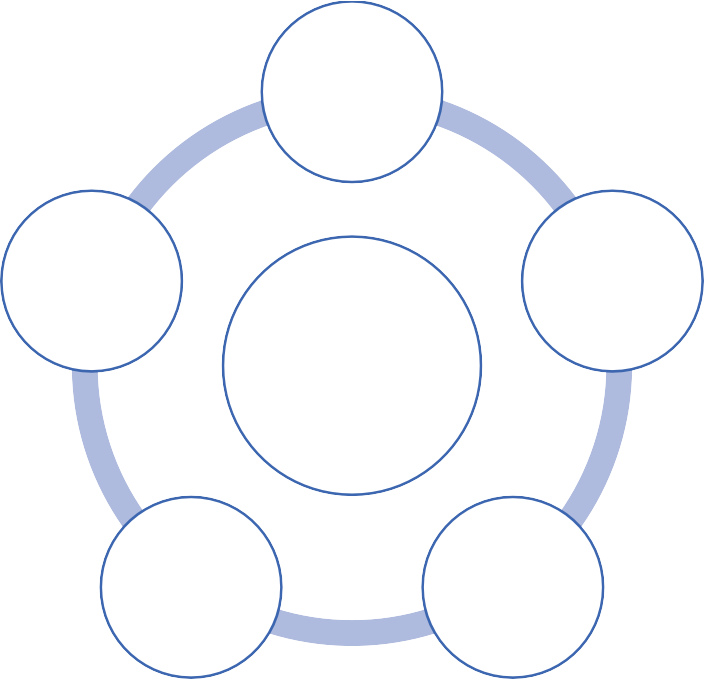
Lean Tool

5S

A workplace organization method that uses a list of 5 words, each beginning with S, to prescribe how to organize a work space



Sort

Sustain

Set in order

5S

Standard ize

Shine

# WHY

5S improves the efficiency and effectiveness of the work, eliminating clutter and disorganization

# WHEN

In the beginning of any improvement effort, as 5S provides an immediate visual change to the workplace, inspiring staff in the promise of the entire improvement effort

# HOW TO

1. Choose a target area for the 5S exercise
2. Engage a cross-functional team, including staff from the targeted work area; Insure that upper management is involved
3. Plan for a staging area, a physical area near the target area, in which to place items that need further categorization
4. Document the “BEFORE” state using the 5S Audit Sheet and photographs
5. Organize and complete the 5S Exercise of the area according to the steps below
6. Record the “AFTER” state using the 5S Audit Sheet and photographs

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| **Sort** | **Identify & eliminate what is not needed**   1. Remove items from the area that have not been used recently (in the last three months) 2. Red tag the unused items 3. Place them in the staging area 4. Have manager or team lead determine disposition: Either back to area, dispose of, or donate |
| **Set in Order** | **A place for everything and everything in its place**   1. Identify everything in the area 2. Define & label or mark off a place for each item 3. Create a standard (a photo, chart, or label) to identify where items go and to make it readily visible if something is missing 4. Make workflow smooth and easy 5. Place frequently used items close to their place of use, relegating less used items further away |
| **Shine** | **Keep the work area clean and uncluttered.**   * “Spring-Cleaning” of all items in area * Create 5S Cleaning Plan |
| **Standardize** | **Develop standards and stick to them**.   * Put procedures in place to make sure the first 3 Ss are consistently and reliably implemented * Build the work structure to incorporates routine “maintenance” of the first 3 Ss into daily work activities * Create visual controls – charts, color coding, photos, marked off areas, etc. – to assure that everything stays as it should be |
| **Sustain** | **Sustain all gains.**   * Conduct 5S Training * Encourage self-discipline & accountability * Regularly conduct 5S Audits |

# Templates:

* + 5S Audit Sheet
  + Learning Session PPT Template for Reporting 5S Exercise

**Area:**

**5S Level of Excellence Audit Sheet Date:**

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| **Level** | **Sort Identify and eliminate what is not needed** |  | | | | | | | |
| 1 | Necessary and unnecessary items are mixed together in the work area |  | Level of Excellence  1 2 3 4 5 | | | | | **Comments** | |
| 2 | Necessary and unnecessary items are separated (boxes, supplies, equipment) |  |  |
| 3 | All unnecessary items have been removed from the work area (no broken  items) |  |  |  |  |  |
| 4 | Documented method to maintain work area free of unnecessary items. |
| 5 | Unnecessary items are immediately visible and triggers a planned response  with root cause analysis and corrective action demonstrated over at least 3 months |  | | | | | | |

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| **Level** | **Set Order A place for everything and everything in its place** |  | | | | | | | |
| 1 | Equipment room shows no sign of organization. Items are randomly located. |  | Level of Excellence  1 2 3 4 5 | | | | | **Comments** | |
| 2 | Designated location established for all items as needed. |  |  |
| 3 | Visual controls are in place so that items that are missing or out of place are immediately noticed (Task Board, color, outlines, labels, numbers, etc).  Visuals make items “home” location obvious. |  |  |  |  |  |
|  | | | | | | |
| 4 | Documented method of visual sweep to identify items out of place or  exceeding quantity limits. |
| 5 | Items are either in use or in their designated location at all times,  demonstrated over 3 months or more. |

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| **Level** | **Shine An effective, organized environment** |  | | | | | | | |
| 1 | Supplies and equipment are dirty and/or disorganized. |  | Level of Excellence  1 2 3 4 5 | | | | | **Comments** | |
| 2 | Equipment room is cleaned on a regular scheduled basis. |  |  |
| 3 | Visual controls are in place. Room is cleaned daily. Procedures are in place to communicate improvement ideas and maintenance needs. |  |  |  |  |  |
| 4 | Equipment and supplies are obviously Clean. Can see evidence that improvement ideas and maintenance tasks are followed up on in a timely  manner. |  | | | | | | |
| 5 | Abnormal is immediately visible and triggers a planned response with root  cause analysis and corrective action, demonstrated over 3 months or more. |

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| **Level** | **Standardize Develop standards and stick to them** |  |  | | | | |  |  |
| 1 | No attempt is being made to document or improve current processes. |  | Level of Excellence  1 2 3 4 5 | | | | |  | **Comments** |
| 2 | Current process is known, but not documented. |  |  |  |
| 3 | Current state is documented as Standard Work performed the same by all employees. |  |  |  |  |  |  |
| 4 | Future state is documented. Implantation plan is actively worked. Area metrics are linked t company metrics and area clearly displayed. |  | | | | | | |
| 5 | Improvements are based on data and tracked for actual results, demonstrated over 3 months or more. |  |  | | | | |  |

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| **Level** | **Sustain 5S is a way of life** |  |  | | | | |  |  |
| 1 | Minimal attention is spent on 5S. |  | Level of Excellence  1 2 3 4 5 | | | | |  | **Comments** |
| 2 | 5S is a scheduled event. |  |  |  |
| 3 | 5S practices are evaluated on regular basis |  |  |  |  |  |  |  |
| 4 | Documented methods have been put into place to ensure adherence to 5S. Current/historical 5S levels are posted. |  |  | | | | |  |
|  | | | | |
| 5 | Employees continually seek improvement opportunities, and the significant level of engagement is visible to outsiders. Exceptional 5S levels in other categories have been sustained for 3 months or more. |  |  |

AREA FOCAL’S NAME: **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Total 5S Level:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**