



New Zealand Lean Academy

GETTING  
STARTED WITH

5 S

This resource was developed by the New Zealand Lean Academy where we're on a mission to make Lean Thinking second nature across NZ!

This eBook about getting started with 5S is just a tiny piece of the puzzle. We're building New Zealand's one-stop shop for Lean Thinking tools, templates, and ideas over at [www.nzla.nz](http://www.nzla.nz)

Come and join us as we bring Lean Thinking to the people, and help make New Zealand the best place in the world to live and work.





## **Rob Bull**

Co-Founder & CEO of  
New Zealand Lean Academy

Good on ya for getting curious about 5S

I'm an absolute geek when it comes to Lean Thinking, but holy-crap there's some wordy-jargon that comes with it! So I've worked hard to make this resource accessible and as practical as possible, giving you everything you need to get started with 5S without having to spend hours watching videos or poring through books.


When you have questions or need guidance on implementing 5S or any other Lean methodologies, don't hesitate to reach out. Together, we can make New Zealand the best place in the world to live and do business.

Let's go!

Rob Bull



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# Why we're learning about **5S**

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## Is this scenario familiar?

You're deep into a job and it's nearly finished, all you need are a couple of components to finish the task. You go to where they are normally stored, but find nothing, well actually worse than nothing - a jumbled pile of tools, spare parts and old equipment. Now you have to spend 20 minutes hunting out something that should really take 2 minutes.

All of those moments of not being able to find something, or being unsure if you have the right version of plans or a report, are costing your business money.

The 5S framework is designed to help sort out these frustrations so you can make items or info easier and faster to find.

"Everything has a place and everything in its place" is the guiding principle here. Yet 5S is more than just shadow boards and labelled shelved in a cupboard. It is about the discipline and behaviour of your whole team that paves the way for the full benefits of continuous improvement. 5S is also a top-tool for embedding the Lean principle of 'respect for people' as you strive to leave an area or workspace in a better state than you found it.

Once you start playing around with 5S you'll see everyone taking ownership and accountability in your workspaces - including the shared spaces such as the team kitchen!





# 5S

## Getting Started

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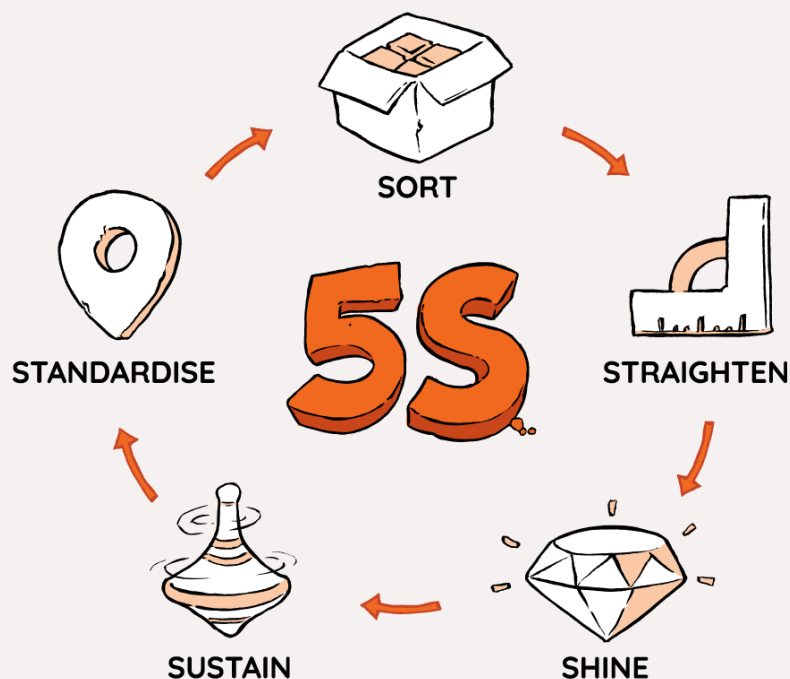
### 5S is a habit, not a request

They didn't think for too long when naming this tool, it's exactly what it says on the tin: five steps, all beginning with S.

These are:

- Sort
- Set
- Shine
- Sustain
- Standardise

Each step builds on the last, and from there it is a continuous cycle of improvement.



# 5S

## Key Elements

### Sort

**Sorting out the stuff you need vs what you don't.**

Usually this is a whole-team exercise to eliminate the bulk of the clutter.

May take a couple of sessions, weeks or even months to fully achieve this, or work through areas one-by-one.

This phase helps to get the buy-in from the whole team through an understanding of **what is being achieved and why**.

All team members can be active in the discussion of setting the new standards & expectations by asking “does anyone use this?”

**Think of ‘sort’ as Spring Cleaning with a purpose,**

### Set

**Ensuring that everything that we own has a home.**

Re-organising workplaces and equipment in a way that supports your typical procedures.

The ‘Set’ phase brings order into each area of your workplace so your team can get the maximum benefit of the resources.

**Ask; “is there a more convenient place for this to be kept?”**

### Shine

**Cleaning up following the decluttering process.**

Clean to inspect.

Use ‘Shine’ time to identify opportunities to further improve the work environment.

‘Shine’ gets team members into an improvement mindset that is more than just keeping the workspace tidy. When they find a mess they’ll ask “why is this here in the first place and how can it be prevented in future?”

**Inspect any areas not conforming to standards and ask “why?”**

# 5S

## Key Elements

### Standardise

**Creating visual systems that show people what the expectations are.**

Agree on the new organisation standards across the different work areas: What is the best location for items, information, supplies equipment and completed work for that particular task?

By this point, every team member has been trained and understands the location of all equipment and consumables.

**“Everything has its place and everything in its place” CONSISTENTLY.**

### Sustain

**New standards are monitored and maintained across the workplace.**

As new standards arise, keep the systems and processes up-to-date.

Team members can see at a glance if they have the right equipment to complete a successful task.

Avoid old habits and clutter don't creep back into the workplace.

# 5S

## Implementation

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### Introduce

Often we recommend to kick start your 5S journey with a good old spring clean. This can be described as a 5S 'blitz'. The idea is to make an initial impact with the team and allow them to make quick and significant changes, particularly with the Sort & Set stages of 5S.

### Embed

Then you can move to phase 2, where you set the expectation that every team member needs to set aside approximately 15 minutes every day to clean, reset and inspect their work areas to maintain the standard. This is typically called a **5S 'closedown'**. It helps set the standard and the routines across the different teams to set and maintain a world-class work place.

*Every day is 5S day.*

### Red Tag Areas

This is a dedicated location for any items that team members think should be thrown away. Think of it as a short-term holding space for any items that don't belong anywhere, and might need to be biffed out.

For whatever reason, staff can 'tag' the item and place it in the designated red tag area. Then it is the responsibility of assigned management, to make a decision about what to do with the item within a certain time period e.g. one week. "Do we still use or need this, or is hanging onto it costing us storage space?"

Once your business is fully embracing 5S, it will kick start the creation of a visual workplace, where just about anyone should be able to find and item in seconds, not minutes!!



# Evaluating

## 5S

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*'Make it exist first, you can make it good later'*

Adam Grant

Ideally, 5S in the workplace should be happening **every day, by everyone**.

There are a few ways a Lean Leader can keep track of how the team are embracing and embedding 5S in their workspace. These are:

- **Audit** (a brief audit tool is included)
- **Measure** the performance of a particular operation (time / quality etc) - this would be an indirect measure
- **Observe** across-team collaboration with audits and generally adhering to the different 5S standards
- **Ask regularly** about 5S based improvement activity

Starting to use 5S is the easy part, keeping momentum going is a bit more challenging. That's why we recommend, with any new initiative, you commit to sticking with it for at least 2 weeks, then review and tweak what you're doing. You may not see change in the first few days, so don't be too hasty in throwing 5S out the window. But, if after 2 weeks it's not working for you, it'd be silly to keep going without making some adjustments.



# SORT CHECKLIST

- ☐ Only the required equipment is present in the area.
- ☐ All obsolete, broken or unnecessary equipment not required for current projects is removed from the area or red tagged for removal.
- ☐ Only the required tools are present in the area.
- ☐ Tools not required for current projects are removed from the area or red tagged for removal.
- ☐ Only the required furniture is present in the area.
- ☐ All obsolete, broken or unnecessary workbenches, shelves, chairs, lockers, etc. not required for current projects are removed from the area or red tagged for removal.
- ☐ Only the required spare parts and materials are present in the area.
- ☐ Items not required for current projects are removed from the area or red tagged for removal.
- ☐ Only the required paperwork is present in the area.
- ☐ Outdated or unnecessary memos, instructions, reports, posters, etc. are removed from the area.
- ☐ All tripping hazards such as electrical wires and equipment cables are removed from all working, standing and walking areas.



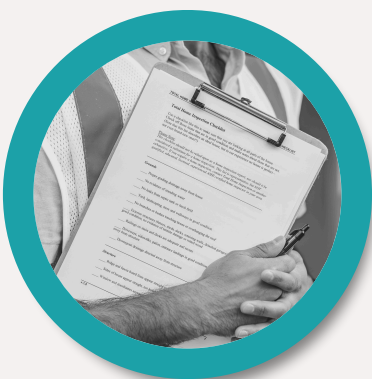
# SET CHECKLIST

- ☐ Equipment / machinery is clearly identified (numbered, named, colour coded etc.) and placed in a clearly identified location.
- ☐ Critical maintenance points are clearly marked.
- ☐ Tools have a designated storage area that is within reach of the user / operator.
- ☐ The location is properly labelled and a system is in place to identify tools that are absent (shadow board etc).
- ☐ When applicable, furniture is clearly identified (numbered, named, colour coded etc) and placed in a properly identified location.
- ☐ Locations for containers, WIP, boxes, bins etc are clearly defined by signs or marked / taped lines and properly labelled.
- ☐ Paperwork is properly labelled and has a clearly identified location that is away from work surfaces.
- ☐ Work areas requiring personal protective equipment (PPE) are clearly marked (floor tape, safety signs / labels etc).
- ☐ Stop switches and breakers are highly visible and located for easy access in case of emergency
- ☐ Fire houses, fire extinguishers and other emergency equipment are prominently displayed and are unobstructed.
- ☐ Floors / aisles are clearly marked; forklift lanes, exits, dangerous goods areas, walkways etc. are all marked with visible lines (floor tape / paint)
- ☐ Working conditions are ergonomically friendly tools and other items needed for daily work are stored at appropriate heights, anti fatigue mats are in place where applicable, related safety signage is displayed clearly etc.
- ☐ The workplace layout accommodates easy unobstructed exit in case of emergency.
- ☐ The emergency exit route is posted in a location for all to see.



# SHINE CHECKLIST

- ☐ All tools are kept clean and in good working order.
- ☐ When possible, tools are stored in a manner to keep them clean and free from risk of damage.
- ☐ Work surfaces (machines, workbenches, dies, and other equipment including electrical boxes) are kept clean and painted.
- ☐ Walls, partitions, rails etc are kept clean and painted.
- ☐ Floors are free from dirt, debris, oil, hardware, empty boxes etc.
- ☐ All drains (if applicable) are clear of debris and clogs)
- ☐ Paperwork is not torn and is kept clean and protected from dirt and other contaminants.
- ☐ Containers, boxes, bins etc are clean and not cracked, torn or otherwise damaged. When stored, they are neatly stacked in their correct location.
- ☐ All personal protective equipment (PPE) is maintained in a sanitary and reliable condition and is properly stored in an easily accessible and labelled location when not in use.
- ☐ All cleaning equipment is neatly stored and is readily available when needed.
- ☐ All equipment safety-related; warnings, signs, labels, floor lines etc are all clean, easy to read, not torn or damaged and provide adequate protection.
- ☐ There is a posted schedule showing times, frequency and responsibilities to clean areas of the workplaces such as windows, corners, walls, doors, tops of cabinets etc.





# STANDARDISE CHECKLIST

- ☐ Tools, equipment, paperwork, furniture etc is stored neatly in designated areas and are returned to their proper homes immediately after use.
- ☐ Equipment maintenance records are visible and clearly state when maintenance last occurred.
- ☐ Product waste (shavings, containers, liquids, wrappers etc.) is consistently and regularly cleaned up and removed from the workplace.
- ☐ Preventative measures have been implemented to ensure the workplace meets 5S guidelines (e.g. systems that do not allow waste to accumulate such as containers to collect product debris from machines).
- ☐ The work environment satisfies the requirements of the work being performed. Lighting brightness, colour, temperature, airflow and quality etc.
- ☐ The results of the previous audit are posted and clearly visible for the entire team.
- ☐ Areas for improvement identified during the previous audit have been addressed and completed.



# SUSTAIN CHECKLIST

- ☐ A member of management has participated in a 5S activity such as an audit or other activity within the past three review periods.
- ☐ Recognition is given to teams who get involved in 5S activities.
- ☐ Time and resources are allocated to 5S activities (e.g. designated daily / weekly clean up time, 5S team leader)
- ☐ All operators, team leaders, supervisors etc are assigned 5S activities to be completed at least once a week.
- ☐ The team took the initiative to make improvements to the workplace that were not identified during the last audit.





# 5S

## Audit Tool

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5S helps us to be more organised, work safer and get the job done to the quality we expect.

Each day, we need to leave our work areas to a high standard. This is why we measure each 'S' regularly. The goal is to get every area scoring in the green zone (8-10) with an overall score of 40+ / 50

Scoring:

1 - 4 = No Effort or below expectations

5-7 = A positive effort but there is more opportunity to improve

8-10 = A high standard, maybe tweaks but overall a great result

Total score is the number out of maximum of 50



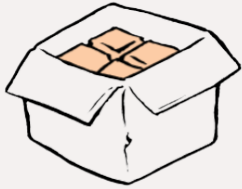
## STRAIGHTEN



In this example, the team has achieved a good standard in the 'Straighten' element of 5S. There is still more improvements they could make to lift the standard in the green zone.

# 5S DAILY AUDIT

AREA:



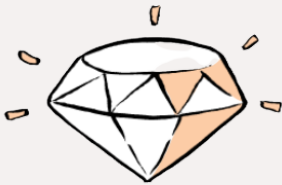
## SORT

1	2	3	4	5	6	7	8	9	10
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## STRAIGHTEN

1	2	3	4	5	6	7	8	9	10
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## SHINE

1	2	3	4	5	6	7	8	9	10
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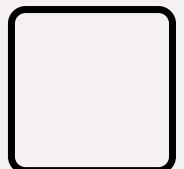
## SUSTAIN

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## STANDARDISE

1	2	3	4	5	6	7	8	9	10
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# FINAL THOUGHTS

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5S is one of the most widely used Lean tools throughout the world because it's easy to get started, and can lead to huge improvements across all areas of a business.

**But just because it seems simple, certainly doesn't mean it's easy.**

Like everything, implementing 5S is all about discipline and communication. But don't worry, we've got you.

Any time you need support with your Lean journey, we're right here to help so don't be a stranger.

We recommend checking out these NZLA resources next:

- 8 Wastes
- Leader Standard Work

## GET IN TOUCH:

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