



What is 5S?

5S is a simple, structured, repeatable method for removing obstacles and keeping workspaces clean, organized, and safe. 5S is also a form of visual management. When applied correctly, the 5S methodology can help show you visually where the problems are in a workspace and remove obstacles by arranging and organizing tools or information in an efficient way. 5S includes five steps: sort, shine, set in order, sustain, and standardize.

The 5S methodology is a structured, long-term effort to improve a workspace.

When should I use it?

- When employees spend too much time searching for items at work
- When employees want to easily keep track of important items
- When employees want to reduce movement and create efficient flow within a workspace
- To eliminate unneeded materials from a work area

How do I facilitate or create it?

Before starting the project:

Meet with the Project Lead

A 5S project needs to be planned thoroughly to be successful. You need complete buy-in from your Project Sponsor and Lead to make the process worthwhile. You should help your Lead develop an A3. The Project Lead is responsible for:

- a. Defining the problem and the boundaries of this 5S project. What areas are we choosing to work on?
- b. Developing the problem into a compelling ‘why’ statement that fits in the first box of the A3. The Project Lead should also choose the project team
- c. Selecting the project team and determining the timeline for the 5S project.
- d. Deciding which metrics he/she wants to improve via the 5S project.

Train staff on 5S methodology

PPI has an introductory course that teaches the 5S methodology (among other Lean tools). Check out our Lean 101® course [here](#).

Discuss the issues with the current space with the project team

It may be helpful to facilitate the team through a fishbone diagram to get a better idea of the root causes associated with the issues the team surfaces.

Take “before” photos.

During the first meeting with project team:

Conduct gemba walks

Make sure to take pictures, document steps, track the step times, and take notes on the obstacles you see. Is there excess movement in the workspace? Are people doing extra work by looking for tools? Are employees making mistakes due to spatial or organizational issues in the workspace? Are the tools that employees use most located close to them? Encourage staff to conduct gemba walks of the process themselves – this practice will allow them to start seeing obstacles in their own workspace. If you do this, be sure to highlight that gemba walks are not an opportunity to pass judgment or offer solutions if you are an observer. And if you are being observed, a gemba walk is not an opportunity to feel ashamed of the way you conduct your work. Remember: gemba walks are about having big eyes, big ears, and a small mouth, and Lean is about having respect for your coworkers and the workspace.

Lead a brainstorming session

What do the project team members like about the current workspace orientation? What do project team members want to change? Document these ideas in a visible space in the workspace for future reference. How much do you want to improve on the current state metrics?

Identify the space you want to work on first

If your A3 identifies multiple areas in need of the 5S methodology, pick one area to start with that will have a high impact, but is low in effort. Starting with a smaller, high-impact space will foster buy-in with the project team.

Develop criteria for disposing of not-needed items

Should the project team dispose of items that are 5 years and older? What about items that only get used once a year? Work with the project team to develop criteria for sorting, and make sure that all team members agree on the criteria. The more specific and detailed the sorting criteria, the better. People have strong emotional connections to their belongings – setting expectations about what will be tossed will mitigate resistance to the project later.

Develop a timeline for the sorting process, and stick to it!

It can help to identify all of the sorting tasks that need to be completed and list them on a visual management board so the project team can cross off sorting tasks as they are completed. For example, “sort through shed tools.”

To begin the 5S project:

#1 SORT: Develop sorting-related processes to support this step.

A shift in mindset is necessary for successful sorting. Instead of assuming that all items are staying except for a few obsolete things, assume instead that all items are going except for the things that are really needed for work. Avoid the trap of the “perfectly good”: “Why should I get rid of this bag of rubber bands? They are perfectly good”... even though the office has ten bags of them that would take 20 years to use up.

- **Develop a step-by-step sorting process, and post a list of the steps in a visible place in the workspace.** Once project team members decide they want to toss out an item, what should they do with it? Lean tells us that the best method is to develop a “red tagging” system:

- Project team member picks up an item and asks him/herself:
 - Does this item meet the criteria we defined as a project team?
 - Is this item needed?
 - If it is needed, is it needed in this quantity?
 - If it is needed, how frequently is it used?
 - If it is needed, should it be located here?
 - Who is ultimately responsible for the item? (Verify from that person.)
 - Are there any other not-needed items cluttering the workplace?
- If the item meets the criteria for tossing, place the item in the “red tag” area and label it by:
 - Frequency of use (Monthly? Weekly? Annually?)
 - Person responsible for item
 - ****Items in the red tag area should be held there for at least two weeks so that other team members have a chance to determine whether it should be tossed.**
- **Develop a formal process for disposing of items, and communicate this process to the project team.** Work with the project team to determine which items can be recycled, and connect the project team with recycling and reusing resources across the city. Assign a person responsible for disposing of items.
 - City and County of San Francisco Virtual Warehouse: A Virtual Warehouse is an online items reuse system for surplus goods submitted by San Francisco City Departments for reuse. The Virtual Warehouse is open to City and County of San Francisco City Departments, all nonprofits with 501(c) status, and all schools. It helps prevent valuable items from going to the landfill, save money on purchasing and disposal costs, and meet San Francisco’s zero waste goals. It is most appropriate for office supplies, rather than construction materials. Do some research to determine if something similar exists in your area!
- **Have the project team complete the post-sort checklist.** Ensure that all unnecessary items have been eliminated from the workplace.

#2 SHINE: Work with the team to complete a comprehensive workspace.

Remove all dust and dirt from the workspace. Clean all tools.

- **Develop a shining schedule with the project team and post in a visible area in the workspace.**
- **Have the project team complete the post-shine checklist.**

#3 SET IN ORDER: Meet with the team to develop a plan

Locate items so they can be retrieved in less than a minute (or faster for frequently used items). It may be helpful to use a Five Whys exercise to determine where something should go.

If the item is used...	It should be located
Multiple times per hour	Visible and within arm's reach
Several times a day	At the workstation
Weekly	Within a short walk
Rarely	Stored somewhere it can be easily found when needed

- **Write this plan down and post it in a visually accessible area of the workspace.**
- **Create a visual workspace by labeling tools and specific areas of the workspace.** Label all storage areas, add tape to the floor to define holding areas for tools, add shadow decals to indicate where an item should be stored, and add tiger marks to demonstrate that something is a safety hazard. Add arrows to help individuals navigate the workspace. One valuable question to ask: “Would I know where this item goes even when it is missing?”

- **Place items in their new homes.** Ensure that there is “a place for everything, and everything is in its place.”
- **Have the project team complete the post-set in order checklist.** Are all items labeled? Have the project team bring in an outside observer who is not familiar with the workspace to see if he/she can find materials with ease.

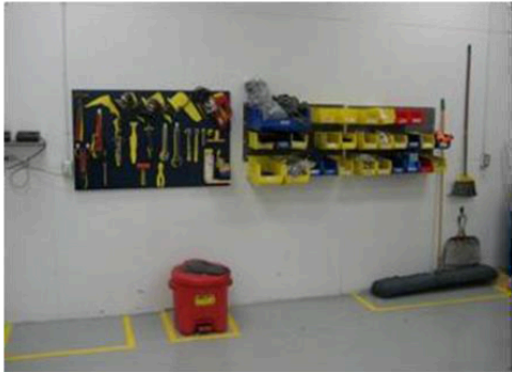


Image 1: Footprinting: Is an item missing from this storage space? How do you know?



Image 2: Is it easy to tell where each tool goes? If a certain tool is missing? What's inside each drawer?

#4 STANDARDIZE: Work with the project team to define routines and practices that will ensure that the work space remains in a state of good order.

- Develop a schedule for maintenance of the work area.
- Develop checklists for cleaning and maintenance
- Develop standard practices for re-ordering supplies
- Create visual aids for proper storage of goods

#5 SUSTAIN: Ensure that the work space is continually maintained and that standards are adhered to.

- Celebrate the achievement of a completed 5S project!
- Use 5S checklist to conduct regular audits of the workspace to ensure that the space maintains its organization and flow.
- Ensure that staff are trained in 5S principles and incorporate them in their individual workspaces.

Tips

- **The 5S's are not one-and-done steps.** Rather, they are the elements of an efficient workspace. The team will need to return iteratively to sorting, cleaning, and so on many times during the course of a thorough 5S project.
- **Use visual management tools to keep the project team motivated.** Create to do lists, and post them in a visually-accessible area of the workspace. When team members complete tasks, they should note their completion on their visual management boards. As Chris McChesney, author of the 4 Disciplines of Execution says, “people play differently when they are keeping score...when they can see at a glance whether or not they are winning they become profoundly engaged.”
- **Shrink the change.** If the project team is feeling overwhelmed by how much they decided to take on at the start, try focusing the 5S efforts on a smaller, more achievable area.
- **Additional resources:** The Life-Changing Magic of Tidying Up, by Marie Kondo; The Home Edit (series on Netflix and book)

Facilitator's Lessons Learned

- **Spend a significant amount of time working to get to know your project team.** Understanding the strengths of the folks on the project team will allow you to ensure that the team members are working to their full potential on the 5S project.
- **Work with the team to define criteria for sorting.** People have a deep attachment to their belongings. If folks aren't on the same page, resentment will build as team members start throwing away their tools or belongings. Make sure that decisions about what to throw out and what to keep come from the team members, rather than from you as the facilitator. You can encourage and challenge, but pushing people to get rid of items they are attached to can backfire and stoke resentment.
- **Clearly define how the team will dispose of items.** Being clear with the team about how unneeded items will be appropriately disposed of will reduce resistance.