

Hoshin Success Compass

From Matthew Cross

A targeted exercise, individually or collaboratively. It really helps to have this facilitated by a third party, especially the first time.

Here is the outline of the process:

1. **Select the question.** You are completing this: 'What are the key issues that must be addressed in order for me/us to _____?' The process is great for annual planning ('achieve success in 20XX'), problem solving, and achieving goals. It can be very specific ('increase sales by 10%'), or global ('more effectively manage my time').
2. **Determine the five key things that will achieve the results.** All statements must start with I/we must, and have three to seven additional words. Select the top five action items and transfer these to the form. Collaboration is powerful in this stage of the process, so get input for individual goals, or work as a group for company goals. Keep each statement focused but specific enough for clarity. (Not: 'We must spend more time planning.' But 'We must hold quarterly/monthly/weekly planning meetings.') Transfer these to the form.
3. **Select the order of important.** On the line above the word 'Order' within each box, number these in order of importance from your perspective - 1 through 5, from your gut.
4. **Create 10 arrows between the boxes.** Next, you'll turn the lines between the boxes into arrows. Compare the two issues connected by each line, and make the arrow point from the one that drives the other as a potential outcome. Another way to consider it - Which of the two is more likely to happen first? Which will make the other easier to accomplish? Each line becomes an arrow pointing from one box to another. The arrow points from the statement that is a driver, or likely to happen first, or can make the other easier to the other. Take time to carefully consider these, and again, get input from a partner or collaborate.
5. **Count arrows out.** Once all the arrows are created, count the number of arrows that point out from each box. Put this total on the line above 'Arrows Out.'
6. **Re-rank the order of importance** based on the arrows out. The box with the most arrows out becomes number 1, and so on. In case of a tie between two boxes, the one that drives the other would be ranked next. The statements that are likely to happen first and drive or make other items easier become your focus and priority.
7. **Focus your action items on #1 and #2.** Compare your original order of importance to this new ranking. Use this information to focus on the issues that can have the most impact on the top five.
8. **Take it further.** Continue the process by doing a Hoshin on the top ranked ranked using this to complete your question on another Hoshin. This leads directly to very high priority action items. Continue with #2. Create short- and long-term action plans individually or as a group. For a group, assign owners/champions and timelines. Individually, create timelines, tasks lists and dedicated calendar time for key priorities.

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What are the key issues that must
be addressed in order for me/us to

?

Create your top 5 statements – all beginning with I/We must – add at least 3 words, but not more than 7 to create each statement.

