5S

Guide

What is 5S?

5S is a technique that results in a well-organized workplace complete with visual controls and order. It's an environment that has "a place for everything and everything in its place, when you need it".

5S produces a workplace that's clean, uncluttered, safe and organized. People become empowered, engaged and spirited by linking people and processes, product begins to flow at the drumbeat of the Customer. The 5S's are;

1. Sort
2. Set in order
3. Shine
4. Standardize
5. Sustain

"Visual order is the foundation of excellence in manufacturing. When it is in its place on the production floor or office, work gets done efficiently and effectively. When it is not in place, work still gets done – but at a level of cost to staff and the company that is hard to justify".

5S is not just a clean-up campaign; it's a system that allows individuals to work more efficiently. It requires;

➢ Perseverance and determination
➢ The ability to see what's important
➢ Attention to detail

5S is the key first step in workplace & work culture improvement.

"Sort" Remove from the workplace all items that are not needed for current work or operation. Sorting means leaving only the bare necessities. When in doubt, remove it.

"Set in Order" Arranging needed items so that they are readily accessible and labelled so that anyone can find them or put them away.

"Shine" Sweep and clean the work area. The key purpose is to keep everything in top condition so that when someone needs to use something, it is ready to be used. Cleaning a work area produces an opportunity to visually inspect equipment, tooling, materials and work conditions.

"Standardize" Define what the "normal" condition of the work area. Define how to correct "abnormal" conditions. The standard should be easily understood and easy to communicate (i.e. visual controls).

"Sustain" Implementing solutions to address the root causes of work area organisational issues. All employees must be properly trained and use visual management techniques.

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Application and Intent of 5S's

#1 SORT: CLEARING THE WORK AREA

Define what is required & what is not required

Disposition All Items

Take Team Action

What to Do With Items No Longer Needed

#2 SET IN ORDER: DESIGNATED ORDERLY LOCATIONS

Maximize Storage Proximity & Storage Options

Location-Specific Designated Storage

Designated Space and Location, Placement, and Potential Paperwork

Storage Don'ts, Signs, Labels, and Colour Coding for Storage Locations

#3 SHINE: CLEANLINESS AND WORKPLACE APPEARANCE

Tips for Cleaning the Workplace

Cleaning Tools, Schedules, and Personnel Responsibilities

Maintaining Workplace Appearance

Shine Measures of Prevention

#4 STANDARDIZE: EVERYONE DOING THINGS THE SAME WAY

Standardize the Same Way

Tips for Formal Methodology

Roles and Responsibilities and Continuous Improvement

#5 SUSTAIN: MAKE IT PART OF THE CULTURE

Leadership and Communication

Prevent Backsliding to Old Habits

Roles and Responsibilities for Continuous Improvement

IMPLEMENTING AN ORGANIZATION WIDE 5S SYSTEM

Roadmap and Plan for 5S Implementation

Leadership Team Roles and Building the Infrastructure

Communication and Team 5S Training

Conducting successful 5S Pilots

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The 8 Wastes in any process

1. Waiting
Customers or staff waiting for equipment, staff waiting for test results, work allocation..

2. Inventories
Work queuing, orders backlog, stocks build up unused, paperwork waiting processing..

3. Defects
Missing or wrong information, wrong information communicated, incorrectly processed..

4. Excessive Processing
Repairs, duplicate tests, re-testing, multiple assessments..

5. Overproduction
Excessive reporting, unnecessary tests, Irrelevant information sent out

6. Movement
Working across multiple sites, storage of consumables in disparate places

7. Transportation
Moving equipment or staff around unnecessarily, or even customers..

8. Under-utilisation
Not fully using skill mix of staff, roles & responsibilities confused, wrong staff doing a task..

5S is a way of identifying not just the Waste in your process but also the sources of waste and removing those from every day ways of working

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How to conduct 5S

SORT

Clearing the area means organizing the workplace so that it is a more effective, more efficient place to work.

- It involves sorting out what is not needed to perform the required work in the work area.
- If it's not needed, remove it.

Use the 48-Hour Rule

- Instead of keeping things around that might get used someday, apply the 48-hour rule to everything in the work area.
- The 48-hour rule says: If it is not going to be used in the work area within 48 hours, it does not belong there.

The steps used to identify what is and is not needed in a work area and then to clear the work area of the unnecessary items are:

- Define what is needed.
- Define what is NOT needed.
- Disposition the items.
- Take action: Sort out (move out) what is not needed and move in what is needed (and is not there now).

Define what is needed

- When considering what is needed in a work area, don't just look at the core equipment and tools used. Consider the materials, supplies, and even the paperwork.
- This is also a good time to evaluate the proper quantities of items to keep in the work area.
- Defining what is needed in a work area is not something that can be done effectively by one person working alone; use a team representing all that work in the area.

Define what is NOT needed

- After the team has identified what needs to be in the area, focus on all the other items currently in the work area.
- If an item is not needed to make the product, support the operation of the equipment, or for safety reasons, then it probably should not be kept in the direct work area.

Disposition the items

- Once items that are not needed in the work area are identified, it's time to disposition them and determine where they should be stored.
- Tag items to be removed; use a standardized set of usage-based guidelines to disposition items to be removed.

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- Whenever possible, use data to determine the frequency of use, do not guess. The less frequently an item is used, the farther from the work area it should be stored.

Take action

- Once items are dispositioned, it's time to take action to clear the work area and move tagged items to a temporary holding area.
- The holding area should be an accessible place where others not on the team can examine the items, confirm that they do not need to be kept in the work area, or discuss why they think an item is needed in the work area.

Recap

- The goal of the first of the 5S's, Sort, is to have only what is needed for the job in the work area.
- The Sort phase applies to all work areas, manufacturing departments, service processes, and offices.

Dispositioning Items

Ideas for using 5S Tags and Dispositioning items during the Sort phase:

No 5S Tag

- Used at least once every two days.
- Do not remove the item from its place of use.

5S Tag, Type A

- Used about once a week.
- Remove it from the direct work area but store it close to the work area.

5S Tag, Type B

- Used once a month.
- Store it somewhere accessible in the facility.

5S Tag, Type C

- Used once a year or less frequently.
- Consider storing it outside or moving it off-site.

5S Tag, Type D

- No longer needed.
- Remove: sell, return, donate, or discard.

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Sorting: What to do with Items No Longer Needed

Suggestions for disposing of items deemed to be no longer needed during the Sort phase:

Sell it

- If equipment or tools are no longer needed, your company may be able to sell them on the used equipment market.

Return it for credit

- If raw materials or supplies are no longer needed but they are within their useable shelf life, your company may be able to return them for credit minus a restocking charge.

Give it away

- If your company cannot sell the equipment, tools, or supplies, consider donating them to a school or not-for-profit organization for tax credit.

As a last resort, throw it away

- If it is a raw material, be sure to check with your safety and environmental staff to determine the proper and safe way to dispose of it.

5S Sort Checklist

What: Examples of items to sort out

- "Too much" stock, supplies, & materials
- Supplies and tools no longer needed
- Obsolete materials or parts
- Obsolete or damaged tooling & fixtures
- Anything that will not be used in the next 48-hours

Where: Examples of places to check

- Along walls, partitions, & columns
- In corners
- On mezzanines
- On top of all flat surfaces
- Under desks & workbenches
- Desk & workbench drawers
- Inside cabinets
- Any stack or pile
- Bulletin boards, schedule boards
- Tool boxes

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SET IN ORDER

Set in Order or designating locations is about organization and orderliness. It means that there is a place for everything and everything must be in its place.

- Once the Sort phase has been conducted (deciding what should be in the work area and what should be removed from the direct work area), it's time to designate a specific location for everything.
- Using designated locations requires discipline and attention to detail from everyone in the work area.

Designated locations save time and reduce both wasted effort and frustration.

- Having designated locations for everything needed in the work area enables employees to exert visual control over their operations. At a glance, employees are able to see if things are in-place or out-of-place and if more materials, supplies, or tools need to be ordered.

Effectively establishing designated locations requires knowledge of storage devices and options.

- On the surface, designating a location may seem like a simple and straightforward task, and sometimes it is. However, establishing effective "homes" for some items requires insight into their use and knowledge of storage and identification options.
- A study of the location, type of storage, and labeling conventions is needed to develop storage systems that help make the work area more effective and productive.

Effective storage is based on a combination of factors such as the frequency of use, the sequence of use, and the bulk or cubic feet occupied by the item stored.

There are numerous forms and types of storage arrangements. It's best to be familiar with the options so that you can select the best mode of storage for a particular item. Modes of storage include:

- The Floor
- Racks and Shelving
- Flow Racks
- Cabinets
- Carts
- Storage Bins
- Portable Equipment
- Custom Storage
- Central Cribs
- Shadow Boards
- Hanging Tools

The use of signs and labels to identify "what is to be stored where" helps employees use storage locations as they were intended to be used

- The information contained on the labels will be easier for all employees to understand if the format for the labels is standardized.
- Where storage locations might change slightly, consider portable labels. For

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example, magnetic labels work extremely well on racking in storage and warehouse areas.

- For consumables, another alternative is to use kanban cards mounted in plastic sleeves as the labels. When the reorder quantity is reached, the kanban card can be removed from the sleeve and be used to reorder that item.

Storage Proximity

Considerations for determining storage locations during the Set in Order phase:

If the item is used several times a day:

- Store "on the equipment" if possible.

If the item is used at least once every two days:

- Store in the work area.

If the item is used about once a week:

- Store close to the work area.

If the item is used once a month:

- Store somewhere accessible in the facility.

Storage Options

Options to consider when selecting or designing storage devices during the Set in Order phase:

The Floor

- For some large or heavy materials, tools, or equipment, the only logical thing to do is store them on the floor.
- Designate a dedicated space for the item, mark the space on the floor, and use it only for that item.

Racks and Shelving

- Racks and shelving allow the effective use of cubic feet rather than just square feet used for storage by making vertical space available.
- Labelling shelves and first-in, first-out practices are important to ensure that the shelves are effective 5S aids.

Flow Racks

- Gravity flow racks are excellent to ensure FIFO (first-in, first-out) inventory practices are followed.
- Flow racks can be designed for either cartons or pallets.

Cabinets

- Cabinets can be both good and bad for organizing a work area. They are good for storage. They are bad in that they can be used to "hide things."
- It takes discipline to ensure a cabinet is a valuable 5S tool and does not detract from the effort.

Carts

- Carts are ideal for moving things into the work areas when needed and then out of the way when not needed.

Storage Bins

- Storage bins are available in all sizes, from small desktop containers to large, rollable bins.
- Using different colour bins to designate different tasks or product families provides a visual check to help make sure a bin is not out of place.

Portable Equipment

- Any equipment that can be made portable should be. This will allow it to be rolled into the work area when it is needed and then rolled back to its home when the job is done.
- Do not forget to designate the area for storing the portable equipment when it is not in use.

Custom Storage

- Even unusual shaped and sized items can be organized.
- After reviewing the item, a maintenance professional can often design and build a custom storage system for those items.

Central Cribs or Storeroom

- Using a centralized storeroom as the designated storage location is rarely as effective as it may seem at first.
- Instead of a central crib, why not consider keeping equipment and supplies in satellite storerooms in the area where they are needed?

Shadow Boards

- Shadow boards provide a visual place to store hand tools and gages. It is easy to see at a glance what is missing from the board as well as what should be placed where on the board.

Hanging Tools

- One method to organize tools in work areas is to mount them from retractable reels above the work area. This keeps them out of the way when not needed, but keeps them right at hand for when they are needed.

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Location-Specific Designated Storage

Tips for designing and defining designated storage spaces:

Designated Space on the Floor

- When items are stored on the floor in the work area, make sure the allocated storage space is not in the way; keep the designated spaces out of the workers' travel paths, material-handling aisles, and away from electrical equipment.
- Designate the space by outlining the space with colour tape or paint and labelling the space.

Kanban Locations

- A kanban is a signal to trigger replenishment of inventory. The kanban can signal it is time to pull inventory from storage or to start the next production run.
- Kanban space options include full boxes, peg boards with a specific number of openings or slots, and totes with predetermined quantities.
- Kanban spaces for raw materials, work-in-process, or finished goods should be clearly marked.
- Consider adding signs above the kanban areas that note the item or items and maximum quantities that should be stored in the space.

Safe Placement

- When designating locations, take into account the weight and size of the object.
- There should be easy access to the storage location, especially to items that are frequently used. Make sure there is enough room around the object to access it safely.
- To avoid potential injuries, heavy items (approximately 25 pounds or more) that are accessed manually should not be stored too high or too low.
- Safe placement also involves the safety of the equipment itself. For example, a sensitive electronic instrument should not be stored alongside a fork truck aisle unless protected by a bollard. And flammable materials should be stored in a safety cabinet or flammable storage area, not out in the open.

Aisles and Access-ways

- Painting aisles and access-ways or doorways is useful to show where not to store things.
- If the aisles are going to be used for egress, make sure they are wide enough and meet local and federal regulations.

Locations for Waste Containers

- Space in the work area should be allocated for peripherals such as trash cans, waste carts, cutting fluid or coolant drums, and even cardboard scrap.
- Designated locations for waste containers must be convenient to the work area if they are to be used the way they are intended, but they must not in the way of the work.

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A Place for Paperwork

- Designated locations for process-related paperwork, both for permanent paperwork such as work instructions and for "transient" paperwork such as travelers or routers are also needed.
- Permanent paperwork should be stored near where it is used.
- It's a good idea to store transient paperwork in a plastic sleeve right on the parts or equipment if possible.
- Paperwork such as data collection forms and SPC control charts should also have designated locations. One technique is to use stands for this type of paperwork at each work area.

Storage Don'ts

Things NOT to do when arranging and designing storage locations and devices:

Don't Use Worktables as Storage Tables

- A worktable is not a good storage area.
- Tables in many work areas seem to become magnets for clutter. Consider removing tables in the work area unless they are needed to perform work.
- If a table is needed, it should be sized for the work being done on it. Do not allow space that could be used for storage. Sometimes it's best to replace a table with a stand.

Don't Allocate Too Much Space

- Be careful not to allocate too much space when designating locations.
- Remember that open areas in any operation tend to get filled up; most of the time the open area gets filled with things that aren't needed in the work area.
- Err on the side of using less space rather than more space unless safety considerations are involved.

Don't Waste the Worker's Time

- When organizing work areas, be careful not to set the storage up in a manner that would waste the worker's time trying to get at the items.
- For example, if the worker would have to wait for a fork truck to unstack items, then don't stack them to begin with. And don't put items on the top shelf in an office if the office workers will need to take time to locate a step stool or step ladder to get access to them.

Signs & Labels for Storage Locations

Tips for using signs and labels to identify what is stored in specific storage locations:

Label the Locations

- When setting in order, label the designated locations and storage containers.
- The information contained on the labels will be easier for all employees to understand when the format for the labels is standardized.
- When storage locations might change, consider portable labels. For example, magnetic labels work well on racking in storage and warehouse areas.

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- For consumables, another alternative is to use kanban cards as the labels by having them mounted in plastic sleeves at the location. When the reorder quantity is reached, the kanban card can be removed from the sleeve and then be used to reorder the item.

Communicate Information with Labels

- Labels can help communicate information at a glance.
- For example, color-coding the labels so that the storage locations and types or classes of inventoried items can be quickly matched saves time.

Use Visual Labels

- Labels containing words or code numbers are good but sometimes pictures are even better.
- Consider putting a picture or schematic of the item on the label to create a visual label that clearly communicates the item stored.

Colour Coding

- Color-coding tools makes it easier to know where they belong and when they are out of place.
- Consider color-coding peripheral equipment such as chutes, dies, and fixtures that go with specific pieces of equipment as well.

Set in Order Checklist

Set in Order: Rationale & Techniques

- The more frequent the use, the closer to the point of use the item should be stored.
- Arrange equipment, tools, & supplies in the sequence of operations.
- Base storage amount on cubic feet, not quantity.
- Use color-coding.
- Designate locations for specific items.
- Use labels & signs to identify stored items.

Set in Order: Storage Options

- The Floor
- Racks and Shelving
- Flow Racks
- Cabinets
- Carts
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- Portable Equipment
- Custom Storage
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SHINE

The Shine phase is more than making the work area spic and span.

- There are three aspects of shine: getting the workplace clean, maintaining its appearance, and using preventive measures to keep it clean.

Cleaning the workplace:

- Take the time to plan what needs to be cleaned, what it will be cleaned with, when it will be cleaned, and who will do the cleaning.

Maintaining the appearance of the workplace:

- Techniques and practices that contribute to the appearance of a work area include: painting, lighting, dealing with clutter, dust collection, minimizing spills, and conducting routine maintenance.

Using preventive measures to keep the workplace clean:

- Once the work area, tools, and equipment are clean, they need to be kept that way.
- Continued housekeeping is one way to keep the work area, tools, and equipment clean. But the better way is to prevent these from getting dirty in the first place.
- Root cause analysis, mistake-proofing, and the use of preventive measures are important to keep the workplace clean and orderly.

Recap:

- Equipment that is kept clean performs more efficiently and has less unscheduled downtime. Additionally, many organizations find that productivity and safety performance improve as housekeeping improves.

Tips for Cleaning the Workplace

Tips for cleaning the workplace in the Shine phase:

What needs to be cleaned?

- Actually, everything will need to be cleaned, but the 5S team should take the time to specifically list out what will be cleaned.
- Use your list to determine what cleaning equipment and supplies will be needed and who will do the cleaning.
- Cleaning the work area does not just mean the process equipment and area directly around it. It means the whole area including the floors, the walls, and even the ceilings and the lighting fixtures.
- Even areas under and on top of equipment, areas which are not normally seen, should be cleaned. These areas are often overlooked or ignored.

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Cleaning Tools

- The proper tools are needed for housekeeping just like the proper tools are needed to do the "real" job.
- Housekeeping equipment and supplies should be kept in designated locations near where they will be used.
- Set up a kanban system for cleaning supplies.

Cleaning Schedules

- Continual cleaning of a work area is the best approach.
- If an area "gets dirty" faster than it can be kept clean, find the reason (root cause) and correct it.
- Set scheduled cleaning times and responsibilities for common areas.

Cleaning Responsibilities

- A formal schedule is best for establishing who will do what and when they will do it. A posted checklist is a good tool for creating the schedule; use the checklist to indicate responsibility and record the completion of housekeeping assignments.

Maintaining Workplace Appearance

Tips for maintaining the appearance of the workplace in the Shine phase:

Painting the Workplace

- Painting is a key part of Shine. Of course, before the area can be painted, it must be clean. Consider painting the walls, ceiling, equipment, and if appropriate, even the floors.
- Establish a painting scheme. Different work areas don't need to have the identical colours, but they should have the same colour scheme.

Proper Lighting

- It's hard to "shine" when the work area is dimly lit. Even a clean area can look dingy under poor lighting.
- Ensure that the work area is bright enough. Natural light is best; consider adding more windows to the work area. If it's not practical or cost-effective to add natural lighting, add more lighting fixtures or consider replacing bulbs and reflectors.

Dealing with Clutter

- Most of the clutter should have been cleared out and organized in the first two phases of the 5S's, Sort and Set in Order.
- Things that are often overlooked include postings on the walls or bulletin boards and hoses or wires running along the floor.

Effective Dust Collection

- When using powders or friable materials, dust collection systems are a must.
- Proper dust collection devices prevent work areas from getting dusty and dirty.

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Minimizing Spills

- Equipment that uses cutting fluid, coolant, and hydraulic fluid "always" seems to have leaks or spills.
- There are methods for preventing spills; one low-tech approach is to put a pan under an entire piece of machinery to collect and contain spills and drips.
- One of the keys to minimize spills is to repair leaks immediately after they start.

Routine Maintenance

- Preventing housekeeping problems involves performing maintenance as necessary. If equipment starts leaking, stop the leak. If dust starts blowing around, find the source and fix it.
- Don't just use tape or other temporary fixes; follow the temporary measures with permanent fixes to the problem to prevent recurrence.

Carpeting

- In manufacturing facilities and at building entryways, keeping carpeting looking acceptable is a difficult job. While regular cleaning and chemical guarding of the carpet will make the areas look better, consider installing darker, mottled carpeting in hallways and areas accessed from the plant or from the outdoors.
- One technique to determine what colour carpeting would hide dirt the best is to place small pads of white carpeting at the entrances to the office areas from the plant. Then, after a few weeks of traffic, take the now-dirty pads to a commercial carpet facility and have them match the colour.

Preventive (Shine) Measures

Tips to help keep the workplace "Shining:"

Root Cause Analysis

- Treat cleaning and organizing the work area as a process improvement problem. The same root cause and problem-solving tools used for quality and productivity problems can be applied to improving workplace organization and appearance.
- A key to preventing recurrence of housekeeping issues lies in root cause analysis of the problem. Root cause analysis involves collecting and analysing data to find out what is at the root of the "dirty equipment or work area" symptoms.

Mistake-Proofing Solutions

- Once the root cause of recurring housekeeping issues is found, identify a solution that mistake-proofs the problem and prevents the work area and equipment from getting dirty in the first place.

Prevention in the Design Stage

- New installations should be designed with housekeeping in mind.
- Prevention ideas that focus on seemingly unimportant housekeeping issues can lead to significant improvements in appearance over the long term.

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STANDARDISE

Standardize, the fourth of the 5S's, involves putting the systems in place to ensure that everyone does things the same way.

- The methodology for Sorting needs to be standardized, the approach to Set in Order needs to be standardized, and Shine especially needs to be standardized.

In order to standardize:

- Roles and responsibilities must be clear and consistently applied.
- Training will be necessary to ensure all know how to apply 5S techniques and "copy exactly," or apply them the same way.
- And, as with any improvement initiative, the effort must not be allowed to become static but must continuously evolve and grow.

Roles and responsibilities:

- Roles in a 5S effort are straightforward. Leaders must set the tone and lead by example.
- Managers and supervisors must commit to the initiative, provide time for the workforce to develop and implement 5S changes, provide guidance with those changes, and support the 5S changes.
- Members of the workforce must embrace 5S principles and practices and help implement the 5S's in their work areas.

5S training:

- Universal indoctrination in general 5S techniques is needed to help build a common 5S vocabulary and skill base.
- As the 5S's are adopted work-area by work-area, each area will develop unique approaches and methods; anyone working in a specific work area must receive training in those work-area-specific methods.
- And, just like with any new skill, practice makes "perfect."

Copy exactly:

- Standardization is about creating best practices and then getting everyone to "copy exactly," using the established best practices the same way, everywhere, and every time.
- Implementing a "copy exactly" mentality involves establishing standardized rules.
- Visual factory techniques including color-coding, checklists, and labeling help reinforce a copy exactly approach.

Continuous improvement:

- It works best when the approaches used to improve 5S techniques and practices are standardized as well.
- For example, if an organization does use a common problem-solving process, time spent communicating new ideas and spreading lessons learned to other work areas will be saved.

SUSTAIN

Sustain is perhaps the most difficult phase of the 5S's.

- You would think that after going through the trouble of Sorting, Setting in Order, Shining, and Standardizing that the fifth S, Sustain, would be easy.
- But, unfortunately, Sustain is perhaps the toughest of the 5S's.

Communication is necessary to reinforce the 5S's.

- Sustaining requires keeping everyone involved, continually reinforcing what and why the 5S's are important.
- Communication becomes the spotlight for a 5S initiative. Keep reinforcing the message and emphasizing roles and responsibilities.
- Sustaining the 5S's requires leadership, commitment, and allocation of the time and resources necessary to keep the effort vital.
- Recognition for jobs done well becomes the fuel that keeps the effort dynamic.

Preventing backsliding:

- Audits can serve as on-going checks on 5S activities.
- A teamwork approach builds a common effort toward achieving a common goal.
- Soliciting ideas for improvement will generate ideas to improve and help sustain the 5S effort.
- And reacting immediately to problems is a must or the organization can quickly slide back to old habits.

Sustaining the 5S effort takes a lot of work. It takes commitment and involvement by everyone to keep the effort going and to prevent the organization from just sliding back into the old ways of doing things.

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5S for the Office Area;

Though it's good to learn visual management and 5S by utilizing concepts of 5S in the office (desk, chair, table tops, etc.), wasted time in the office doesn't come from looking for a pencil or looking for a phone or an important file. Once you've really grasped the concept of 5S – it's time to use the tool to solve problems that you are making visible through your audits and checks.

One of the greatest wastes in an office environment is file storage (or lack thereof). This may happen digitally (internet or internal database) or physically in a filing cabinet. If you've looked over and over for a file, can't find that PowerPoint, or aren't sure if you're using the latest version of a document you and a team have been editing, you will benefit from using 5S on your file storage.

Sort: Are there multiple people in your office using the same set of files? Do some folks save a version of the file on his or her computer, a network folder, maybe a personal computer, and a back-up flash drive? How many versions of the same file does that create?!

Sort through the files you and your team don't need. DELETE the ones you definitively do not need. ZIP or ARCHIVE the ones you'll probably never need but are too scared to delete. Separate them from the files you need to use.

Most importantly, use that recycle bin! It's a perfect place to implement the idea of a "red tag" holding area.

Set in Order/Straighten: How do you currently access your files and how do you currently name your files? Are you searching by name? Date? What files do you use most often?

Perhaps sort your notes first by client, then by date, because that is the way we are searching. We don't mind the multiple folders to click through to find some files because we don't access them as much as we would access standard topics. However, if you're using files more often (e.g. daily) put them a click or two away!

Shine: How are you naming your files? Does everyone in your office have a different way to name essentially the same kind of file?

Keep file names tidy and consistent. If they aren't a click or two away – you should be able to search (e.g. spotlight) and find them quickly.

Standardize: Create standards for naming files and placing files. Create standards for updating and saving files. For example, we have a standard training package on

Workplace Organization – if a colleague of mine finds an improvement with the standard training package s/he must make the update, negotiate it with our team, and THEN update the standard training package.

Sustain: Just like 5S on the manufacturing or hospital floor – successful 5S should have an end-of-shift restoration and a weekly team leader audit. Remember – this is to help make problems visible so you and your team can solve them.

Sustaining 5S in the Office

Some Office 5S checklist activities:

1. Clear desktop of all files (file appropriately)

2. Clear email inbox

3. Close all running programs

4. Restart computer

A weekly 5S Office Audit items may include the following:

1. There are no files on Computer #1's desktop

2. There are no files on Computer #2's desktop

3. There are no files on Computer #3's desktop

4. The "Coaching" folder matches the standard posted in the folder

5. The "Training Topics" folder matches the standard posted in the folder

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Successful 5S Efforts

Don't See Your 5S Initiative as a Stand Alone Effort – Besides bringing up 'program of the month' memories from the past amongst your people, treating your 5S initiative as a stand-alone process will create a lot of confusion about why you are undertaking this effort and will result in the inefficient use of resources. Many companies use special training, audits, and meetings that have a specific 5S focus in an effort to get the program going. Instead, you should build 5S practices and expectations into your larger performance improvement plan and operational excellence strategies. Similarly, don't form a 5S specific team – instead, build 5S initiative reviews into your regular Leadership Team and workgroup team meetings.

Require Management to Set a Strong 5S Example – Nothing will kill a 5S effort quicker than having employees walk by messy managers' desks or work areas right after they have attended a 5S project update meeting. Just as the Leadership Team should be the most effective team in a given company, the work areas of managers in a 5S company should be the cleanest and most organized. Additionally, you should expect every member of management to support 5S practices consistently and regularly – if a manager sees someone not practicing 5S ideals, they should politely challenge those people and ask them to correct the behaviour or condition, even if that person does not report to them.

Require Every Supervisor and Manager to Enforce 5S Practices on a Daily Basis – The monthly walk through (high performance workplace audit) discussed below serves as a great tool for providing measurable 5S progress and for reinforcing the ultimate in 5S expectations, but you should also recognize that supervisors are conducting performance audits whenever they are out there with their people. What is not said often sends a stronger message than what is said – if a supervisor walks by someone who is violating a 5S (or other type of high performance) expectation and does not say anything, they are telling that employee that their behaviour is OK. Similarly, the daily reinforcement of good 5S practices when they are exhibited carries much more weight than saying 'thank you' to the overall group in a meeting.

Incorporate 5S Expectations into EVERY Employee's Job Description – If you want your work areas to remain swept, straightened, and shiny, expect each employee to leave them that they when they go home for the evening. This is best accomplished by (1) rewriting EVERY job description to include this expectation, (2) emphasizing this expectation in work group meetings, and (3) providing immediate performance feedback when a workplace does not meet the expectation at the end of a shift or day.

Clearly, and Visually, Define What Each 5S Workplace Should Look Like – 'Before and after' pictures of 5S progress send a strong message about what is expected and will be recognized. Pictures also help people better understand what each 5S concept will look like when it is actually put in place on the job. You may also benefit from taking your work groups over to a '5S best practice' work area and talking about the differences between that workplace and how their own currently looks.

Modify Procedures and Work Instructions to keep 5S Changes Alive – If you want all of your people to adhere to the "A place for everything and everything in its place" philosophy, you had better rewrite your procedures to include steps for putting things back where they belong. You also need to make sure that clear, easy to use procedures exist for disposing of waste or obsolete product or supplies. After all, don't our work instructions define what we are expected to do at work each day?

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Build 5S Expectations Into Your Monthly High Performance Work Practices Walk-Through – Sure, you can do a special 5S walk-through each month just like you do the monthly safety inspection, but your time will be much better invested if you create a monthly high performance practices walk through assessment tool and include 5S expectations as part of it. For example, in addition to looking for consistency of 5S practices, also look for consistency in the use of visual performance postings, safe work practices, proper lean changeovers, six sigma project support, and employee awareness of high performance concepts as you move through each workplace.

Include 5S Recognition in Your Regular Employee Recognition Efforts – The best thing you can do is recognize each team each month that meets or exceeds the minimum score on the high performance work practices walk through. Avoid the tendency to give out a "Cleanest Workplace of the Month" or a "Most Organized Department" award, and especially avoid punishing people for being 'one of the worst'. You only have so much recognition money to spend in your budget – use them to recognize team success against an all-encompassing set of high performance work practice criteria.

Create a 5S Action List and Show Regular Progress towards Its Completion – One of the best things about putting 5S in place is that once you get over the initial hump, it is relatively easy to keep 5S alive. For example, once you have sorted out all of your obsolete equipment and supplies, you should not have to do those tasks again as long as your people each fulfil the expectations of their 'modified' daily job. By creating a single 5S Action list for the whole facility, reviewing it weekly as part of your Leadership Team meeting (don't form a 5S Implementation Team), and tracking the per cent complete for each action item on the action plan, you can easily keep up with the progress of your initiative.

Create a 5S Implementation Plan with Milestones that Appreciate Process Evolution – If you follow the above nine guidelines, you should see progress in a relatively short amount of time. Additionally, you should see little regression back to where you were when you started your 5S initiative. For example, after 3-6 weeks of consistent sweeping and straightening up at the end of each day, that behaviour should have become a habit, each workplace should be much cleaner, and the need to emphasize and spend time on these two pieces of the 5S puzzle should be low. Also, once you have undertaken that big effort to get rid of all of the stuff you have collected over the years and created a reorganized approach to storage in all work areas, you should not have to worry about doing those tasks again.

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Implementation Strategy

Step 1: Start with the Leadership Team

- As with any improvement effort, implementation of the 5S's must be driven from the top of the organization.
- Only Top Management can create the environment needed and give the effort the visibility and importance it needs for long term viability.

Step 2: Build the Infrastructure

- The 5S effort should fit within an organization's existing improvement structure.
- Divide & conquer by establishing 5S subcommittees for Communications, Training, Project Support, and Best Practices.

Step 3: Launch Communications

- Conduct short, focused, and frequent communication sessions with all employees on the what, why, how, when, and who of the 5S initiative.
- Deliver the message in several formats including group meetings, using the organizations' intranet or website, bulletin board postings, and internal newsletters.

Step 4: Train Teams in 5S Techniques

- Develop a plan to train everyone in basic 5S concepts and then supplement the generic training with just-in-time training in work-area-specific practices.
- Note that the initial teams may need to be trained in problem-solving techniques and root cause analysis.
- Additionally, there may be a need to provide training for the leadership team in communication skills, recognition strategies, and facilitation skills.

Step 5: Begin 5S Pilots

- Select areas that need the 5S's (and that you project will be successful in adopting 5S practices) as pilot areas. What is learned in the pilot areas will be used to help develop a full roll-out plan.
- The first pilot work areas to receive 5S treatment should be ones with high visibility. For example, select work areas in which nobody wants to work because they are so congested or dirty.

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Step 6: Establish Best Practices

- Creation (and use) of a Best Practices Database can help multiply the impact of 5S successes by providing the means to share successes throughout the organization.

Step 7: Develop a Full Roll-Out Plan

- After completing the initial pilots and before involving the rest of the organization in the 5S effort, step back and evaluate how the pilots went.
- Get ideas from members of the pilots about how to strengthen the 5S process and use those ideas to develop a roll-out plan.
- A comprehensive roll-out plan defines the sequence of events, establishes roles, responsibilities, and performance measures.

Step 8: Continually Evaluate & Adjust

- As with any process, as lessons are learned, make improvements to the 5S effort.
- Modify and strengthen the infrastructure, select new tools to add to the "arsenal," develop improved methods to measure and communicate progress, and challenge work areas to constantly improve.