Why Aren't We Doing Hoshin Kanri at Our HE Institutions?

Lean HE Global Conference
October 20-22, 2021
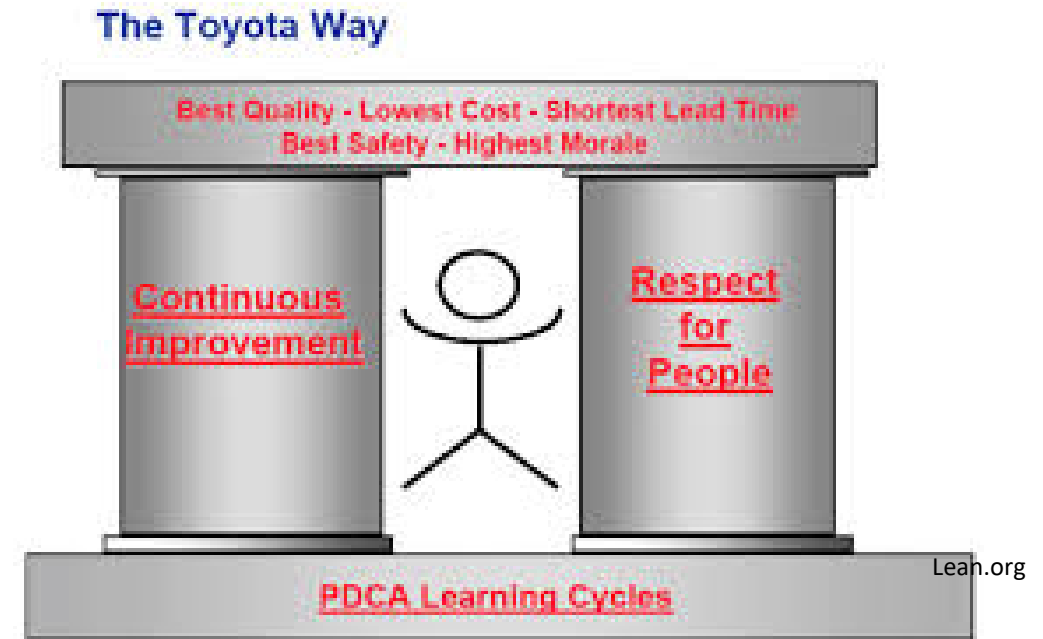University of Strathclyde (Virtual Host)

Bill Balzer

Bowling Green State University

Leanhighereducation.com

Opportunities for the Broad Application of Lean Principles and Practices in HE

- Rapid Improvement Event (Kaizen)

- 5S

- Daily Lean, 3C, Stand Ups, "Just Do It"

- Lean Meetings

- 3P (Production, Preparation, Process)

- Strategic Problem Solving, A3, PDCA

- Total Productive Maintenance

- **Strategic Planning Deployment (and control): Hoshin Kanri**

The Toyota Way

Best Quality - Lowest Cost - Shortest Lead Time
Best Safety - Highest Morale

Continuous Improvement

Respect for People

PDCA Learning Cycles

Lean.org

QUIZ (self graded):

Name three of your institution's strategic priorities

BONUS:

For one strategic priority, list one or more targets that you review weekly to confirm your alignment and direct contribution to the success of the strategic plan

BGSU®

Why Strategic Planning Deployment is Needed

- 66% - 75% of large organizations struggle with execution
- 55% of middle managers can't name one of their company's top five priorities
- 50% of C-suite cannot connect the dots between strategic priorities, … and only 16% for frontline supervisors and team leaders

Sull, Homkes, & Sull (2015). Why strategy execution unravels – And what to do about it. Harvard Business Review, cited by LEI President Josh Howell 7/13/21

Common Points of Failure in Strategy Deployment

- Vague or subjective goals that managers are mysteriously expected to know
  - Result: Manage in line with their own interpretations, own unit goals, or personal ambitions
- Strong vertical/hierarchical organization with no cross-unit process ownership
  - Result: No understanding of each other's needs, creates blame culture
- Limited communication and employee engagement
  - Result: Employees don't know how their jobs contribute to institutional success
- Post-planning exhaustion
  - Result: Limited accountability for implementation

Hutchins (2008)

Katenasser.com

BGSU®

RIE Failure: Downstream Effects Due to Failure in Strategy Deployment?

- Albliwi et al.'s (2014) systematic literature review documented a number of critical failure factors of Lean Six Sigma, including:
  - **Weak link** between the continuous improvement projects and the strategic objectives of the organization
  - **Misalignment** between the goal of the RIE and the goals of the organization (and beneficiary)

My Earnest Request: Shouldn't LHE Practitioners Do More?

- Is our LHE work supporting strategy deployment?
  - Do the LHE activities your office conducts align with your institution's strategic priorities?
  - Do our Daily Lean Stand Ups, Lean meetings, Structured Problem Solving, etc. incorporate progress on activities that align with our institution's strategic priorities?
  - Are the Rapid Improvement Events we facilitate for other areas aligned with our institution's strategic priorities?
- Isn't strategy deployment high level PDCA?
- Isn't strategy deployment (Hoshin Kanri) part of a Lean transformation?

Learning Goals

- What is Hoshin Kanri
- The Need for Hoshin Kanri in Higher Education
- State of Practice of Hoshin Kanri in Higher Education
- How LHE Practitioners Can Promote and Support Hoshin Kanri in Higher Education

"What starts with the loud voice of the CEO at the top becomes a faint whisper by the time it reaches the front lines of the organization where value of whatever description is created and where improvement becomes real."

Womack (2018)

Set Aside (for Today!): Strategy **Development** in HE

- **Strategy is creating competitive advantage within an industry**

- Many HE strategic plans are similar (e.g., Improve undergraduate student success, retention and degree completion) and fail to articulate a competitive advantage

- **Lean tools and activities can support HE strategy development!**

Strategic Competitive Advantage for a HE institution:

Reduce the time from "student application to admission decision" from two months to 24 hours

- shorter cycle time than competitors will increase our market share and grow enrollment

Learning Goal #1

What is Hoshin Kanri

Hoshin Kanri: Strategic Planning Deployment

- **Hoshin Kanri is the translation of a high-level strategic plan into sustainable results at all levels of the institution**

- Four components (and many definitions!)
  - Ho: Direction   Shin: Focus
  - Kan: Alignment   Ri: Reason

- Together
  - Hoshin: "direction" "compass needle"
  - Kanri: "management/administration" "control"

方針管理

hoshin
Direction

kanri
management, control

North Star: "A Ship in the Storm Going in the Right Direction" (Dennis, 2021)

Hoshin Kanri: Engaging People in Strategy Deployment

X Matrix: One-page visual representation of priority alignments, metrics, and accountabilities

Catchball: Alignment by tossing ideas back and forth at each level, asking what can be done to achieve strategy, where there might be problems, and what commitments are needed to address problems

A3/PDCA: Scientific process applied to determine cause and conduct experiments to close the gap between standards and what is occurring

30/60/90: Plan that lays out clear courses of action at every level to ensure activities align with strategy

Kanban Board: Track progress against standards established by strategy deployment; deviations from an expected result in action plans are problems to be solved

Respect for People: Capitalize on vast knowledge of employees at all levels; provide general direction but allow employee/unit latitude to formulate local plans ("implementation to point of impact on the beneficiary")
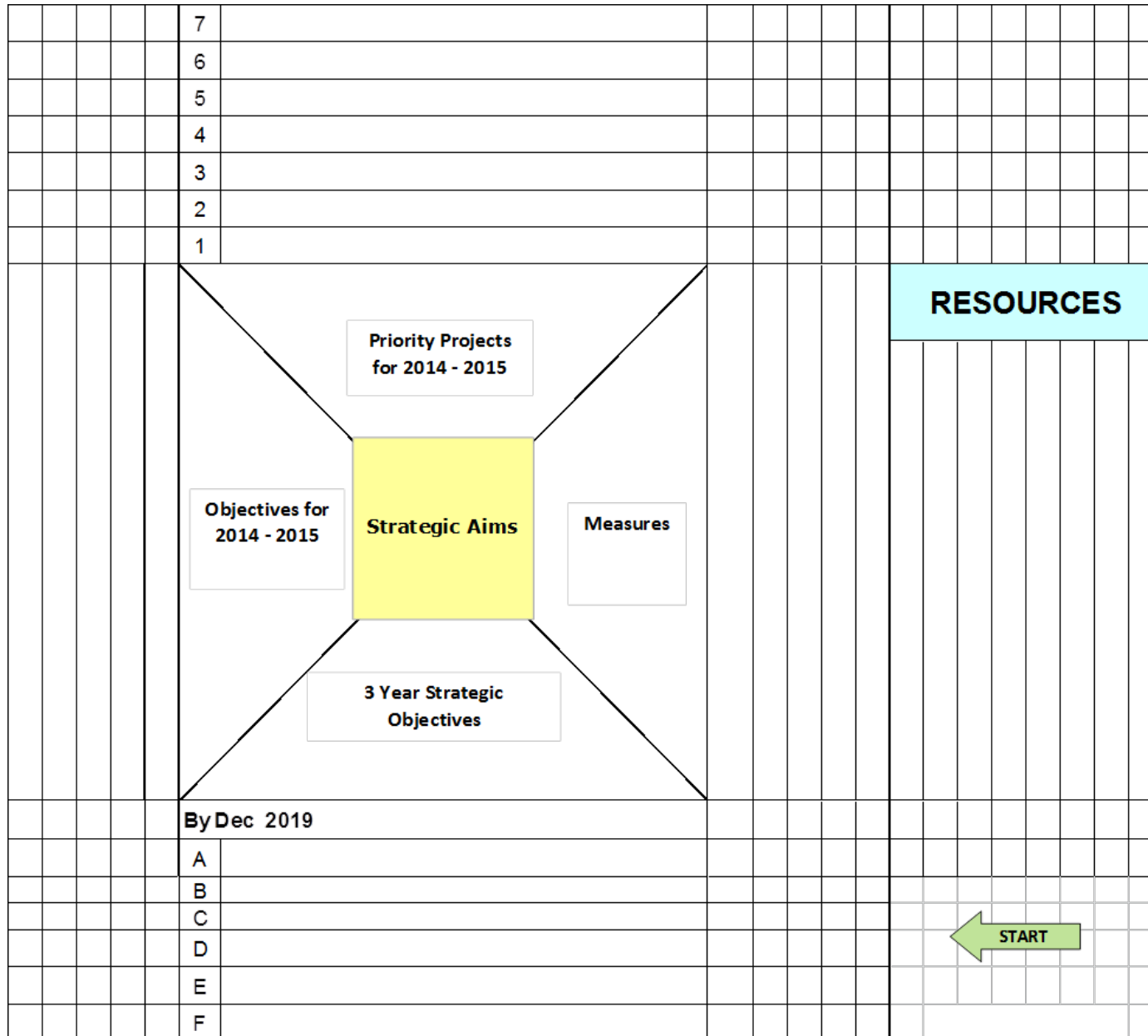
You: What is an X Matrix?

Me: A single-page visual strategy deployment

Richards and Savage (2015)
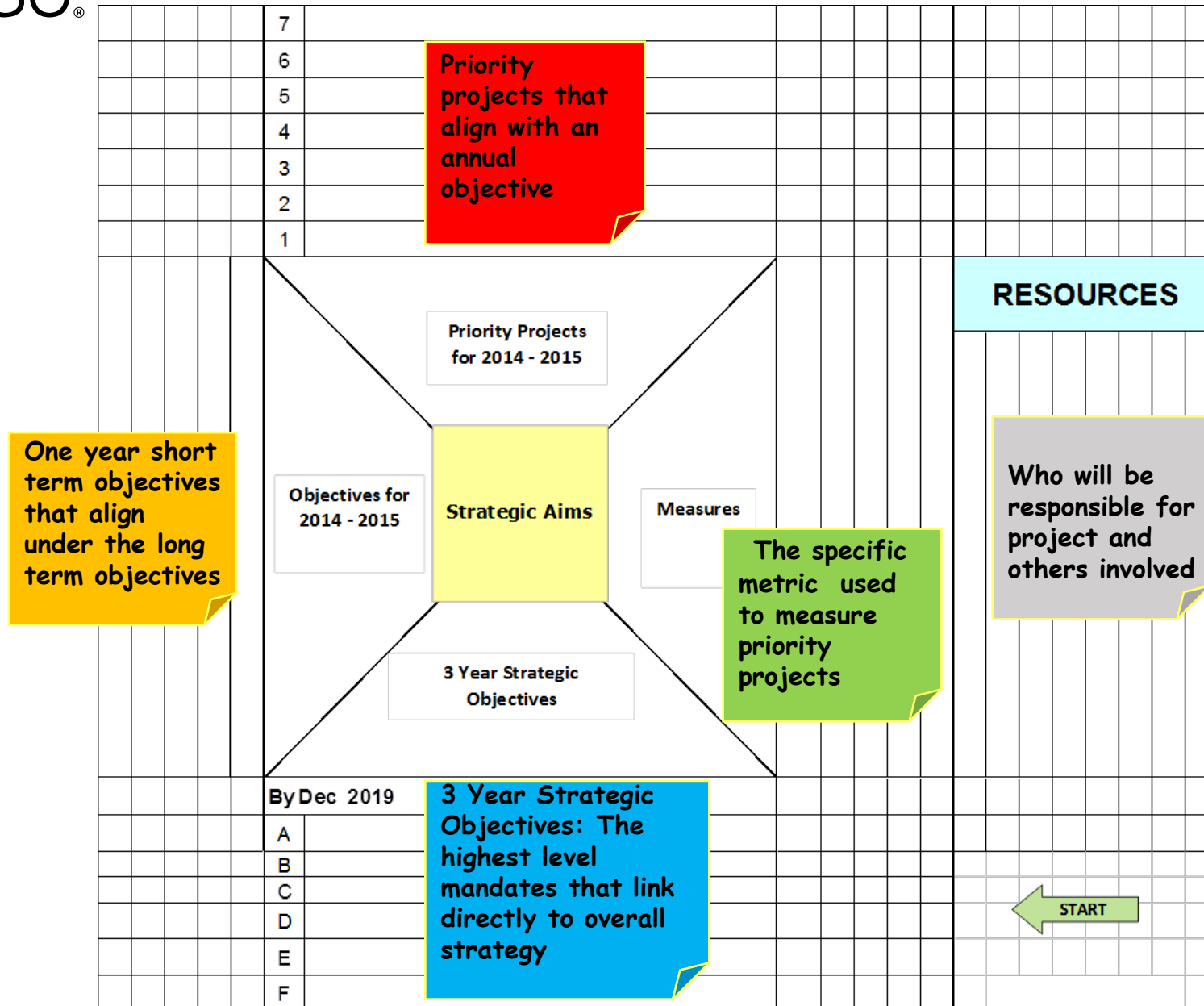
You: Yikes, this is daunting!

Me: Let me show you your way around the X!

Richards and Savage (2015)

University level

Division level
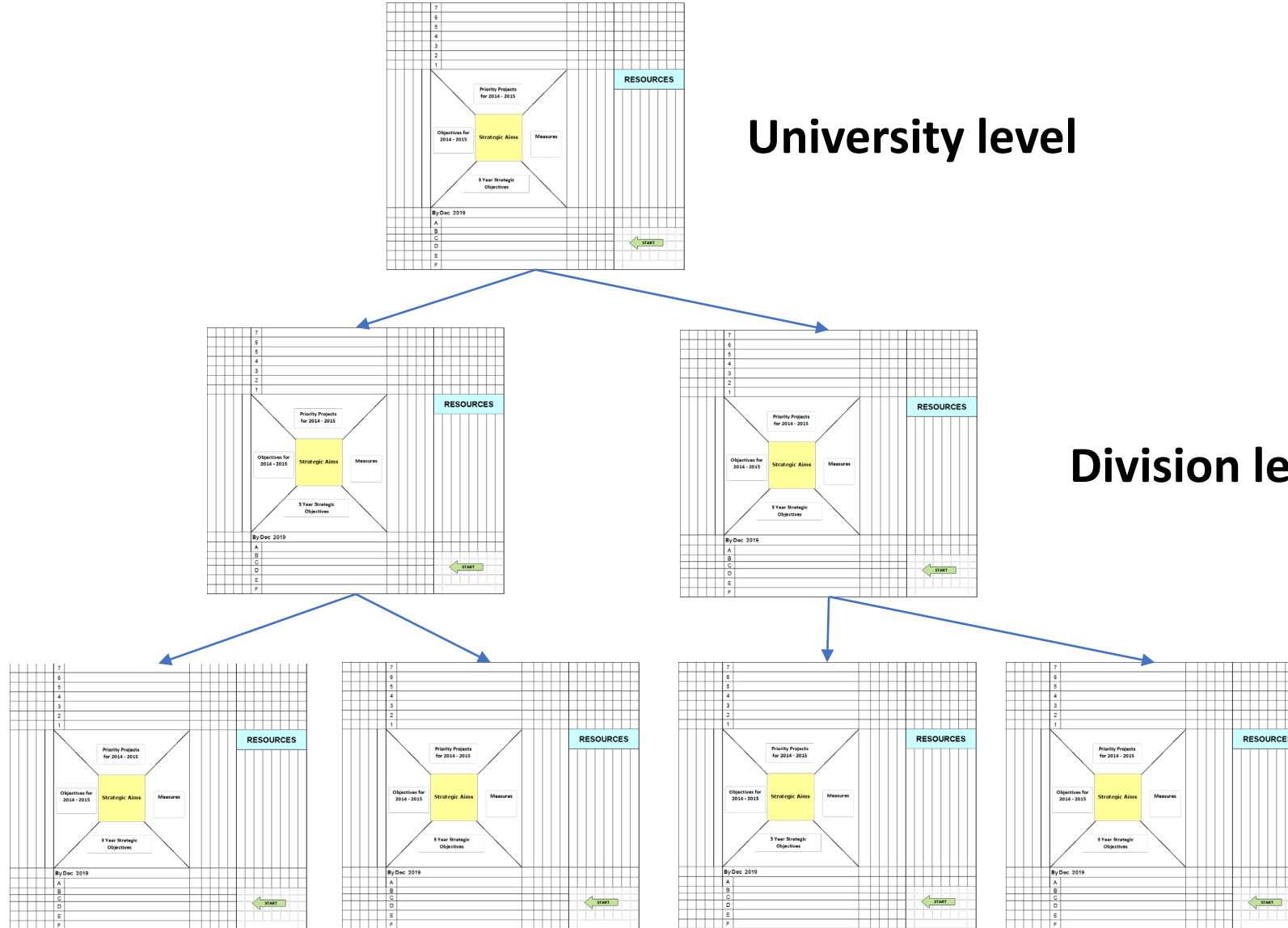
Unit level

Hoshin Kanri Strategy Deployment: Linking X Matrices Across Institutional Levels

Hoshin Kanri and Pillars of Lean

- **Continuous Improvement**
  - Creates common goals and clarity on how each employee contributes
  - Clear well-defined structure of roles, responsibilities, and metrics that can be managed for improvement

- **Respect for People**
  - Each employee is the expert in their own job whose views matter and are respected
  - Invest in employees and leverage job knowledge and creativity

Hutchins (2008)

Learning Goal #2

The Need for Hoshin Kanri in Higher Education

Strategic Planning (and Deployment) Needed in HE

- Turbulent, dynamic HE environment
  - COVID-19
  - Demographics
  - Competition
  - Cost
  - Funding
  - Accountability
- HE falling short of its mission
- HE institutional closings, consolidations, crises
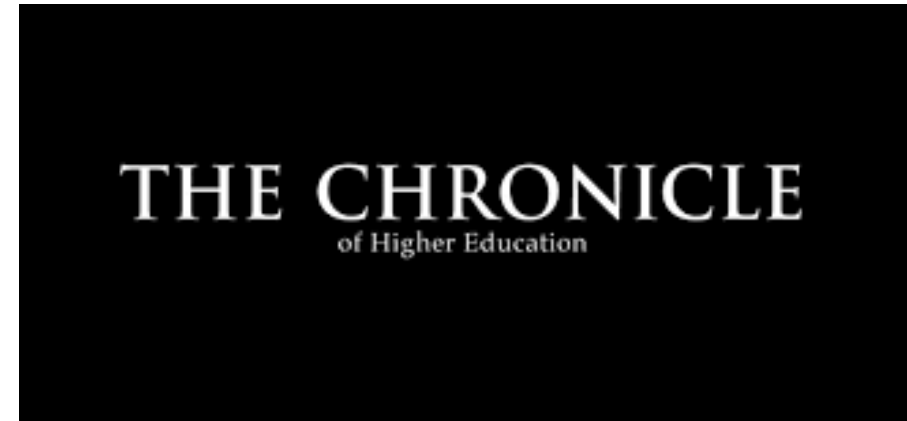
THE CHRONICLE
of Higher Education

5 Ways Higher Ed Will Be Upended: **Colleges will lose power, prices will go down, and credentials will multiply – among other jarring shifts.**

Levine & Van Pelt, Aug. 25, 2021

Are HE Strategic Plans Effectively <u>Deployed</u>?

- Inactive (sits on shelf)
- Active (mentioned occasionally)
- No straight line from strategy through implementation (point of impact)
- Limited accountability
  - No Metrics
  - No Timeline
  - No Milestones
  - No Owner

In Contrast:
Hoshi Kanri – Toyota Style

- Once-in-a-century disruption from "Auto Industry" to "Mobility Industry" (Mobility 2.0)
- Simultaneous emergence of
  - Autonomy
  - Alternative Energy
  - Shared Assets
  - Hyper-Connectivity
  - Changing Rules of Trade
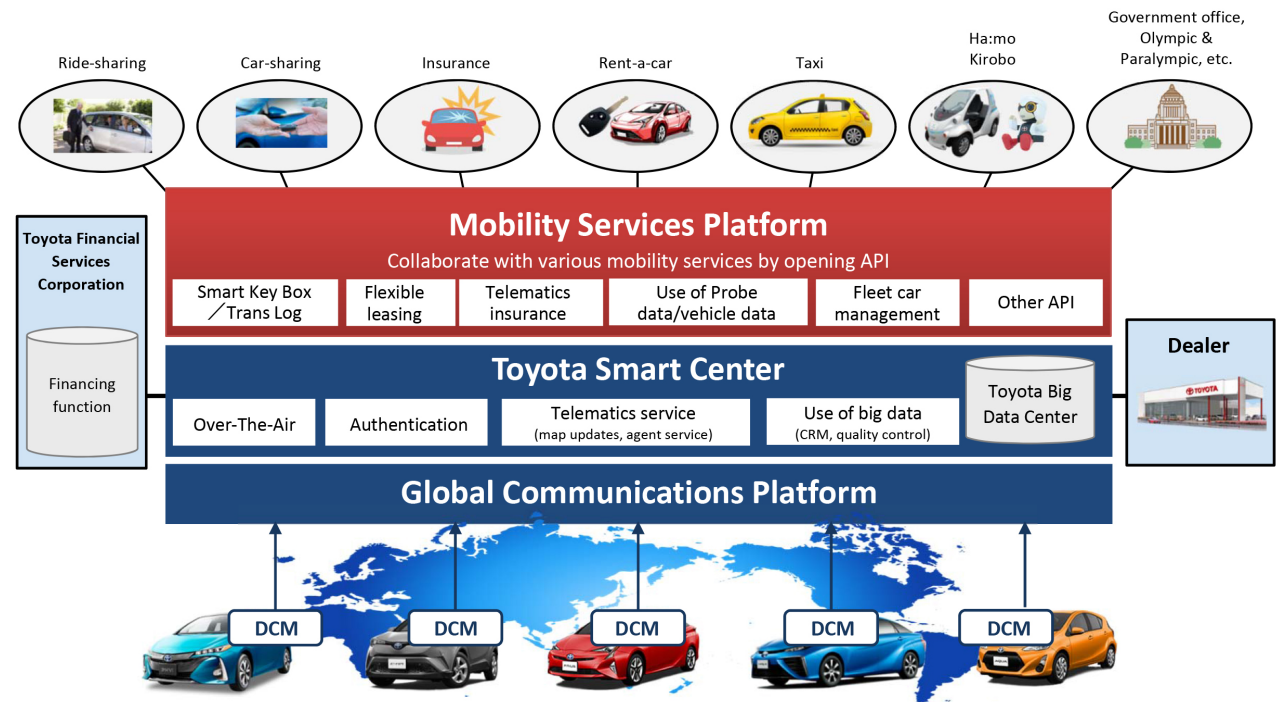
Womack, J. (2018)

Toyota Response: <u>Strategy</u> Hoshin

- **Expanding concurrent engineering from individual vehicles to whole mobility systems**

- **Toyota experiments**
    - Pioneering solid-state batteries AND hydrogen fuel cell vehicles
    - Partnerships with ride hailing and logistics firms
    - Toyota fleets of shared, autonomous vehicles (2021 Olympics)
    - Application of TPS principles to development of software packages to support these innovations

- **Expend massive sums for lengthy experiments (and many may fail) while defending its current employees**

Toyota Response: Kanri <u>Deployment</u>

- **"Connect the dots" for the value-creating front-line workers**
- **Create financial resources to support the respond-to-disruption hoshin**
  - Increase production rate with no capital spending
  - Sustaining world-best quality
  - Rethinking every aspect of the whole production activity (Jishuken: broader scope over an extended period of time)
  - Reducing the number of workers required on the line (in response to labor shortages and declining birth rates)
- **Long Term: Toyota survival and defend jobs**

Learning Goal #3

State of Practice of Hoshin Kanri in Higher Education

Brief Mentions of Hoshin Kanri HE

- Ahmed (2016)
  - A literature review that culminated in a proposed (and cursory) Hoshin Kanri model for HE institutions

- Emiliani (2004)
  - Hoshin Kanri, a Lean tool/process, can be used to determine which business courses should be offered in response to challenges (e.g., business school focus, professor capabilities, accreditation standards, value expectation of students or employers)

Limited Applications of Hoshin Kanri HE

- Istanbul Technical University (Asan & Tanyas, 2007)
- University of Warwick (Roberts & Tennant, 2003)
- Cardiff University (Sarah Richards & Eva Savage, 2015)
- Michigan Technological University
- Bowling Green State University
- Owens Community College
- Lean HE Europe Steering Group

Istanbul Technical University
(Asan & Tanyas, 2007)

- Limited evidence of Hoshin Kanri in HE

- Presents integration of Hoshin Kanri (process based) with Balanced Scorecard (performance based) for strategic management/deployment

- Illustrates using HE engineering management graduate program
  - Catchball (across two levels) for alignment and integration of strategies before reaching implementation plan

- No discussion of implementation

University of Warwick
Roberts & Tennant (2003)

- Warwick Manufacturing Group Quality & Reliability Team's five-year "strategic intent, stretch goals"

- Iterative "catchball" process to connect "vital few" goals (e.g., increase publication rate) with key processes of research, teaching, and consulting

- Monthly reviews (progress against the plan)

- Annual review (appropriateness of vision and vital few goals, progress against milestones, new milestones, confirm individual commitment)

Figure 3 Relationship betwen key processes and team goals

Key:
● Strong
◆ Medium
○ Weak

	Team Goals	Increase publication rate	Obtain research funding	Innovate in our teaching methods	Grow our consultancy	Develop our professional/academic standing	Develop forums for industrial contact
Research	Primary and secondary research					●	
	Networking with academic and business organisations					●	●
	Developing research proposals		●				
	Disseminating results	●					
Teaching	Mentoring student projects	◆					
	Design and delivery of training			◆		◆	○
	Development of teaching methods			●			
	Assessment of students	○		○		○	
	Module tutorship			○		○	○
Consulting	Skills identification and development				◆		
	Establish market presence				●		◆
	Diagnostic evaluation				◆		
	Allocation of resource				○		
	Bid acceptance process				◆		
	Terms of reference				○		
	Delivery and review				●	●	
	Disseminating results	●					

Cardiff University
(Sarah Richards, personal communication, August 25, 2021)

- Hoshin Kanri proposed to prioritize and track (a too large) large number of university projects
  - X matrix "reverse engineered" from existing strategic plan to provide visualization and the need to prioritize in Year 1, Year 2, etc.
  - Strong support for concept, but no change in practice (due to longstanding culture and new leadership)
- Pivot: from university-wide to local applications (e.g., improve the speed and quality of admissions process)
  - X matrix with 3-year strategic objectives, more targeted objectives for next 6-months, and prioritized projects
  - Each priority project in X-matrix linked to a "living" A3 describing current and future states, issues to be addressed, short-term actions, targeted improvements, and costs and savings

Improve admissions experience of overseas students

Cardiff U X Matrix: Rapid and quality processing of admissions applications

Priority Projects

				#	Project													
x	x			14	An evaluation of the process at identified institutions				x		x			x				
					Enable applicants to select interview slots via a portal			x										
	x				Develop a basic dashboard for schools (age of applications)			x			x					x		
	x				... Enterprise Service Desk			x			x					x		
	x				...MS to oply allow submission of complete applications			x			x		x					
		x			...is applicants per course		x				x							
			x	8	...t portal to improve experience for overseas students			x		x	x	x					2394.docx
x		x	x		Develop a Kano model for the admissions process		x			x	x	x	x	x	x	x	x	
	x	x		6	Produce 'as I's process map for international applicants	x				x	x	x		x		x		
	x	x		5	Produce 'as I's process map for PGT applicants	x				x	x	x			x	x		2392.vsd
	x	x		4	Produce 'as I's process map for UG applicants	x				x x		x		x				2392.vsd
	x	x		3	Produce a customer journey map for international applicants	x				x	x x x x x x x x						2351.vsd
	x	x		2	Produce a customer journey map for PGT applicants	x				x x x x		x x						
	x	x		1	Produce a customer journey map for UG applicants	x				x x x x x x x x						2237.pdf

RESOURCES

Objectives for the next 6 months (Jan 2015)

Set up a best practice admissions function by Oct 2017 to ensure rapid, quality processing of all applications to Cardiff University

Measures

3 Year Strategic Objectives

Column headers (left):
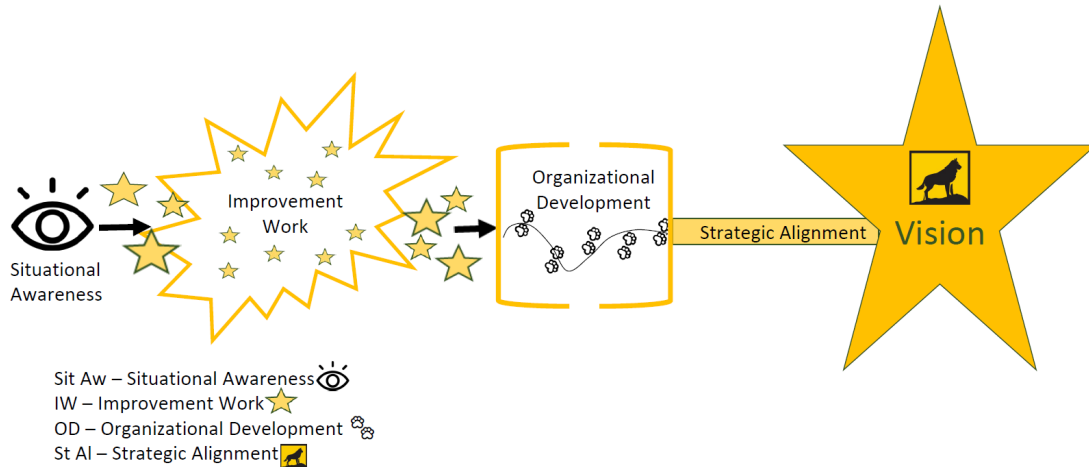- Identify best practice in other comparable institutions
- Implement identified SIMS quick wins to improve the current applicant experience (prior to imlemention of project)
- An understanding of how many admissions criteria need to be written
- An accurate understanding of current admissions processes
- An accurate understanding of the current customer experience for admissions

Column headers (right / Measures):
- Completed customer journey maps
- Completed and validated process maps
- Completed Kano model
- The number of Tactical initiatives implemented
- Best practice identified and articulated
- Sarah Richards
- Eva Savage
- Person A
- Person B
- Person C
- Person D
- Person E
- Person F

						3 Year Strategic Objectives													
x		x	x	x	A	To set up a best practice admissions function by Oct 2017			x		x							
			x	x	B	The policies and processes are streamlined, effective and efficient and consistently applied	x	x		x								
x	x		x		C	The applicant process is straightforward for all applicants		x		x								
x				x	D	The response time reflects best practice in comparable institutions				x								
	x		x	x	E	The experience encourages applicants to accept offer	x			x								

START HERE

Cardiff U A3: Project to Improve Admissions Experience of Overseas Students

Project Title:
CARBS PG Admissions Process

Issue Definition:
Currently the PG Admissions Office cannot guarantee a quick turnaround in comparison to our main competitors, and students accept offers elsewhere. Our conversion rate needs to improve. We want to streamline and speed up the process. A robust business process is required to meet increased activity in PG Admissions, whilst reducing the academic burden on academic staff. Also, UK/EU recruitment activity is growing therefore additional admin support is required to support recruitment events and follow-up (*Ref. Strategic Plan – increase recruitment of home/EU students to PG schemes*)

Current State:

Up to 2 weeks (longer if selector is away)

- Application received in admissions office (90% electronic)
- Office downloads and **prints**:– transcripts, references, English language qualifications
- To complete sheet -check educational institution (NARIC) - ranking of institution - English language qualifications - GPA Recommend – CF/UF/ reject
- Make up pack (1 FTE +4 temps) -application forms and docs - front sheet (from Registry) completed by admissions tutor & signed
- Packs go to tutors with recommendation. Some turn around in 24 hours, others up to 2 weeks. Return packs to office
- Decision logged (SIMS) + offer released (to REGIS) Application shredded (10k)

Could be up to 40 documents to print out

- Enrolment online – from 3 weeks prior to start date
- Once accepted, get CAS letter – unique number to apply for VISA - can't then apply anywhere else
- If UF: Accept or reject offer If CF: Wait for results or pre-sessional engl etc) Cut off around July
- Up to 5 working days to REGIS making offer to student

Issues:

- Time taken (and cost) to print documents (ink cartridges and paper costs) to batch and send to selectors (can be up to 40 documents per application) – 90% of applications are electronic.
- All printed applications and documents must be disposed of in confidential waste.
- To print, read and make a recommendation to tutors can take administrative staff between 20 minutes and 1 hour per application.
- The admissions team make an initial recommendation, and then send paper copies of applications to selectors. Selectors may take up to 5 days to turn around the applications. This causes unnecessary delays in getting offers out to applicants.
- After 6 months of tracking the difference between the administrators and selectors decisions, it has been calculated that only 9% of decisions made by administrators were changed by selectors – these were all changed from REJECT back to C or U
- If selectors are away, e.g. on leave, the turnaround can be much longer (there are no automatic deputies).
- Registry may take up to 5 days to release the offer. Registry repeats all the checks that the administrators carry out in CARBS. The admissions team is currently made up of 2 permanent FTE and 3 temps. 1 permanent FTE post was vacated in Nov 2011. The post has been frozen and covered by a temp since then *(Manchester Business School has 7 PGT admissions officers)*.
- As the admission team are temps they are unable to access external training with NARIC (free to permanent members of staff)
- The CARBS website is not clear on how to apply.
- If admin staff were empowered to make offers international recruiters could scan applications and have a same day decision
- Speed of response required when the international team are recruiting overseas
- Administrative staff in other University Schools make offers (ENGIN/CLAWS), and other Business Schools (Warwick)
- The release of capacity in the PG admin team will allow us to manage the increase in PG Admissions and to help support Recruitment & Communication activity

Future State:

- Applications received into the office
- Admissions Team to read on screen and make decision
- Record decision in SIMS?
- Reject
- Make an offer (put on hold)
- Refer 20% to admissions tutors
- Anne-Marie to check and release offer to Registry
- Up to 5 working days to REGIS making offer to student

This stage would not be needed if the team were staff not temps

90% electronic

Follow current process

1 Day

Short Term Actions:

	Action	By who	When
1	Selectors to develop a decision tree for the Admissions Team (including advice on suggesting suitability of alternative course) based on clear criteria. Selectors to support briefing sessions with Admissions Team	SMT	27 June 2012
2	Allow Admissions Team to make selection decisions and forward only 'grey area' cases and random sample (20%) to selectors during trial pilot of 6 months	SMT	27 June 2012
3	All selectors to allocate deputies	Selectors/Section Heads	27 July 2012
4	International recruiters to scan applications during overseas visits to Admissions Staff for same day decision	SMT	27 June 2012
5	It is anticipated that we will need 3 Grade 3 FTE permanent posts to replace the 3 Temps (subject to revised Job Descriptions)	SMT	27 June 2012
6	The existing Grade 3 FTE Post to be reinstated	SMT	27 June 2012
7	Training programme for Admissions team	Masters Programmes Manager	By 31 December 2012
8	Develop an admissions process chart for the website	Admissions Office	27 July 2012

Costs & Savings:
Current cost of 3 Brook Street Temps
Projected costs of 3 x grade 3 posts
Saving, if only 20% of documents are printed
Saving from 80% reduction in confidential waste
Saving in academic time = 3,500 hours p.a.

@ £11.50 per hour = £63k p.a.
@ bottom of scale = £53,456 p.a.
= £2,400 p.a.
= £320 p.a.

Measures:

Measure	June 2012	Dec 2012	April 2013
Time taken from receiving application to making an offer	10 Days – 20 days	1 day	1 day
The number of applications forwarded to selectors	100%	20%	10%

Follow up:
- To work with Registry to understand the duplication and speed up the release of offers to students.
- Continue to collate data on cycle times, error rates etc

Michigan Technological University

(Ruth Archer, personal communication, July 20, 2021)

Implementing the
Administration Operating System AOS

Situational Awareness → Improvement Work → Organizational Development → Strategic Alignment → Vision

Sit Aw – Situational Awareness
IW – Improvement Work
OD – Organizational Development
St Al – Strategic Alignment

- AOS annual themes and initiatives based on university strategic plan and visioning categories championed by AVP Theresa Coleman-Kaiser

- Units create goals for each theme (separate A3 for each theme)

- Director/Manager develops annual performance goals based on unit's A3 theme goals

- Separate monthly meetings to discuss unit A3 goals and individual performance goals

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Bowling Green State University: Strategy Deployment Process (Balzer)

BGSU X Matrix
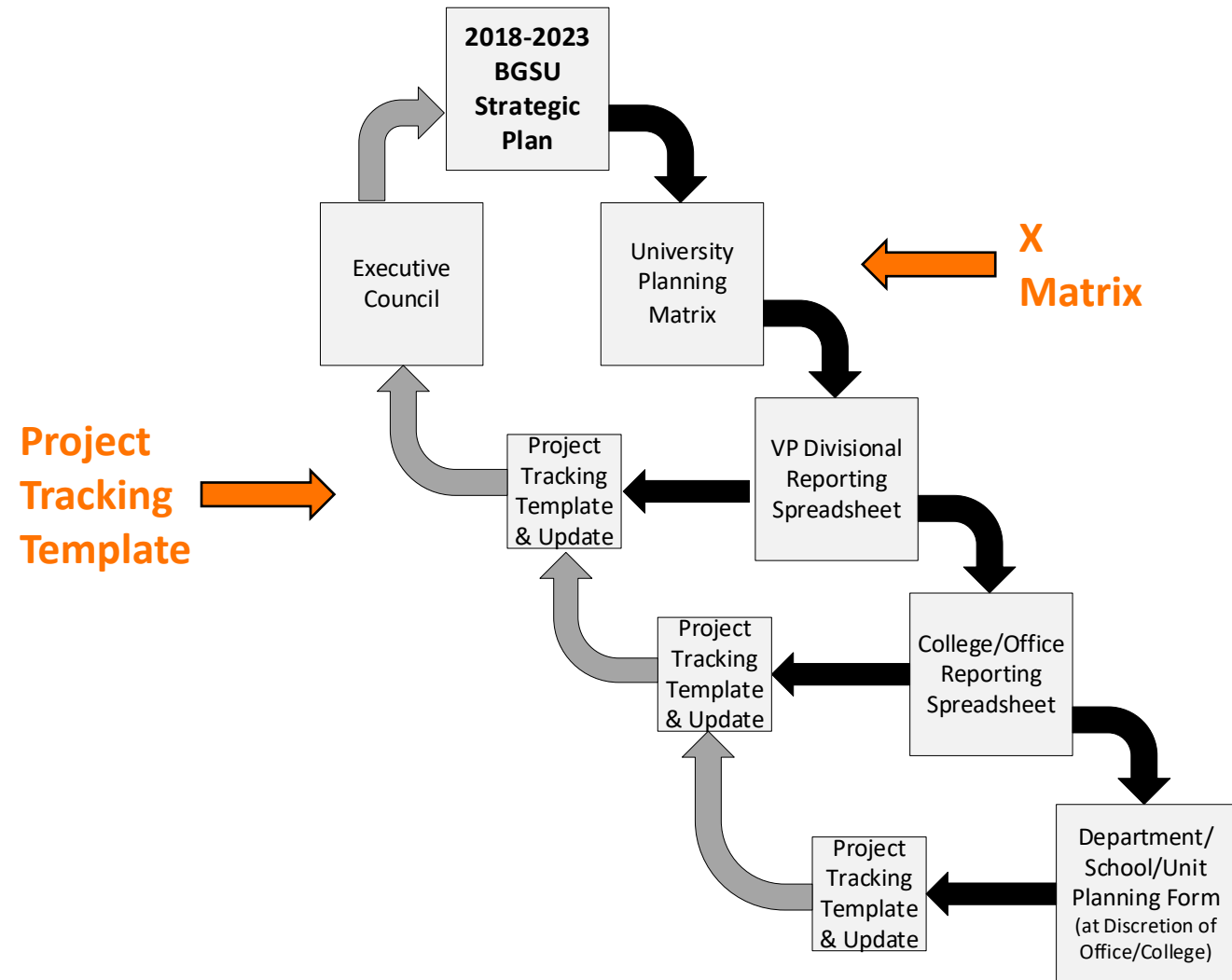
BGSU Project Tracking Template

2019-2020 Priority Initiative Project Tracking Template — Approved Template - April 11, 2019

2019-2020 Priority Initiative:	1.3 Add Programs in High Demand	Date Created:	6-Mar-19
Project/Action Background:	Add or enhance academic programs in areas of workforce demand such as in health care (e.g., nursing), applied STEM (e.g., data science, software engineering), and hospitality. Focus on programs that build on current BGSU faculty/programs that can be implemented in next 18-24 months.		
Responsible Lead:	Joe Whitehead	Team:	Deans, UG and Grad Admissions, Institutional Effectiveness

WHAT actions/steps need to be accomplished to achieve this strategic priority initiative?	WHO will be responsible for making sure this action/step is accomplished?	WHEN will the action/step be started and completed?		What key metric(s) will be used to assess progress on this action/step?	Progress (G/Y/R fill)	Follow Up (IF Required)
		Started	Completed			
Identification of workforce demand areas	Julie Matuga	1-Jul-19	1-Oct-19	Comprehensive list of high demand progarms		
Specify criteria for programs to be considered (alignment with BGSU, startup costs, timeline to implement, etc.)	Provost and Deans	1-Jul-19	1-Nov-19	etc.		
Action C	Person X					
Action D						
etc.						

Owens Community College 2019-2022 Strategic Improvement Goals and Key Objectives:
30/60/90 Plan – A Small Section! (Balzer)

Strategic Improvement Goals and Key Objectives		Lead	Dec-20		Jan-21		Feb-21	
Enrollment, Completion & Student Success	1.1 Actively manage enrollment and drive increases in targeted student populations	AG		Target transfer in student population for Spring 2021 (4 year students)	Onboard new Assistant Director, Admissions	Begin SEM and Marketing external consultant partnerships to drive enrollment	SEM Plan development begins Launch partnership to drive returning student enrollment (ReUp)	Kick off for ReUp (Records/IT/IR/Etc.)
	1.2 Improve student retention and completion	AG	Finish upgrade to new version of Degree Works and training Advising staff (IT/Records)	Video to Celebrate Summer and fall Graduates	Onboard new Athletic Director	"Finish for Your Future" taskforce recommendations to leadership team	Communication plan for students re: degree check list	
	1.3 Measure and improve post-college success	DS	Finalize completion plan	Submit completion plan to BOT and state		Select completion plan priorities and implement pilots	Review next steps for Math redesign (Stats and Emporium)	
	1.4 Create pathways to success to serve all students	DS	Finalize completion plan			Review and establish options for year long schedule	Complete external audit of computer science/IST programming	Expansion of FYE materials to FYE class for a fall start. Have first draft of degrees to be all online.

Lean HE Europe Steering Committee

(John Hogg, personal communication, June 17, 2021)

Learning Goal #4

How LHE Practitioners Can Promote and Support Hoshin Kanri in Higher Education
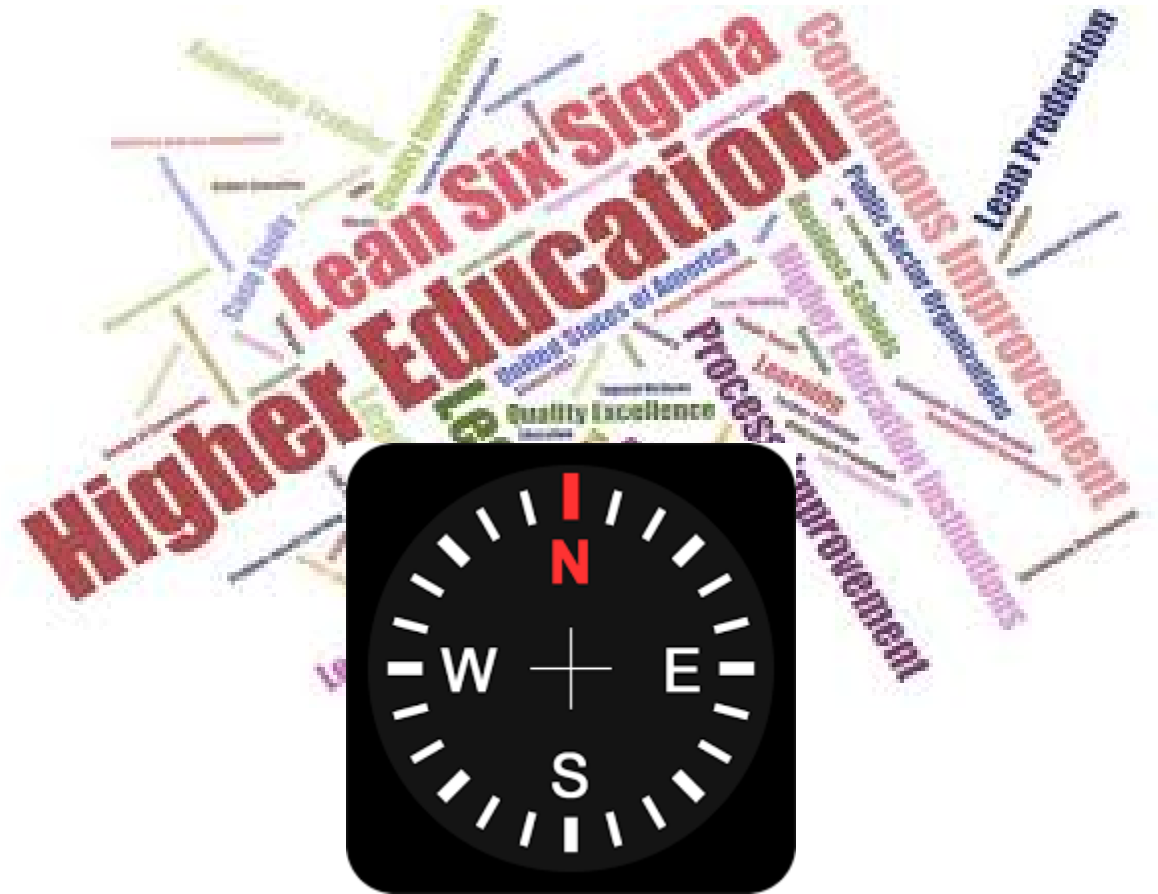
Why Aren't We Doing Hoshin Kanri at Our HE Institutions?

- The success of HE demands strategic planning and deployment – Hoshin Kanri is the ultimate "PDCA continuous improvement cycle" and "gap analysis"

- Hoshin Kanri is in our "Lean wheelhouse"

- Institution-wide implementation is not needed to benefit from Hoshin Kanri

- Why a limited role for LHE in strategy deployment (when Lean has so much to offer)?

- **Assuming LHE practitioners want to be part of the strategy deployment process, how can the process be improved?**

Can Root Cause Analysis Offer Insights Into the Limited HE Application of Hoshin Kanri?

WHY?
↳ WHY?
↳ WHY?
↳ WHY?
↳ WHY?
Real solution is found here

Limited
Application
Of
Hoshin Kanri
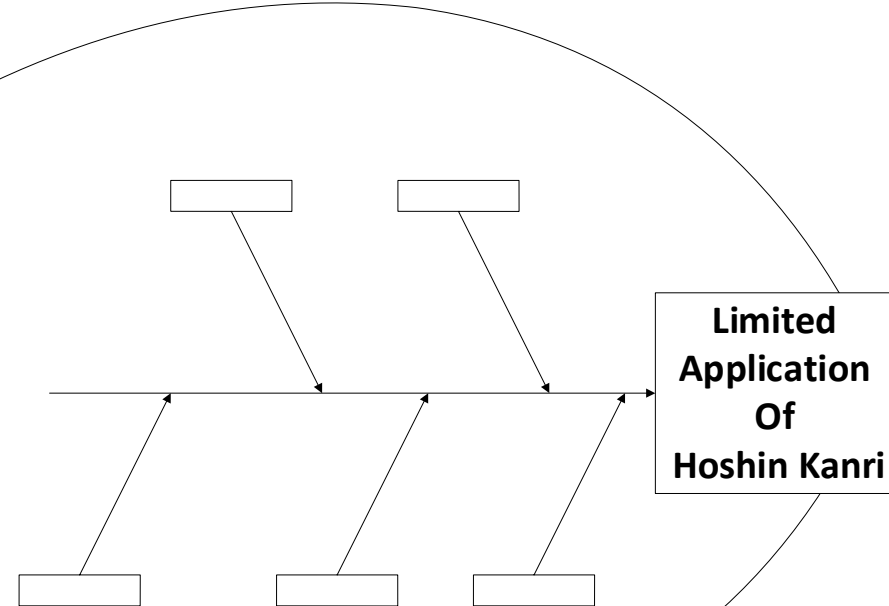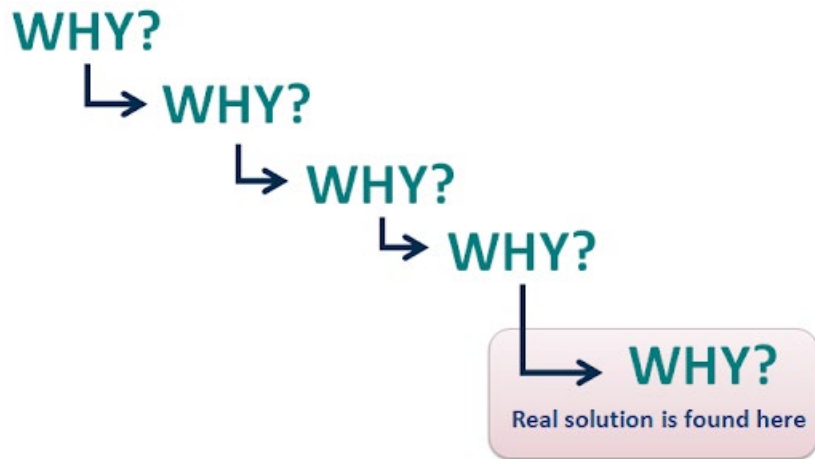
Some Preliminary Thoughts

PLANNING PROCESS

- LIMITED FOCUS ON EXECUTION
- COMFORT WITH EXISTING APPROACH
- MULTIPLE OWNERS

LHE PRACTITIONERS

- NO TRAINING OR EXPERIENCE
- LIMITED RESOURCES
- NO INFLUENCE

HE ENVIRONMENT

- CONSULTANTS PROMOTE OWN APPROACHES
- HOME GROWN APPROACHES TO PLANNING
- NO OTHER HEIs USING HOSHIN KANRI

HE LEADERS

- NO KNOWLEDGE
- LOSS OF CONTROL OVER OUTCOME
- RESISTANT TO CHANGE

Limited Application Of Hoshin Kanri

R:\DeanBalzer\Psychology\Research\Lean\Hoshin Kanri\Fishbone - why limited Hoshin Kanri in HE - used in 2021 Lean HE Global presentation.vsdx

Address Root Causes of Limited HE Application of Hoshin Kanri

Root Causes	Corrective Actions
LHE Practitioners have no Hoshin Kanri training or experience	- Grow our own experts - LHE Global workshops on Hoshin Kanri - Find a Hoshin Kanri teacher - Add Hoshin Kanri to LHE application tool kit
HE Leaders have no knowledge of Hoshin Kanri	- Get a seat at the (strategy deployment) table - Hoshin Kanri "elevator speech" - Expose leaders to Hoshin Kanri practices (including other organizations)
Planning Process has multiple owners	- Division- or unit-level Hoshin Kanri (early adopters or pioneers) - Resolve the strategy deployment "pain point" - Build, test, and improve "standard work" policy deployment process
HE Environment embraces home grown approaches to planning	- Conduct "proof of concept" Hoshin Kanri demonstrations - Demonstrate the benefits of catchball, X matrix, A3, 30/60/90, etc.

Hoshin Kanri - An Important Opportunity for Lean HE Practitioners

- HE will continue to face significant challenges

- Challenges can be addressed with <u>strategic</u> plans

- HE needs to improve <u>deployment</u> of strategic plans

- Hoshin Kanri is built on Lean pillars of continuous improvement and respect for people

- Hoshin Kanri is readily applicable to HE

- Lean HE practitioners can add great value by promoting and implementing Hoshin Kanri

Some Helpful Resources for Practitioners: Three Books to Add to Your Library

Pascal Dennis (2009). Not HE, but a fictitious case study as a guide through the planning and execution process
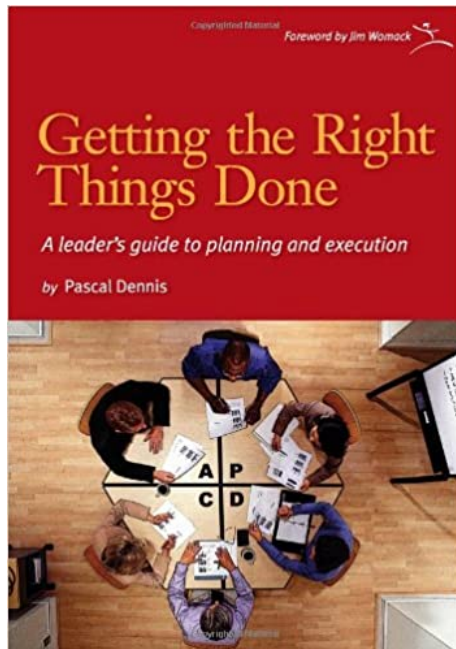
David Hutchins (2008). Not HE, but a detailed model from vision through deployment as well as documenting implementation
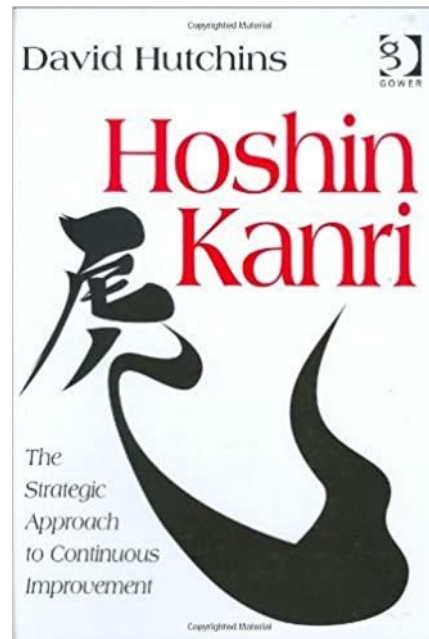
Thomas Jackson (2006). Not HE, but useful and easily applicable. Includes forms and templates
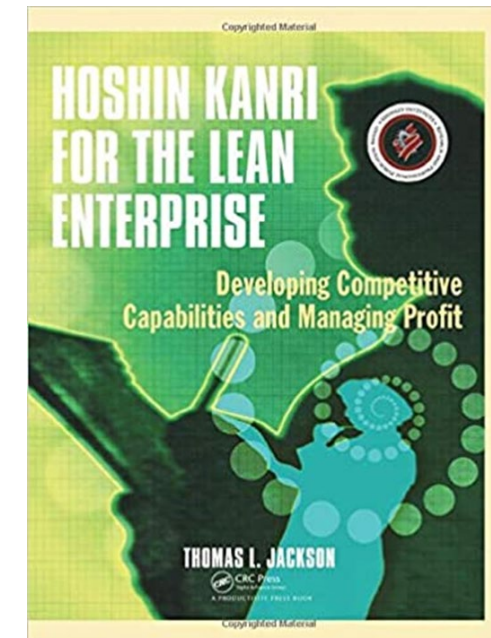
Some Additional Helpful Resources

➢ Bob King (1989). Not as practical but one of the very early books

➢ Joseph Colletti (2013). Convenient "Memory Jogger" reference and pocket guide

➢ The Lean Post. Many articles, compliments of the Lean Enterprise Institute
https://www.lean.org/LeanPost/

➢ Sarah Richards and Eve Savage have a nice set of slides on the X matrix and how it works (from their 2015 Lean HE Hub presentation). Contact them or me if interested in a copy
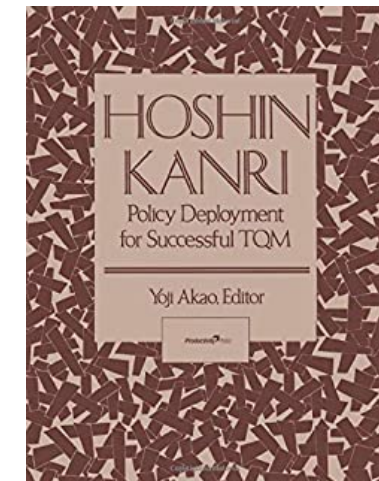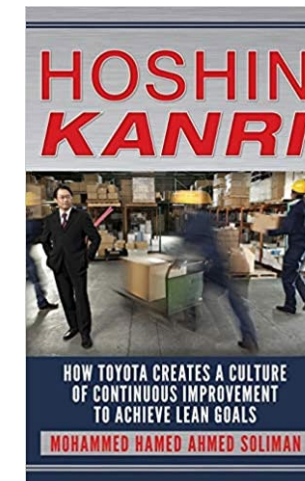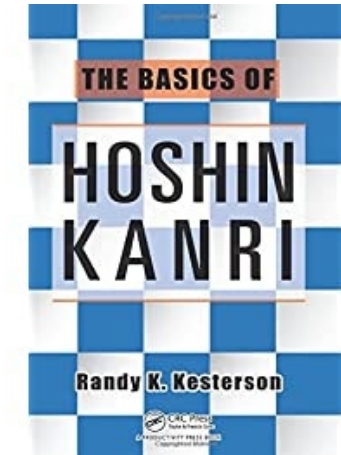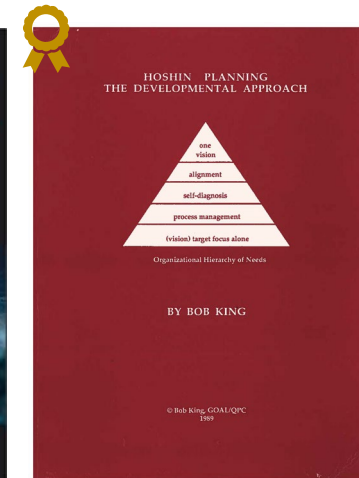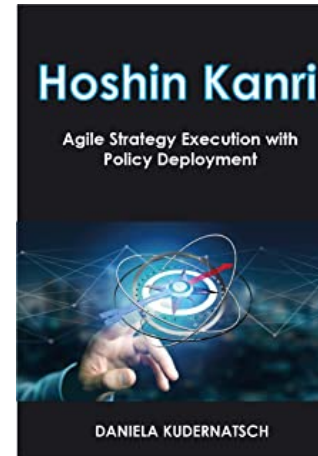
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My Thanks - and Your Questions & Comments

I will post my presentation at **leanhighereducation.com**

Want to chat? **wbalzer@bgsu.edu**

And all of our thanks to John Hogg, U Strathclyde, and LeanHE