

Personal Hoshin

My System For Discovering and
Executing What Matters Most

Bob Wallner

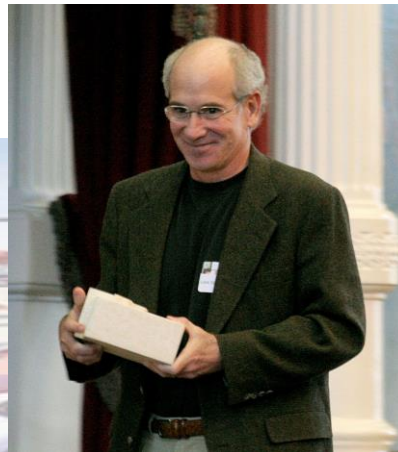


The journey of a thousand miles begins with a single step.



~ Lao Tzu (Philosopher)

It is better to take many small steps in the right direction than one big step in the wrong direction.



~ Louis Sachar (Author)

DISCLOSURE

1. I didn't invent something new
2. System is what works for me
3. Tools change often – System stays the same
4. Simple but NOT easy



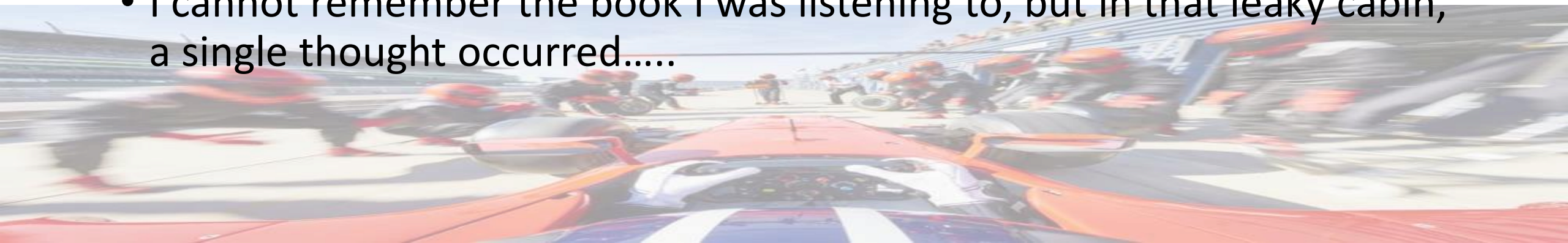
BIRTH OF A PERSONAL HOSHIN STRATEGY

- April 2016 – Leadership changed offered me the opportunity to take my skills elsewhere.
 - After going through 5 steps of grieving, I invented a new one; arrogance!
 - From April 2016 – August 2016 I had many interviews, but few opportunities.
- My severance was to run out the end of August so I asked my wife if I could get away to the White Mountains to hike and think.



SETTING THE STAGE

- Chose a cheap cabin just north side of the National Forest
 - No WiFi or cell service
 - No indoor plumbing or indoor cooking means
 - Cabin leaked when it rained and there was NO SUNSHINE in the immediate forecast!
- By day 3 of the 10 days, I had pre-paid, I was getting tired of hiking in the rain and my mind wasn't any clearer than when I came up.
 - Decided to take a zero day and stay in and listen to audiobooks.
- I cannot remember the book I was listening to, but in that leaky cabin, a single thought occurred.....



THE “AH-HA” THOUGHT

There are 525,600 Minutes Per Year

1000's of minutes learning how to be more efficient, but;

ZERO minutes trying to understand if I'm efficiently doing the right things!

The
AHA!
Moment



Personal Kanban

Tracking my learning

NO

Gave up

Shingo Bronze Certificate

Returned to research

Created a website

ISS Black Belt

“WHY”

Completed Gym

2 Hours per day of Adult Learning

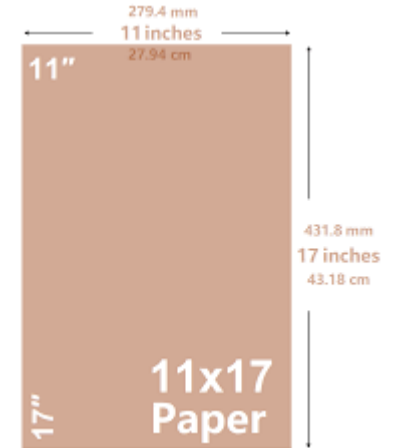
Belt

MY METHOD OF PERSONAL IMPROVEMENT



.... AND ACTION!!!

- Went to the office supply store and did what I normally did when I was stumped at work....purchased lots and lots of post-it notes.



- The next 4 days I converted the empty walls of the cabin to my own personal Obeya!!!!
- APPOLOGIES: I never took pictures of my first days. I understand now the value of that information.

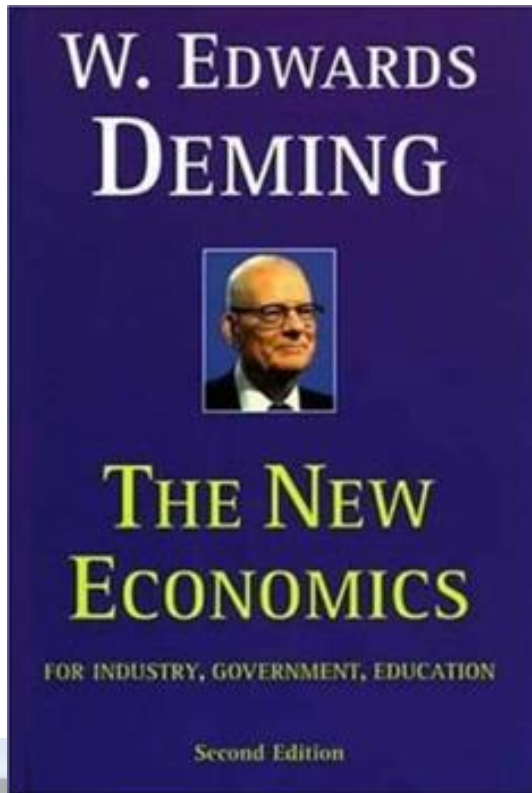


INITIAL PROBLEM STATEMENT

**WHAT DO I NEED TO WORK
ON AND WHY?**

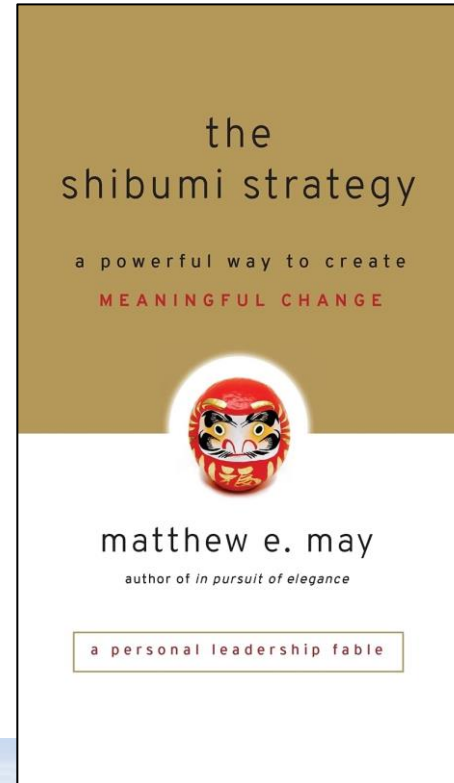


FOUNDATIONS OF AN IDEA



System of Profound Knowledge

1. Knowledge of a System
2. Knowledge of Variation
3. Theory of Knowledge
4. Understanding of Psychology



Reaching Shibumi

(Elegant Simplicity, Effortless Effectiveness, Understated Beauty)

1. Genchi Genbutsu (Observation)
2. Hoshin (Goal Alignment)
3. Kaizen (Continuous Improvement)
4. Hansei (Deep Reflection)

DEVELOPMENT OF MY PERSONAL HOSHIN SYSTEM

Dr. Deming defines a system as:

- “A network of interdependent components that work together to accomplish the aim of the system.”

System must:

1. Have an aim. “Without an aim there is no system”;
2. “Be managed – it will not manage itself”;
3. “Have cooperation between components toward the aim of the organization”.


(New Economics pp. 50-51)



DEVELOPMENT OF MY PERSONAL HOSHIN SYSTEM

Matthew E. May explains to reach a state of Shibumi you must:

1. Understand and align my goals
2. Understand the current state by going to see
3. Reflect deeply on the gap between my goals and the current state
4. Improve using kaizen
5. Start over at #1



(The Shibumi Strategy p.141)

STEP 1 TO MY PERSONAL HOSHIN DEVELOPMENT

1. UNDERSTANDING MY VISION/AIM (THE WHY)



CREATE AN AIM OR VISION STATEMENT



[Our Work](#)

[Local Services](#)

[How You Can Help](#)

[ABOUT US / POLICIES AND POSITIONS](#)

Vision

The vision of the ASPCA is that the United States is a humane community in which all animals are treated with respect and kindness.

Avon Mission, Vision & Values

Avon Mission Statement

Our mission is to improve the lives of women globally. In our core cause areas of Breast Cancer and Violence Against Women, we aim to accelerate progress, accountability and discovery, while also reducing the social stigma that sometimes keeps these issues in the shadows. We take a woman-centric approach on all projects to break traditional barriers and build a better future for women, because we know that the greater the support, the more empowered women feel to take control of their health and safety.

Avon Vision Statement

To be the company that best understands and satisfies the product, service and self-fulfillment needs of women - globally.

THOSE CABIN WALLS - BRAINSTORMING



=

WHAT IS CRITICALLY IMPORTANT TO ME

- ✓ Personal Health
- ✓ Family & Friends Relationship Quality
- ✓ Spiritual Relationship (Religious & Self)
- ✓ Professional Ambitions
- ✓ Financial Stability



MY PERSONAL VISION STATEMENT

To achieve personal and professional **JOY***

**Joy was borrowed from Richard Sheridan and his work at Menlo Innovations*

My definition of "Joy" is living a purposeful life that enriches both myself and those whom I touch.



STEP 2 TO MY PERSONAL HOSHIN DEVELOPMENT

2. CREATE MY LONG-TERM GOALS (5 YEAR)



MY ORIGINAL STRATEGIC A3 DRAFT

WHERE DO I WANT TO BE IN 5 YEARS?

HOW WILL I DO IT?

WHERE AM I NOW?

HOW WILL I MEASURE IT?



Last Revised: 1/1/2021

True North Strategy Deployment Plan - 2019-2023

Next Annual Update:
Q4 2021

Vision: To achieve personal and professional JOY through physical, financial, professional, spiritual, and personal health.

Performance, Gaps, and Targets							Future Action Plan				
Metric	2018 (Baseline)	2019 Actual	2020 Actual	2021 Actual	2022 Actual	2023 Target	Year	Goal (Lagging)	Success Metric	How (Leading)	
Physical - Weight Pounds	2018 Base	2019 YE Data	2020 YE Data			2023 YE Target	Physical	2018 (Base)	2018 Base	Body Weight	A Whole Food
Financial - Debt to Income %	2018 Base	2019 YE Data	2020 YE Data			2023 YE Target		2019	2018 -X	Body Weight	B Cardio
Financial - Retirement	2018 Base	2019 YE Data	2020 YE Data			2023 YE Target		2020	2019 -X	Body Weight	C Sleep
Professional - Side Hustle Time	2018 Base	2019 YE Data	2020 YE Data			2023 YE Target		2021	2020 -X	Body Weight	D Weight Training
Spiritual - Daily Goal	2018 Base	2019 YE Data	2020 YE Data			2023 YE Target		2022	2021 -X	Body Weight	E
Personal - Family Relations	2018 Base	2019 YE Data	2020 YE Data			2023 YE Target		2023	2022 Maintain	Body Weight	F
2019 Baseline Conditions							Financial	2018 (Base)	2018 Base	Debt:Income	A Annual raises of X%
12/31/18 Current Status								2019	2018 -X	Debt:Income	B Monthly Budgeting
- Jen took a job as a Instructional Assistant - Drop in income from \$X / week to \$Y /week.								2020	2019 -X	Debt:Income	C Leave CC/DC home
- Reduced Medical Insurance = \$X annual ~ \$Y/week								2021	2020 -X	Debt:Income	D Plan spending week
- Reduced Weekly "Daycare Expenses" of approximately \$X annual to \$Y /week.								2022	2021 -X	Debt:Income	E Side Hustle
- Currently we have don't plan regular review of bills; therefore don't know our cash flow								2023	2022 -X	Debt:Income	F
- 2019 we will have one last major tax burdon based on 11 months of daycare. (est \$X)							Financial	2018 (Base)	2018 Base	Retirement	A Aggressive return option
- Final year of Bob's child support which will put \$X annual ~ \$Y/week in pocket								2019	2018 +X	Retirement	B Maximize company contribution
- Grandkids and Sam have moved out / Taylor has moved out - should anticipate a reduction in utilities as a result								2020	2019 +X	Retirement	C Increase contribution 1/2% annually
- Unsure of annual bonus amount cannot account for as income.								2021	2020 +X	Retirement	D Jen get retirement plan/pension
- \$100 per week on gas is a killer - no current plans to look for alternatives.								2022	2021 +X	Retirement	E Jen get 50% Side Hustle
- Masters scheduled to be complete in March-2019 (1 class + capstone remain)								2023	2022 +X	Retirement	F
Rationale for 2023 Plans							Professional	2018 (Base)	X%	Side Hustle Time	A Finish Degree
- Eliminate Tax Burdon by Jen not having tax removed from check (Approx \$X annually)								2019	X%	Side Hustle Time	B Publish Book
- Child Support removed save (\$X annually)								2020	X% + 5%	Side Hustle Time	C On-Going Training (Busman Holiday)
- Medical Insurance Expenses costs reduced (\$X annually)								2021	X% + 10%	Side Hustle Time	D Create Website
- Kids room returning to office - Book/side hustle becomes a reality								2022	X% + 25%	Side Hustle Time	E Develop Plan
- Masters complete								2023	100%	Side Hustle Time	F Just Do It
Follow-Up / Unresolved Issues							Spiritual	2018 (Base)	2018 Base	Goal Attainment	A Daily Hansei
Elimintate storage unit								2019	2018 +X	Goal Attainment	B Daily Meditation
Proactive Budgeting - Create & Maintain								2020	2019 +X	Goal Attainment	C Daily Prayer
Expense Reduction opportunities (Truck Loan, Cable plan, Cell plan)								2021	2020 +X	Goal Attainment	D Weekly Church
								2022	2021 +X	Goal Attainment	E Measure It
								2023	2022 +X	Goal Attainment	F Make It Habit
							Personal	2018 (Base)	2018 Base	Family Relations	A Dates With Jen
								2019	2018 +X	Family Relations	B Visits with Casey
								2020	2019 +X	Family Relations	C Visits with Leah
								2021	2020 +X	Family Relations	D Visits with Mom & Dad
								2022	2021 +X	Family Relations	E Overnights with Grandkids
								2023	2022 +X	Family Relations	F

VISION

CURRENT STATE

STRATEGIC GOALS

STEP 3 TO MY PERSONAL HOSHIN DEVELOPMENT

3. CREATE A 1-YEAR TACTICAL A3 (THE HOW)



ORIGINAL TACTICAL A3 DRAFT

WHERE DO I WANT TO BE THIS YEAR?

WHY AM I PRIORITIZING?

WHAT IS MY CURRENT STATE?

HOW WILL I DO IT?



Last Revised: 1/1/2021

Strategy Deployment Plan - Fiscal Year 2021

Quarterly Update: Q1 2021

Vision: To achieve personal and professional JOY through physical, financial, professional, spiritual, and personal health.

Performance, Gaps, and Targets

Metric	2020 Base	2021 Target	2021 Actual	Δ -/Miss +/Hit
Physical - Weight Pounds	2020 YE Data	2020 +X		
Financial - Debt to Income %	2020 YE Data	2020 -X		
Financial - Retirement	2020 YE Data	2020 +X		
Professional - Side Hustle Time	2020 YE Data	X% + 10%		
Spiritual - Daily Goal Attainment	2020 YE Data	2020 +X		
Personal - Family Relations	2020 YE Data	2020 +X		

Current Business Conditions

12/31/20 Current Status

Positive Items	Negative Items
- I have a good income	- Health issues (Hearing, Eyes, Hip, Weight)
- I have been fairly successful as a BU Manager	- Shots aren't helping hip
- Getting 3% raise 1st of year	- Stressful Job looking for change
- Jen and I have jobs through Covid	- Covid making life hard
- Jen Insurance much better & cheaper	- Difficult to be social
- Leah Child Support complete	- Not a lot to look forward to right now

Rationale for 2021 Plans

2020 was a rough year for all aspects of my life except financial. I turn 50 in May and my health is in the worst shape of my life. I weigh more than I have my whole life. I have severe hip arthritis and I feel blood pressure meds are in my future. For 10 months I stopped doing my daily hansei and I have slipped in all areas back to pre-2019 levels. I will have some career decisions coming up in 2021. Specifically, how to address wanting to step down as BU Manager of my division and what the fallout could be.

For 2021, the driving force must be my health even if it means short term sacrificing other goals on this list. If I want to be able to improve all areas of my life I have to start with my physical well being.

Follow-Up / Un-resolved Issues

- 1) General Physical scheduled for 1/4/21
- 2) Hip Surgery scheduled for 1/4/21
- 3) Career decision discussion with VP required by 1/5/21

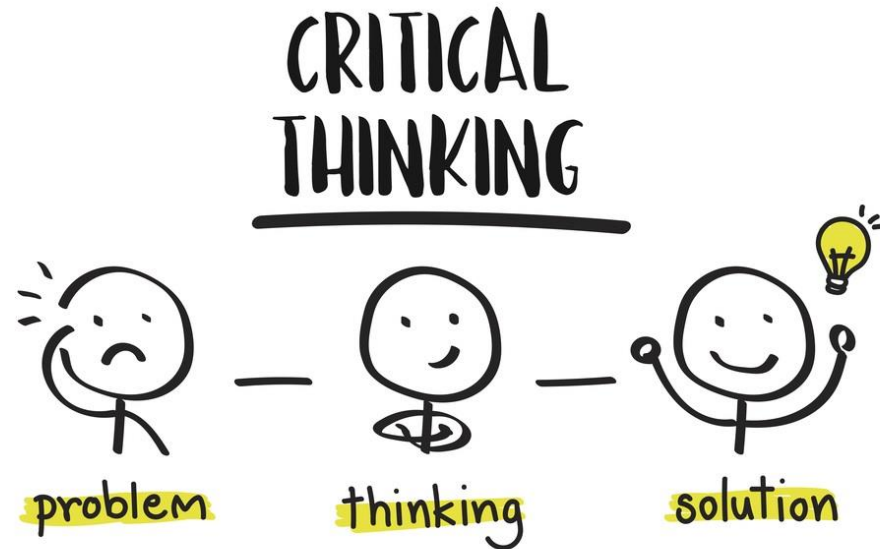
2021 Tactical Plan

Goal	Leading Indicators	Success Metric	Strategy
1 Weight Loss X Pounds	<20g Carbs	7x Week	A Plan Meals / Pack Lunches / Shop Healthy
	Cardio Days	6x Week	B M-F Gym 2 hrs
	Weight Lifting	5x Week	C Leave Debit Card Home
	Sleep	6+ hr/day	D Sleep by 9:00
2 Debt to Income % 2020 -X	Leave CC Home	7x Week	A Leave CC Home
	Track CC Purch Budget	\$0 CC Spend	B Track Spending for Budget
		1x Month	C Plan Monthly Spending D 50% Bonus to go toward Debt
3 Retirement >= 2020 +X	Maximize Contribution	X%	E Direct transfer from paycheck to 401K
	Company Match	Y%	F 50% Bonus to go into 401K
6 Side Hustle X% + 10%	Write Book	Draft	A Write Weekly (2 Hours)
	Public Speak	2x Year	B Lean Conferences
	Create VA resources	Created	C Create 3 Unique Resources
	Social Media	Presence	D Daily LinkedIn & Twitter
	Continuous Education	Daily Learning	E 2 hrs per day
7 Goal Attainment 2020 +X	Daily Hansei	Daily	A Set time in office end of day
	Daily Kaizen	Daily	B Decide tomorrows kaizen
	Daily Meditation	Daily	C After Gym
	Daily Prayer	Daily	D Before Gym
	Church/Rosary	Weekly	E Sunday minimum
	Read Bible	Annually	F During Lent
8 Strong Family Relations 100%	Date Nights	2/Month	A Planned Dates
	Visit Casey	1/Month	B Schedule time
	Visit Leah	1/Month	C Schedule time
	Lucas/Ryder	2/Overnite/Mo	D 1 Sam Weekend/1 Casey Weekend
	Visit Mom & Dad	1/Week	E Weekly time

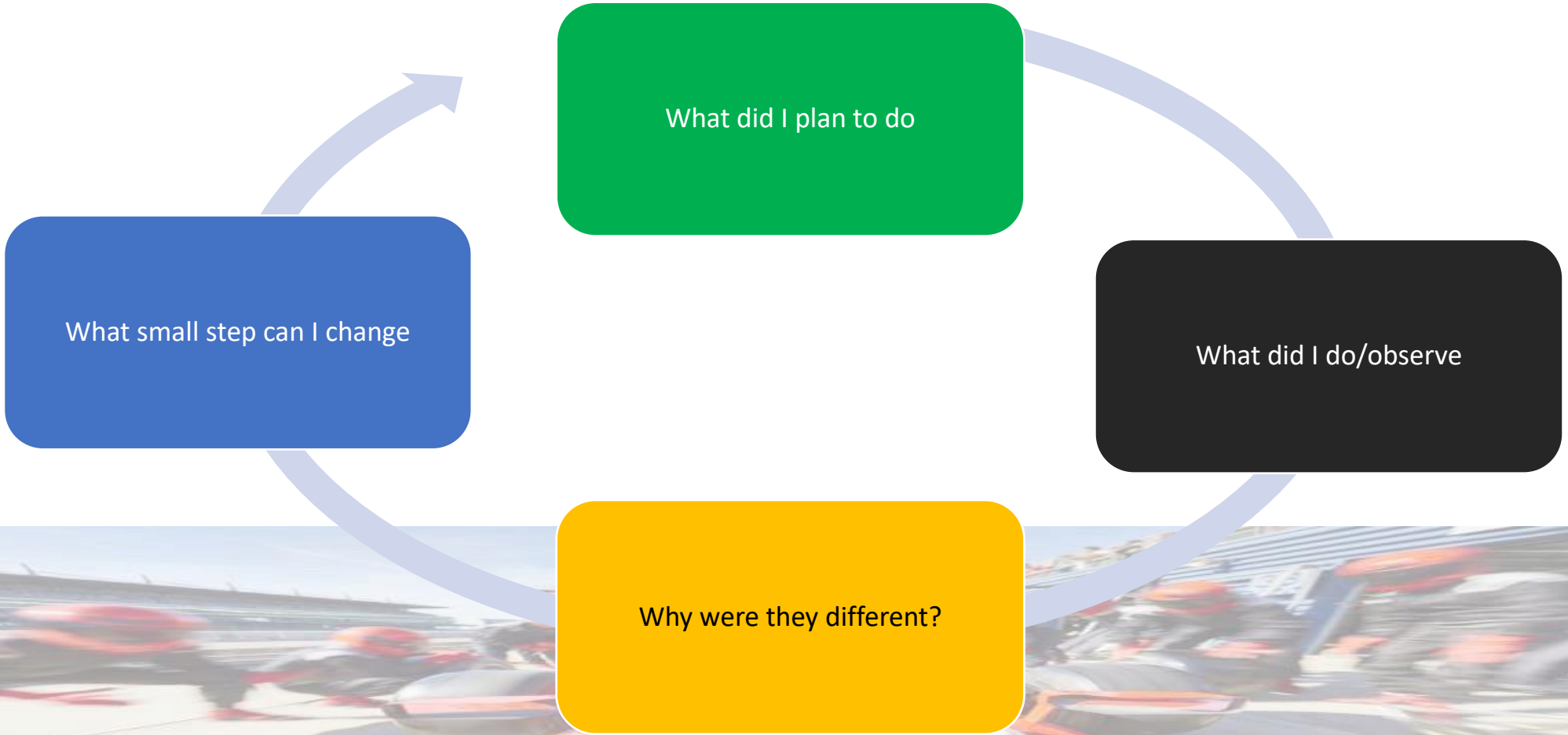
CURRENT STATE
TACTICAL HOW WILL ACHIEVE

STEP 4 TO MY PERSONAL HOSHIN DEVELOPMENT

4. CREATE A KATA OF DAILY REFLECTION (HANSEI)



ESTABLISH A DAILY KATA OF HANSEI / REFLECTION



MAKE TIME FOR YOUR HANSEI

May Monday 31

DAILY RITUAL

<input type="checkbox"/> Body	<input type="checkbox"/> Finance:	<input type="checkbox"/> Professional:
<input type="checkbox"/> Spiritual:	<input type="checkbox"/> Personal:	<input type="checkbox"/> Other:

TODAY

Goal	Hoshin (Planning)	Genchi Gembutsu (Outcome)
Body		
Financial		
Professional		
Spiritual		
Relationship		
Other		
Other		

Root Cause - <u>Hansei</u>	Change - Kaizen	
	What	When

REFLECTION

DAILY RITUAL

<ul style="list-style-type: none"> <input type="checkbox"/> Body: Gym <input type="checkbox"/> Body: Weigh-In 	<ul style="list-style-type: none"> <input type="checkbox"/> Finance: Credit Card Home <input type="checkbox"/> Finance: Debit Card Home
<ul style="list-style-type: none"> <input type="checkbox"/> Professional: 2 Hours Training <input type="checkbox"/> Professional: Write 15 Minutes 	<ul style="list-style-type: none"> <input type="checkbox"/> Spiritual: Hansei <input type="checkbox"/> Spiritual: Prayer <input type="checkbox"/> Spiritual: Meditate
<ul style="list-style-type: none"> <input type="checkbox"/> Relationship: Talk with Mom & Dad <input type="checkbox"/> Relationship: Dinner with Jen 	



TODAY'S STRATEGIES

Category	Hoshin kanri (goal alignment)	Genchi gembutsu (outcome)	Hansei (gaps)	<u>Kaizen</u> (changes)
HEALTH	< 1800 Calories			
FINANCE	\$0 Spend			
PROFESSIONAL	Complete 1st Draft of Personal Hoshin Presentation			
SPIRITUAL	Massage Chair 15 Min			
RELATIONSHIP	Home by 6:00			
Work	Kaizen team capture current state of project			

REFLECTION

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STEP 5 TO MY PERSONAL HOSHIN DEVELOPMENT

5. TRACKING PERFORMANCE TO TARGET

A. ADJUST ACTIONS AS NEEDED (KAIZEN)

改善

Kai = Change

Zen = Good



TRACK LEADING INDICATORS - DAILY

HEALTH ACTIVITIES																																	
Leading Indicator Tactics	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	Sa	Su	M	Tu	W	Th	F	S	Comments / Concerns	
A) < 1800 Cal (Daily)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
B) <20 Net Carb (Daily)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
C) Gym (5x Week)	Y	Y			Y	Y	Y	Y	Y			Y	Y	Y	Y	Y			Y	Y	Y	Y	Y			Y	Y	Y	Y	Y	Y	22	
E) Blood Press Check (Daily)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
F) Sleep Score 95+ (Daily)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31

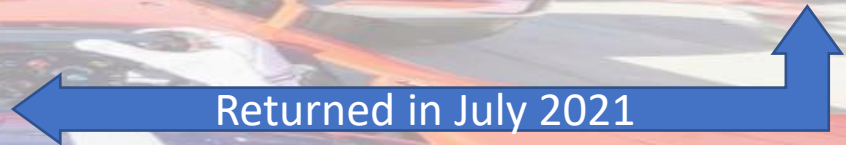
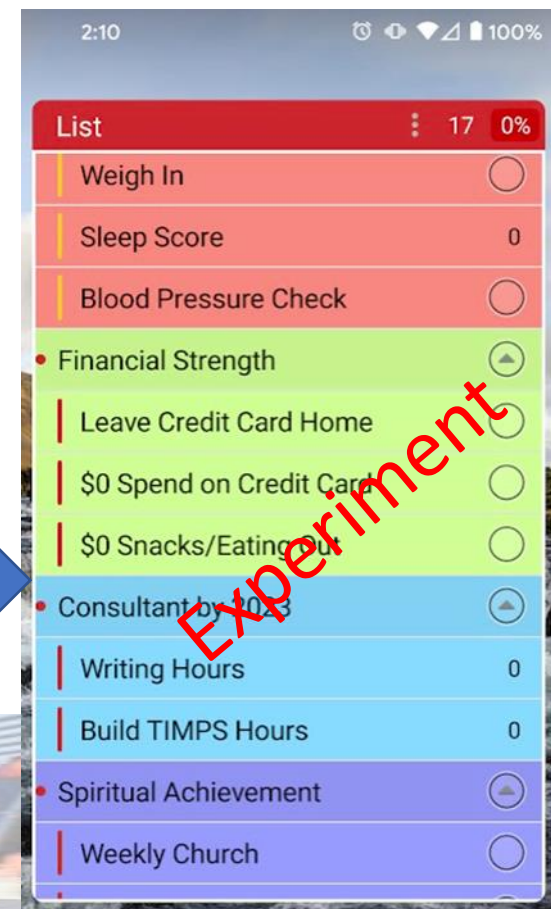
FINAINCIAL ACTIVITIES																																	
Leading Indicator Tactics	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Comments / Concerns	
A) Leave CC Home	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
B) \$0 spend on CC	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
C) \$0 Snacks/Eating Out	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
D) Budget (Monthly)																																	1

PROFESSIONAL ACTIVITIES																																	
Leading Indicator Tactics	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Comments / Concerns	
A) Daily Education Hours (2Hr)	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	62
C) Weekly Writing (5 Hrs)				5							5							5							5								20
F) Build TIMPS (2 Hrs)				2							2							2							2								8

SPIRITUAL ACTIVITIES																																	
Leading Indicator Tactics	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Comments / Concerns	
A) Daily Hansei	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
B) Daily Kaizen	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
C) Daily Meditation	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
D) Daily Prayer	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31
E) Weekly Church				Y							Y							Y							Y								4

FAMILY ACTIVITIES																																
Leading Indicator Tactics	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Comments / Concerns
A) Dates with Jen															Y																Y	2
B) Dinner with Casey																															Y	1
C) Dinner with Leah																															Y	1
D) Overnight Lucas & Ryder														Y																Y	2	
E) Visit Mom & Dad				Y							Y								Y						Y						4	
F) Call Mom & Dad	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	31

1/1/2019 - 4/30/2021



TRACK LAGGING INDICATORS - MONTHLY

HEALTH GOALS		Last Updated: 6/30/2021											
		Timeline: 2021											
Leading Indicator Tactics		J	F	M	A	M	J	J	A	S	O	N	D
A)	< 1800 Cal												
	Target Days	31	28	31	30	31	30	31	31	30	31	30	31
	Days ate <1800 Calories	5	6	12	26	30	30						
B)	<20G Net Carbs												
	Target Days	31	28	31	30	31	30	31	31	30	31	30	31
	Days ate <20G Carbs	5	6	8	12	19	14						
C)	Gym (5x Week)												
	Target Days	22	20	22	21	22	21	22	22	21	22	21	22
	Days Did Cardio	4	6	9	18	17	15						
E)	Blood Pressure Check												
	Target Days	31	28	31	30	31	30	31	31	30	31	30	31
	Days Checked	4	2	7	10	21	26						
F)	Sleep Score>95 Hrs Per Night												
	Target Days	31	28	31	30	31	30	31	31	30	31	30	31
	Days with 6 or more hours sleep	21	23	27	28	29	27						
Lagging Indicators		J	F	M	A	M	J	J	A	S	O	N	D
1)	Month End Weight (Pounds)												
	Plan												
	Actual												

LEGEND: Green = Achieved - Red = Did Not Achieve - Black = No Data

SPIRITUAL GOALS		Timeline: 2021											
		Timeline: 2021											
Leading Indicator Tactics		J	F	M	A	M	J	J	A	S	O	N	D
A)	Daily Hansei												
	Target Days	31	29	31	30	31	30	31	31	30	31	30	31
	Actual Days	16	16	18	30	30	30						
B)	Daily Kaizen												
	Target Days	31	29	31	30	31	30	31	31	30	31	30	31
	Actual Days	15	16	16	30	17	30						
C)	Daily Meditation												
	Target Days	31	29	31	30	31	30	31	31	30	31	30	31
	Actual Days	2	6	13	30	31	30						
D)	Daily Prayer												
	Target Days	31	29	31	30	31	30	31	31	30	31	30	31
	Actual Days	17	16	25	30	31	30						
E)	Weekly Church												
	Target Days	5	4	4	4	5	4	4	5	4	5	4	4
	Actual Days	0	2	4	4	5	4						
E)	Listen to Bible (Lent)												
	Target Hours	0	18.5	70.25									
	Actual Hours Listened To	0	26.4	75.3									
Lagging Indicators		J	F	M	A	M	J	J	A	S	O	N	D
1)	Lagging Indicator Score												
	Plan	129	138.5	198.25	124	129	124	128	129	124	129	124	128
	Actual	50	82.4	151.3	124	114	124	0	0	0	0	0	0

MY GENERAL RESULTS

1. Clear vision of what I want/need to work on
2. Understanding why I did/did not achieve goals
3. Easier decision making
4. Ability to know if I'm moving the needle toward my goals
5. Knowledge of what I need to do to meet my goals



FAILURES BY NOT FOLLOWING MY HOSHIN

2/2020 – 4/2021 – Accepted a position within my plant as a Business Unit General Manager

My gut was no... *I hated my time as a production supervisor, I knew short-term results were expected...but divisional P&L responsibility!!*

- + Financially – Exceeded my 5-year plan
- + Professionally – Great learning experience
- Physical health – required extreme hours – no time for gym & ate out a lot I put on almost 70 pounds and developed health issues
- Relationships – Exhausted, stopped going out with wife and family / lost ground on relationships with my children and grandchildren
- Spiritually – stopped investing in myself



SUCCESS FROM FOLLOWING MY HOSHIN

5/2022 I was approached by a former schoolmate from my Master's Program about going to work for Callaway Golf.

My gut was no...*Boss half my age, didn't like title, fear of not working for my mentor first time in 11 years & fear of telling my mentor I was going to leave.*

- + Health – 2 hours a day less commute meant more time at gym
- + Relationships – Less commute = more time with family
- + Professional – allow me to mentor young engineers and develop Strategic Improvement as I see it, getting out of my mentor's shadow
- + Spirituality – able to meditate and reflect daily.
- + Financially – Lateral move, but with my commute ½ distance + current gas prices – major win.

FAQ: TIME INVESTMENT

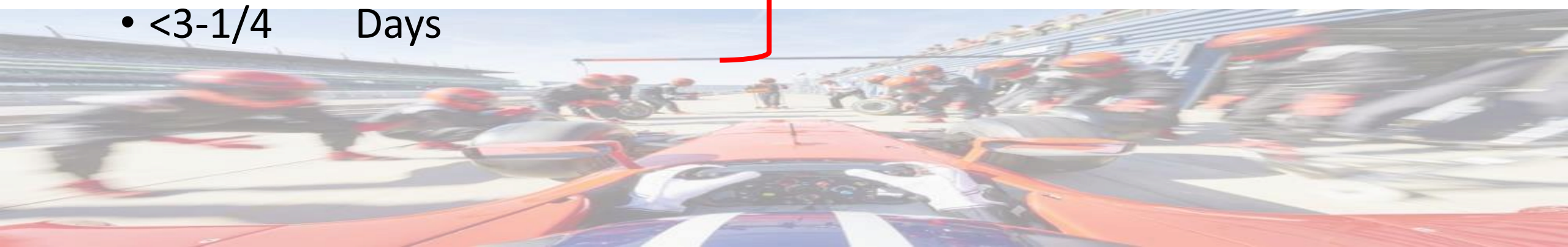
- 10 minutes Daily Hansei (3630 Minutes Annually)
- 15 minutes Weekly Hoshin Review & Planning (780 Minutes Annually)
- 4 hours Annual Hoshin Review & Planning (240 Minutes Annually)

- 4650 Minutes per year

- 77-1/2 Hours

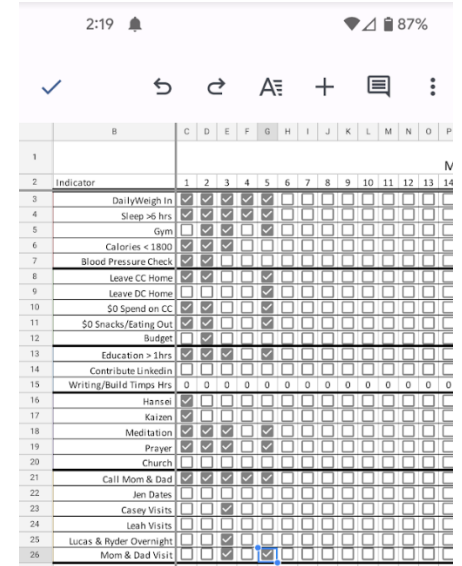
- <3-1/4 Days

<1% of my available time

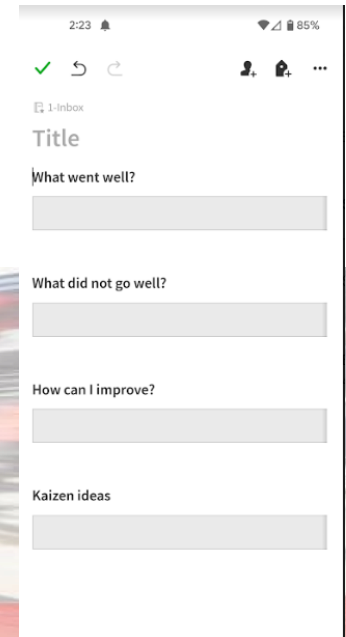


FAQ: TOOLS RECOMMENDED

1. Pencil & 11x17 Paper
2. Knowledge of PDCA
3. Spreadsheet that you can access from smartphone
4. Notebook or reflection template
5. Dedicated Time
6. Accountability Partner - Helpful



	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1															
2	Indicator	1	2	3	4	5	6	7	8	9	10	11	12	13	14
3	Daily Weigh In	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Sleep >6 hrs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Gym	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Calories < 1800	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Blood Pressure Check	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Leave CC Home	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	Leave DC Home	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	\$0 Spend on CC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11	\$0 Snacks/Eating Out	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12	Budget	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
13	Education > 3hrs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
14	Contribute LinkedIn	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
15	Writing/Bull Times Hrs	0	0	0	0	0	0	0	0	0	0	0	0	0	0
16	Hansei	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
17	Kaizen	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
18	Meditation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
19	Prayer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
20	Church	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
21	Call Mom & Dad	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
22	Jen Dates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
23	Casey Visits	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
24	Leah Visits	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
25	Lucas & Ryder Overnight	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
26	Mom & Dad Visit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>



2:23 85%

1-inbox

Title

What went well?

What did not go well?

How can I improve?

Kaizen ideas



FAQ: HELPFUL RESOURCES

- Books

- Me, Inc How to Master the Business of Being You ~ Scott Ventrella
- Getting the Right Things Done ~ Pascal Dennis
- New Economics ~ W. Edwards Deming
- Shibumi Strategy ~ Matthew E. May
- Personal Kanban ~ Jim Benson & Tonianne DeMaria Barry



FINAL OPINIONS / LESSONS LEARNED

- Some people do not need a systemic approach to knowing their hoshin...I did!
- Implementing this in my personal life has given me confidence implementing hoshin planning in the company I work for.
- Ignoring leading indicators is not a strategy – it's a wish.
- Not looking at the impact on all areas that are important to you, may drive negative consequences.



Bob Wallner



I've spent 27-years working exclusively in manufacturing throughout New England. From 1994 to 2006 I was working in Supply-Chain and Operations Management before I found my true calling in Continuous Improvement. Since 2006 I have found myself practicing Lean, Six Sigma, and Theory of Constraints. From 2010 to 2022 I worked in the aerospace industry in Southern New Hampshire. As of May of 2022, I have had the opportunity to lead the Continuous Improvement efforts of Callaway Golf Ball Organization in Massachusetts.

I hold a Bachelor's in Business Administration from Westfield State University and a Master's in Lean Manufacturing from Kettering University as well as an SME Lean Bronze Certification and a Six Sigma Black Belt.

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Thank You!

Questions?

