need to prioritize them.

- **Measures of Success**

  As mentioned earlier, it is important to quantify all goals. So there is a clear difference between vision and goals. 'To be a market leader in the next 3 years' isn't a goal. For some goals, there may be more than one measure of success. It's a good idea to include all of them, but they can be carefully screened before inclusion.

- **Organizational Strategies**

Organizational Strategy is the most misused management term. Goals and strategies are interchangeably used and they are thoroughly confused. As Michel Porter puts it, strategies represent the 'How' part of achieving the goal, not the 'What'. Strategies are arrived based on internal and external environments. Number of strategies to be no more than 7 but preferably just 5. I'm not covering the details of how organizational strategies are arrived here, but you will find information regarding this in the coming sections. Most times, a given strategy can be helpful in achieving more than one goal.

Like goals, strategies have to be prioritized as well. Some organizations consider inorganic growth as a strategy and include it as the last strategy. But it isn't mandatory to include acquisition as a strategy by default.

- **Ownership for Goals**

Goals without individual ownership will never be accomplished. Hence each of the goals at the organizational level are owned by individual leaders. Just to reiterate, I used the word 'Owned' not 'Assigned'. Hence the individual leaders of the organization engage in a discussion and agree to own goals rather than being assigned by the Chief Executive. In achieving some of these goals, there will be inter-dependencies. That's where joint accountability comes into play.

- **Strategic Projects (Initiatives)**

Strategic Initiatives are strategic thrust areas where the leadership believes the organization has to do something different in order to achieve 1 or more goals. Few synonyms for Strategic Projects are Strategic Initiatives, Critical Strategic Projects, etc. There is no restriction on the number of strategic projects, but should be limited based on how much an organization can manage concurrently. Most organizations falter here. Similar to goals and strategies, strategic projects are also prioritized. In order to ensure a strategic project is successful, there needs to be a robust project plan, cross-functional teams and rigor.

Once created, a strategic plan is a live document and needs to be reviewed and updated every month.

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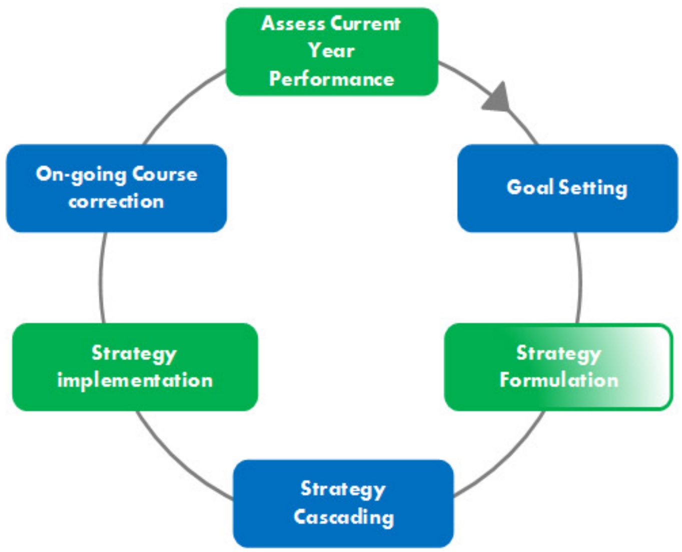
12 Step Strategic Management Cycle

Management of strategies is a vicious cycle. Most organizations aggressively start them and progress till they hit execution roadblocks, they stumble and quit. By then, it's time for the year's performance evaluation so they scramble and fire fight to achieve their goals.



12 Step Strategic Management Cycle is a comprehensive approach that leverages the principles of Hoshin Kanri and Blue Ocean Strategy. 12 steps mentioned below are followed sequentially, but many of them can be initiated concurrently.

1) Current Performance Assessment

Strategic management process of the coming year commences with a stock-taking exercise of current year's performance. Most of information relating to current performance will be readily available, but the purpose of this exercise isn't mere stock-taking. It goes beyond that to understand the lessons learned from current year, variation in performance and reasons for it. Therefore this exercise is reflective in nature.

2) Internal Environment Scanning

Internal environment plays a very critical role in our success. Quite often, leaders take internal challenges for granted. They feel that they can push their way through. Internal scanning is aimed at understanding changes in competencies/skills, mindsets, business models, associate satisfaction, attrition reasons, technological/infrastructure barriers, etc. Best way to scan the internal environment is through information research, interviews and focus group discussions.

3) External Environment Scanning

External environment plays an equally critical role in our success. Scanning of external environment is an evolved task in many organizations. There are industry research bodies, market subject matter experts, analyst reports, secondary information research information, commissioned studies undertaken by the organizations, etc. The only point I wish to highlight is the voice of customers and more importantly the voice of non-customers.

4) SWOT Creation/Updation

SWOT is probably one of the oldest management tools. It is simple yet powerful. But it’s also the most abused tool. When I ask leaders to update their SWOTs, they avoid and prefer to delegate. But when I insist, they reluctantly get involved. In reality, the quality of SWOTs are unbearable. Most SWOTs are nothing but a journal of accomplishments and perceptions. But a good SWOT should be factual, frequently updated (at least yearly) and should be prepared with involvement for all stakeholders.

5) Goals Pre-work

Organizational goals have to be comprehensive and quantitative in nature. A facilitator plays a critical role in conducting pre-work exercise. Potential candidates for goals are collated, grouped, prioritized and selected through consensus.

6) Goals & Strategies Formulation

The real truth about most strategic plans is that there are no real strategies. Goals and strategies are interchangeably used. A good strategic plan should have 3~5 unique strategies derived from SWOT. Strategies answer the ‘How’ part and not the ‘What’.

7) Ownership

When goals are finalized, unique owners for each goal are also to be assigned. What differentiates between organizations that are successful with execution and others is their ability to create Individual Ownership and Shared Accountability (IOSA) in delivering organizational goals. ‘Catch-ball’ mechanism is a method adapted in Hoshin Kanri approach to drive this joint accountability for goals.

8) Strategic Projects Identification

Strategic Initiatives aka Strategic Projects are nothing but the most important projects that require sponsorship to achieve specific stretch goals. So it starts with identifying stretch goals that cannot be accomplished by business-as-usual (BAU) means. These are good candidates for strategic projects. It is critical to ascertain ownership, measures of success, duration and sufficient sponsorship for each strategic project. Thus organizations are recommended to choose and run only a limited number of strategic projects. Those which don’t qualify to become strategic projects go into parking lot and are pursued in FIFO (First In First Out) approach. Prioritized strategic projects are funded, sponsored and resourced the most.

9) Cascading of Strategies

Strategies need to be cascaded to grass-root level and this happens through deployment of strategic plans. Enterprise Strategic Plan needs to be cascaded to Organizational Strategic Plan (Business Unit level) and further to Functional Strategic Plan. Usually, most organizations cascade goals and metrics using Balance Score Card approach, but goals are only one aspect of strategy deployment.

10) Weekly Progress Meeting

The leader of each strategic project has a project plan. He/She forms a cross functional team. Weekly progress meetings are chaired by the respective project leaders and are meant to take stock of task level progress, identification of bottlenecks, resource constraints and new ideas. The success of any organizational strategy execution resides in the diligence to these routines by the strategic teams.

11) Monthly Strategic Reviews

Monthly strategic reviews are conducted by the Senior Leadership Team that created the Strategic Plans where they review the progress of each strategic project, as leader of each project makes a presentation. This forum addresses issues relating to conflict of interest, participation issues, priority setting, etc.

12) Quarterly Strategic Reviews

This is the time to reflect. A quarter is a good enough period to validate if the existing strategies and strategic projects are still relevant with respect to the dynamic internal and external environment. If some of them needs to be changed/dropped/added, then those decisions are taken in this meeting. Further formal closures of successfully completed strategic projects and kick-offs of new ones from the parking lot. Thus this meeting acts as a fountainhead of strategic direction for any organization. Unfortunately the agenda for quarterly strategic reviews of many organizations is grossly off these objectives.

Finally, there are no approaches that fits all organizations. Depending on organizational culture, existing practices, leadership bandwidth, etc., its best to align the 12 step approach to organizational practices to create maximum buy-in and minimum chaos.

Cascading Strategic Plans during Policy Deployment

The strategic planning process can sometimes get really complicated. Especially when it comes to large enterprises with multiple lines of business, where each line of business is unique and have nothing common between them.

The objective of this section is not to give prescriptive advice on what will work for particular situation, but restrict to introducing various levels of strategic plans as one chooses to cascade them. Arriving at an apt solution for a particular situation would require me to know about your organization and its current practices.

Broadly the strategic plans are classified into 3 levels:

- ### Enterprise Strategic Plan

  A strategic plan drawn at this level will be owned by the group chief executive or president. Two scenarios are likely first, the enterprise operates in different geographies and so each geography is a separate legal entity and operates independently. Second, the enterprise could be a conglomerate having multiple lines of business such as retail, telecom, mining, hospitality, etc. In either of these cases, the divisional strategies would be vastly different from each other. These types of organizations are usually referred as M-form (Multi-divisional form). It is very difficult to have a holistic strategic plan at this level for whole enterprise. The strategic plan at this level is more about goals and broad overarching strategies of the enterprise. Overarching strategies are closely linked to the enterprise's values and guiding principles such as agility, vibrancy, sporty, caring, economical, etc., Broadly, the enterprise level strategic plans includes 3-5 goals of the enterprise for next 3 years, 1 ~3 overarching strategies and owners for each goal.

However if the enterprise, isn't that diverse, then its enterprise level strategic plan resembles divisional strategic plans in form, structure and construction.

- **Divisional Strategic Plan**

  Divisional strategic plans are owned by the divisional business heads. They include 3-5 goals, 5~6 strategies specific to the division, derived based on the division's internal and external environment conditions (SWOT), ownership assigned for each goal and specific strategic projects (initiatives) that will help to achieve the goals. The entire leadership team of the division is involved in creating this strategic plan. If there is an enterprise level strategic plan, then the goals of the divisional plan align to that of the enterprise. With regard to the strategies, while divisional strategies would be more specific, there will be an alignment to enterprise strategies.

  There would be as many divisional strategic plans as the number of divisions in the enterprise.

- **Functional Strategic Plan**

  A functional strategic plan is created for each unique function of a division. It is owned by the respective functional heads. The main purpose of the functional strategic plan is to align the functional goals to the divisional (and enterprise) strategic plans. The goals are directly derived from the divisional plan. Usually there isn't much emphasis on the functional strategies. Instead functional strategic plans are more tactical in nature. Functions will have to own and contribute to divisional strategic projects as well as drive function level strategic projects. For example, a HR department may own a divisional strategic project to bring employee attrition below certain level, but they also want to drive function level strategic project to improve HR staff efficiency. Thus functional strategic plans are more about resource ownership, alignment between divisional and functional strategic plans, managing the utilization of resources between divisional and functional priorities, etc.

There are as many functional strategic plans as the number of functions in the division.

In large enterprises, the functional strategic plans also need to have alignment to enterprises like divisional strategies. For example, the HR functional strategic plan needs to be aligned to respective divisional strategic plan as well as enterprise level HR Strategic plan.

In cascading functional strategic plans from enterprise and divisional strategic plans, the role played by the facilitator is very important. He/She should diligently map the enterprise and divisional priorities, interview all concerned, understand ground realities and above all, stay neutral.

What Are The Skills To Lead Strategy Implementation?

One real reason for your organization to fail is not wrong Strategy, but its poor execution. To ensure that does not happen, there are certain skills and experience that are critical:

- Bulky strategy dossiers don't matter when it comes to implementation. People who submit such dossiers and leave implementation to you are not the right people to implement strategy. Instead, you will need change agents who are going to work side-by-side to implement your strategy.
- When it comes to strategy implementation, industry or sector expertise doesn't matter. Remember that only to advise you on the next strategic move, sector experience is critical. Instead look for down-to-earth professionals with functional expertise in organizational change, metrics deployment, goal setting, etc.
- Professionals with proven functional expertise in areas such as Business Transformation, Change Management, Finance, Risk, Technology & Leadership Development would really matter.
- Most leaders approve the show of aggression as good execution-ability. But execution is a skill that requires good precision, patience, judgment, clarity and persistence. Strategy Implementation is both an art and science of execution.

In a nutshell, the right strategy implementation professionals will stitch together your organization to fulfil your strategy.

Hoshin Kanri

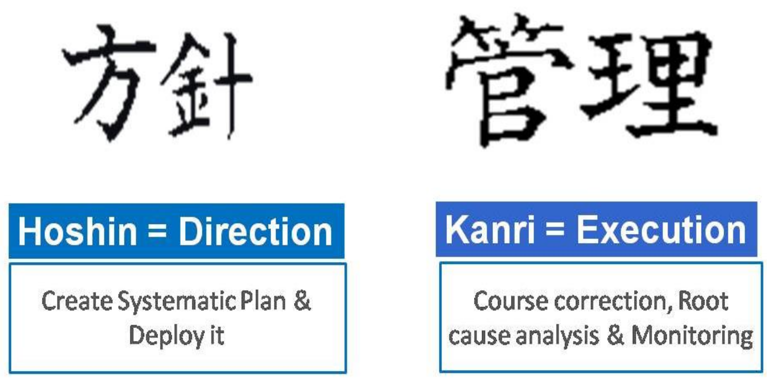
What is Hoshin Kanri

Hoshin Kanri is a Japanese method for strategy formulation, cascading and implementation.

Many organizations practice Hoshin Kanri including HP, Bridgestone, M&M, Suzuki, Toyota, Honda, Ford, etc. Its roots are from Total Quality Control (TQC).

Hoshin Planning can be considered as a process of setting annual goals for an organization or function and deploying them down the line. In general, Hoshin Planning covers defining 3 year organizational goals, their quantification and ownership, organizational strategies to accomplish them, strategic projects (aka Hoshins) at organizational level that are helpful to accomplish goals. Many organizations also want to cascade their organizational hoshin plan to functional level.

Kanri is the strategy implementation process in Japanese approach of Hoshin Kanri. It is a



mechanism through which Hoshin is executed or deployed across an organization. It involves execution, course correction, root cause analysis, monitoring, etc. To my knowledge, it is the only approach that seamlessly integrates strategy creation to its implementation. Considering that this Japanese method has been in existence for 60~70 years now, it is interesting to know that originators of Hoshin Kanri have given equal (or even more) emphasis on strategy implementation way back then.

Brief History – Hoshin Kanri

During the evolution of Total Quality Revolution in Japan, organizations were able to make quality improvements but did lack the direction and engagement of the management in the process. Hence Juran noted that it was management's responsibility to own the quality policy and lead quality improvement efforts. Subsequently, in 1960, Juran emphasized the responsibility of management to set goals & plans for improvement. Following that Peter Drucker's book 'The practice of Management' reiterated the need for accountability.

In 1965, Bridgestone published a report on planning techniques adopted by Deming Award winning companies. The common approach of all companies were based on underlying principles laid by Juran mentioned in earlier. This approach was called as Hoshin Kanri.

Top 7 Salient Features of Hoshin Planning Process

Following are the top 7 salient features of Hoshin planning process:

- **Prioritization:**

  Every organization, however big it is, works with limited resources – time, people and $$. One of the key reasons for derailment of business strategy execution is lack of prioritization at the time of creation of annual strategic plan. This is one such area where all organizations fail, immaterial of their size. Between the eagerness to achieve stretch goals and fear of not achieving them, most leaders compromise on the prioritization and end up doing everything. One of the fundamental principles of Hoshin Kanri is prioritization. Some goals are more important than others, some strategies are more fruitful than others and some strategic projects create more impact as compared to others than created only trivial impact. So it is not possible to give equal priority to all goals, strategies and strategic initiatives. Thus Hoshin planning process forces the leadership team to prioritize organizational goals, strategies and strategic projects based on parameters like organizational vision, internal and external environments and voice of customers.

- **‘De-selection’**

  At first sight, ‘Deselection’ might sound like corollary of Prioritization. “Deselection” actually precedes prioritization. Hoshin Planning process encourages the leaders to deselect goals, strategies and strategic projects that aren’t important rather than selecting important ones. Thus ‘De-selection’ is a process of systematically eliminating or parking, goals, strategies and strategic projects that aren’t most important. In my experience most large organizations fail when it comes to deselection. They run too many strategic projects concurrently with gross overlap in scope by resources who are spread thin on various projects. These are clear indications that ‘deselection’ isn’t effective. The criteria for de-selection can vary. Usually following criteria work –

  - Will it provide breakthrough results?
  - Are required critical resource available?
  - Is there a strong association with organizational vision?
  - Is internal and external environment factors conducive?

- ‘**Must-do, can’t fail’ Attitude:**

  Hoshin Kanri approach emphasizes organizational leaders to imbibe a ‘Must do, Can’t fail’ attitude when it comes to prioritized strategic projects. In spirit, it means that an organization believes that a ‘must do, can’t fail’ initiative is critical for the success of the organization and hence the leaders need to do all it takes to make it successful because its failure directly impacts the organizational goals.

- **Joint Accountability:**

  Hoshin process encourages sole ownership and joint accountability of the leadership team in deciding and achieving the goals. While individual leaders hold sole ownership of an organizational goal, the leadership team of the organization too holds joint accountability. ‘Catch-ball’ mechanism is a method adapted in Hoshin Kanri approach to drive this joint accountability for goals. Again, this is one of the biggest areas where large enterprises fail.

- **Constructive Negotiation:**

  Hoshin doesn’t encourage strong top-down approach. Instead it encourages leaders to negotiate goals, resources and ownership, both vertically and horizontally using ‘Catch-Ball’ mechanism. By doing so, leaders participate in their own goal setting rather than accepting goals given to them. Cross functional ownership of goals are also agreed in the similar manner. While this process does consume some extra time in finalizing the strategic plan, it brings in lot of clarity and acceptance among leaders.

- **Resource Optimization**

  Resources are very critical for the success of strategic plans. They can either be people, equipment, funds or other resources. But, in most organizations, its people who drive strategic plans. But when they are over utilized, it directly impacts the success rate of strategic initiatives and achievement of organizational goals. Embedded in Hoshin planning process is the resource allocation and optimal utilization to avoid failure due to skill mismatch or non-availability. There are inbuilt mechanisms that prevents a resource from being over utilized.

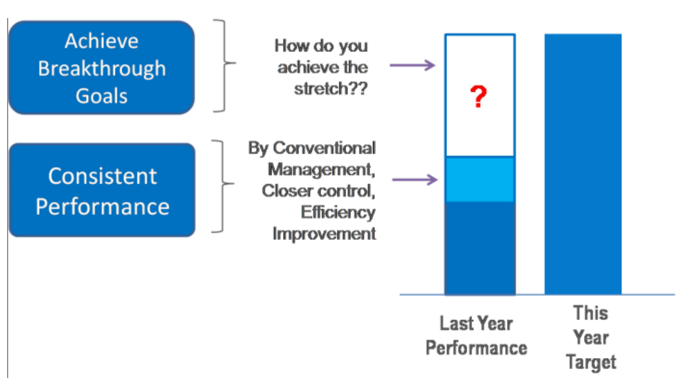
- **Integration of budgetary planning and performance management process**

  Hoshin planning process isn't a stand-alone annual planning process. Organizations that have been successful with Hoshin Kanri have integrated the budgetary planning and associate performance management process. The ensures that financial planning and associate incentives are aligned to organizational goals, strategies and strategic projects.

While there are few more features of Hoshin Planning process, the above 7 are compelling enough to pursue this approach if an organization wants to succeed in achieving its critical goals.

Top 7 Salient Features of Kanri Strategy Execution Process

The salient features of Kanri Strategy Execution Process, you will be able to appreciate this.



- **Diligent Review Mechanisms :**

  First and foremost feature is existence of diligent review mechanisms in Kanri process. None of us are new to reviews, but Kanri process focuses in appropriate forums, agenda and duration of these reviews. More importantly it emphasizes on consistency of reviews. A cathedral has to be built one stone at a time. In the same way, organization goals have been accomplished by systematically achieving one milestone after another. Kanri review mechanism is built to enhance the chances of success in execution of strategies.

- **Course-correction:**

  Today business environment is very dynamic. Strategic plans created in the beginning of the year become redundant in a quarter or two. In order to assess changes in the environment and keep strategies and strategic initiatives relevant, Kanri strategy execution process has built-in mechanisms such as quarterly strategic reviews and forced re-prioritization that ensure organization remains concurrent and takes timely >course corrections. Kanri is a compass that guides the captain of ship to alter course to compensate for strong currents and winds, there by reaching the destination.

- **Fact-based Decisions:**

  I have personally reviewed the strategic projects of many organizations. Frankly, I find them hollow. The importance with which they are conceived by the leadership team is missing in their action plans. Most strategic projects are wish lists in an action plan format. The team uses a trial and error method to accomplish the objective of the project. As a result the success rate of strategic projects are very low. But the real problem is lack of systematic and fact/data based analysis prior to formulation of action plan. As a result, the team works on trivial things and miss the vital factors that would deliver breakthrough results. Among organizations practicing Hoshin Kanri, the use of A3 approach for conducting this fact based analysis of the problem is distinct.

- **Power of Gemba:**

  ‘Gemba’ in Japanese refers to actual work place (field). Usually strategic plans are created and reviewed in boardrooms. But Hoshin Kanri emphasizes on the role of creating and managing strategic plans through insights from Gemba. So, both during Hoshin planning and Kanri strategic execution process, the leaders have to visit Gemba for insights. In fact the kanri monthly reviews happen in the Gemba. This gets leaders close to ground reality.

- **Visual Control:**

  Like many other Japanese management approaches, Hoshin Kanri relies on visual control mechanisms (Mieruka in Japanese). Starting from the X-matrix to the Project Plans and Traffic Light dashboards depicting the status of strategic projects, visual control is a key means for driving strategic plans.

- **Sustenance of results**:

  One of the reasons for people to believe that execution is an issue is because strategic projects don't sustain on long run. Kanri Strategy Execution process not only enables to deliver breakthrough results but it also focuses on sustenance of those results. Mechanisms to sustain and monitor the outcomes of strategic projects are given equal importance. Visual traffic light dashboards are updated for the leaders to understand the progress of strategic meetings.

- **Resource Optimization :**

  Execution issues such as lack of participation from team members, resources being too busy to attend strategic project meetings and many such trivial issues are addressed in Kanri weekly and monthly reviews. The means of drawing consensus on these issues is by using 'Catch-ball' method.

Outcomes of Annual Hoshin Planning Process

If you are considering a Hoshin Planning session, following are the tangible deliverable that you can expect out of this exercise:

- **Policy Deployment Document (CEO Level):**

  Also called as X-matrix, this one page document strategic plan of any organization that includes goals, strategies, strategic projects and owners. It is also known as PD1 document in many organizations (representing level-1). We will cover X matrix in greater detail, as we move forward.

- **Policy Deployment Document (Functional Heads Level):**

This is again a one page X-matix document that has been cascaded from the CEO level document. It is also known as PD2 document. There are different ways of cascading strategic plans from organizational level to functional level. Usually each function has a separate PD2 document. The purpose of this document is to act as a strategic plan for the function. Through this document the functional head not only delivers his department's commitment to organizational goals but also set functional goals and further cascade them to her teams. In addition to explicitly stating the functional goals, this document is also helpful in resource assignment and utilization.

- **Project Management Document:**

Also known as PM1 in some organizations, it is nothing but a project management document for each Hoshin (strategic project/initiative). It has details of the tasks, responsible person, duration and progress status. This document is owned and updated by the respective hoshin leader. Further, if there are specific strategic initiatives/projects at functional level in addition to organizational strategic projects, then the Project Management Documents for those functional projects are called as PM2.

There is a lot of rigor that goes into creating these documents. Leadership involvement, ownership and detailing play a critical role in the effectiveness of these outcomes of annual hoshin planning process. Thus I should warn that just completing this documents for the sake of doing so isn't Hoshin Kanri!

Roles in Hoshin Kanri Strategic Management

The success of any strategy and its execution is dependent on how leaders within the organization demonstrate ownership and participate in its execution.

Most conventional strategic management approaches don't have well defined roles that leaders need to play, when it comes to strategy creation and execution. In many cases, the roles are un-articulated and considered to be inherent to the leader's position. As a result, things start off very well with the strategic plan formulation, but things fad when it comes to strategy execution. By the end of the year, there are arguments, disagreements and displeasure in owning failures and success.

Hoshin Kanri, Japanese strategy and execution approach is a well-designed approach that clearly defines various roles involved in the strategy formulation and its execution. While it is still the leaders of the organization who plays these roles, because the roles are articulated, a level playing ground is established. This acts as an enabler for successful execution of strategic plans.

Hoshin Kanri approach advocates Individual Ownership and Joint Accountability (IOJA). Hence roles are defined for individual and for groups. Here are the key individual and group roles in Hoshin Kanri

- **Hoshin Leadership Team**

  Hoshin Leadership Team is nothing but a steering committee that is responsible for creating and executing strategic plans within the organization. Usually it has representatives from the senior management team. The Chief Executive or President is the chairperson of this team. However, the criteria is not necessarily hierarchy driven. It depends on many other factors. I've discussed the functioning of Hoshin Leadership Team in a separate section.

- **Functional Hoshin Leadership Team**

  Functional Hoshin Leadership Teams can be formed depending on how the organization chooses to cascade their strategic plans to downstream organization. The role of functional hoshin leadership team will be similar to that of organizational hoshin leadership team, but restricted to respective functions.

- **Hoshin Teams**

  These are teams formed to driven strategic projects. Strategic projects are also called as hoshins or strategic initiatives. The composition of the team is usually cross-functional in nature. This team is led by a Hoshin Leader who is responsible to deliver the objectives of the project, formation of the team and reporting of progress to Hoshin Leadership Team. The team members will be assigned specific tasks. Team members have joint accountability to fulfill the objectives of strategic project. These teams are dissolved once the project meets its objectives.

- **Hoshin Planning Core Committee**

  This core committee consists of key sponsors of Hoshin Kanri deployment program in the organization. The role of this committee is to plan, review and implement necessary course correction in its implementation through hoshin policies, change management, corporate communication, etc. Usually this committee is spearheaded by the hoshin kanri facilitator, who is usually an expert in Hoshin Kanri and may be an external to the organization. He/she seamlessly works across various levels of the organization throughout the year for strategy formulation and its execution.

Hoshin Kanri X-matrix

A Hoshin Kanri X-matrix is a one page document strategic plan of any organization that includes goals, strategies, strategic projects (initiatives) and owners. It is also known as Policy Deployment (PD) document.

It is an X-shaped matrix diagram linking the aspects mentioned above. One wouldn't miss the big X at the middle of this document.

The organizational X-matrix is owned by the CEO/President but it is jointly constructed by the leadership team of an organization and with the guidance of a Hoshin Kanri expert. It is one of the key deliverable of the Hoshin planning session. Many organizations are used to voluminous strategic plan, but in Hoshin Kanri approach, even for large conglomerate, strategic plan is a single page document. An X-matrix is a very good example of how Hoshin Kanri uses visual management style. Being simple one page document, an X-matrix doesn't go into a filing cabinet but instead, it is prominently (yet confidentially) displayed in the board room. Many Japanese organizations have the culture of conducting their monthly strategic review meetings around the displayed X-matrix.

X-matrix is created in the beginning of the financial year and updated every month. Once in a year, the X-matrix and its contents are revisited by the leadership team.

Any strategic plan has to be cascaded to the entire organization. In Hoshin Kanri, the X-matrix created at organizational level is cascaded to various functions or business units as child X-matrices. There are clear linkages that are established between the parent and child X-matrices.

There are several variations of X-matrix. Some organizations focus on strategy deployment while others focus on metrics deployment. When an organization over emphasizes on metrics deployment, Hoshin Kanri approach tends to replace balance score card approach.

For best results and especially if you are doing it the first time, I recommend you to have an expert to run this for you. He can educate the leadership team and at the same time get this important annual goal setting accomplished.

Uniqueness of X-matrix

In my experience X-matrix has been very beneficial for enterprises of all sizes. For large corporations with multiple business lines and products, I have found that there may be multiple X-matrices and that leads to lot of confusion.

One of the biggest benefits of X-matrix is that it acts as a document that forges agreement among all stakeholders on the strategies, tactics and metrics. Hence the ‘catch-ball’ happens when this document is completed. Usually this format is printed in A0 size and used for filling up different sections.

The second benefit is that it acts as a good communication tool for management to share their plans with rest of the organization. It can be displayed in a common place for employees to see and understand the organization’s priorities

Demystifying Hoshin Kanri X-Matrix

If you are new to Hoshin Kanri, I’m sure your curiosity to learn about Hoshin Kanri would have left you more confused about X-matrix.

This section attempts to clarify the construct of a Hoshin Kanri X-matrix.

To briefly summarize, X-Matrix is a one page document that links an organization’s goals, strategies, metrics, strategic projects and responsible people.

First of all, there are several variations of Hoshin Kanri X-matrix and there are no standards. Here I’m going to explain to you, a variation that most of my clients find useful.

- ## Business/Organization Goals

At the 9 clock position of the X-matrix, the organizational goals are entered. Usually not more than 5, but preferably just 3. It is a general practice to include the targets for next 3 years for all the goals. In Hoshin Kanri, prioritization plays a critical role. So the goals are prioritized based on their importance to the organization. The most important goals are placed closer to the X. The goal on the extreme left would be least important while one on the extreme right would be more important.

Many organizations don't prioritize goals as they feel all the goals are equally important.

- ## Organizational Strategies

Organizational Strategies are placed in the 12 clock position. Usually not more than 7, but preferably just 5 strategies. I'm not covering the details of how organizational strategies are arrived here. Strategies are also prioritized. The most important strategies are placed closer to the X. So the strategy on extreme top is least important and the one at the bottom (closer to X) is the most important one. There needs to be consensus among the organizational leaders on these strategies and their priorities.

Some organizations consider inorganic growth as a strategy by default and include it as the last strategy. But this isn't mandatory.

- **Owners for Goals**

  Hoshin Kanri approach prescribes individual ownership and joint accountability (IOJA). Hence each of the goals at the organizational level are owned by individual leaders. In achieving some of these goals, there will be inter dependencies. That's where joint accountability comes into play. In the X-matrix, owner names are mentioned in the extreme right side after strategies. I'll later mention how these are linked to the goals.

- **Strategic Projects**

  Strategic Projects (Initiatives) are to be added in 6 clock position. Some organizations call strategic projects as 'Hoshins'. Few other synonyms are Strategic Initiatives, Critical Strategic Projects, etc. These are strategic thrust areas where the leadership believes the organization has to do something different in order to achieve 1 or more goals using 1 or more strategies. There is no restriction on the number of strategic projects, but it is critical to limit the number to something that the organization can concurrently manage. Most organizations falter here. Similar to goals and strategies, strategic projects are also prioritized.

- **Establishing relationship between Goals, Strategies, Owners and Strategic Projects**

  The most common way to establish these relationship is using symbols in the intersection area of each of the above. Generally, two different symbols are used to represent strong and weak relationships. But I prefer to use numbers of a 3 point rating scale (9,3 & 1). 9 represents a strong relationship, 3 for moderate relationship and 1 for weak relationship.

So the 10 clock position will be used to represent the relationship between goals and strategies and 2 clock position to represent the relationship between strategies and strategic initiatives.

For the relationship between goals and owners, the interaction matrix appearing next to 2 clock position will be used.

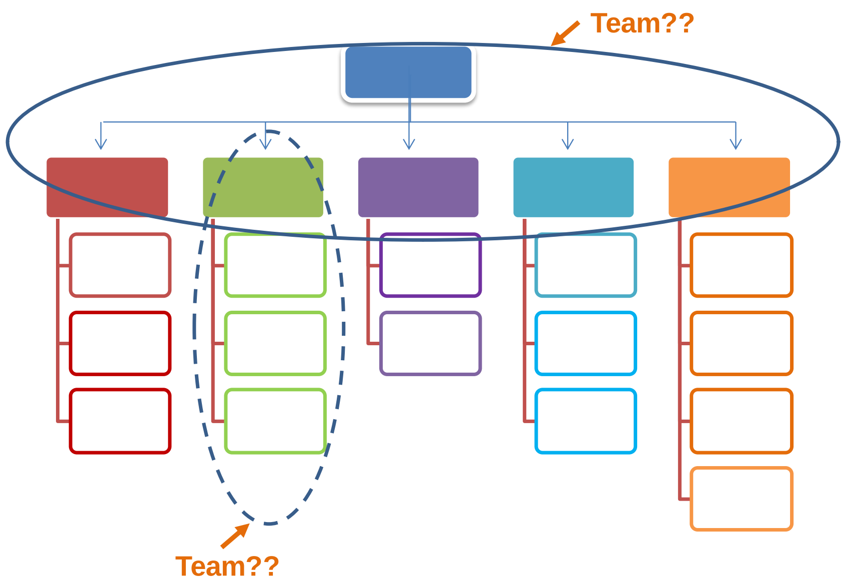
Once created, the X matrix will be a live document and needs to be reviewed and updated every month.

Cascading Goals To Teams

Importance of Team Work In Strategy Execution

In cricket, a batsman in good form compensates for the runs missed by his partner. Let's say in a situation where they need 26 runs to win in 2 overs. They don't set individual targets such as 13 runs per person in 6 balls. Instead, one takes the lead and other does his best.

We observe similar phenomenon in many other sports and arts too. In a live theatre performance, when an artist forgets his scripts, co-artists make it up by altering their scripts instantly to make sure the message is conveyed and the show is successful.



I recently asked a team of senior management staff of an enterprise to write down the names of key team members. Their lists mostly contained names of their subordinates. No one from the senior management appeared in each other's list.

So the CEO feels his direct reports are his team, but the direct reports don't feel CEO as part of their team. Irony isn't it!

Each member of leadership team seems to have a feeling that they are representing their respective teams in Management Committee. So they are there to defend, protect, project, celebrate, complain and express the interests of their business unit (or department).

When I challenged them on their definition of team, some were confused and remaining reluctant. Perhaps such a transforming, yet simple thought cannot be accepted in a single go.

Some points to ponder as a leader of the senior leadership:

- Are you willing to take up initiatives where there is lack of clarity or clear demarcation of ownership with your peers?
- Do you care for the success of other business units or departments?
- Are you confident that you can willfully persuade your peers without undue influence?
- Would you voice for something of concern for the organization, that is beyond your purview or assume that to poke your nose into other's business is poor etiquette and stay away?
- Are you genuinely open to view points from peers that contradict yours, especially if it's about your business?
- Do you use senior leadership meetings to push your department's agenda or instead push organizational priorities into your department's agenda?
- Do you allocate your best resource for projects led by other departments or just a head for them to count?

These are all inconvenient questions to answer. But to gain some common understanding and move forward is very important for the senior leadership team because like individuals, teams have their Karmas too. They bear fruits of their actions and decisions. Individuals of the team ripe the fruits of their team's actions or decisions – good or evil!

So if you are part of a team, you can't say I don't care about some decisions because they don't impact me or my business. Sooner or later they will impact you.

In simple words, the sense of 'joint accountability & commitment' of individuals to common organization goals is nothing but 'Team Karma'.

Why does Team Karma matter more for senior leader than anyone else.

A study concluded that **80 % of all organizations which have well defined strategies fail to execute them well!**

Failure to execute strategies is senior leadership team karma, not the CEO's!

A senior leader's team karma in driving organizational strategies are:

- 'Agreeing to Agree' rather than 'Agreeing to Disagree' on organizational prioritizes
- Actively contributing for initiatives that you or your department isn't responsible
- Releasing your best staff for the most important organization strategic initiative

- Accepting to take budget cuts, if you can, to divert budget for other important strategic initiative
- Being accountable for organizational goals and strategic initiatives
- Provide resources to a strategic initiative run by another department than to a trivial project of your department

Thus to create a sense of team belonging among the senior leaders, their Team Karma is the first and most important step for any organization's success in strategy execution, immaterial of scale, line of business and geography.

How to deploy targets to teams?

We would cover about the traditional ways that most of us adapt to deploy targets to our teams, pros & cons, live cases and introduce 'Catch-ball' method of deploying targets which is several notches above traditional methods.

First, I'm talking about traditional ways of deploying metrics. Here are two scenarios that I commonly come across where people are really puzzled about deploying goals to teams.

- **Scenario A**

  Head of a business unit has received an annual target which is at least 3 fold more than last year. While he doesn't have a say in deciding his targets, he has to manage to convey this target to his team managers. He knows there is going to be resistance, but he wouldn't care much about it as he doesn't have a choice.

- **Scenario B**

  Staff attrition is on a rise this year. Operation attributes this to low non-competitive staff compensation & lack of flexible work policies. However, HR head associates this to poor staff supervision, low/no motivation, poor daily management and lack of clarity on growth. So essentially, there is lack of ownership for staff attrition.

Scenario A is an example of vertical deployment of targets to one's direct reports and scenario B is horizontal deployment, where there is shared ownership of targets, inter-dependencies, etc. between different departments.

Traditionally, vertical deployment of targets has not been a problem due to concentration of power and controllership with the functional head. Mostly Top-down approach is used, but rarely Bottom-up approach is also used. Bottom-up most of the time, sounds impractical and an ideal-case.

In my experience, 'Catch-ball' technique which is used in Hoshin-Kanri is much more effective method to deploy goals. It takes a mid-way approach between top-down and bottom-up, but at the same time it doesn't compromise on ownership, timeliness and success rate.

More importantly, in an increasingly matrix-driven culture, deploying goals to peers (cross-functional) for shared accountability can only be addressed by Catch-ball technique. Traditional methods of Top-down and Bottom-up have least impacts.

In following sections, 'Matsushita example of top-down approach to deploy targets' & 'Bando example of bottom-up approach to deploy targets' where they are interesting live cases to read.

Both these approaches have their own pros & cons. Let's review the most important ones.

	Pros	**Cons**
Top Down	• Quick & fast in deploying • Goes well with directive leadership or when the message comes from 'trusted' & 'respected' Leader • Also works well for regulatory targets • Most of times, teams achieve such targets • Incentives are carrot & stick • Works where there are dominant reporting relationships	• Demoralizes teams • Not a long term & sustainable approach • Discourages openness & transparency • Can't be used to share cross-functional ownership

Bottom Up	• Team participation is high & so builds morale • Encourages empowerment & fosters openness • Benefits on long run • For cross-functional goals, it's not as bad as Top-down	• Targets may not be met all times • Leader should be ready to compromise if team can't deliver • Time consuming process

Top-Down Approach Example: Matsushita Company

Here's a live case that I read from The TQM Magazine, Volume10, Number 6, 1998 by Yoshio Kondo. I liked it and thought it is very apt and also interesting to read.

"Matsushita Electric Industries' Car Radio Division received a demand from one of its customers for a 10 percent price reduction. The leadership team put their heads together to try to meet this request but, after much discussion, reached the conclusion that they would be unable to achieve such a large price cut even by implementing all the cost reductions they could think of. They therefore decided to convey this to the customer. When this information reached the company's chairman, Konosuke Matsushita's ears, he said, "Whenever we receive a demand for a price reduction from our customers, it is our practice at Matsushita to work out how we can achieve an even greater cost reduction – in this case 15 percent. Please think about this again". After receiving this instruction from their company's founder, everyone involved started investigating the possibility of reducing costs even more thoroughly and eventually succeeded in cutting them by 13 percent. When this success was announced to him, Matsushita reportedly made a personal visit to the automobile company that had requested the price reduction and said, "Thanks to your request for a 10 percent price reduction, my company has succeeded in reducing its costs by 13 percent. We are extremely grateful to you".

It is an example of successful top-down deployment. What made it work?

- Demand came from customer directly
- Matsushita's stature & position – People had immense respect for him, but he was also the Chairman & Founder
- This was in Japan and happened in the middle of last century

You and I know that it's not possible for Managers to demonstrate such authority in today's matrix culture. All the fat has already been sucked off and there's nothing much to squeeze further in the system.

In spite of these deficiencies, it's easy for a manager to give a one-way message and walk-off. So top-down is still very popular.

There's a great opportunity to adapt 'catch-ball' technique which overcomes most deficiencies of top-down approach.

Catch Ball Technique in Hoshin Kanri

Indeed this topic is very close to heart for many of us, isn't it?

Each of us will have stories of frustration to share on how we were appraised poorly, received low bonuses, promoted last, long arguments with boss & colleagues and in some cases even lost our jobs for no fault of ours!

When goals come from seniors, in good spirits, it is assumed as everyone's responsibility to meet them. But when really things don't go as they were planned, scapegoats are born.

I have seen lack of responsibility in the following situations:

- **Ownership issues for failures between departments.**

  For example, if there's staff attrition, is that HR or Line Manager who owns this failure.

- **Ownership issued within homogeneous teams.**

  For example, lack of ownership on team sales target among sales staff of that team While (A) has been difficult to resolve traditionally, (B) is not so much a problem when the Manager exercises good control (Top-down).

Catch-ball technique, a part of Hoshin Planning is a very effective method to encourage employees to take ownership and empower them.

As the name suggests, the ‘ball’ of responsibility is thrown between team members till consensus is arrived. In essence, it is a series of constructive and dialogue-based process where team members discuss and agree on ownership of targets.

Unlike the traditional top-down approach, manager doesn’t thrust targets on his team. In this technique, she proposes a target and allows the team to debate on the capabilities, constraints, resources, etc., before they agree on a goal. If they disagree, the manager has an opportunity to review the target, as she too hasn’t agreed the target with her manager.

Thus the mechanism involves several rounds of discussion between team members before goals are agreed. From an organizational perspective, the CEO/business leader gets to know by the end of ‘catch-balls’ if the target set by him is achievable or not; and the constraints associated with it.

In my personal experience, as people get to discuss about the target in advance, several opportunities arise, such as:

- **Systematic**

  A lot of planning activity gets accomplished upfront, rather than putting it for later months

- **Think-tank**

  There is thorough understanding about the target – what needs to be accomplished, when, how, challenges, levers, etc, among all the team members

- **Team Work**

  Team members get opportunity to mingle and understand each other better. Especially in today’s environment where staffs rotate every 2 years and we end up dealing with new members every time, these catch-ball sessions help.

- **Shared responsibility**

  Many targets require participation from other functions, like the above example of staff attrition. So in this case, may be attrition due to ‘managerial’ issues can be owned by line management and those due to ‘compensation & retention’ by HR. Something like this cannot be agreed till discussions happen. In preparation to achieving such a target, a robust data collection mechanism at the time of staff exit has to be implemented. Such discussions & aspects are hardly covered in traditional goal setting.

- **Empowerment**

  When targets are not achievable, it encourages dialogues with Managers or Senior Managers on why it can't be achieved. Such situations usually force managers to empower their teams. So, even when a manager is 'control-freak', he is forced to empower his team.

- **Culture**

  Due to the nature of discussions, when catch-ball technique is used over 1 or 2 years for annual planning sessions, there is a big change in company's culture. People are open and transparent. They see each other eye-to-eye and they learn to agree to disagree.

- **Accountability**

  Many times, when targets are unachievable, people accept such targets only to see how they can palm it off later when things don't work. They probably know of other constraints that can be their 'official' reasons for failure – clear case of procrastination and finger pointing. Such situations don't occur as 'Catch-ball' encourages discussion and subsequently 'Kanri' ensures rigorous monthly monitoring.

- **Stretch Targets**

  As discussed in the section of 'bottom-up' example, teams tend to achieve more than the target and that too willingly.

Bottom-Up Approach Example: Bando Company

Here's a live case that I read from The TQM Magazine, Volume10, Number 6, 1998 by Yoshio Kondo. I liked it and thought it is very apt and also interesting to read.

"Bando Chemical Company, for a long time had been implementing the top-down type of planning, in which production was carried out in accordance with targets set by the factory manager. In the first 2 weeks of the month, there used to be sag in production but there used to a catch-up in the last leg.

After much investigation and deliberation, this factory decided to change its system for setting the monthly production quotas. Under the new system, the factory manager would first propose the draft monthly production target and explain carefully why it was necessary to achieve that target. The proposal would then be thoroughly discussed by the people in the workplace. When this system was first implemented and the individual values determined as a result of the discussion were collated, the final value turned out to be a little less than that originally proposed by the factory manager."

When such situations we often try thrust higher targets on people in order to meet the originally proposed value. Though we start out with a bottom-down approach we end up with top-down. To an employee, it looks like an eye-wash.

"This factory took a different approach. It was decided to trust their commitment and enthusiasm and leave the total arrived at as the official monthly production target.

A curious thing happened when the setting of targets was changed from top-down to bottom-up in this way. The sag in the monthly cumulative total production graph occurring at the beginning and middle of the month disappeared, and the production proceeded more or less in accordance with the target line. Also, the monthly target was consistently achieved. Another interesting thing was that, although the target value established as a result of discussion in individual workplaces in this way started out slightly under the factory manager's proposed draft target, it increased month by month and at the end of six months, was approximately 20 percent higher than the factory manager's proposal, a result originally thought to be out of the question."

So again, this is an example of successful bottom-up approach. We wouldn't ever adapt this method. It is time-consuming and many managers feel defeated to accept a target lesser than what they initially proposed!

It sounds impractical in our culture and current conditions.

There is no doubt that it is a powerful way to get team energized, but lacks universality.

There's a great opportunity to adapt 'catch-ball' technique which overcomes most deficiencies of bottom-up approach and top-down approach.

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- Facilitate Annual Strategic Planning session
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He regularly conducts public & inhouse master classes on Hoshin Kanri, Strategic Planning, CX, Business Model Innovation like Blue Ocean, Analytics for HR, Service & Sales professionals.

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