

# How to lead Hoshin Kanri

Discover how you can make Hoshin Kanri easier by leading your organization to breakthrough performance



“How stimulating is it to simply do what you are told without having any impact and without really understanding why it should be done?”

Melander et. al.

Implementing Hoshin Kanri, 2022

### Is Hoshin Kanri too hard?

Can you deliver the results that you need to completely transform the way your organization achieves its goals through Hoshin Kanri? Can you truly take every day as an opportunity to improve? And why is your strategy execution stuttering?

With this eBook, we explain the role **you** can play in leading Hoshin Kanri, using it to bring together the worlds of strategy and operations.

You could be a site level team member, or sit as the Chief Strategy Officer of your organization; the need is the same - to engage your organization in building goals and delivering results, with your customer in mind.

Read on to discover the role you play in succeeding with Hoshin Kanri and how i-nexus can help you simplify the entire methodology.

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# The role of a leader in strategy execution

The oil tanker metaphor is synonymous with strategy execution. To align your entire organization in one direction is almost impossible. But not with the right leadership approach.

Challenging the business to achieve a new level of performance, and succeeding, requires a strong leader.

That necessity comes from a commercial reality that markets are blurring, new products are entering at break-neck speed, and our buyers have new expectations.

How we adapt to that reality comes down to the leadership you offer. That doesn't necessarily mean you are a Cx member, it is in fact a challenge that everyone must step up and meet.

To that end, you must support your business to engage everyone in the strategic planning and strategy execution process, alongside keeping your customer firmly in mind at all times.

Hoshin Kanri is the strategy execution framework which will allow you to achieve this – but what must be in your DNA to help you lead this?

## Openness

If you sit at the Cx level, you know the role you play in strategy execution. You'll also know the ivory tower metaphor. If you work in a plant, you know your role in delivery. In either case, openness is a consistent theme.

That means looking at strengths, weaknesses, goals, skills, and resources with honesty. If plans are built on denial, how can you lead the execution with real conviction?

## Collaboration

Don't think of strategy and operations as being separate. Hoshin Kanri, and strategy execution, requires your business to utilize Lean tools and thinking for delivering strategic goals. Be inspired by the standard work and improvements of operational excellence teams, and use this expertise to fuel the leaps you desire from Hoshin.

## Learning

At the heart of Hoshin Kanri is experimentation.

Hypotheses are formed, and work is set towards proving these. Much like any portfolio's management, it is important to analyze, learn, and apply these throughout the organization, where appropriate.

Don't be afraid to fail. Be brave enough to learn.

## Leading by example

Classic economics state that individuals are obsessed with personal gain and doing as little as possible to succeed (Qiu et. al, 2018). Leading by example challenges this. Through a combination of showing your business

*how* to do something, and *doing* that very thing in practice, alongside letting people volunteer to lead execution, you can truly drive engagement.

This approach also enables your organization to detach strategy execution from the ivory tower metaphor, as you use techniques such as catchball to encourage participation.

## Commitment

Linked to the importance of leading by example is commitment.

That isn't simply the commitment to a goal or a process, it is a commitment to the philosophy and all that comes with Hoshin Kanri.

Whether you are taking your vision and forming breakthrough goals, or working on the action plans and countermeasures to help deliver improvement priorities, you must be committed to Hoshin Kanri.

When you are committed, those around you will naturally follow, and this has a trickle down effect, energizing all.

## Why read this eBook?

For over two decades we have used our experience across strategy execution, Hoshin Kanri, Lean, Six Sigma, and project management to power the success of market leaders and challengers in automotive, manufacturing, life sciences, and financial services.

This eBook takes our learnings and gives **you** actionable advice on how to successfully lead Hoshin Kanri in your organization.

# The philosophy of Hoshin Kanri

## What is at the heart of Hoshin Kanri?

While Hoshin Kanri comes with a set of tools and techniques, there is more to it than the sum of its parts.

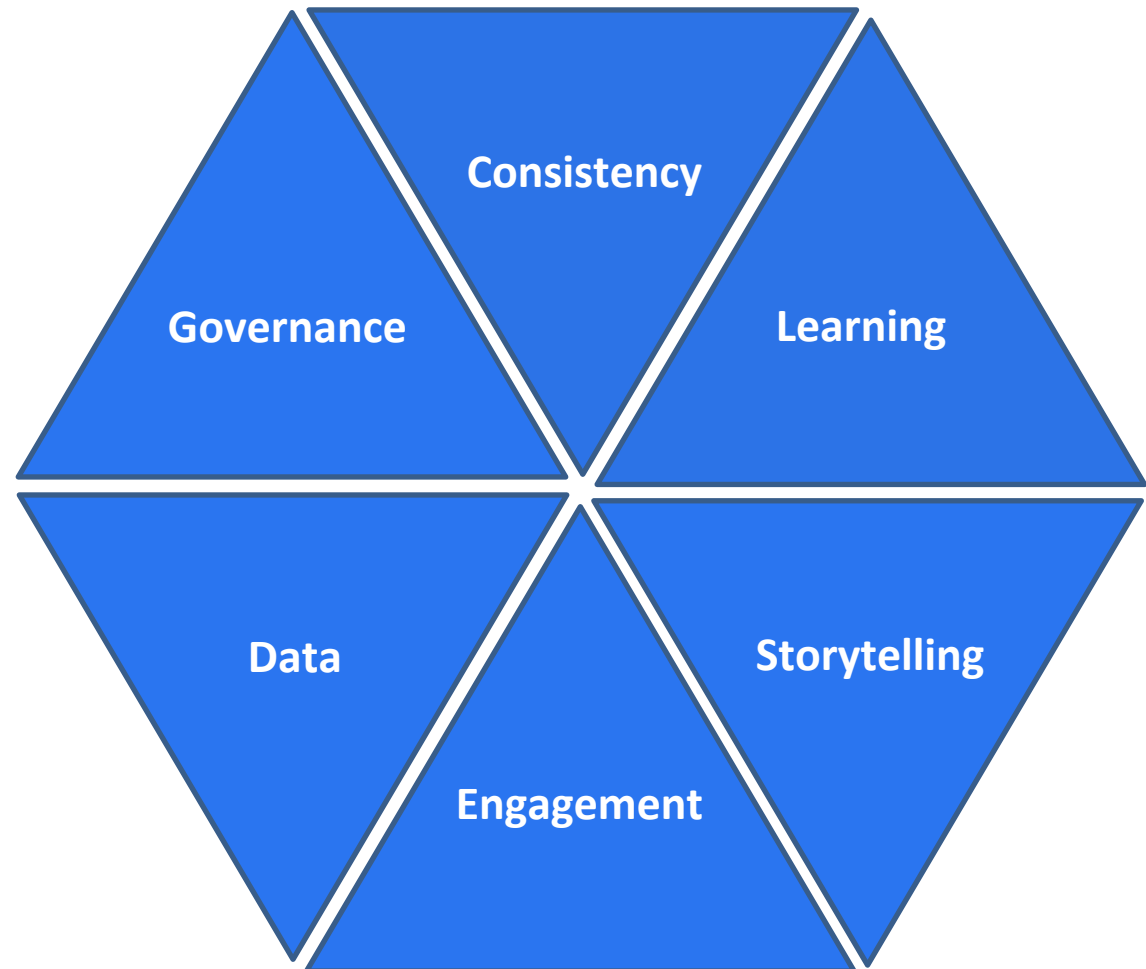
This eBook explores the philosophy that underpins the Hoshin Kanri framework.

Originating from Japanese manufacturing in the 1950s, the method is being quickly adopted by organizations seeking a structured approach to bring together the running (operations and daily management) and change (strategy execution) of the business.

There are six guiding principles to understand:

- 1) Consistency
- 2) Learning
- 3) Storytelling
- 4) Engagement
- 5) Data
- 6) Governance

This eBook explores each, giving advice on how you can live and breathe these principles as you get set to lead Hoshin.



[Learn more about catchball](#)

# Consistency

Whether borrowing from your Lean toolkit, or establishing Hoshin from the ground up, an agreed set of tools and processes is key

## The Hoshin framework

The Hoshin Kanri framework is where the structure begins. A seven step process which covers *how* to apply Hoshin Kanri, at a top level.



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## X-matrix, bowling charts, and action plans

The Hoshin Kanri framework comes with a set of tools to help you plan, execute, and track your goals



### Plan

The way that you plan out your Hoshin Kanri is typically inside the x-matrix.

This four pronged visualization covers your strategy from the true north and breakthroughs, through to projects and metrics, and can connect multiple levels of your business to one direction.

The x-matrix covers:

- 1) What do we want to achieve?
- 2) What will we focus on this year?
- 3) What will we do to achieve that?
- 4) How will we measure that?

The x-matrix brings this together, adding in the resources associated with each of the four quadrants. This can be passed down from the Cx using strategic themes or breakthrough goals, feeding back to the top corporate level.



### Execute

Once the goals have been set, portfolios of work will form.

These can be seen as strategically themed – i.e., portfolios focused on ESG goals, revenue goals, people goals etc.

While the x-matrix is a standard tool to use for planning, the execution of your work comes down to what is inside your program and project management toolkit.

This could include, but is not limited to:

- Project charters
- Value stream mapping
- DMAIC
- Stage-gate
- Agile
- Kaizen



### Track

The tracking element of Hoshin Kanri has more standardized tools to choose from.

This starts with the bowling chart (targets to improve dashboard) – a traffic light system to help visualize exceptions in performance.

The exceptions trigger root causes analyses using 5 whys, Fishbone, and Pareto, leading to defined countermeasures which are executed via action plans to determine and record the steps to overcome these.

You can also use an operational scorecard to motivate teams, rolling this back up to a strategic scorecard.

Beyond this are impact analysis and benefit visualizations to illustrate your impact in financial terms.

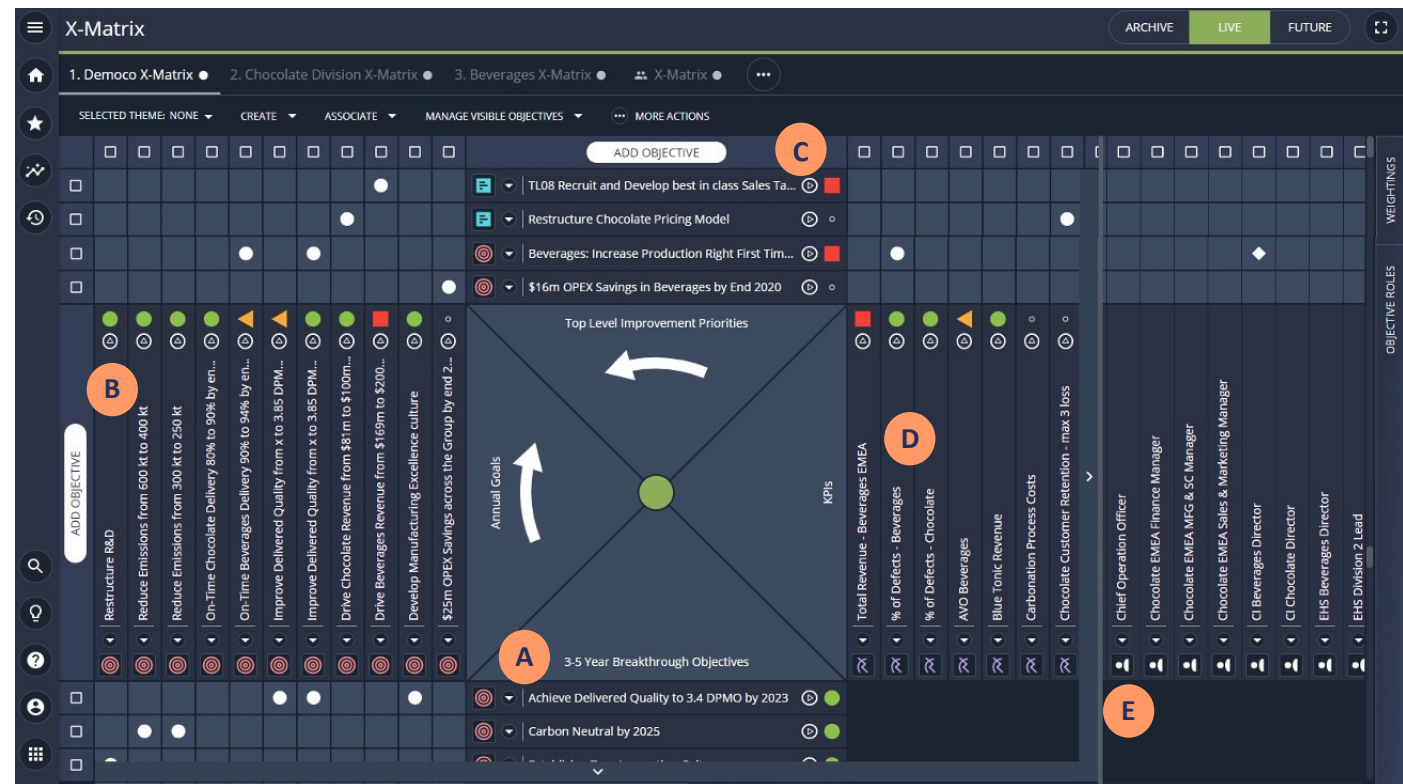
# Consistency

Whether borrowing from your Lean toolkit, or establishing Hoshin from the ground up, an agreed set of tools and processes is key

## Deconstructing the x-matrix

The x-matrix shows:

- A) **Long term goals:** Breakthrough goals, covering 3-5 year term
- B) **Short term goals:** Annual goals which aim to move you towards your breakthroughs
- C) **Improvement priorities:** AKA strategic portfolios (themes of activities) which consist of programs / projects to deliver in order to hit your annual goals
- D) **Targets:** The goals for the breakthroughs, annuals, and improvement priorities, and
- E) **Accountable owners:** Stakeholders / resources responsible for delivery of breakthrough, annual, or improvement priorities





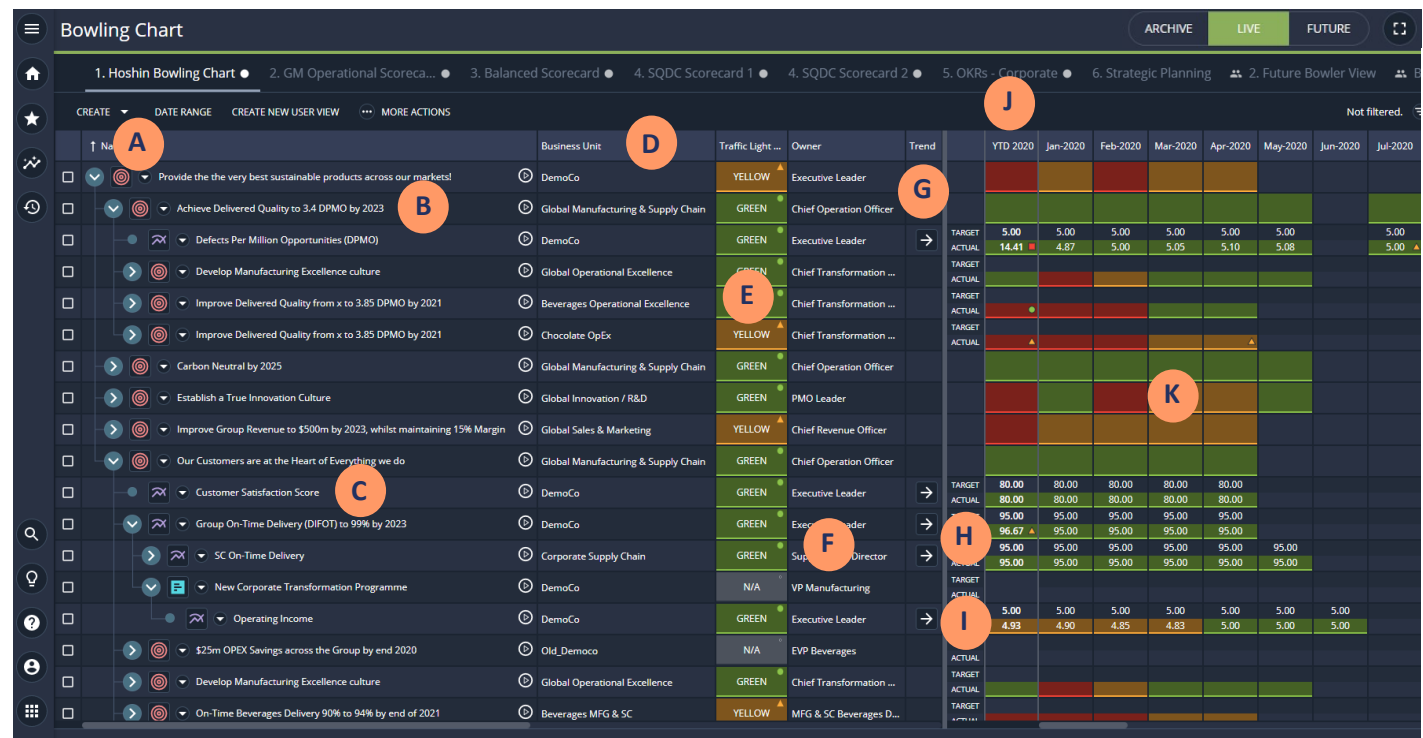
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## Deconstructing the bowling chart

The bowling chart shows:

- A) **Breakthrough:** Long-term goal supported
- B) **Annual:** Short-term goal supported
- C) **Metric:** What's being measured?
- D) **Business unit:** Where does it sit in the organization?
- E) **Traffic Light Status:** AKA TLS - red, amber green status of results to date vs. your target
- F) **Owner:** Who is accountable for the metric?
- G) **Trend:** What is the pattern of results?
- H) **Target:** What do we want to achieve?
- I) **Actual:** What are the actual results?
- J) **YTD:** What are the results in the year to date?
- K) **Week:** What are the results for this week?
- L) **Journal:** Commentary around the metric





# Consistency

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## Deconstructing an A3 countermeasure report

The A3 countermeasure report shows:

- A) **Performance:** Line graph of metric results
- B) **Summary:** What is this metric about?
- C) **Thresholds** What are the metric's traffic light levels?
- D) **Latest journal:** What is the latest status?
- E) **Action plans / countermeasures:** Action plans are a plan to deliver a result, Countermeasures are plans to improve if the action plan fails
- F) **Health:** Is the action going to plan?
- G) **Status:** Is the action live or being planned?
- H) **Start:** When does the action start?
- I) **Projected finish:** When will the action end?
- J) **Method:** What best practice / template is being used?



# Learning

A commitment to success through education is a key step in your Hoshin Kanri

The Hoshin Kanri framework begins with a true north – your guiding star – and it is here where a learning philosophy takes root. This being the second step of the journey is by design. All that flows from is to get you to that destination.

When we consider catchball for goal-setting, portfolio management principles, root causes and countermeasures, and the Deming cycle of Plan-Do-Check-Act, we can have a collection of tools designed to support experimentation.

These offer a structured approach to finding new, innovative ways to tackle your goals.

But, the learning mentality cannot blossom without the right culture. By this, we mean having:

- Leadership which empower teams to create goals and determine the work to achieve these
- Appreciation of the constraints of the plan (budget, skills etc.) and their potential impact
- Consistent tools and systems to allow for scientific planning, execution, and tracking of work
- Openness and transparency when discussing results and an acceptance that not all experiments will succeed

You can support a learning culture with these tips.

## Goal-setting

The catchball goal-setting technique will encourage your teams to participate in creating their goals.

This process will naturally lead to ‘what if’ statements, this generates ideas for projects which can deliver the results needed.

And, when the following year’s annual planning takes place, catchball will be informed by the data-collection and analysis generated *from* that experimentation.

## Portfolio prioritization

Once you have created a portfolio of improvement priorities, consisting of projects and programs, you’ll begin the experimentation in practice.

As part of the learning process, it is important to have a prioritization framework to help you make decisions based on performance (actual and forecasted), as opposed to gut-instinct.

Without a way to score and order these improve priorities, your experiments will be limited in their effectiveness.



## Plan-Do-Check-Act

How do you look at the nuts and bolts of your experiments? Using Deming’s Plan-Do-Check-Act (PDCA) [or Observe-Plan-Do-Check-Act] we can adopt a scientific approach to measuring and adapting our actions.

This will take you from planning your work through to executing, analyzing your results, and finally standardizing that work. The standardization allows you to transplant the results of the experiment elsewhere, multiplying the value of your work.

## Countermeasures

Borrowing from the world of Lean, countermeasures give you a structured means to find the root cause of your failings.

These can be spotted through a red x amber traffic light system on your operational scorecards, such as through a bowling chart.

Countermeasure tools can include, but are not limited to, the 5 whys, PDCA and Cause-Concern-Countermeasure (fishbone / Ishikawa diagram). These results should be captured and standardized for value across the business.

# Storytelling

The way that you communicate your plan, how it will be executed, and its results can make or break Hoshin Kanri

While another principle of Hoshin Kanri (engagement) addresses the way that goals are formed, the communication, or storytelling, is where you can win hearts, minds, and the spirit of your organization.

So, the question comes down to *how* you can do this.

Generally, the leadership qualities covered at the start of this eBook come to mind.

A degree of openness and leading by example can go a long way with motivating and winning over your audience.

For instance, shy away from presenting the plan in an email or presentation. Instead, opt for virtual or face to face roadshows and workshops.

Or, look towards culture hacking techniques such as growth corners which give an open, but private, space to engage in conversations around goals and work that are crucial to success.

**“No one ever made a decision because of a number. They need a story.”**

Michael Lewis, The undoing project, 2017

You can also consider storytelling techniques to frame your strategic planning communications in an engaging way



## Scene setting

*Communicate a future where you've achieved your goal, the role that teams play in getting there, and what they'll feel once they've reached this exciting future*



## The obstacle

*Work collaboratively in workshops and meetings to unearth the obstacles and what needs to change so that you can reach that future*



## The resolution

*Create solutions to overcome these obstacles, and bring it all back to the future – use this as a springboard for how you'll move into execution*

Source: Ed Gabrys, Executive Essentials: Master Storytelling to Become More Persuasive and Increase Engagement, 2021, Gartner

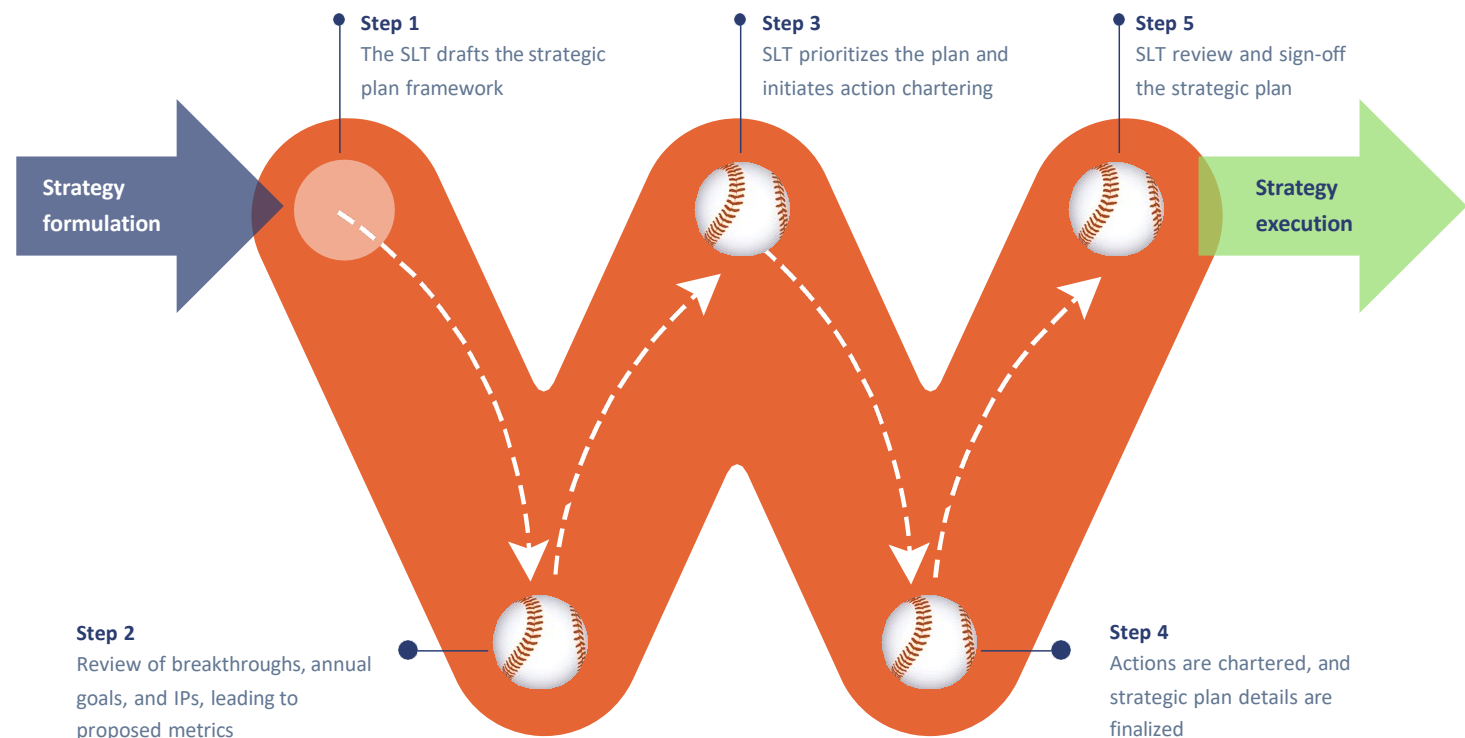
# Engagement: catchball via the “W” process

You can build your plans, and goals, using the “W” process - a simplified roadmap for strategic planning, incorporating the Hoshin Kanri catchball goal setting technique

The catchball technique allows for your business to set out goals which are not dictated from a corporate level, but instead give autonomy to local level business units and sites.

The metaphor finds its origins in baseball. The baseball represents a goal or a strategic theme. As it gets passed from the corporate level down, those closer to markets have a chance to review what is being asked of them, and create goals which are *meaningful* to them.

Afterall, it is more stimulating for teams to determine *how* they deliver you towards true north, as opposed to stifling their creativity, and removing the fun of strategic planning. The “W” process gives you a structured way to execute catchball. A walk through guide on how to lead this can be found by watching our accompanying webinar or reading our companion eBook.



[Learn more in this webinar](#)

# Engagement: distributed planning

As you start to use the catchball / “W” process, a natural question is whether you should use it for your plans across the business

The process should be used flexibly as a practical framework for your strategic planning meetings, but ultimately it is dependent on your business as to whether the process should be mandated to individual business units / departments etc.

For many, a top-down approach to strategic planning is unsuitable, but setting guiding strategic themes and breakthrough goal setting principle can give more structure to plans created from the bottom-up.



# Data: the bedrock of success

With experimentation a core feature of Hoshin Kanri, it is important to find a means to manage exceptions in performance – and that comes in two forms: the bowling chart and countermeasure A3s.

Hoshin Kanri comes with a standard reporting tool – the bowling chart. However, when combined with an A3 countermeasure process, you can move beyond simply looking at data, to *doing* something with the data.

## Why data matters

Too often, leaders review success in terms framed around the delivery of the plan. They do not look beyond the plan itself and consider whether the plan and the portfolios of work are still supporting the end goals.

Consider if you can relate to these statements:

- I can identify challenges before they have an impact
- I review performance on a weekly, monthly, quarterly, and annual basis, looking at exceptions that I can affect
- I put to use a standard set of tools as part of a root cause analysis – countermeasure – action plan method, in the style of Deming's PDCA

These statements show the importance of regularly collecting, visualizing, and acting on performance data.

Performance management in Hoshin Kanri is managed through bowling charts and A3 root causes analyses.

## Bowling charts

A bowling chart – with its namesake from a literal score card used in bowling – uses a traffic light system to visualize your targeted and actual performance.

By using colors, you can easily glance the chart and base discussions on exceptions, namely the ambers. Some organizations even use a strict green and red system to allow for action to be taken sooner rather than later.

## Root cause analysis

A root cause analysis is a method of problem solving used for identifying the key causes of faults or problems in a process, or a metric running off course. This can be performed with Pareto, Fishbone, or 5 whys tools.

## Countermeasures

A countermeasure is an action(s) against a process problem in an immediate sense. Countermeasures eliminate the symptoms of underperformance and are the result of problem-solving techniques such as a root cause analysis. When implemented effectively, the countermeasure will allow the rest of the process to continue smoothly.

## Action plan

An action plan is a program or project planning tool that helps you determine if your plan is achievable by listing out the key milestones and the impact each milestone should have on the monthly targets. This is used as a way to record countermeasures.

## Putting the data to use

These tools do not automatically provide results. Instead, they should be seen as part of the wider learning culture you are instilling as part of Hoshin Kanri.

Moving away from a gut-based approach to data-based decision making is possible with these tools. And, once you standardize the tool set, you can move on to the collection of the data itself.

Collecting data is challenging. That's because it often relies on your staff remembering to enter information, and doing so in a regular, timely manner. It's made worse when the data has to be entered into multiple systems, each day. It is clear that this is where Hoshin falls down.

Because Hoshin requires a solid bedrock of data, if you cannot find a way to encourage your team to update their metrics, how can you make the right decisions?

Quantitative data is half the battle. You must be able to understand the context of data. Teams should supply journals to help you appreciate what's behind the figure.

With the collection and entering of data standardized, the focus then turns to the way you report on this information, and how often you do this.

It quickly becomes crucial to use tools like the bowling chart, and to get consistency and efficiencies in the technologies used to avoid the administrative burden of Hoshin weighing everyone down, and enable your team to think more strategically.

# Governance: the role of a strategy realization office

A consistent theme in this eBook has been unifying the worlds of strategy and operations, but a question that needs to be asked is *who* is responsible for overseeing the governance (creation, execution, and reporting) of Hoshin Kanri?

## Enter the strategy realization office.

The strategy realization office (SRO) - sometimes called the strategy office - focuses on the planning, execution, and tracking of a strategy, its portfolio, programs, and projects.

**“The SRO is a dynamic structure that may or may not have a hierarchical alignment within the organization...likely to be driven by a C-level executive or a change advocate.**

**[The SRO finds] common ground between bold, high-level goals and nitty-gritty, ground-level realities”**

Leverage a Strategy Realization Office to Execute the Strategy, 17 June 2020, Joanne Kopcho et. al.

Typically owned by the Chief Strategy Officer, supporting roles go to 'Heads' such as those in Strategy, Lean, and Innovation, who are tasked with filling the gap between a strategy and its delivery.

## SRO v PMO

In some cases, an SRO is a digitally advanced enterprise PMO (Project Management Office) designed to drive successful strategy execution.

Your PMO will focus on executing projects, which naturally means their attention is towards operational, tactical efforts. When an organization fully embraces the idea of Lean / Operational Excellence, the PMO is found at the heart of every continuous improvement success.

The PMO is all about driving your company to implement projects properly and efficiently, supporting Project Managers in sharing resources, best practices, coaching, and monitoring compliance with project and process standards.

Where business justification is a PMO's goal, SRO serves strategic alignment needs. Another distinction is that the PMO focuses on deliverables. It looks at how accurately projects meet deadlines and budgets. Strategy realization focuses on creating value aligned to a strategic direction.

Still, your SRO should work with and learn from the PMO, specifically with how they apply processes and apply consistent standards to strategy execution. Together, the SRO and PMO offer structure and consistency, but are *not* the same unit.

## What will your SRO do?

The SRO is there to help your organization:

- Drive **inclusion** in strategy formulation

and goal setting

- Create **clarity of direction** through internal communication of plans
- Facilitate **strategic alignment** - meaning the joining of employees' work and performance management to strategic initiatives
- **Monitor strategic programs**, fostering collaboration, communication, and identifying risks of strategy execution failure
- Evaluate and analyze the performance of portfolios, **proving the real value** delivered, in any easy-to-prove manner
- Guide key stakeholders on the **importance of communicating the plan, goals, results, and why it matters** to everyone - and seek a 360 feedback loop on the plan, and crowdsource new ideas

## What are the benefits of the SRO?

With an SRO, you increase the chances of achieving your strategic goals, and the benefits are clear:

- Focus - the SRO adds reinforcements to your efforts to roll out a strategic plan, helping you to bring a further focus to everyone's efforts
- Commitment - HBR reports that 71% of employees in companies who poorly executed their strategies are second-guessing decisions - the SRO will support in driving up commitment to direction, because...
- Collaboration - the SRO helps everyone collaborate, and make decisions that were once seemingly impossible, possible - by giving structure, frameworks and neutrality
- Data - the SRO places data at the heart of everything, and so, naturally will lead to decisions based on reality, not narrative



# The challenges you'll encounter

Theories are meaningless without experience – here are eight challenges leaders face with Hoshin

- 1** Hoshin Kanri works best when goals unify strategic / transformational and operational work. Strategy is nothing but a direction of travel, so ensure that from the moment you build your plan you bring together the people delivering programs and projects, ensuring their work feeds your goals.
- 2** The seven steps of Hoshin Kanri offer a framework, but there are gaps. One gap is the lack of a situational assessment. It is implied that you would perform one for each goal, but it is not spelled out. Look towards tools like PR Smith's SOSTAC and a VRIO analysis, as well as using catchball which empower local units, to help you understand your market and build a plan that acknowledges this.
- 3** While terms like breakthroughs and catchball are part and parcel of Hoshin Kanri, consider the audience before you use jargon. Ask yourself whether you need to call catchball "catchball", or instead explain the approach. Or, if you want to use set Hoshin and Lean terms, use a jargon buster so that everyone can sing off the same hymn sheet.
- 4** It's OK to fail at Hoshin Kanri. In fact, the sooner that it is accepted that success is not automatic, the sooner the culture of learning can be embedded. Those CEOs who expect success without hedging bets via hypotheses should avoid Hoshin Kanri for their framework.
- 5** When setting out your breakthroughs and annual goals, consider whether these firstly serve your customers, then if you gain a competitive advantage from delivering them, what skills are needed, and lastly how to facilitate cross-functional work. With this in mind, you can craft the themes and goals which serve those who matter most – your customers.
- 6** When determining the resources for your plan, make sure you ringfence these from firefighting. While supporting the business to continue running is important, that is for other people. The lesson here is that you cannot achieve the step change you desire without dedicating resource to the cause.
- 7** Keep your organization aligned. While creating goals collaboratively is a great start, Hoshin Kanri often wanes in effectiveness in the second and third years (see below for more on that) – so, be mindful to employ strong communication, openness, transparency, and collaboration throughout the life of your strategy; all enabled with an SRO.
- 8** A key reason that Hoshin stalls in its results is complexity – be that from too many process requiring too much effort to maintain, or the administration of Hoshin itself in spreadsheets and PowerPoints being too much, seek out a solution to remove the complexity risk.

# How to get Hoshin Kanri right

## Understand the limitations of the tech you are using for Hoshin Kanri

Having invested time, effort and money in developing a vision and strategy, it is crucial you identify the specific outcomes you expect (goals), the initiatives you need to deliver those outcomes, and your approach to tracking key metrics and delivery.

The disconnect between boardroom strategy and the nuts and bolts activities of the of project management teams within an organization can be a critical weakness in strategy execution.

Organizations need tools that allow vision, strategy, goals, and milestones to cascade through their organization at every level to ensure alignment and buy-in.

Traditionally, execution has been managed using a patchwork of tools including the Microsoft Office suite (Excel, Project, PowerPoint), project management tools such as Trello and BaseCamp, and business analytics modules such as Power BI.

These tools can be very effective when looking after small, local transformation projects; however, when applied to organization-wide strategy execution they can quickly become unmanageable, inefficient and ineffective.

### The weakness of traditional tools

Using these traditional tools also creates a challenge when tracking progress.

With standalone systems each requiring manual data input, it becomes almost impossible to quickly pull all key data together into one, cohesive report on progress against goals. Senior executives, therefore, lack clear sight of whether their strategy is being executed.

Underpinning the execution levers of capability, mindset and alignment is the imperative to execute in an environment that enables transparent, timely and reliable reporting.

Without regular visibility of progress and data they can trust, an executive team will be unable to adapt their plans or understand whether their strategy is delivering results.

When information does not flow both horizontally and vertically among business units, groups will often end up behaving in silos without recognizing the holistic impact of their (or others') specific strategic initiatives.

Without clear and consistent reporting, executive teams can find themselves oblivious to the number and impact of the myriad initiatives they have in progress.

This initiative overload can rapidly lead to Business as Usual impacts or lacklustre execution, and may result in key staff burning out and leaving their roles.

### The knowledge gap

Most organizations lack the tools to identify, measure and manage the demands that initiatives place on the managers and employees doing the work.

Similarly, because business units and functions often launch and manage initiatives in isolation, they may not understand the impact on other functions if resources are required to support them.

Combatting initiative overload – or preventing it in the first place – requires the means and willingness to implement difficult strategic decisions.

Organizations need a real-time count of ongoing initiatives, an ability to assess them, and an appropriate process for ending initiatives that are no longer making a significant business impact.

Visibility and alignment are key to avoiding these challenges, and the required level of transparency is only possible using smart, agile and intuitive strategy execution software.

# Meet i-nexus

## The answer to simplifying Hoshin Kanri

The same patchwork of technologies isn't enough to overcome lost plans, errors, and the cost of poor execution. i-nexus software simplifies how you achieve your goals with solutions built to simplify the challenges of Hoshin Kanri.



### Focus on what matters

i-nexus is the place to align *everyone* and *everything* that matters to your goals, so wherever you sit, you can focus on doing more of the right things



### Single source of truth

i-nexus cuts the complexities of planning, executing, and tracking your goals, providing your organization with *the* single source of truth



### Deliver more goals

i-nexus simplifies your challenges, enabling effective strategy execution and operational excellence which helps you deliver more of your goals



i-nexus replaced our spreadsheet patchwork with a single solution that automated our processes. Automating our manually-intensive process has led to productivity gains and the ability for the team to think strategically.



**Mahesh Shankar, Director,  
Strategy, Wabtec  
Corporation**



We needed saving from spreadsheet hell. i-nexus transformed our Hoshin Kanri method, replacing spreadsheets with a digital solution. Better still, i-nexus has enabled us to take the next evolutionary step beyond KPI reporting and towards building a stronger countermeasure culture.



**UNIVERSAL  
ROBOTS**

**Mogens Saigal,  
Senior Director,  
Universal Robots A/S**

[Watch our x-matrix demo](#)

# Meet i-nexus

## Crystal clear visibility

i-nexus removes the bad from Hoshin Kanri. No broken spreadsheets. No searching for the right plan. i-nexus makes everything crystal clear. Every goal and project feeds success. Automatically create your bowling chart. Account for every resource and owner. Every corner of your business connects to the i-nexus x-matrix. With i-nexus, Hoshin Kanri is simply easier and takes less effort.

## The only rotatable x-matrix

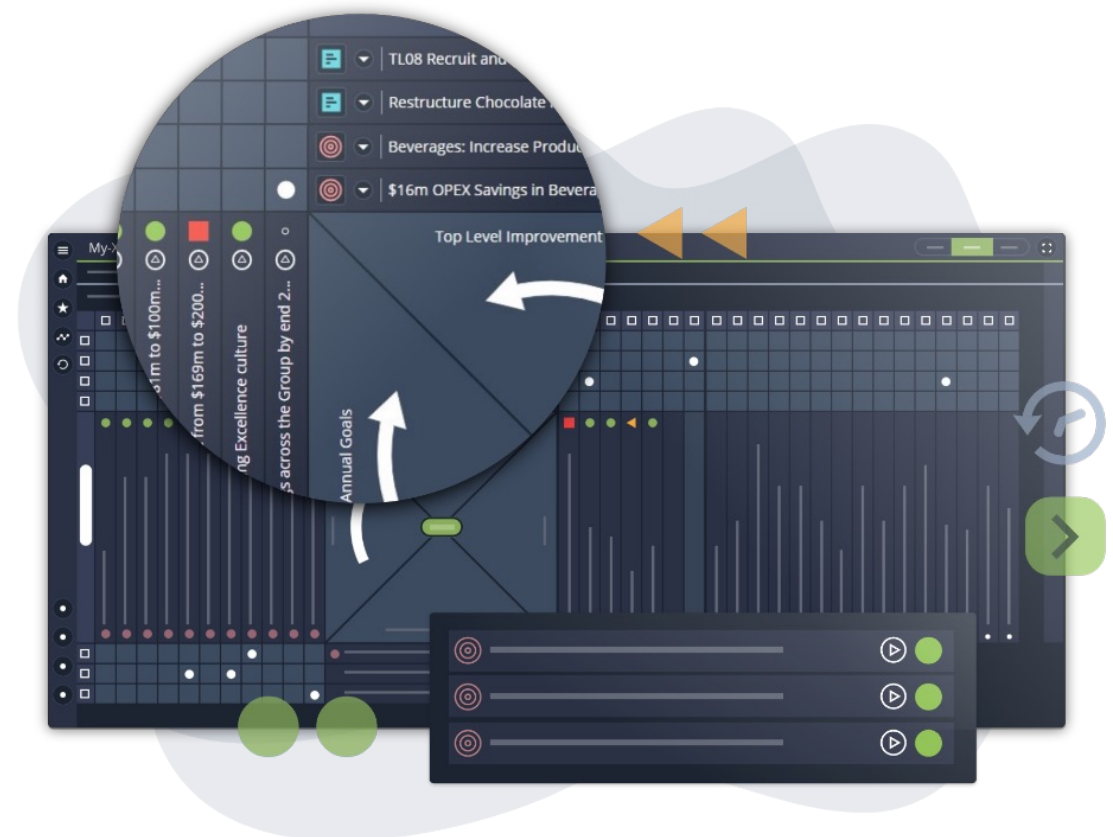
The small things matter.

So, unlike other x-matrix software or spreadsheets, the i-nexus x-matrix rotates. And that means a lot.

Rotate your plan to the level you're interested in. Experience an unlimited version of x-matrix planning. Go beyond the surface and pinpoint the operational barriers between you and achieving your goals.

With i-nexus, there's no printing off copies, or a need to master spreadsheets.

Everything you need is *here*.



# Meet i-nexus

## Focus your plan

Our x-matrix puts you in control of building, delivering, and leading a focused, balanced plan.

That means focusing on where you team spends their time, balancing your resources by spotting execution overlaps, and delivering that plan with clarity of performance.

Our x-matrix opens up a world of detail to ensure you can spot what makes, or breaks, your plan.



# Meet i-nexus

[See our bowling chart demo](#)

## Connectivity

Connectivity is at the core of our Hoshin Kanri toolset.

Our x-matrix isn't just a planning tool. Build your x-matrix in i-nexus and you'll enjoy automatically generated bowling charts based on your plan, with one location to add journals.

But it doesn't stop there. You can build supporting projects, countermeasures, action plans, and metrics all inside the x-matrix and bowling chart.

i-nexus is *the* place for your goals, cutting admin down to size.



# Meet i-nexus

## The tools you'll be using

Simplify how you achieve your goals with tools built for an easier way to plan, execute, and track what's driving your strategy execution.



### The place to plan

Bring your x-matrix to life and leave behind emails, slides, and spreadsheets inside one solution – i-nexus.

With the multi-dimensional x-matrix planning tool, and collaborative catchball goal setting, you can easily build all the elements of your plan, keep them connected, and focus all work against one shared true north so that you're confident of an error-free, robust plan.

Wherever you sit, our x-matrix, balanced scorecard, and portfolio tools support well-balanced, transparent plans, connecting your goals, portfolios, projects, KPIs, and resources, so that you align and engage your organization.



**X-matrix**



**Portfolios and projects**



**Catchball goal-setting**



**Planning cycles**



### Align everything to your plan

Take your plan to action with portfolios, programs, and projects aligned to your short- and long-term goals.

With i-nexus, you control the pace and quality of delivery with best-practice templates and process workflows, powered by a suit of tools to drive home the way you want to work and keep everything focused on your true north.

Whether delivering a project, leading the PMO or SRO, or providing your executive team with insights, you'll drive buy-in of the plan, and build a stronger execution and achievement culture.



**Portfolio execution**



**Programs and projects**



**Govern execution**



**Idea management**



### Know if the plan is working

Inside i-nexus, metrics and projects link, forming impactful bowling charts and scorecards to focus your team, all easily updated with data and journals, creating a crisp picture of performance.

With the ability to analyze root causes and implement countermeasures, and use dashboards and automatic reports on financial targets and KPIs, you can keep everything on track, identify exceptions, and prove the impact and benefits of your plan.

Knowing if the strategy is going to plan is painless with i-nexus.



**Bowling charts**



**Counter-measures**



**Benefits and impact**



**Financial reporting**



# Meet i-nexus

## Close your strategy execution gap

Get everyone focused and collaborating on your strategic goals inside i-nexus

### The methods we support



Hoshin Kanri



Balanced Scorecard



Your business system



### Eliminate your execution gap

i-nexus shows you what's causing your gaps, letting you focus on where to double-down efforts to improve, and keep track of the areas you'll excel in



### Strategy realization

i-nexus gives your strategy office and PMO the visibility to connect strategy to operations and hit more of your targets



### Cascade strategic goals

i-nexus helps you create clear goals and targets in every corner of your organization, guiding the resources, programs, and reports key to your plan's roll out



### Know if strategy's delivering

i-nexus uses every piece of data to create a picture of your strategy delivery, forming insights that mean you'll always know whether your plan will succeed



### One plan, one direction

i-nexus stops the jumping between spreadsheets and systems, so you can manage your plan in one location



### Digitalize your execution

i-nexus replaces your spreadsheets and integrates with your systems, creating real change with automated reporting, workflows, and process standardization – the formula to drive home how you want to deliver your strategy



### Overcome blockers

i-nexus brings together what makes your business your business – processes, products, plants, languages, and people – all aligned, ready to overcome blockers on your road to change



### Respond with agility

i-nexus doesn't just focus on today – you can build *your* next plans while executing today's, helping you respond and adapt to whatever comes your way

## Remove the burden of patchwork technologies

i-nexus evolves your strategy execution beyond a patchwork of unrelated tools



### Planning

MS Excel  
MS PowerPoint  
MS Word  
MS SharePoint  
G Suite



### Executing

MS Excel  
MS Projects  
Smartsheet  
Asana



### Tracking

MS Excel  
Tableau  
Crystal Reports  
Pegasus  
Qlik

## The place for strategy execution

i-nexus integrates with the technology that matters to delivering your goals

 Jira

 salesforce

 clarizen

 Trello

 Microsoft Teams

 Dynamics 365

 aws

 Outlook

 Office 365

 mevisio

 Microsoft Azure

 Suite

## Next steps

### Take the next steps in your journey to simpler Hoshin Kanri

The key to Hoshin Kanri does not rely on any one thing, but it does start with the way you lead the charge.

This eBook has shown the coordination needed to bring together your people and process to create a solid foundation for success.

But, it is technology which will drive you closer to your goals.

As you reach the end of this stage in your journey, turn to i-nexus for more information on how you can achieve more of your goals, with less effort, by clicking any of the links below.



See how i-nexus helps your execution



Book your own demo of i-nexus



Read our G2 reviews



## Who we are

We're driven by our passion to help your organization thrive and deliver the change it wants to see. Through our intuitive, powerful strategy software, we align everyone and everything in your organization to help you achieve more of your goals, with less effort.

## Trusted by global organizations



To get in touch with any questions, reach out to the team via the below channels:

Email: [info@i-nexus.com](mailto:info@i-nexus.com)

Web: [i-nexus.com/contact-us](https://i-nexus.com/contact-us)

Phone: UK: +44 (0)845 607 0061 | USA: +1 855 615 1589

## We wrap around you

We use two decades of experience in strategy execution, Hoshin Kanri, Lean, Six Sigma, and project management to help you overcome challenges, spot gaps, and accelerate the success of your organization.

## Achieving your goals together



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