Leadership Worksheet - How to Use the Hoshin Kanri Matrix

Hoshin Kanri X-Matrix Overview

The X-Matrix is a one-page strategic alignment tool that connects:

1. Breakthrough Objectives (Long-term vision goals)

2. Annual Objectives (Short- to medium-term goals)

3. Strategic Initiatives (Key projects or activities)

4. Metrics / KPIs (How you'll measure progress)

5. Responsible Owners (Who is accountable)

The X is laid out in a cross shape, with each section linking logically to the next.

Step-by-Step Instructions to Fill It In

Step 1: Define Breakthrough Objectives (Top of the X)

Purpose: Translate your vision into 3–5 bold, long-term (3–5 year) transformational goals.

Instructions:

- Focus on what must change drastically to realise the vision.

- These should be measurable or directional (e.g. "Be recognised as the most customer-centric tech provider in the market").

- Example:

  o "Achieve 80% employee alignment with our purpose by 2028."

  o "Establish sustainable revenue streams across 3 business models by 2027."

Step 2: Identify Annual Objectives (Left Side of the X)

Purpose: Clarify what must be achieved this year to move toward the breakthrough goals.

Instructions:

- Choose 3–7 strategic priorities for the year.

- These should be achievable within 12 months and linked to at least one breakthrough objective.
- Example:
  - "Launch internal campaign to translate vision into role-specific behaviours."
  - "Complete pilot of new product offering aligned with vision."

Step 3: List Strategic Initiatives (Bottom of the X)

Purpose: Detail specific projects or actions that will help meet the annual objectives.

Instructions:

- These are programs, initiatives or working groups.
- Make each initiative clearly scoped, resourced, and time bound.
- Example:
  - "Conduct 3 vision co-creation workshops with departments."
  - "Roll out Hoshin review process in monthly leadership meetings."

Step 4: Define Metrics & Targets (Right Side of the X)

Purpose: Choose how you will measure progress toward your annual objectives and initiatives.

Instructions:

- Include both leading (activity-based) and lagging (result-based) indicators.
- Targets should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound).
- Example:
  - % of employees who can link their daily work to the vision
  - % increase in cross-functional collaboration scores
  - % of projects directly linked to strategic goals

Step 5: Assign Owners (Around or Beside Each Quadrant)

Purpose: Make someone accountable for each initiative and objective.

Instructions:

- Use initials or names to indicate who is responsible for:
  - Each strategic initiative

- - Each annual objective
- Ensure that owners are empowered and supported

Step 6: Create Alignment Links (Visual Connections)

Purpose: Use arrows or notations to show how each item links to others.

Instructions:

- Draw arrows from each annual objective to the breakthrough objective(s) it supports.
- Connect each strategic initiative to the annual objective(s) it contributes to.
- Match KPIs to both annual objectives and strategic initiatives.
- Use different thickness or colour arrows to show strong vs. weak alignment.

Condensed Example Of A Matrix

Section	Example Entry
Vision	"Build a values-driven culture where every team is aligned with purpose."
Breakthrough Objective	"Achieve 80% alignment in employee pulse surveys by 2028."
Annual Objective	"Create a behaviour framework tied to the vision and launch in all departments."
Strategic Initiative	"Facilitate 5 team workshops to co-define vision-aligned behaviours."
KPI / Metric	"% of employees who say they understand how their role connects to the vision."
Owner	"People & Culture Lead"

Tips for Success

- Start small: Focus on 3–5 key objectives to avoid dilution.

- Use visual tools: Templates in Miro, Lucidchart, or Excel can make collaboration easier.

- Review monthly: Make the X-Matrix a living document, updated through your regular strategy reviews.

- Make it visible: Display the current matrix in team dashboards or strategic planning documents.

Going Further...

There are many Hoshin Kanri templates available for free on the Internet, and they can be a great place to start. However, if you're looking to go beyond traditional strategy tools and want to **embed your vision into culture, leadership behaviours, and everyday operations**, I offer a **proprietary adaptation of the Hoshin Kanri method**, specifically designed for organisations going through culture change and transformation.

If you'd like to explore how this approach can be tailored to your team or organisation, get in touch to arrange a conversation.