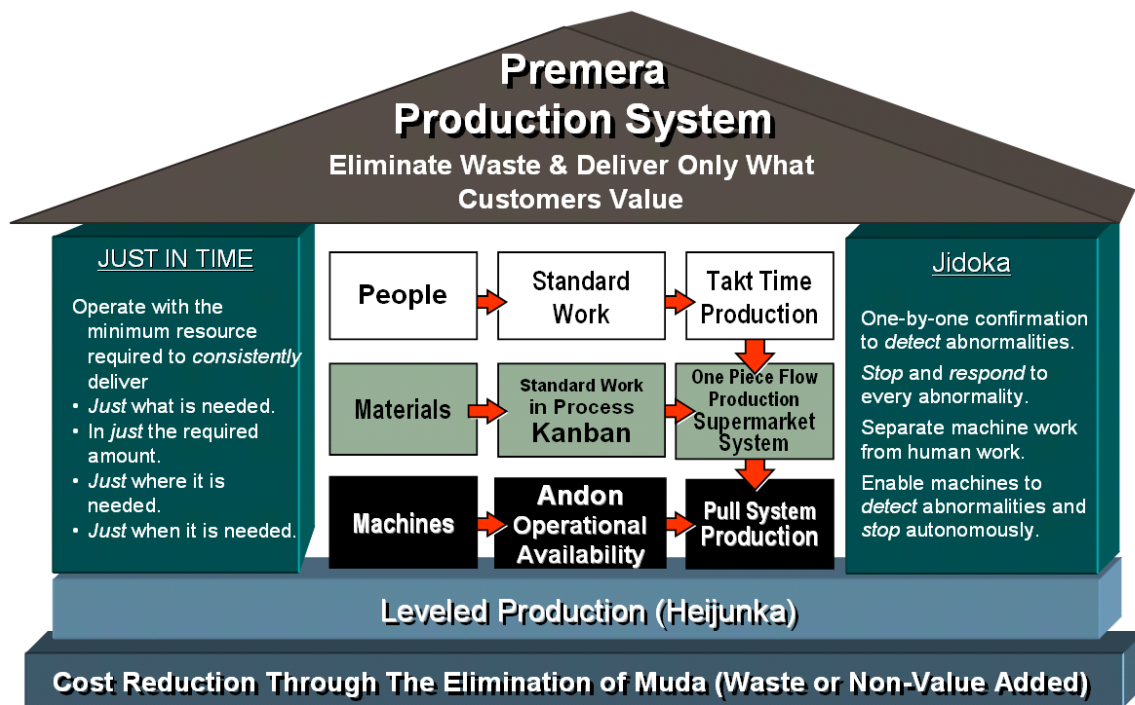


# 5S

## Workplace Organization



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# Key Points

At the end of this module, you will be able to:

- Define the 5S's (sorting, simplifying, sweeping, standardizing, and self-discipline).
- State the five major general benefits of implementing the 5S concepts.
- Apply the 5S principles to your own work area and common areas.
- Rate the work area of another associate and use the 5S approach suggest improvements.

## What is 5S?

5S represents a strategic approach for organizing the workplace to minimize the waste of time.

*The central purpose of 5S is to provide a clear view of the work so that processes can be plainly seen and easily improved upon.*

*"A place for everything, and everything in it's place – clean and ready for use."*

The five steps of the 5S process include:

- **Sorting.** Separate necessary from unnecessary.
- **Simplifying.** Create a place for everything.
- **Sweeping.** Control the work area visually and physically.
- **Standardizing.** Document agreements made during previous steps.
- **Self-Discipline.** Follow through on all 5S agreements.

Work areas (individual and common work areas) that are clean, neat, and well organized enhance quality and productivity because tools are

easier to find, less time is spent on tasks and problems become more visible more quickly (thus easier to improve upon).

Structuring work areas, tools and processes so that they are easier to improve upon (continuous improvement) is really what LEAN thinking is all about. 5S plays important role in our journey towards implementing our LEAN Production System (LPS).

## Five Primary Benefits of 5S

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### Improves Productivity



- People work better in organized areas
- Time saved when documents and tools are easy to access
- Substitute workers function easily
- Keeps us competitive

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### Cuts Costs

- Common documents saves duplication
- Each work area or department has only needed documentation
- Resources shared



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### Promotes Teamwork



- All team members participate
- Shared agreements, respect for others
- Shared responsibilities for implementation
- Clearer understanding of each others' role

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### Promotes Safety

- Hazards removed
- Work areas cleared of dangerous items
- Walk areas cleared
- Bending, twisting, and lifting minimized



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### 5S is Visual Control



- CS Monitoring
- Central Duplicating
- Mail Room
- Accounting

# Exploring 5S

Let's explore the 5 components of the 5S process in greater detail.

## Why Sort?

Sorting is the first step in eliminating waste. By separating the necessary from the unnecessary, we are able to better identify and/or eliminate unsafe conditions or unnecessary materials. This helps to eliminate clutter and create a safe working environment.

Sorting identifies what is needed to perform our job and eliminate what is not necessary to perform our job.

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## Why Simplify?

Simplifying is all about having a place for everything and making sure that everything is in its place to efficiently and ergonomically perform a job. By keeping tools and materials organized in a standard and consistent manner, we work more effectively. This will help to reduce human error and reduces wasteful downtime.

Simplifying takes proximity and frequency of tools used in mind to maximize productivity (i.e. "daily" tools closest at hand, "weekly" tools not the closest but easily accessible, and "monthly" tools filed away or stored).

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## Why Sweep?

The purpose of sweeping is to create a clean, safe, and organized working environment. When we sweep, we are actually inspecting our work areas for problems and correcting them so they don't happen again. Sweeping provides the quick ability to see if something is missing, broken out of place that might negatively impact work effectiveness.

In common areas, this prepares it for the next use (i.e. meeting rooms should be “swept” by the current meeting group to prepare the space for the next group). Sweeping is also a great way to develop and demonstrate a sense of pride in your or your team’s work area.

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## **Why Standardize?**

Applying 5S to your work environment is easy to do once, but work environments tend towards entropy (disorganization) again if not maintained. Standardizing represents the process of maintaining the work area once 5S has been applied.

By standardizing work areas, team members know where to find the required tools to perform their jobs. Standardizing also allows us to control the work that comes into our area. This visibility helps to improve how we manage our work area and processes.

Standardizing (through the processes of documentation) provides consistency in maintaining organization, neatness, and cleanliness.

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## **Why Self-Discipline?**

Self-discipline is the step individuals and teams use to ensure that their standardized work area remains standardized over time and indeed continues to improve over time as well.

It is a way of creating and reinforcing habits through practice. Over time this will lead to ensuring that 5S standards implemented naturally becomes “the right way to work.” In this way, 5S truly does represent an important component of creating a LEAN culture.

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# Electronic 5S

5S is not just a tool to be used in organizing the physical workspace. The strategy can also be applied to the electronic files we create and store in our PCs and on our shared servers.

- Clearly mapping and creating electronic filing policies eliminates time spent searching for updated documents.
- Helps improve customer service (internal and external) since documents are easily located.
- Minimizes rework because updated documentation is easily located reducing chance of defects.

## 5S Levels of Excellence

Each of the 5S's can be graded based on a 1 to 5 rating system. Higher levels indicate higher effectiveness.

	Level 1	Level 2	Level 3	Level 4	Level 5
<b>Sorting</b> Separates the necessary from the unnecessary.	Necessary and unnecessary items are mixed together in the work area	Necessary and unnecessary items are separated (including excess inventory)	All unnecessary have been removed from the work area	A method has been established to maintain work area free of unnecessary items	Employees continually seek improvement opportunities
<b>Simplifying</b> Puts everything in its place and organizes it.	Tools, supplies, and materials are randomly located	A designated location has been established for all items	Designated locations are marked to make organization more visible	A method has been established to recognize with visual sweep if items are out of place or exceed quantity limits	Vehicle developed to provide continual evaluation and process in place to implement improvements
<b>Sweeping</b> Makes everything neat and clean.	Tools, supplies, and material are randomly located	Work/break areas are cleaned on a regularly scheduled basis	Work/break areas, machinery and office equipment are cleaned daily	Housekeeping tasks are understood and practiced daily	Area employees have devised a method of preventive cleaning and maintenance
<b>Standardizing</b> Defines how a task should be done.	No attempt is made to document or improve current processes	Methods are being improved but changes haven't been documented	Changes are being incorporated and documented	Information on process improvements and reliable methods is shared with employees	Employees are continually seeking the elimination of waste with all changes documented and information shared with all
<b>Self-discipline</b> Ensures that all 5S policies are adhered to in daily work.	Minimal attention is spent on housekeeping and safety	A recognizable effort has been made to improve conditions in the work area	A recognizable effort has been made to improve conditions in the work area	Follow-through of housekeeping and safety policies is evident	General appearance of a confident understanding of, and adherence to the 5S program

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# 5S Practice Activities

In the following activities, you'll have the opportunity to practice using 5S concepts to rate individual work areas.

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## **Partner Activity: 5S This Workspace!**

**Activity Time: 5 minutes**

Work with the participant seated next to you and record two ways this associate might apply each 5S step below to their workspace.

Sorting

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Simplifying

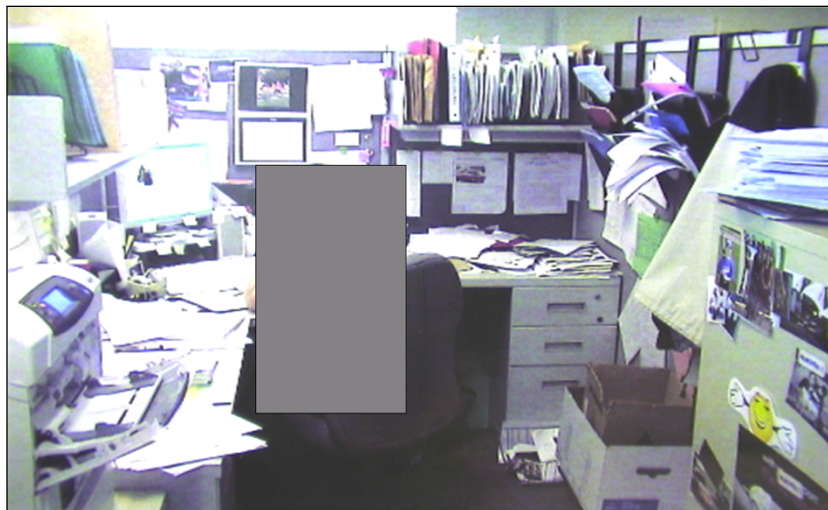
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Sweeping

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Standardizing

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Before Applying 5S





After Applying 5S

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**Individual Activity: Could You Use 5S?**  
**Activity Time: 5 minutes**

Rate your own workspace for how well it currently (“pre 5S”) reflects each 5S component below. Rate your workspace from a 1 (you don’t do it at all) to 5 (you’re naturally a 5S master). Circle your rating.

Sorting	1	2	3	4	5
Simplifying	1	2	3	4	5
Sweeping	1	2	3	4	5
Standardizing	1	2	3	4	5
Self-Discipline	1	2	3	4	5

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# Go to the Gemba!

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**Group Activity: Rate an Actual Workspace!****Activity Time: 20 minutes**

Count off to form small groups. Compare each of your individual ratings from the activity above. Identify a group member who has rated themselves close to a 3 in most 5S categories. Out of those identified select a "volunteer." The group will go to the "volunteer's" desk and work together to identify two suggestions for applying each 5S concept below.

Sorting

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Simplifying

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Sweeping

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Standardizing

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# Summary of Key Concepts

- ☑ The 5S approach is the foundation of any good workplace.
- ☑ 5S's must become visible in order to be preserved.
- ☑ 5S promote teamwork, safety, cuts costs, and improves productivity.

## Appendix A: Key Terms

**Sorting:** Separate necessary from unnecessary.

**Simplifying:** Create a place for everything.

**Sweeping:** Control the work area visually and physically.

**Standardizing:** Document agreements made during previous steps.

**Self-Discipline:** Follow through on all 5S agreements.

# Appendix B: 5S Forms & Checklists

## 5S Team Agreement Forms (Physical & Electronic)

Form Purpose: These agreement forms allow a team to document their shared understanding of how their team will apply 5S to their work areas. Gaining agreement is critical to the success of 5S.

5S Team Agreement		
Section: BlueCard Team		<b>Physical Space</b>
Date Completed:		
Date Reviewed and/or Revised:		
<b>Tips for completing 5S Agreement:</b>		
<ol style="list-style-type: none"> <li>1. Creation of the 5S agreement is a TEAM effort and should be done with all staff present.</li> <li>2. Every effort should be made to have consensus on issues; however, the Team Lead has final say if the team can't reach agreement.</li> <li>3. This template is simply a guide for your team.</li> <li>4. The 5S agreement should be reviewed and revised at least annually – more often if there are changes in how the team is organizing their area.</li> </ol>		
	<b>Team Standard</b> (This section is for you to document what the team agrees to) You can have one agreement and include the sub-agreements for different types of areas within the larger agreement, or you can develop separate agreements for separate types of areas, whichever is easier.	<b>Guidelines</b>
<b>Sorting</b>		
Define what is <b>NECESSARY</b> And <b>UNNECESSARY</b>	Highlighter, in/out box, stapler, tape dispenser, calculator, notepad, post-its, phone, claim stands, pencil holder/desk caddy, pens, calendar, file holder, trash can, wov box, ruler, envelopes, mirror, Kleenex, lotions, hand sanitizer, desk wipes, fan, headphones, job aides, training manual, plants, pictures, paperclips, rubber bands, letter opener, staple remover, white out, finger protector, binder clips, file folders, water bottle, cell phone caddy, coaster, mouse pad, radio, chair, printer, procedure rack, speakers.  Quantities should be kept to necessary amounts.	Does each person need something at their desk? Can a team share scissors or a printer etc?
List <b>FREQUENCY</b> Of use of Necessary items	Daily and weekly	Do you use this daily, weekly, monthly?

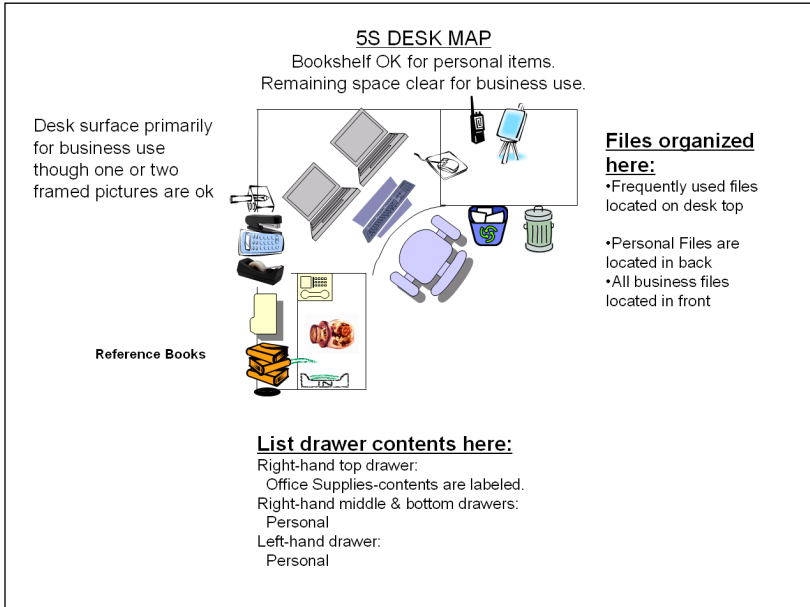
Sample Page 1 of a 5S Team Agreement for Physical Space

5S Team Agreement		
Section: KPO Team – Z:KPO		<b>Electronic Space</b>
Date Completed:		
Date Reviewed and/or Revised:		
<b>Tips for completing 5S Agreement:</b>		
<ol style="list-style-type: none"> <li>1. Creation of the 5S agreement is a TEAM effort and should be done with all staff present.</li> <li>2. Every effort should be made to have consensus on issues; however, the Team Lead has final say if the team can't reach agreement.</li> <li>3. This template is simply a guide for your team.</li> <li>4. The 5S agreement should be reviewed and revised at least annually – more often if there are changes in how the team is organizing their area.</li> </ol>		
	<b>Team Standard</b> (This section is for you to document what the team agrees to) You can have one agreement and include the sub-agreements for different types of areas within the larger agreement, or you can develop separate agreements for separate types of areas, whichever is easier.	<b>Guidelines</b>
<b>Sorting</b>		
Define what is <b>NECESSARY</b> And <b>UNNECESSARY</b>	Necessary: One folder for Main Topics. No more than three levels of subfolders. KPO Staff folder is for appropriate documents relating to this team only. Documents for overall Lean are to be stored in the other folders. Unnecessary: Folders with no documents.	Does each person need something at their desk? Can a team share scissors or a printer etc?
List <b>FREQUENCY</b> Of use of Necessary items	Each folder touched at least monthly	Do you use this daily, weekly, monthly?
Define <b>ORGANIZED</b>	Documents are not to be held in multiple folders within Z:KPO. One shortcut per folder acceptable.	What does the team agree is "organized" in appearance and function. Labels? Shadow boards? Demarcated desk areas?

Sample Page 1 of a 5S Team Agreement for Electronic Space

# 5S Desk Map

**Form Purpose:** These maps allow anyone on the team to find and information even when the "owner" of the desk is not available. It allows team productivity to continue even in the absence of a team member.



5S Desk Map

# 5S Implementation Checklist

**Form Purpose:** The purpose of this checklist is to provide reliable steps for preparing for and performing 5S activities in the work area. Included in this checklist is a preferred sequence of events and corresponding "how to" guides for each step.

Task	5S Guide
<input type="checkbox"/> <b>1.</b> Develop your implementation plan <ul style="list-style-type: none"> <li>• Create 5S documentation system</li> <li>• Determine pace of implementation</li> <li>• Draft "straw horse" 5S Map</li> <li>• Determine "before 5S" photo logistics</li> <li>• Establish visible ways to communicate 5S activities</li> <li>• Coordinate and schedule services required form support organizations</li> <li>• Draft time line</li> <li>• Communicate your plan to upper management</li> </ul>	Develop Implementation Plan
<input type="checkbox"/> <b>2.</b> Photograph the work area.	Take Area Photograph
<input type="checkbox"/> <b>3.</b> Educate work group (5S Overview)	5S Overview Lesson Plan
<input type="checkbox"/> <b>4.</b> Finalize 5S Map	Finalize 5S Map
<input type="checkbox"/> <b>5.</b> Perform Work Area Evaluation	Perform Area Evaluation
<input type="checkbox"/> <b>6.</b> Perform 5S:	
a. Perform Sorting	Perform Tagging Technique Conduct Sorting Auction
b. Perform Simplifying	Prepare for Simplifying <ul style="list-style-type: none"> <li>• Using Labeling Technique</li> <li>• Using Outlining Technique</li> <li>• Using Shadowboard Technique</li> </ul>
c. Perform Sweeping	Perform Sweeping
d. Perform Standardizing	Perform Standardizing
e. Perform Self-Discipline	Perform Team Self-Discipline Perform Individual Self-Discipline
<input type="checkbox"/> <b>7.</b> Measure Results	Measure Results
<input type="checkbox"/> <b>8.</b> Repeat from Task #6: "Perform 5S" per your work group's plan	

*5S Implementation Checklist*

# 5S's Checksheet

**Form Purpose:** Allows the team to rate itself on whether it applies or does not apply each of the steps of 5S in specific categories.

5S's Checksheet		
Instructions: 1. One person reads each statement out loud. 2. Team members respond "yes" if they agree with the statement, and place a checkmark in the "yes" column for that statement. 3. Team members respond "no" if they disagree with the statement, and place a checkmark in the "no" column for that statement.		
Sorting	Yes	No
Do employees know why this program is in place?		
Has criteria been established to distinguish necessary from unnecessary items?		
Have all unnecessary items been removed from the area? <small>Examples: Excess materials, infrequently used tools, defective materials, personal items, outdated information, etc.</small>		
Do employees understand the procedure for disposing of unnecessary items?		
Do employees understand the benefits to be achieved from the program?		
Has a reliable method been developed to prevent unnecessary items from accumulating?		
Is there a process for employees to pursue and implement further improvements?		
Simplifying	Yes	No
Is there a visually marked specified place for everything?		
Is everything in its specified place?		
Is storage well organized and items easily retrievable?		
Are items like tools, materials, and supplies conveniently located?		
Do employees know where items belong?		
Has a process been developed to determine what quantities of each item belongs in the area?		
Is it easy to see (with a visual sweep) if items are where they are supposed to be?		
Are visual aids in use? (For example: signboards, color-coding or outlining).		

5S's Checksheet		
Sweeping	Yes	No
Are work/break areas, offices and conference rooms clean and orderly?		
Are floors/carpets swept and free of oil, grease, and debris?		
Are tools, machinery, and office equipment clean and in good repair?		
Is trash removed on a timely basis?		
Are manuals, labels, and tags in good condition?		
Are demarcation lines clean and unbroken?		
Are cleaning materials easily accessible?		
Are cleaning guidelines and schedules visible?		
Do employees understand expectations?		
Standardizing	Yes	No
Are current processes documented?		
Do employees have access to information they require?		
Is there a method in place to remove outdated material?		
Do employees understand the processes that pertain to them?		
Does a system of communication exist that enables employees the opportunity to improve existing processes?		
Self-Discipline	Yes	No
Are safety and housekeeping policies followed?		
Is safety data posted in appropriate locations?		
Are safety risk areas identified?		
Are employees wearing appropriate safety apparel?		
Are fire extinguishers and hoses in working order?		
Are personal items stored neatly?		
Is personal cleanliness evident?		
Are break areas cleaned after use?		
Do employees know and observe standard procedures?		
Do employees have the training and tools that are necessary to make this program work?		
Is there a confident understanding of and adherence to the 5S's?		

5S's Checksheet

# 5S's Levels of Excellence

**Form Purpose:** Allows the team to rate itself on how well its work area currently matches up with the Levels of Excellence. Recall the Levels of Excellence table previously reviewed in the 5S Levels of Excellence section of this guide).

**5S's Levels of Excellence**

Instructions:

1. Team discusses results of 5S Area Checksheets completed for all sections of the work area.
2. Team uses the checksheets as a basis for determining the level of excellence for each of the 5S categories. There is no one-to-one correspondence between the number of marks in the "yes" column on the checksheets, and the level of excellence. The checksheet provides additional information on which to base your subjective opinion.
3. As levels are determined, write the date in the appropriate column for that level (one level per category).

**NOTE:** The "Levels of Excellence" form pertains to the entire work area. Work area sections are probably at different levels. When this happens, the entire work area defers to the lowest level.

Level	Sorting	Date
1.	Necessary and unnecessary items are mixed together in the work area.	
2.	Necessary and unnecessary items separated (includes excess inventory).	
3.	All unnecessary items have been removed from work area.	
4.	Method has been established to maintain work area free of unnecessary items.	
5.	Employees continually seeking improvement opportunities.	

Level	Simplifying	Date
1.	Tools, supplies and materials randomly located.	
2.	Designated location established for all items.	
3.	Designated locations are marked to make organization more visible (For example: color coding or outlining).	
4.	Method has been established to recognize with visual sweep if items are out of place or exceed quantity limits.	
5.	Vehicle developed to provide continual evaluation and process in place to implement improvements.	

Level	Sweeping	Date
1.	Factory/Offices and machinery/office equipment are dirty and disorganized.	
2.	Work/break areas are cleaned on a regularly scheduled basis.	
3.	Work/break areas, machinery, and office equipment are cleaned daily.	
4.	Housekeeping tasks are understood and practiced continually.	
5.	Area employees have devised a method of preventive cleaning and maintenance.	

**5S's Levels of Excellence**

Level	Standardizing	Date
1.	No attempt is being made to document or improve current processes.	
2.	Methods are being improved but changes haven't been documented.	
3.	Changes are being incorporated and documented.	
4.	Information on process improvements and reliable methods is shared with employees.	
5.	Employees are continually seeking the elimination of waste with all changes documented and information shared with all.	

Level	Self-Discipline	Date
1.	Minimal attention spent on housekeeping and safety.	
2.	A recognizable effort has been made to improve the condition of the work environment.	
3.	Housekeeping and safety policies have been developed and are utilized.	
4.	Follow-through of housekeeping and safety policies is evident.	
5.	General appearance of a confident understanding of, and adherence to the 5S program.	

*5S Levels of Excellence Rating Sheet*