WORKSHEET + WORKED EXAMPLE

Connect Strategy to Real Work

A negotiated link between strategic direction, team work, and available support.

40 minutes | Hoshin Kanri · Alignment and catchball

Use it in three moves

1. Connect the longer-term direction to a small number of current priorities. Explain the result each should make possible.

2. Pass proposals both ways. Ask teams to challenge feasibility, suggest approaches, and negotiate the resources needed.

3. Agree actions and review evidence from the work. Record what changed in the strategy or support because of what teams knew.

State the longer-term direction

Name the few outcomes that matter and why; keep assumptions open to challenge.

Choose the current-year priority

What meaningful progress is feasible now? State a baseline and outcome, not only a project name.

Catchball · Exchange proposals and constraints

Invite teams to test feasibility, suggest means, and negotiate resources. Record changes made in both directions.

Connect Strategy to Real Work

YOUR WORKING NOTES / CONTINUED

Connect team actions and measures

Name the action, owner, support, expected contribution, and evidence. Treat the cause-and-effect link as a hypothesis.

Review progress and barriers regularly

Use operational reviews for action and periodic strategic reviews for direction. Escalate mismatches, not just red numbers.

Revise the plan from the work

What evidence changes direction, scope, support, or the next cycle?

A question for me

Where can the people doing the work genuinely renegotiate this target?

See one way through

FICTIONAL WORKED EXAMPLE / NOT THE ANSWER TO YOUR SITUATION

State the longer-term direction

Over three years, make reliable access to our service possible across all shifts.

Choose the current-year priority

This year, establish dependable late-shift coverage for the two highest-volume request types.

Catchball · Exchange proposals and constraints

Late shift explains that training time and backup access are missing. The sponsor narrows the first rollout and funds protected practice.

Connect team actions and measures

Cross-train two backups and test coverage on a real shift. Track resolved requests, rework, and workload.

Review progress and barriers regularly

Monthly: check coverage and barriers. Quarterly: reconsider whether the two request types remain the right priority.

Revise the plan from the work

If training is complete but access still fails, change the permissions process before expanding the target.

The thinking behind it

The people closest to the work should be able to change the plan, not merely receive it. Show which decision changed because of what they knew.

Hoshin Kanri connects strategic direction with operational work through planning, review, and two-way dialogue often called catchball. This original starter guide emphasizes negotiated feasibility; it is not a full deployment system or a guarantee that all goals align.

Lean Enterprise Institute · Hoshin Kanri

Read You Have a Culture Problem by Nic Payne