

RPM-ACADEMY

American Society for Quality
Ottawa Valley Section

Mastering Hoshin Planning

December 3, 2025, Ottawa, ON Canada



Description

In a time defined by disruption, uncertainty, and complexity, organizations—and the people within them—need more than just vision. **They need alignment, focus, and execution.**

This hands-on workshop introduces participants to the power of **Hoshin Kanri** (Hoshin Planning, Policy Deployment) using the practical and visual **X-Matrix** tool—an essential framework to bridge the gap between long-term strategic goals and day-to-day actions.

Whether you're navigating digital transformation, driving continuous improvement, or simply striving to align teams around a common purpose, Hoshin Planning offers a structured and repeatable approach to ensure that strategic priorities don't get lost in the noise.

Assuming that 3–5-year strategic goals are already defined, this session focuses on:

- Translating vision into measurable annual goals
- Aligning projects and initiatives with strategic intent
- Assigning ownership and accountability
- Using the X-Matrix to visualize alignment, identify gaps, and drive performance.



Participants will leave with practical tools, templates, and a clear understanding of **how to apply the X-Matrix** in their own organizations or in the personal life—immediately and effectively. Because in today's world, clarity and alignment aren't luxuries—they're survival tools.

Why We're Here

We have a strategy... but how do we actually execute it?

- Disruption is constant
- Priorities compete
- Capacity is limited
- Alignment drifts
- Execution gaps widen

Focus!

Tonight: how to bring focus and clarity back into the system.

Strategy Fails for Predictable Reasons

- ✖ Too many priorities
- ✖ Lack of alignment
- ✖ Inconsistent execution
- ✖ No visibility
- ✖ No accountability
- ✖ Noise overwhelms clarity



Hoshin solves the root cause: misalignment.

The Strategic Cascade



We'll translate this entire cascade onto one page using Hoshin.

Why 3–5 Year Horizon?

In today's environment:

- Markets shift faster
- Technology resets the landscape
- Competitors emerge overnight
- Customer expectations evolve continuously



Three years may be the new “long-term” and Hoshin fits this turbulent reality perfectly.

Complementary Strategy Tools

Tools that inform the strategic cascade:

- SWOT (strengths/weaknesses/opportunities/threats)
- PESTLE (macro forces)
- Porter's Five Forces (industry dynamics)
- Value Stream Mapping (operational “truth”)
- Voice of Customer (external reality)



Hoshin doesn't replace these — it organizes what they reveal.

What Is Hoshin Kanri?

A disciplined method to:

- Set direction
- Align efforts
- Focus resources
- Measure progress
- Achieve breakthrough results

Transparency: Strategy \Rightarrow Execution \Rightarrow Results



The Hoshin Flow

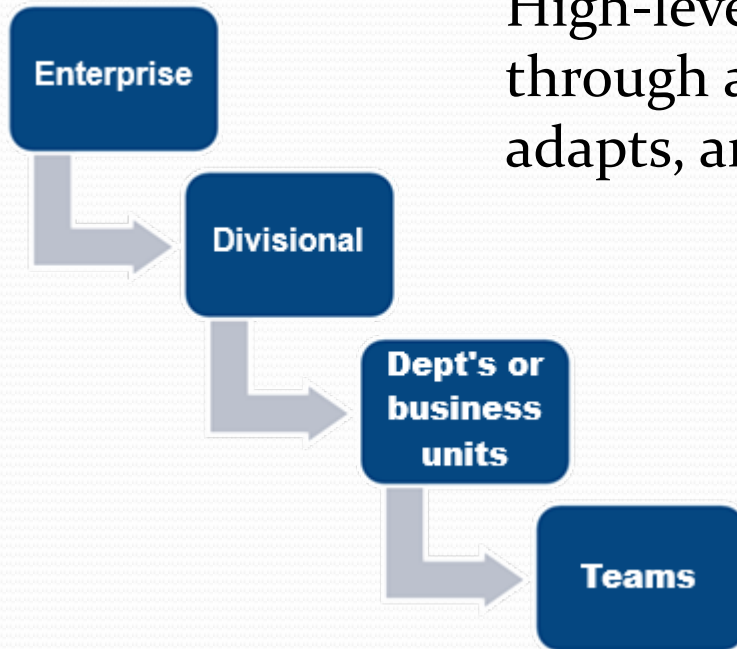
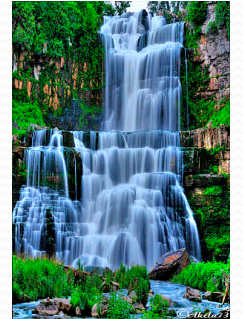
1. Breakthrough (3–5 year) goals
2. Annual priorities
3. Key initiatives / projects
4. Metrics & ownership
5. Review cadence (monthly/quarterly)



This is the foundation of the X-Matrix.

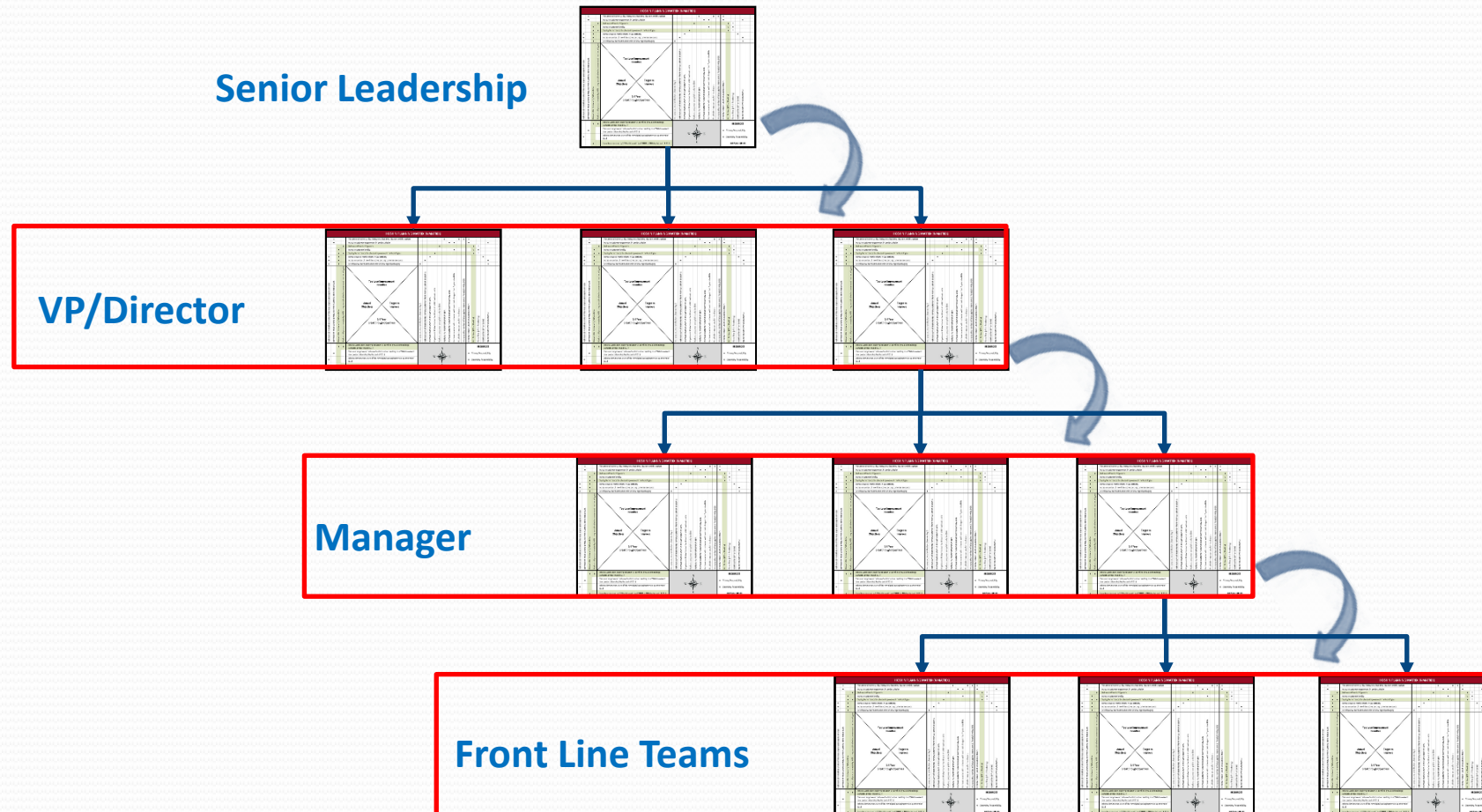
The Hoshin Cascade (“Waterfall”)

High-level breakthrough objectives cascade downward through and across the organization. Each level interprets, adapts, and translates goals into its own X-Matrix:



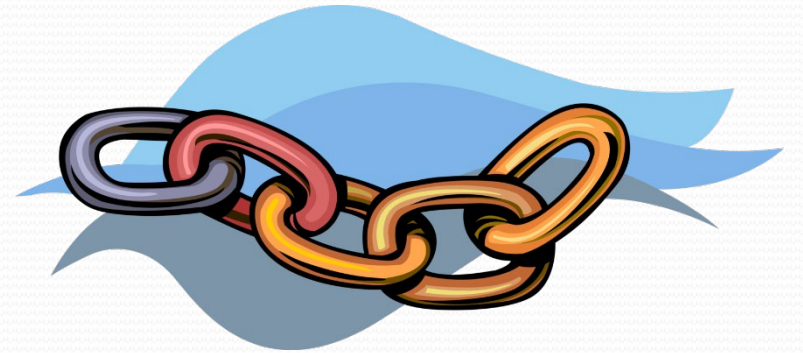
Each level develops commitments and actions that roll up to support higher-level goals. This ensures everyone is aligned, nothing important is forgotten, and nothing unimportant gets added.

The “Waterfall”



Why Hoshin Works

- Creates shared clarity
- Reveals gaps and overload
- Connects the “why” to the “how”
- Makes execution visible
- Forces prioritization
- Aligns teams around measurable commitments



Two Core Principles

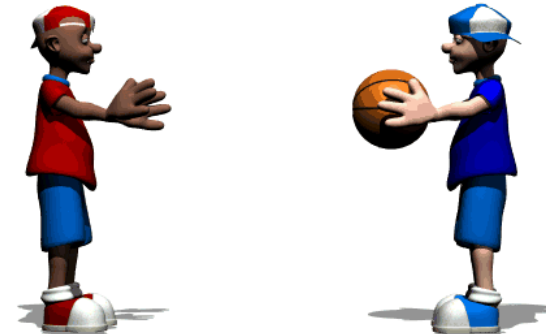
1. Focus

- Choose what matters most.
- Say no to everything else.



2. “Catchball”

- Iterative alignment between top-down and bottom-up perspectives.



Common Strategic Planning Mistakes

- ✖ Too many initiatives (“everything is priority #1”)
- ✖ Goals that are vague
- ✖ Metrics that don’t measure
- ✖ No Prime for each initiative
- ✖ No cadence of review



Transition to Exercise

Tonight, you'll build a Personal Hoshin Plan:

- 3–5-year aspirations
- Annual priorities
- Key initiatives
- KPIs & ownership

This is the practical heart of the workshop.



Final Thought

“You can have the best strategy and the best building in the world, but if you don’t execute, it doesn’t matter.”

- Arnold Schwarzenegger

...and if the Terminator says execution matters, we should probably listen. 😊



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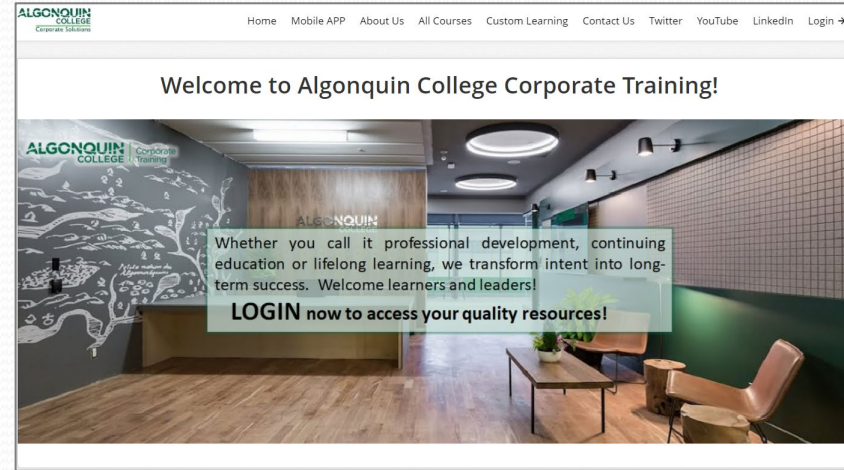
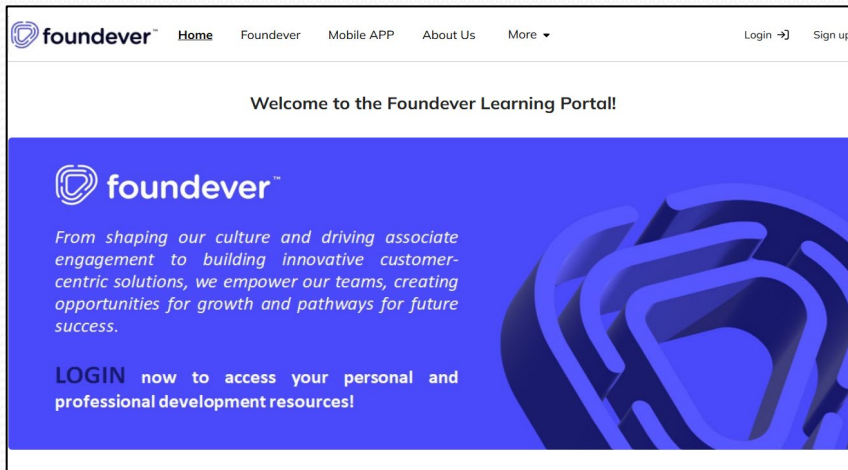
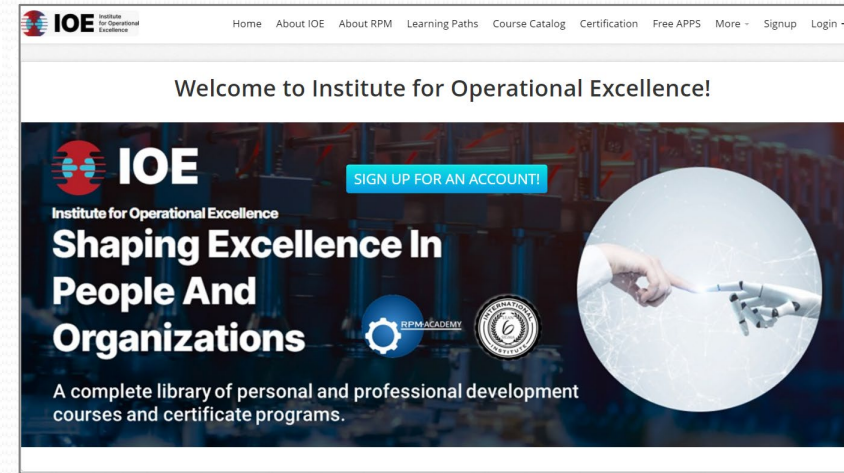
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Thank You

