

# Getting the *Right* Things Done –

## A Leader's Guide to Planning & Execution

**Who should attend:** Executives, Managers, Lean Facilitators, Group & Team Leaders

**Length:** 2 or 3 days

**Objective:** This working session will teach participants the fundamentals of Strategy Deployment (Hoshin Kanri), Toyota's planning and execution system, and its underlying mental models, through interactive group activities and business case studies.

### Description:

Focus and alignment are the biggest constraints any lean transformation faces. In this two-day, hands-on workshop, you will use interactive case studies and exercises to learn the proven strategic planning and execution system called Strategy Deployment or Hoshin Kanri. You will learn how to focus and align activities, how to involve all levels, and how to apply the scientific method of plan, do, check, adjust (PDCA) to consistently achieve required results.

Strategy Deployment matches available resources with key activities so only activities that are desirable, important, and achievable are authorized. Strategy Deployment aligns functions and activities with critical strategic goals by developing — usually through an annual planning process — clear and aligned actions, timelines, measures, and responsibilities. It provides the support structure for the weekly, annual, and long-term cycles of the PDCA method. You'll learn:

- The philosophy and structure of the Strategy Deployment system
- Mental models underlying Strategy Deployment
- The fallacies of the command and control school of planning
- The PDCA cycle in Strategy Deployment
- Using Catchball to create shared understanding and alignment
- The “Key Thinker” concept
- A3 thinking
- How to make Strategy Deployment part of your culture

Strategy Deployment answers the critical planning questions: Who are we? Where are we going? How do we get there? How do we involve and motivate our team members? How do we sustain our activities? How do we learn from our successes and our failures?

The success of a lean transformation hinges on the company's answers. Strategy Deployment makes knowledge flow by applying the scientific method of PDCA at all levels. It encourages clear thinking, breaks down barriers, and facilitates cross-functional management. Strategy Deployment becomes the nervous system of the learning organization.

## Curriculum

Day 1: *Mental Models*, Fallacies of the Command & Control school of planning – and how to avoid them; the Strategy Deployment system, PDCA at each level, Catchball, Key Thinker concept, A3 Thinking

Day 2: Building the management system, Mental models and Lean culture, PDCA at the supervisor, manager and executive level, Metrics – the dashboard concept, contingency planning, implementing Strategy Deployment – pacemaker role, sustaining Strategy Deployment – common obstacles & how to deal with them, Case studies.

Day 3 (optional): Objective is to apply learning of days 1 & 2 to your business.

Deliverables: True North, Mother A3's and corresponding dashboards, Level 1, 2 and 3 check process, go forward plans.

## References

*Getting the Right Things Done – a Leader's Guide to Planning & Execution* (Lean Enterprise Institute: Cambridge MA, 2006) by Pascal Dennis

*Lean Production Simplified – a Plain Language Guide to the World's Most Powerful Production System 2<sup>nd</sup> Ed.* (Productivity Press: New York, 2007) by Pascal Dennis