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Tricks and Tips on Hoshin Kanri

Guest was Anthony Manos



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Anthony Manos is a Catalyst with Profero, Inc., where he provides professional consulting services, implementation, coaching and training to a wide variety of organizations, large and small, private and public, in many industries focusing on Lean Enterprise and Lean Healthcare. Mr. Manos has extensive knowledge of Lean and quality in a wide range of work environments. Tony is trained and certified by the National Institute for Standards and Technology (NIST) U.S. Department of Commerce in all elements of Lean manufacturing.



Over the past ten years, he has helped more than 150 companies in several aspects of Lean implementation including: team building, standardized work, 5S workplace organization & visual workplace, quick changeover, plant layout, cellular, Kanban, total productive maintenance, kaizen events and Hoshin planning. Tony is an internationally recognized speaker and expert on Lean presenting workshops and sessions at several conferences a year. As a member of American Society for Quality's (ASQ) faculty, he teaches a two-day course in Lean Enterprise and a one-day course on Kaizen.

Tony is the co-author of the book "Lean Kaizen: A Simplified Approach to Process Improvement" and author of many articles on Lean and its allied subjects. He wrote the script for SME's DVD Total Productive Maintenance Blitz and is the co-editor of ASQ's upcoming Lean Handbook. He writes commentary on Lean in his blog: blog.5Ssupply.com.

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Implementing Lean Marketing Systems



Joe Dager: Welcome everyone. This is Joe Dager, the host of the Business901 podcast. With me today is Anthony Manos, he's a catalyst with Profero Incorporated, where he provides professional consulting services, implementation, coaching and training focusing on Lean enterprise and Lean health care. Mr. Manos has extensive knowledge of Lean and quality in a wide range of work environments. Anthony is the co-author of the book "Lean Kaizen: A Simplified Approach to Process Improvement." And author of many articles on Lean and satellite subjects.

He wrote the script for SME's DVD "Total Productive Maintenance Blitz" and is the co-editor of ASQ's upcoming "Lean Handbook." He is part of the team that originally developed the Lean certification for AME, SME, the Shingo Prize, and ASQ, where he serves on the Certification Oversight and Appeals Committee for the Lean certification.

He also writes commentary on Lean on his blog at 5SSupply. Tony, I would like to welcome you, and I appreciate the opportunity to interview you. That's quite a list of Lean background. Can you start out by maybe cleaning up that intro for me?

Anthony Manos: Yeah, absolutely, Joe. Thank you very much for having me. I do appreciate that we took the time to get a chance to connect. Let me clean it up for you this way, I'll just say, "I'm a student of Lean." Lots of people go, "I'm a Lean expert." I'm like, "No. I'm always learning more about Lean."

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Joe: That shows a lot about your Lean credentials. [laughs] OK. It really reinforces them. Well, we're here to introduce a subject that we're here to talk about which is Hoshin. Can you start out the podcast and just try to explain what Hoshin is?

Anthony: Many of your listeners might have heard about Hoshin or Hoshin Kanri. It's also known as Policy Deployment, Hoshin planning. There are different terms that people use. Hoshin is a general term that people might use. But it's really about long term planning so you can set a long-term initiative, but then drilling it back so that we know what our day to day items are going to be. Then the best way to put this is it actually drives alignment from the top to the bottom of the organization.

Hoshin Kanri is more of the literal translation from Japanese is kind of shiny metal or shiny object in the sense of a compass. So, it's all pointing us in the same direction. One of the ways I heard it explained is trying to get all the ships to arrive at the harbor at the same time.

If you think about all of these different entities, business units, departments, and you're trying to get them aligned so that we all end up at the same place at the same time.

Joe: A fancy word for a business plan or not?

Anthony: That's a great question. The way I would typically describe Hoshin to new people would be, I call it "strategic planning on steroids." That's a little bit different from a business plan, too. For some people, they try to create a business plan for the year. Other groups or organizations might do things like strategic planning. But to me, Hoshin brings it up a whole new level. The way I describe this Joe is that there's a lot of different planning

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methods out there. Everything from "no planning at all" which, believe it or not, has some advantages because you save a lot of time.

The disadvantages, you're not really sure what the results are going to be. All the way through to things like "the old management by objective," and strategic planning in Hoshin. I think Hoshin really elevates the concepts of the business plan or strategic planning. By applying more of the rigorous plan-do-check-act or a good PDCA cycle...

Joe: Is it just another problem-solving journey? Or is it more elaborate than an A3 or PDCA cycle?

Anthony: In a sense, it is part of problem solving. But I don't know if I would call it more elaborate. To me it's more elegant. There are different tools that we would use. For instance, in A3, might be one of the ways that we would communicate out the plan. But it really does follow the rigorous PDCA. There are a lot of different tools that we go through to try to get an organization to put their longer term plans together, and then be able to drill it down.

Joe: So, there is a prescribed method to Hoshin planning?

Anthony: Yeah, I would say there's a prescribed method. But I would almost say that for every company that uses Hoshin, they all have their own versions of it. But the way I try to explain it, there's what I call the "pre-worker homework." Things we need to do before we get into a Hoshin planning session. Especially when we begin to work with the top level executives, I want them to be thinking of longer term. Or sometimes I'll mention over the horizon, things that you don't actually see right now, but could have an effect on us in the

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future. So, there's the usual things like, "Let's do our environmental scan where we're looking at different things from an economy point of view, social economics, everything from what's going on in the marketplace, our suppliers, et cetera, and start to brainstorm ideas that we think these things might have an effect on us in the future.

That's just starting to kick it off. Then they do ask them to do things like review their vision statement if they have one, missions, values, and those kinds of things. Once again, we just want to check to make sure do they really make sense with the organization.

Joe Dager: People start with Lean and they start with, "Oh, we've got to drive the culture and we've got to do that." Other people start with the tools. Is Hoshin something that you introduce early in a Lean journey or is this more of a mature organization that wants to use Hoshin?

Anthony: That's an interesting balance there. A lot of people like to have the tools in the beginning so that they can actually learn the concepts. If you had Hoshin in place first, obviously, it would be pointing us in the right direction. For many organizations, it would be like, yes, this would be great if we had Hoshin first. Then we could plan everything out and it would be ready to go. That doesn't always work that way because sometimes the organizations are just not ready for it. The reason that it seems like Hoshin really takes off, again, because this is another iteration or cycle for people using it over the last couple years, is they've gotten used to a lot of the Lean tools, per se, and they're looking for what's next.

Hoshin wasn't actually what's next, they just haven't delved into it as a tool that they should use yet. Yeah, that's a good point. Should they start out with it or does it take a

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while for them to work into it? I think the idea would be for them to start with it but most organizations aren't ready for that so we have to get them used to using some of the other tools in Lean to implement it so they get the experience so they can move into something like Hoshin.

Joe: What would make them not ready for it?

Anthony: I've got to tell you right away the good old Plan-Do-Check-Act cycle. As much as people say that they know it, they don't always practice it. Just recently, I was working with an organization. I loved it because they admitted we're really good at planning, we do a lot of the P but not so much anything else. Or companies are like we don't really plan, we do a lot of do and then we have to redo and redo. I think that the concept of PDCA takes companies a little bit of time to mature.

Joe: I look at it that you could actually make big mistakes with Hoshin.

Anthony: Yeah, I guess so. Fortunately, for any of the organizations I've worked with and helping them on their Lean journey and the Hoshin portion of it obviously will stop them from making any egregious errors. But for most companies, what I think has been amazing because we've actually used this process for organizations that weren't actually specifically pursuing Lean. They were just looking for something. They didn't have a good planning system in place or something that would get them past the initial first year. Even though they weren't a Lean organization or a company pursuing Lean we were able still to apply Hoshin principles.

Joe: Hoshin is supposed to be a breakthrough strategy. Is it that or is it still just PDCA?

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Anthony: That's the adventurous part. We are looking for a breakthrough. When we're working with a high level to start the process what's really going to set you apart? What's going to make you different? What is going to raise your organization above and beyond any of your competitors? What is it that's really going to set you apart? That's a breakthrough. That does really let's think different; let's go beyond what we've done in the past from our planning, year to year planning, those types of things. Let's actually start to focus on something that's going to vault us ahead or give us a nice quantum leap over our competition. That's the breakthrough portion of it.

Joe: How does Hoshin help do that? We can all talk about it but how does it actually create breakthrough?

Anthony: Once again, I think an important part is getting back to pre-work. Prime the pump whether it be they did their environmental scan looking at the different things that are going to be happening over the next few years, taking that and then going into a brainstorming session and really trying to come up with what are the things that are going to set us apart. Then from there I think what really helps out is determining what are the priorities or what are the most important things to be working on, not only from a five-year and on point of view but if this is where we would like to be in five years what do we need to do this year to move us forward? That's a big aspect of what Hoshin will do is following that approach really ties all of these things together.

Joe: One of the things I've been talking lately about appreciative. I've heard that Toyota is applying appreciative inquiry with their Hoshin.

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Anthony: One of my favorite things is if you look back on the history of planning and strategic planning, and then all those types of things. Strategic planning was declared bad back in the 1990's. There's a "Harvard Business Review" article that said, "Hey, listen, you can't predict the future, so why are you even trying?" Like, "Why are you putting all this effort into planning when you know that things have to change anyway?" But there are different kinds of paths or methodologies, so just companies might have done their SWOT analysis, and they think that's a strategic plan, or they integrate that with an environmental scan, and then create a strategic plan, or if they do Hoshin, or appreciative inquiry. It's all like moving forward.

Now, for that portion of it, I don't know how successful companies or organizations are with it yet, being, from my point of view, more relatively new compared to something like Hoshin, that's been around since the 1960's.

Joe: We're moving to this more agile-type thinking, and with the Lean startups, it's, "Build, measure, learn." It's, "Inspect and adapt" in the gaming industry. There's all these things that says that planning, like you mentioned in the "Harvard Business Review," that people look at planning as obsolete, because you can collaborate and throw things out, and test with your customers so quickly. We've even more acceptable of being part of beta. We live in beta on Google. But we're saying that Hoshin's getting a comeback. It seems contradictory to me a little bit.

Anthony: I think also it works on where the organization is at. If they're a small organization versus large, if they've had any type of planning before in the past that either worked or didn't work, and how are they responding to the marketplace? Adapting to the

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marketplace is obviously extremely important, but you also still have to have your longer-term vision, or where you're trying to get to, so you can adapt and change to it. Part of that is actually going, "Well, where do we want to be, and what are the things that are going to help us get there?" By being able to meet with the customer is one, and obviously that's going to be one way.

On the other hand, an example would be, "Well, sometimes the customers don't know what they want, and we're the ones that have to discover it for them." That's where things like the planning can come into place. Like, "Let's go out there and we have some new products or services, and we think these are going to be a hit. Well, let's go find out."

Joe: You think you could just give me an overall view of the Hoshin process?

Anthony: Absolutely. I mentioned a couple of things like doing the pre-work, priming the pump of understanding what's going on in the environmental stand, checking the different things out. Environmental scan, things like the economy, what's going on socially-cultural, what's going on with suppliers, competition. We just get the teams to go, "What do you think is going to happen over the next few years that might have an impact on you?" I'll admit it, and this is one of those things that, "Hindsight is 20/20." Obviously, when you're trying to predict things, you're never going to be perfect. But Joe, I remember, this is a few years ago, and when we were going through our planning session, someone mentioned, "Well, what happens if oil goes above \$50 a barrel?" Of course, we had a laugh. It's a good laugh now, but back then, we were wondering what would happen.

I think it's very interesting, because from people's different points of view of where they're at, when you make a statement like that, "Well, what would happen when oil goes above

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"\$50 a barrel?" Back then, by the way, one of my initial thoughts was, "Wow, plastics costs might go up because of the oil." But it's very interesting.

Another team or group, when they were talking about what happens to things like gas prices, they mentioned, "Well, fewer people are going to drive."

So, it's very funny how, by putting these concepts out there, you can have different points of view and try to determine how it would affect your organization. Getting that stuff out in the beginning really helps. Of course, doing the standard things like a SWOT analysis, what I notice is a lot of people use SWOT, strengths, weaknesses, opportunities, and threats, but I don't think they really know about how to go about to do it.

A couple of the tricks of the trade that we picked up over the years is, when you're doing your strengths and weaknesses, which are supposed to be internal to the organization, one of the tools we'd use to help a company, especially if they're new at this, is we used the Baldrige Award criteria categories. There's leadership, planning, customer focus. There's the measurement, analysis, knowledge management, human resource focus, process management, and results. So we do ask them, "What are your strengths and weaknesses in each of those areas?"

This just makes it easier for them to put something in a bucket. "Give us some strengths and weaknesses of your leadership. Give us strengths and weaknesses of your customer focus." Companies don't have to do it this way, but we've found that when you can give them a little structure to start out with, that really helps out a lot.

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Then what we do is, with opportunities and threats, which should be external to the organization, we use a model like the Porter's Five Forces, where they can look at things like suppliers, strengths and weaknesses of their suppliers, of substitutes that can people can replace your product or service with someone else's, new entrants, buyers, and rivalries. Once again, it's just a little bucket that they can put their opportunities and threats.

Joe, at this point, I want to mention that a lot of times, people just think the opposite of an opportunity is a threat, or a threat just flipped around becomes an opportunity. We really try to make sure that they understand that it's not always that way. There are certain things that threats are a threat, an opportunity might be an opportunity. Once we get to that point, I think their brains are full, and they're ready to go to the brainstorming portion of it.

Typically, we'll start out with just a little statement like, "It's five years in the future. You guys are tremendously successful. What does it look like, and how did you get there?" Then we just let them go to town, just let them brainstorm and come up with ideas. We just use a little Post-it Note method. They can write them up there, we throw them up on the wall. We get the team to go up there and make an Affinity diagram, start to group these things so they can see.

It's like, "Wow! You see all these wild and crazy ideas. These are great ideas. This has really liberated us from doing the day-to-day things so that we can really think, 'What's that quantum leap? What's that thing that's really going to give us that breakthrough to move us forward?'"

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Then from there, we do some other things, like a Gap analysis. Where are you guys at today in this category? Then, maybe, where would you like to be? Then another little tool that we use is drivers, means, and outcomes, so we just try to look at the categories.

Does A cause B, or does B cause A? Or does A drive B and B drive A? We try to determine if things are drivers, which means these are the things that will make things happen. The means, which is these are things that are the way to get it done, and then outcomes, like, these things are going to happen.

That really opens up people's eyes to like, "Wow! What should we really start to focus on?" From there, we can start to put together their high-level plan. If companies want to use an X-Matrix or tree diagram, whatever it's going to be, we help them put that together.

Then from there, they go into that term called "catch ball." Catch ball is when they actually just pass it down to the other levels of the organization, to communicate, get buy-ins, get their plan set. They throw it back up, and there's usually communication to it. "Yes. This is looking good," or, "No. We'd like for you to take a look at this portion of it again."

Based on the size of the organization, it might go down another level, and et cetera, et cetera. This is one of those ways that you get alignment within the organization. Anyone that's a value-adder would actually see what their day-to-day task or job is, how it actually...

Joe: This really sounds like a high-level leader standard work type operation.

Anthony: Yeah, that's a great way to say it. One of the things I do want to mention is, for anyone out there that says, "Well, I don't think our top-level executives would ever do

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anything like that," that's OK. If they're not willing to do it, you can still do it within your own department, business unit, wherever you're located, and your group. You can actually put together your own little Hoshin plan, because all you're trying to do is align yourself with whatever the powers-that-be above you need. Even when you're the CEO and CFO and all the C-suite folks, they still have people they have to report to. Everyone always has a boss. As long as we're trying to align, "where do they want to go?" we can put our plan together to help us get there.

Joe: To simplify a little bit, Hoshin is just really getting everyone on the same page.

Anthony: Yeah, that's a great way to say it. It takes a little more work than that, but yeah, it's a great way to get the alignment, or get everyone on the same page, so that we can actually see the impact of. If we actually make a change here, how does it change things over here? Or did we actually move any closer to our goals?

Joe: You discussed catch ball. I was intrigued by that because in essence it sounds really simple. You design something, you throw it out there. Then they work on it a little bit, and then they throw it back, and it tells you what worked and what didn't work, and you modify it, and you throw it back. In its simplest form, is that a good explanation?

Anthony: Yes, that's a great explanation of catch ball. But I did like what you said, that in concept, it seems relatively simple, but in practice, to do it correctly, I think people are a little bit shocked the effort that it takes to get it done. So, whatever level above you that they created their plan and they bring it down to you, or the portions that apply to you. Plus if you're a manager or a director and you've got some initiative that you wanted to do anyway, how do the things that you've got in mind and your team...

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Joe: I have all these great ideas how to improve the thing and I get this Hoshin thing that gets thrown at me. I catch it and I look at it and I don't really want it. I want to throw it back.

Anthony: That does happen. One of the things that we look at, obviously, it's at the highest level, they're setting the long-term goals for the organization. But what will happen is we get a level or two down you're going to realize there're certain things that you're going to need to do anyway. If you remember the old say if it was the budgeting planning process or an operational planning process, companies and organizations used to do that anyway. We need to get this new capital equipment this year or we're going to set up this whole new social media marketing campaign. Those are things that would have to be done anyway or things we're going to do.

If they're in direct opposite alignment of what top management wants, yeah, that's going to be a tough sell, but if it at least is getting us closer or making us more competitive, et cetera, that's the part that you can work it into your plan. I would never look at a plan that after we threw it down a level, they work on it and brought it back to us and they said, "Yes, we're going to work on these things but we also have these initiatives that we'd like to attend to."

I would look at those initiatives and go, "Hey, these look pretty good. Yes, go ahead. Go with it." Or go, "Well, we have to make sure we have enough resources, which are time, people, and budgets."

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Joe: A lot of people take this cultural aspect, let's say Hoshin things, and they really don't look at the time and the budget it requires to get it accomplished. Should there be a return on investment on this type of work?

Anthony: There probably should be something. You've got to look at it from if it's just an ROI, and I don't mean the old type of Return on Investment. I'm laughing only because I worked at an organization where basically they would want to know the ROI hurdles for this year and they'd find out from management well you have to have at least a 20 percent ROI and they'd sit there and make their calculations. Yeah, I've got 25 percent ROI. My projects a go. I always joke around that if everyone always got a return on investment that they were hoping or that they actually calculated out, I think every company would be a \$17 billion a year company. People don't always get the ROI out that they thought of and I can probably count on one hand the number of organizations that I've worked with that actually ever went back to go verify that that ROI actually came out.

One of the other things we look for, I talk about the measures or metrics, and sometimes it's just what our measure of success is? How do we know that we're moving this forward? Talking about the just straight up return on investment is the financial portion of it. We'd also be looking at more of a Kaplan Norton Balanced Scorecard approach, too, or look at the quality cost delivery.

Joe: In essence, it still has to come back to the financial aspect somewhere doesn't it?

Anthony: Sure. That's the results portion of it, but there are other types of results, too. Once again, yeah if we just look at the Balanced Scorecard, we want financial results well we have to take care of our customers. In order to take care of our customers, we have to

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have good, solid internal processes, in order to have that we have to have good people. It all ties together. We can make short term gains financially and have other things that suffer because of that. We're trying to look for a balanced approach.

Joe: If I want to start with Hoshin, how would you recommend someone start with it?

Anthony: One of my recommendations would be definitely start small, meaning only have a few, a handful, maybe two, three, no more than five major initiatives that you're thinking about over the next five years. That's a lesson learned. Our own company, we made the mistake of trying to bite off more than we could chew. That's definitely a risky mistake of when you're first trying to do Hoshin. Just follow the steps. There are a lot of great books out there that describe the Hoshin process. Just get through it. Understand the environment, your slot analysis, do your brainstorming, select the top ideas, and then start to put your plan together to move it forward. All I can really say is the key element for Hoshin is just do your own hansei, your reflection, your own personal reflection.

You're doing your Hoshin planning next year. What can we do to make it better? One of the key elements for this, too, is to make sure that you do your reviews, typically monthly reviews and then quarterly reviews and of course an annual review. We have to learn what worked and what didn't and what we need to improve upon for next year.

Joe, I think that's probably one of the reasons why the companies have a hard time with Hoshin is because you're trying to do this in the bigger scale of things maybe only once a year.

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Joe: Great point because I think that is the essence of a lot of this planning. A lot of PDCA is that the planning process has to develop itself. You're going to get better at the planning process. The first couple times that you do something, you're more than likely to fail at the planning process than you are what you're doing.

Anthony: Right, the execution portion of it. We do want to build in lessons learned, what worked, what didn't work. We usually do that right up front before we get going into the next year's session because we're going to realize obviously it's not perfect. What could we have done better?

Joe: Is there something about Hoshin that I didn't ask that you'd like to add?

Anthony: I think, once again, a lot of people maybe are intimidated by Hoshin, they think it's overwhelming, or they get enamored with one tool like the X Matrix. These are the kinds of things I would say. Hoshin is not as hard as you think it is. Just take the step by step approach. Put a plan together and get it through the organization. Don't rely on one tool like the X Matrix. That's only one out of many tools that we've actually used to help develop a Hoshin plan for a different organization. Joe, overall, I would say if you don't have anything this is a great way to get started. I would say, for myself personally, it makes me actually feel good or even more secure knowing that our organization has a plan in place instead of just trying to react and always react to whatever the marketplace is throwing out at us.

It actually makes me feel a little bit more secure to go this is our plan, this is how we're executing it, did we meet our goals, did we not, what do we have to do next time, what do we have to do as an interim condition to get it back rolling, to get it back on track?

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Joe: How often should you be looking at your Hoshin plan?

Anthony: That's a great question. I mentioned, too, the review meetings at the lower levels are typically at a monthly level and then at a higher level, they usually do at a quarterly. Those are just some rules and guidelines. Every organization does it different. One of the things I like is that Hoshin should be visual. It's a communication tool and that's a major portion of it. Your Hoshin plan should be out so that people can see it. Based on the size of the organization, if you need to go electronic go electronic. One of my favorite things is, because of all my travel, when I'm on an airplane or waiting for the airplane, I'll pull up my Hoshin plan and go am I meeting this? Am I moving this process forward? What do I need to do to keep moving this forward so that we can get on to the next thing?

Joe: I know you travel a lot, go a lot of places, consult for a lot of organizations but what's coming up for you?

Anthony: We've got a lot of great things coming up. Matter of fact, I'm just heading out to ASQ, the American Society for Quality's Lean Six Sigma Conference in Phoenix. They're doing a presentation there on the Lean Handbook and I've been lucky enough to be one of the co-editors for this upcoming book. The Lean handbook is based off of the body of knowledge for the Lean certification through the four partners which are the AME, Association of Manufacturing Excellence, SME, Society of Manufacturing Engineers, the Shingo Prize, and the American Society for Quality. I'm looking forward to that. I've got a lot of editing coming up here in a short period of time but hopefully, that book should be out in about April. It's really going to tie together a lot of the Lean concepts that people

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have known over the years. We've been lucky. We've been having a lot of great contributing authors, minds and Lean helping us out with that.

Joe: What's the best way for someone to get a hold of you?

Anthony: The easiest way to get a hold of us is to visit our website, www.proferoinc.com. You mentioned earlier, too, we do have a blog at blog.5ssupply.com and 5S Supply is our sister company. That's an organization where we always had a hard time trying to find the stuff that we needed to be able to do our kaizen events, our improvement events, so we started 5S Supply over five years ago. We're always looking for the things that we wish we would have had to be able to make the Lean implementation a little bit easier.

Joe: Thanks everyone for listening. This podcast will be available in the Business 901 blog site and also the Business 901 iPod store. Please consider joining us at the Lean Marketing Lab for a discussion on Lean marketing. Thank you.

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Podcast Transcription



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What others say: *In the past 20 years, Joe and I have collaborated on many difficult issues. Joe's ability to combine his expertise with "out of the box" thinking is unsurpassed. He has always delivered quickly, cost effectively and with ingenuity. A brilliant mind that is always a pleasure to work with." James R.*

Joe Dager is President of Business901, a progressive company providing direction in areas **such as Lean Marketing, Product Marketing, Product Launches and Re-Launches. As a Lean Six Sigma Black Belt**, Business901 provides and implements marketing, project and performance planning methodologies in small businesses. The simplicity of a single flexible model will create clarity for your staff and, as a result, better execution. My goal is to allow you spend your time on the **need versus the plan.**

An example of how we may work: Business901 could start with a consulting style utilizing an individual from your organization or a virtual assistance that is well versed in our principles. We have **capabilities to plug virtually any marketing function** into your process immediately. As proficiencies develop, Business901 moves into a coach's role supporting the process as needed. The goal of implementing a system is that the processes will become a habit and not an event.

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