

# 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:
  - "Achieve 80% employee alignment with our purpose by 2028."
  - "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.



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- 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



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

## Tips for Success

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



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- 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.



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