The Hoshin Kanri Bibliography

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January, 2014

Guide

This bibliography is in four parts: dedicated books (16 titles), journal articles and occasional papers (91), chapters/sections in books (23), and selected conference papers (10). Many consultancy web sites have explanations and concepts; these are omitted here. The period 1990-1995 saw the publication of six books (a period towards the end of the high point of TQM adoption in the West) and four in 2006-2010 (a period of popularity for 6-sigma and increasing general interest in lean production outside the automobile sector). Much of the explanation and discussion continues to fall within the quality management and operations literature, rather than in that of strategy and strategic management.

Dedicated Hoshin Kanri Books

Contributors: Akao Y., Imai T., Koura K., Noda Y., Nomi T., Ohta A., Tamura S.
Translated by Glenn Mazure, and an Introduction by Greg Watson (Compaq Computer Corp.) who uses a model adopted by GOAL/QPC, which Watson states is a simplification of the methodology in the book.
Chapters: (1) TQM and Hoshin Kanri (Akao), (2) Promotion of Hoshin Kanri (Nomi), (3) Control Items for Hoshin Kanri (Koura), (4) Hoshin Kanri with Daily Control, Cross-functional Management, and Work Plans (Koura), (5) Implementation of Hoshin Kanri: Case studies (various), (6) Hoshin Kanri as a Part of TQM: A roundtable discussion: this is a previous article by Akao Y., Koura K. and Nomi T. (1986), Hoshin Kanri as a Part of TQC, Japanese journal, Standardization and QC.
Bibliography, Notes about the author/Editor-in-Chief.

This is the seminal text, translated from the Japanese with an introductory chapter from Greg Watson (Compaq Computer), and involving Japanese academic authors. It is technical and a difficult introduction, but it is full of detailed insights. The ten step approach for deploying policy is: (1) establish company motto (purpose statements), quality (customer) policy, and promotion (i.e. how to carry it out) plan; (2) devise long and medium term management strategies; (3) collect and analyse information to determine longer term policies; (4) plan target (the what) and means (the hows); (5) set control items and prepare a control item list (the determination of annual targets and means); (6) deploy the policy, deploy the control items; (7) implement the policy plan (understanding targets how to manage them, catchball); (8) check the results of implementation (the daily management of targets/means); (9) prepare status reports for implementing hoshin kanri (periodic reviews by senior management, including annual diagnosis). A diagrammatic definition of hoshin kanri is given by Nomi in terms of the stages and the PDCA cycle for its overall management, and a CAPD cycle for its overall annual management of annual priorities; see 22-23.


First published in 1996, a consultant’s book, it is written by someone who helped facilitate hoshin planning at HP, and is published by a leading web based consultancy on total quality that supplies good notes about hoshin kanri. A split is recognised between the vital few hoshins (and hoshin plans), and the business fundamentals (business fundamentals plans - daily control is the foundation for hoshin). Examples include Great Northern (insurance) and Rockford Int..


Appendices: Statistical Tools, Management and Planning Tools

A consultant’s briefing for members of the American Management Association. The reference to compass in the title refers to the importance of aligning everyone through strategic priorities to the organization’s overall direction – like a ship tossed about in a rough sea and always needing to be brought about back on its destination. Hoshin kanri is presented as a management system, without getting lost in the detail quality and lean management. It involved assistance from practitioners in health, as well as Danaher, Intel, Hewlett-Packard, Procter and Gamble, Texas Instruments, Teradyne, and Zytec.


A US consultant’s publication (first edition 1994) with much detail about quality tools presented in a roll binder in half-manual form. Colletti visited six Japanese companies in 1991 with Bob King and the GOAL/QPC study team. Examples include materials from a variety of practitioners. The idea of focussed planning is stated to be an American style of hoshin kanri.


Chapters: Introduction, Part I – The Hoshin Kanri Sequences (1) Creation Sequence, (2) Deployment and Dialogue Sequence, (3) Review Sequence: Monitoring, Modification, and Year II Upgrades, - Part II
Hoshin Kanri: Background and Advanced Detail (4) Introduction to Hoshin Kanri, (5) Pitfalls and Temptations, (5) Other Options and Tools.
Appendix: Sample Hoshin Charts and Tool Illustrations.
A small ring-bound guide that will fit into a pocket for quick reference on the job; it provides an excellent summary of the ground and some associated tools. The only pocket guide.

Collins B. and Huge E. (1993), Management by Policy: How companies focus their total quality efforts to achieve competitive advantage, Milwaukee WI: American Society for Quality Control Quality (ASQC) Press. 194 pps.
Appendices: Seven basic process improvement tools; Seven new management planning tools
Glossary of terms, Bibliography
The Management by Policy (of which policy Deployment is a part) is contrasted with Management By Objectives. There is a strong total quality influence (the publisher is a quality management society), and it stresses the important of separating the vital few from the trivial many. While the book refers to the name, hoshin kanri, only in the glossary as the Japanese term, the book is a clear exposition of the approach. A new combination of old and new strategic planning is illustrated.

A book written by consultants that emphasizes planning, also vision (example of North Island Federal Credit Union) and considers hoshin kanri with its emphasis on deployment at two levels and the importance of review. The tools and techniques, including QFD, are covered separately.

Conclusion and Lean Glossary.
A how-to book about lean management, using a made-up case, the fictitious Carjo Manufacturing. It uses the name, Policy Deployment, and presents it in terms of two levels: strategic planning and daily management. Lean approaches such as value stream mapping, systems thinking the theory of constraints, and other chapters are devoted to quality tools. There is not much hoshin kanri in this.


A guide written by an ex-Toyota manager, rather more than a manual it uses an imaginary company and people to illustrate issues associated with the adoption of hoshin kanri (called here strategy deployment). The personalised style may not be to everybody’s taste and there is no index. The emphasis is on visual management (A3), PDCA in a lean environment, and the need to focus, align, and make a quick response.


Appendices: Policy Management Support Tools, Quality Function Deployment

Uses the name Policy Management, presents the stages and the importance of PDCA, catchball, the president’s audit. It is contrasted with MBO, and it includes a case study of Florida Power & Light., as well a comparison of The Budd Co., and Hewlett-Packard. An easy book to read.


An early authoritative Western account of hoshin kanri, which it termed, Hoshin Planning. The work was based on team discussions that included Dow Chemicals, Procter & Gamble, Spectra Incorporated, Hewlett-Packard, and IBM. A model was derived for the integration of Hoshin Planning with TQM: this shows the three distinct areas of daily control, cross functional management, and hoshin planning. While the first maximises an individual’s departmental performance, and the second maximises coordination and cooperation among related functions, hoshin planning maximises focus on strategic targets, from the CEO to line employees. Hoshin Planning is “simply PDCA applied to the planning and execution of a few critical (strategic) organizational objectives.” The report gives advice about implementation for US practice.


A UK book, rather dense and difficult in its presentation; hoshin kanri gets lost in a welter of other (if related) subjects such as total quality, lean, QFD etc. Chapter 10 is really the only one dedicated to hoshin kanri.


Conclusion, Recommended Reading.

Hoshin kanri seen as a way to implement a superior form of lean management. The text covers the approaches and tools used in lean.


Appendices: Various diagrams, Toyota Auto Body Hoshin Plan.

Glossary, Conclusions, Bibliography

Along with the GOAL/QPC report, this is the first English language text; it is presented in a manual style, and strongly influenced by practice a Hewlett-Packard. Reporting on a visit to Japan by GOAL/QPC delegates in 1988 he found it to be the only system common to the companies visited. He used the words, Hoshin Planning. He argues that analogous to Maslow’s hierarchy of needs, the higher-order goals are possible only when lower-order ones have been fulfilled: i.e. strategic goals must be founded on meeting the needs of daily management. “Hoshin planning helps to control the direction of the company by orchestrating change within a company. This system includes tools for continuous improvement, breakthroughs and implementation. The key to hoshin planning is that it brings the total organization into the strategic planning process, both top-down and bottom-up. It ensures that the direction, goals, and objectives of the company are rationally developed, well defined, clearly communicated, monitored, and adapted based on system feedback.”


Frequently asked questions.

First edition was 1998. Authoritative authors well versed in early Japanese work and practice. Good explanations of the basic concepts (unusual observations about the use of reflection reports in reviews). Strategy techniques and quality tools are included. Consideration is given to functional areas such R&D, Product Production units, and Sales.


Appendices: Establishing Mission, Values and Vision, Hoshin Toolbox, Sample Hoshin Plans (excerpts)

Resources for additional information, Glossary

Chapter 13 is available as a standalone paper via GOAL/QPC (dated 2000). The most complete text on hoshin kanri in the health sector. The roles for leadership are made explicit. The reason for hoshin kanri is to achieve breakthroughs for its customers. The planning process involves focus, alignment of the organization on that focus, implement the plan, and review and improve. Healthcare examples are given throughout and the text ends with detailed cases as indicated by chapter heads.

King in the Foreword lists five lessons from experience (1) organization must be clear why it is doing TQM, (2) the hoshin review process is of primary importance, (3) have a time-table, (4) keep focus on one or two key breakthroughs, (5) start hoshin only when employees are adept at daily management.


Notes, Chapter bibliographies

An early book, by a manager who worked in the management services department of Florida Power and Light, one of the first Western companies to use Policy Deployment. It uses FPL as a case (examples of tables) and also use in SPATCO, a petroleum company. The work refers to the roles of an executive-level policy committee to conduct the process, and executive cross-functional committees to oversee performance in the areas of quality, delivery, cost, safety, and morale; the latter provides input to the policy committee and later to the quality committee to draft and check policies. This is how business fundamentals influence policy at the executive level.


Glossary

Written by a consultant as a populist text that uses Policy Deployment ideas to make strategy work. It uses a check-list style of presentation

*Journal Articles and Occasional Papers*
An early account of hoshin kanri (called here Policy Management) at an Indian company, Kirloskar Brothers Ltd., which derived and used (a rather large number of) 13 objectives. Very superficial.

The use of hoshin kanri (called here hoshin management) with activity-based management to reduce costs, in 1994, in the Japanese company, Omron Okayma Ltd. The approach is understood as a bottom-up gradual improvement process (the strategic dimension is ignored).

A Turkish account of a proposed use of combining the balanced scorecard (a performance approach) and hoshin kanri (process approach) at Istanbul Technical University. Uses Akio’s definition and the FAIR model; the scorecard objectives correspond with the vital few of hoshin kanri.

One of the first English language papers. A case study written by a manager of Florida Power & Light about hoshin kanri, called here, Policy Deployment. The perspective is limited and mainly taken from quality rather than strategic management.

A summary of principles from her (1995) book above. Hoshins are understood as annual priorities derived from the needs of a mid-term plan. Detail is given of catchball planning and review, and a number of examples are cited, including Hewlett-Packard. One of the best easy-to-read papers about hoshin kanri.

A review that covers the integration of strategy formulation and TQM. The Akao (1991) definition is used, but the paper only includes a brief note on hoshin kanri, with an emphasis that process matters as well as performance.

A good brief overview of the principles that emphasizes using one hoshin, the importance of catchball, and review.

An exposition of Policy Deployment using FAIR, corresponding to the APDC phases of the Deming cycle.

A good very early review of principles for the health sector, citing a crisis at Methodist Healthcare System as an example of hoshin planning. The importance of a vital few is perhaps lost.
A research article about the tracer methodology used for following the management of hoshins in real time at three Japanese UK subsidiaries.

How hoshin kanri uses teams for top executive audits at Nissan; this is explained theoretically as a high order dynamic capability.

An easy to read overview, illustrating hoshin kanri as an approach for re-inventing the organization, a means of achieving whole-company alignment and focus at an operating level. A common language is achieved and a clear distinction is made between hoshins and kaizen and the point made that strategic direction is a two-way process.

The importance of visibility in communication, a new model for effective strategy. Catchball is described using the Methodist Healthcare System, involving Southwest Texas Methodist Hospital and four others in San Antonio, and improved clarity and focus at Sodexo USA.

A brief paper that emphasizes how matrices and charts feed across organizational levels, while maintaining sight of strategic goals.

The difference here is made between hoshin planning and conventional planning on the use of tools to drive data and participation. The paper refers to Akao (1991) and presents a case study at Our Lady of Lourdes Medical Center, and the Methodist Healthcare System. It refers to the GOAL/QPC TQM wheel, which distinguishes between hoshin management, daily management, and cross-functional management. Catchball and review are explained.

A very brief note on linking hoshin kanri to lean and six sigma thinking; the approach, noted as Policy Deployment, is to cascade and drive strategic goals down to integrate them into daily activities. The importance of a vital few is not brought out.

An article about practice policy Deployment at Rover Group, UK. Understood here as part of kaizen and quality strategy. Indicates how ideas were seen in the early adoption by Western companies.

A recent academic paper based on case studies of three Japanese subsidiaries in Poland. It finds that hoshin kanri is a PDCA method of objective formulation and deployment. There is no explicit mention of a vital few/breakthrough. A link with ISO 9000 is noted.
One of best early visual overviews of how corporate objectives are used and cascaded into annual operations. Hoshin kanri as a structured process, with checks at different levels, is clearly shown. The terms Quality Policy Deployment and Policy Deployment are used. The article was based on three visits by manufacturers to Japan to study total quality control.

Of nine organizations using both hoshin kanri and the BSC, remarkable results are claimed; another ten that used only hoshin planning claimed a lesser beneficial result. Detail is not supplied.

The above four articles constitute a series about the deployment of strategy. These do not go very deep and could be understood as not specifically about strategic deployment in a hoshin kanri sense. There is a mild reference to quality management.

An early account about improvement rather than strategy.

An account by an executive, giving quality management aspects that relate to hoshin kanri.

About the involvement of top management in applying Policy Deployment, using FAIR.

Based on the King (1989) and GOAL/QPC (1990) approach, this covers the implementation of Hoshin Planning at the Delaware County Community College. An outline is given of the strategic planning process.

A case based on the Edward L. French Center of Devereux, a residential psychiatric center.

One the best incorporations of ideas from a spread of literature. It uses the GOAL/QPC (1989) Hoshin Planning process model and adapts it to include preplanning analysis, mission, values, standardisation. A
long list of related components, including quality principles and tools, is also included. The author distinguishes between Western and Japanese approaches, arguing that the former includes strategy as well as hoshin planning processes, but the Japanese is devoted solely to hoshin kanri processes.


Using the name, Policy Deployment, this uses his adaptation of the GOAL/QPC model as a framework to compare the contrasting approaches of Xerox (Management by Results) and Hewlett-Packard (Hoshin Planning).


A magazine article attributing Toyota’s success to hoshin kanri. Quotes are provided by lean consultant, Pascal Dennis, and Toyota. According to a census of US manufacturing plants, 26.9% use strategic or policy deployment; it was 53% for manufacturers that employ over 500 people.


A report of a presentation by consultant, Bob Dean, who pints that strategy should not be confused with deployment, and improvement priorities should be limited to four or six.


An excellent paper giving a Japanese view of TQM in Western firms. Has a number of pages on Management By Policy (Hoshin Kanri), which is effective for strategy that requires a company-wide effort. These describe its nature and explains the system was developed to implement the PDCA cycle for company policies. He explains eight issues for Western practitioners.

Kenyon D. A. (1997), Strategic planning with the hoshin process, *Quality Digest*, 17(5), 55-64.

By an HP manager who gives examples from HP process, include tables.


Hoshin planning has two sides: breakthrough activities and business fundamentals. Management aims to balance these. This is a good case that shows the main elements of the process used by HP.


An introductory explanation of hoshin kanri and its significance for lean manufacturing.


A theoretical exposition of functional management and the role of hoshin kanri.


A Japanese account of the process, when the PDCA cycle for leaders is central.

An explanation of principles and how these were used to develop and implement the NHS North East’s new objectives, goals, initiatives and monitoring metrics framework.

A comprehensive literature review up to this date. The importance of catchball is stressed.

Loftus P. (2006), When lean companies stay fat: as Danaher's experience demonstrates, lean manufacturing is an exacting discipline requiring a comprehensive view of the business, *Chief Executive (U.S.)*, October-November, 6 pps.
An overview of the Danaher business system by an executive at Accenture. Hoshin kanri is the thing that makes its lean working different. Not much detail.

The rise of six sigma’s popularity and adoption in healthcare of lean approaches has seen a renaissance of hoshin kanri. An emphasis on tools and good examples are provided of the X matrix and value stream map. It is important to envision the future (looking for present gaps).

Observes that companies using hoshin kanri still wish to use MBO; The Theory of Inventive Problem Solving (TRIZ) provides a solution to this contradiction, the authors argue.

Hoshin kanri is consistent with thinking in strategy that includes the resource-based view (the dynamic capability it provides however, seems to be internally rather than externally focused), emergent strategy, and agency theory. Strategy formation and implementation phases are more integrated than traditional approaches. The research uses latent semantic analysis.

A limited review to set a research agenda for further research in services.

A concise explanation of the steps for completing a hoshin X-matrix process. The authors offer their own adaptation.

The TPS is grounded in a hoshin kanri planning system made up of five alignments. These are explained as a strategic, horizontal, vertical, process management, and employee development, alignments. The latter three are often handled poorly by US lean practitioners.

Hoshin Planning is considered as one of four planning approaches. There is only a brief note.
A overview to give the flavour of Policy Deployment or Strategy Deployment in cascading corporate objectives to an organizational level.

An outline of the overall process though without examples.

A Japanese author who argues for a more strategic approach. A detailed example from Canon and its use of S7 (the seven strategic tools: environment, product, market, product-market, portfolio, strategic element, resource allocation, analyses) is used to show how strategy formulation and policy (goal and means) might come together.

Pekdemir I., Arslantas C. C., Berber A. and Ulgen A. (2000), *A study on hoshin kanri planning systems applications in companies that have received ISO 9001-9002 certifications from the Turkish Standards Institution*, Istanbul University, School of Business Administration, 92-107.
Provides a broad view of Hoshin Kanri Planning Systems in Turkish companies are ISO 9001-9002 approved. Using a statistical analysis they conclude that a long-term view and forecasting are important to hoshin planning. Rather unclear.

About the successful use of tools at Carson-Tahoe Hospital.

An explanation of Quality Strategy Deployment, a 13 step process based on a combined QFD and hoshin approach at the Manufacturing Engineering Laboratory of City University Hong Kong.

How Hoshin Planning could be used in health; use of Melum and Collett (1995).

A rare reference to Proctor & Gamble’s Objective, Goals, Strategies and Measures (OGSM), a hoshin system. Here it is shown to deploy sustainability-oriented strategy. A balance of the formal and informal is emphasized for integrating sustainability as an organizational way of thinking.

This is an explanation of Policy Deployment for executives. The process is outlined and the barriers to effectiveness listed. He argues that the system brings together all the elements of the internal and external supply chain.

Policy Deployment can be used to implement major changes to working; a case study at Delco Chassis, General Motors.

The testing of Hoshin Kanri by a small team at the Warwick Manufacturing Group, Warwick University. The authors claim the original Japanese concept can be applied without adaptation in a Western service sector organization.

The EFQM was used first to self-evaluate, then it was followed by the application of policy management and policy deployment. This facilitated participation from management and health professionals. Institutional policies were integrated with normal operational planning.

Partly based on the experience of Analog Devices Inc. and Teradyne, this covers the subject well and includes many illustrations and figures. The importance of diagnosing the hoshin kanri system rather than its achievement is also observed.

An overview, but the article is primarily about quality tools and techniques.

Stratton B. (1997), TI has eye on alignment, *Quality Progress*, October, 30-34.
About total quality at Texas Instruments, but notes Policy Deployment as enhancing TI’s ability to focus on what is important.

A discussion between participants about the previous three years of hoshin kanri. The main advantages had been in terms of an enhanced commitment and involvement. See Toeplitz (1998).

The use of Strategic Quality Management (hoshin kanri ideas) in a UK SME.

The creation of a five year quality strategy at Rover Group and its policy deployment.

A case study to show how strategic policy deployment works in a large UK engineering firm.

The use of the Delphi technique for catchball at the Rover Group to develop a quality strategy based on hoshin kanri. Some deficiencies were observed.
An introduction and explanation for a quality management audience.

This is more about deriving a self-assessment framework then having directly anything to do with hoshin kanri. The example is a new product development process at Land Rover.

Hoshin kanri is explained and offered as a practical method for managing knowledge.

Strategy deployment defined as a two-way process that facilitates goals and plans both up and down an organization. Senior management identify priorities to support a vision or mission (true north). The paper explains the basics, stressing A3s and PDCA. There are two deployment cycles a year. Thedacare is one of the most influential lean and hoshin kanri practitioners in Health.

Thomason D. (2005), Getting your ducks in a row or hoshin kanri, *Logistics & Transport Focus*, 7(7), 29-34.
Proposes using hoshin kanri for organizational alignment. A case study of Unipart illustrates how its policy deployment worked.

The story of the hoshin process as it was applied to the orchestra’s organization. This was the first article, for the follow-up, see Symphony Orchestra Institute (2000).

A case study of hoshin kanri at Mack Trucks.

Hoshin kanri at a departmental level to help in the alignment of tasks.

An illustration of the generic model using the APDC cycle to define the main phases of the process.

Using the term, Policy Management, to explain the FAIR strategic management framework for implementing strategy, which was an outcome of ESRC sponsored research.

A position paper explaining a research project.

A research study, using the FAIR framework to examine Hoshin Kanri (called here Policy Deployment) at Xerox (UK), which was primarily a service organization. A major issue was the overloading of the number of vital few programmes.

A research study of practice at Hewlett-Packard showing the relation of business fundamentals to hoshins.

A research paper presenting findings from an ESRC sponsored study of hoshin kanri at Calsonic Exhaust Systems, Nissan Yamato Engineering Company, and NSK Bearings Europe. The importance of company-wide review is paramount, and some of the main issues include changes in personnel, problems with administering periodic review, and cross-functional working in departmental forms of organization.

An exploration of the complimentary uses of the BSC to formulate objectives/measures, and hoshin kanri to deploy objectives/means derived from the BSC. This is discussed in association with strategic management concepts, including purpose statements, business model, core competences and dynamic capabilities.

Hoshin kanri is part of an integrated approach to strategic management, but this requires taking a resource-based view of strategy, which may not be favoured by companies from countries which take a more market-based approach.

The role of top executive audits at Nissan South Africa and their importance to Nissan's hoshin kanri.

Top executive audits and hoshin kanri as higher order dynamic capabilities, following thinking in the resource-based view of strategy.

A description of the hoshin kanri cycle, informed by practice at Florida Power and Light.

This is introduced an integrated model of Hoshin Management and Six Sigma, which was successfully used at Inventee Multimedia & Telecom Corporation in Taiwan, where previously their implementation had faltered.


A description of successful hoshin kanri at a semiconductor manufacturing company based in Taiwan. The authors introduced their own EIDPER (i.e. envision, identity, prioritise, execute, review, stages) model for implementation, which they contrast to the FAIR model.


A paper was originally published in the International Journal of Applied Strategic Management, and the case examples from Proctor & Gamble, Komatsu Ltd., Hewlett-Packard, Rank Xerox Ltd, date from the 1990s. The paper concludes with a 'common roadmap' (based on benchmarking) of nine steps: vision, a hoshin drives change, used for annual strategic planning alongside business planning, identify vital few via catchball, cause-and-effect thinking for implementation programmes, method and scope of deployment, team-based implementation, and monitoring through measurement and review.

**Chapters/Sections in Books**


A review of hoshin kanri as a tool, termed here Policy Deployment, in lean working. Reference is made mainly to Cowley and Domb (1997). It is noted that policy deployment is the PDCA cycle applied at an organizational level (the FAIR model).


The story of the introduction of Hoshin Planning to corporate Hewlett-Packard through its Japanese subsidiary, Yokagawa HP. HP developed its own less formal approach using only three forms (i.e. planning, implementation, and review tables).


A consultant and executive outlines a two part deployment model for a 5 year business strategy on one side, and breakthrough and improvement for customer driven plans, on the other.


A good early account from Ernst and Young Quality Improvement Consulting Group, presenting Policy Deployment as a means for orchestrating continuous improvement and it contrasts the approach with MBO. No cases used.

A classic total quality text, it notes the deployment of top management’s annual goals as first abstracts, then becoming more specific and concrete for practical use, and the importance of priority (following the Pareto principle). Kaizen policy is cross-functional and functional policy is based on this.

A classic total quality text, however it uses a vocabulary not mainstream to hoshin kanri: it use priority (i.e. hoshin) and routine (i.e. daily) management. Policy Management is management that starts with policy. A list is given of priorities to consider for long-term policies and plans.

They outline how the catchball is used by mobile phone company, Information and Communications Mobile, and Thai Carbon Black. The significance here is that Kaplan and Norton suggest hoshin kanri can complement the use of the BSC. The latter used to formulate strategic objectives and the former to deploy them.

There are two particularly relevant parts: Policy Control (Hoshin Kanri) in Japanese Companies, and Internal QC Audit by Top Management. The latter is rated outstanding, and provides a check on policy, and gives a chance for leaders to reflect on how they do things.

A literature review. While appearing in later editions, the substance has remained geneerl unchanged since the first edition of the book.


A book focused on the human perspective at Toyota. It makes the point about other companies using it, that it is necessary to have a facilitating culture (and the basics for participation such as the necessary skills and trust) or hoshin kanri will not work at the floor level: these things provide the foundation.

Explains the phases of Strategic Policy Management and gives examples from Mercy Health Services.
A review of the issues that middle management must address and how to do this.

Policy Management as an application of TQM to strategic management and the importance of cross-functional management, especially for integrating suppliers in the value chain.

A good strategic rather than a total quality view of Hoshin Management. Examples include NEC Shizuoka. Daily work is unified through hoshin management; at the top of the model is the president’s diagnosis (a rare account); hoshin management is opposed to MBO (or immature MBO).

One of first western managers to become directly involved with Toyota and attempts to introduce ideas into western firms, including the GM Fremont plant (NUMMI), this is an insightful account. For example, “Policy management is often confused with policy deployment, a relatively simple prioritization process in which the desires and objectives of senior management (the company) are deployed throughout the organization (the employees). That is a good first step. But policy management Toyota-style was a much more dynamic process, with lower levels of the organization taking part in formulating policy as well as carrying it out. As lean organizations mature policy deployment should evolve into policy management.” (p. 58).

Explains an annual hoshin plan, the planning process, also covers the daily management or business fundamental plan. Hoshin reviews, formats and guidelines, through to implementation plans, and Q&As are considered. Much of the methodology explains comes from internal Hewlett-Packard sources. An excellent account.

An account of the first seven years of using lean working in healthcare, written by two executives from the ThedaCare Center for Healthcare Value. The center had too many programmes and not enough resources to be effective. Hoshin kanri, called here Strategy Deployment, was used to focus on a few key priorities. Use of A3 to link highest level objectives to issues worked out using root cause analysis. The importance of involving senior managers is crucial. An A3 template, and a visual matrix diagram, are included in the appendices.

Whi
errecognising Policy Management, he suggests Managing by policy as an alternative name. The chapter gives an overview and some more general background.

Wikipedia (2013), Hoshin kanri, free online encyclopedia, </en.wikipedia.org/wiki/Hoshin Kanri> accessed August. Understood as a strategic planning/strategic management methodology that uses seven steps. This seems to emphasize top-down strategy, while it is recognised that progress must be reviewed periodically. Important elements such as catchball, PDCA for senior managers, the vital few, annual diagnostic audits, seen relatively neglected. Time to update the encyclopedia.


Selected Conference Papers

Cwiklicki M. (2010), TQM methods applied in the hoshin kanri management system, Business and Management, 6th International Scientific Conference, May, Vinius Gediminas Technical University, Lithuania. A recent review of literature and research conducted in Japanese subsidiaries in Poland. The subsidiaries were sampled to identify a link between different management methods and the occurrence of hoshin kanri; only six sigma had a positive correlation with hoshin kanri.


Hawkins R. M. (1992), policy deployment: avoiding the crisis of distraction, American Society for Quality Control, Quality Congress Transactions, 599-605. An early account of implementation by a Western company of Hoshin Planning at McDonnell Aircraft Company. The need to prioritize and minimise goals, and the need of direct hands-on involvement of the senior executive are noted as some of the main lessons.

Koura K. (1990), Survey and research in Japan concerning policy management, ASQC Quality Congress Transactions, San Francisco, 348-352. Report on research carried out by the policy Management Case Study Research Committee of the Japanese Society for Quality Control. A long definition is given for policy Management, as well as an account of basic thinking, and brief introductions to the flag system of Komatsu and the Goal and Measure Matrix Diagram of Kobayashi Kosei.
A case study of TQC and hoshin kanri started in 1991 at NEC Radio and Electronics.

The paper covers four anonymous case studies of Policy Deployment in four Indian companies. These had won the Deming Prize. Approaches were successful, sometimes used with the BSC and six-sigma. There was no uniform approach and no cultural problems.

Summarises the elements of hoshin kanri and experience at Northern Telecom where the process started with a five year vision.

The importance of Policy Deployment as a means to provide direction to TQM. A good process flowchart and notes. The JUSE quality triangle is also presented.

Seeing the purpose of Policy Deployment to make sure the organization attains its long-term plans, a ten point integrated strategic planning process is explained based on Florida Power and Light in the early 1980s. It takes time to understand its integrated nature.

A case study of Managing for Results at Xerox and while deemed successful he gives some learned lessons.