

Hoshin: align strategy through catchball

Translate a strategic direction into a feasible team contribution, expose a cross-functional tradeoff and return evidence that can revise the agreed means.



The target is shared; the proposed means conflict

Fictional equipment-services business: leaders want customers to receive confirmed repair dates sooner. Planning proposes daily small releases, while purchasing proposes larger less-frequent batches to reduce transaction effort. Both claim to support the strategy, but their resource and timing assumptions conflict.

Your role and the reference condition

Service director, planning owner and purchasing owner discussing contributions with frontline representatives.

Normal: A small set of priorities links purpose, current gap, proposed means, capacity and review evidence.

Gap: Departments repeat the same strategic slogan while committing to incompatible operating patterns.

Work within these conditions

1. The exercise teaches alignment dialogue, not a complete strategy or a mandatory X-matrix.
2. A target is not evidence that the organization has capacity or a feasible method to achieve it.

Fictional teaching case. Supplied observations support the exercise; proposed actions are not verified customer results.

See how the method works

Start with a small number of strategic gaps that matter to the organization. Discuss proposed contributions with the teams expected to deliver them, including resources, conflicts and feasibility. Alignment needs dialogue across functions as well as between levels. Link agreed work to observable measures and learning, then review progress and adjust the means when evidence changes. Frontline experience should inform strategic choices, not merely receive targets. A matrix can summarize the relationships but cannot replace those conversations. Use daily management to understand current capability and A3 thinking to carry the reasoning behind important improvement work.



Connected method map: Strategic gap, Proposed contribution, Catchball, Agreed improvement, Review evidence. Every authored connection is shown with a numbered arrow and named legend.

Follow the evidence and decisions

Inspect the supplied case inputs

Proposal / evidence	Declared fictional fact
Customer need	Reliable confirmed repair date sooner
Current gap	Requests wait for parts availability confirmation
Planning proposal	Review priority requests daily
Purchasing proposal	Batch confirmations twice weekly
Resource constraint	One shared specialist; current workload not yet observed
Success criterion	Faster confirmation without less reliable promises

01 / State purpose and gap together

The director asks what customers are waiting for and keeps date reliability beside speed. The group identifies availability confirmation as the current learning focus.

Why: A single speed target can reward promises that the process cannot honor.

Evidence / check: The contribution starts with customer outcome and a specific process gap.

02 / Ask for means and capacity evidence

Each owner explains how the proposed pattern would change the wait, what specialist time it requires and which assumptions remain untested.

Why: Catchball is a dialogue about feasible contributions, not merely sending a number downward.

Evidence / check: Daily versus twice-weekly confirmation and the shared specialist dependency are visible.

03 / Resolve the horizontal conflict

Planning and purchasing propose a bounded daily review for a defined priority subset while observing specialist demand. The director agrees what existing work can be deferred during the trial.

Why: An additional task without capacity tradeoff is an unfunded promise.

Evidence / check: The agreement names eligible cases, owner, support and work deliberately deferred.

04 / Return trial evidence to direction

The owners review confirmation delay, promise reliability, specialist workload and effects on deferred work. They report what the trial taught before scaling or revising the means.

Why: Frontline evidence must travel upward and sideways, including evidence that challenges the initial plan.

Evidence / check: A review decision can adopt, adapt or abandon the means while explaining implications for the strategic objective.

Completed catchball agreement - trial results pending

Alignment item	Agreed contribution	Evidence / review
Purpose	Sooner reliable repair-date confirmation	Delay and later promise accuracy
Trial scope	Defined priority subset reviewed daily	Case identities and eligibility
Capacity tradeoff	Director approves deferred work	Specialist time and displaced demand
Shared ownership	Planning + purchasing counterparts	Accepted handoff and blockers
Learning return	Review before wider rollout	Revise means if reliability/workload worsens

Speed improves but promises become unreliable

A hypothetical trial shortens initial confirmation, but several dates are revised because availability was assumed rather than verified.

Decision

Do not scale the method as a success. Examine the missing verification and adapt the trial while preserving the customer reliability requirement.

Reasoning

Optimizing one measure can defeat the strategic purpose.

What would change the decision?

Report both confirmation time and revised promises, with affected conditions and the next test.

Practise with a changed case

Two teams promise the same specialist

New fictional organization aims to shorten onboarding while retaining complete setup. IT proposes a daily access clinic; training proposes daily induction at the same time, both requiring one specialist. Neither proposal accounts for existing support work.

Commitment	Dependency
IT clinic	Same specialist at 09:00
Training induction	Same specialist at 09:00
Existing support	Must continue; capacity unknown
Purpose	Earlier complete onboarding, not partial setup

Your task

1. Identify the unresolved tradeoff and missing evidence.
2. Propose a bounded contribution agreement with owner and capacity decision.
3. Choose measures that detect a misleading speed improvement.

Use the next page to record your reasoning before reading the answer.

Your practice worksheet

Two teams promise the same specialist

Purpose / current gap

Proposed means and assumptions

Capacity or cross-team conflict

Agreed trial / work deferred

Review measures and upward feedback

Complete your reasoning before turning to the answer. Use the separate learner workbook for group practice.

Check your reasoning and transfer it

1. The shared specialist cannot simply be promised twice; observe demand and agree priorities or an alternative sequence with the responsible authority.
2. A bounded cohort trial can test a coordinated schedule while recording displaced support work. The exact schedule is not given, so several feasible proposals are valid.
3. Measure time to complete setup, unresolved access/training needs and effect on support demand. A faster first appointment alone is insufficient.

Suggested completed record

Agreement field	Suggested entry
Conflict	Same specialist, same time; existing work unaccounted
Trial	Bounded cohort with coordinated appointments
Authority	Sponsor agrees priority/capacity tradeoff
Review	Complete onboarding time, defects and displaced work

Plausible wrong turns

1. Catchball is not consensus theatre or simple target cascading.
2. Departmental commitment does not create resource capacity.

Evidence of a sound answer

1. Make a concrete means/capacity assumption visible.
2. Resolve both vertical and horizontal responsibilities.
3. Include a measure that can challenge the proposed success.

Take the learning back to work

Commitment	Agreed follow-through
Owner	Strategy sponsor and cross-functional contribution owners
Record	Contribution/trial agreement linked to strategic purpose
Review	At the agreed trial review and periodic strategic reflection
Verification evidence	Customer outcome, operational feasibility, capacity tradeoffs and unintended effects
If unresolved	Return the constraint to the sponsor and revise means or commitments rather than quietly accepting impossible targets.

Help someone else apply the method

Prepare

1. Director/planning/purchasing role cards
2. Blank contribution agreement
3. Competing schedule cards

Minutes	Activity and coaching prompt
5	Frame strategic purpose What would make faster confirmation worse for the customer?
8	Conduct catchball dialogue What work or capacity supports your promise?
9	Practice shared-specialist case Who can authorize the tradeoff?
5	Debrief learning return What evidence would make leadership revise the means?

Debrief

1. If the answer repeats the target, request an operating proposal and resource assumption.
2. Accept alternative trials with explicit scope and countermeasures for displaced work.

Individual or remote practice

Write the contribution, then challenge it from the other department's perspective before revising.

Connect the method and check its boundaries

Before application

1. Organizational purpose
2. Capacity and tradeoffs visible

Outside this lesson

1. Cascading targets is not agreement
2. An X-matrix alone is not hoshin

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Vertical/horizontal alignment, PDCA and capability development

Method reference; original OPEX scenario and diagram are synthetic teaching content, not source case results.

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