

Hoshin Planning, also known as Hoshin Kanri or Policy Deployment, is a strategic planning methodology that aligns organizational goals, objectives, and strategies across various levels of the organization. Below is a draft procedure followed by a checklist for Hoshin Planning:

Procedure for Hoshin Planning:

1. Strategic Direction and Leadership Alignment:

- Define Vision and Mission: Clearly articulate the organization's vision, mission, and core values.
- Leadership Engagement: Ensure leadership commitment and alignment with the strategic direction and objectives.

2. Strategic Objective Setting:

- Identify Strategic Objectives: Define key strategic objectives aligned with the organization's vision, mission, and long-term goals.
- Prioritize Objectives: Prioritize strategic objectives based on impact, feasibility, and alignment with organizational priorities.

3. Strategy Development and Deployment:

- Develop Strategies: Develop strategies and initiatives to achieve the strategic objectives, considering internal capabilities, market dynamics, and competitive landscape.
- Deploy Strategies: Cascade strategies and initiatives across various levels and functions of the organization, ensuring alignment with strategic objectives and priorities.

4. Action Planning and Execution:

- Develop Action Plans: Develop detailed action plans, including activities, timelines, responsibilities, and resources required to implement strategies and achieve objectives.
- Implement Action Plans: Execute action plans, monitor progress, and ensure alignment with strategic priorities and objectives.

5. Performance Measurement and Monitoring:

- Establish KPIs: Define key performance indicators (KPIs) to measure progress, track performance, and assess the effectiveness of strategies and initiatives.
- Monitor Performance: Monitor performance against KPIs, conduct regular reviews, and make data-driven decisions to drive continuous improvement.

6. Review and Continuous Improvement:

- Conduct Reviews: Conduct periodic reviews of Hoshin Planning implementation, strategy execution, and performance outcomes.

- Refine Strategies: Refine strategies, action plans, and performance metrics based on feedback, changing circumstances, and lessons learned from implementation.

Checklist for Hoshin Planning:

Strategic Direction and Leadership Alignment:

- Defined organization's vision, mission, and core values.
- Secured leadership commitment and alignment with strategic direction.

Strategic Objective Setting:

- Identified and prioritized key strategic objectives.
- Aligned strategic objectives with organizational priorities and goals.

Strategy Development and Deployment:

- Developed actionable strategies and initiatives to achieve objectives.
- Cascaded strategies across organizational levels and functions.

Action Planning and Execution:

- Developed detailed action plans with activities, timelines, and responsibilities.
- Implemented action plans and monitored progress regularly.

Performance Measurement and Monitoring:

- Established relevant KPIs to measure progress and performance.
- Monitored performance against KPIs and conducted performance reviews.

Review and Continuous Improvement:

- Conducted periodic reviews of Hoshin Planning implementation.
- Refined strategies and action plans based on feedback and performance outcomes.

By following this procedure and checklist for Hoshin Planning, organizations can create a structured and aligned approach to strategic planning, execution, and performance management, driving sustainable growth, and continuous improvement across the organization.