



1. Pre-Work

Checklist:	<input checked="" type="checkbox"/>
Obtain Management Commitment / Buy In	
<ul style="list-style-type: none">• 5S supported, recognized & rewarded	
<ul style="list-style-type: none">• Time is allotted for daily 5S	
<ul style="list-style-type: none">• All departments participate – warehouse, office, etc.	
<ul style="list-style-type: none">• 5S Part of annual performance appraisal	
<ul style="list-style-type: none">• All new employees are trained	
<ul style="list-style-type: none">• 5S is audited monthly & results posted	
Create a 5S Committee	
<ul style="list-style-type: none">• Select one Site 5S Leader	
<ul style="list-style-type: none">• Select a 5S leader for each department	
<ul style="list-style-type: none">• Representation from cross section of workforce (floor level, supervisors, etc.)	
<ul style="list-style-type: none">• Members selected are outgoing, orderly, hygienic	
Train the Entire Site	
<ul style="list-style-type: none">• Entire site has been 5S trained	
Develop a Deployment Plan	
<ul style="list-style-type: none">• Take “before” pictures of all process areas	
<ul style="list-style-type: none">• Select a 5S kick-off date (Red Tag event)	
<ul style="list-style-type: none">• Plan 5S kick-off (leadership address, OT if required, pizza, etc.)	
<ul style="list-style-type: none">• Communicate 5S kick-off date	



2. Sort

Checklist:	
Red Tag Event Preparation	
<ul style="list-style-type: none"> • Buy or make red tags 	
<ul style="list-style-type: none"> • Select a day for red tag event 	
<ul style="list-style-type: none"> • Obtain authorization for OT, extra manpower 	
<ul style="list-style-type: none"> • Select a red tag "Holding Area" for small, medium & large items. Tape off the area 	
<ul style="list-style-type: none"> • Obtain necessary bins, pallets, trays for items 	
<ul style="list-style-type: none"> • Communicate the date & time 	
<ul style="list-style-type: none"> • Participation from all employees 	
Red Tag Day	
<ul style="list-style-type: none"> • Start early 	
<ul style="list-style-type: none"> • Remove everything from the work area 	
<ul style="list-style-type: none"> • Empty all cabinets, drawers, and tool chests 	
<ul style="list-style-type: none"> • Start small – dispose of extra pencils, paper clips, etc. 	
<ul style="list-style-type: none"> • After cabinets & drawers, begin red tagging larger items 	
<ul style="list-style-type: none"> • Move items used less than every 48 hrs. to a storage area away from process 	
<ul style="list-style-type: none"> • Red tag all unnecessary items and move to Red Tag holding area 	
<ul style="list-style-type: none"> • Continue until the floor space, cabinets, bench tops and work areas have been cleared 	
<ul style="list-style-type: none"> • Where possible, paint or wash the windows, floors, cabinets, and bench tops 	
<ul style="list-style-type: none"> • Plan the Red Tag Disposal <ul style="list-style-type: none"> ○ Throw in trash 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Employee auction 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Donate to charity 	
<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Transfer to another branch 	



3. Set in Order

Checklist:	✓
Design the new workflow (minimize wasted space, strive for cellular flow)	
Return tables, desks etc. to the process area	
Identify work zones	
Create an "Address System" for the work zones	
Floor tape or spray paint:	
• Identify each work area (i.e., shipping, receiving, QC). Designate a colour code for each area	
• Identify aisles, staging areas, takt time zones	
• Identify safety zones (eyewash stations, fire extinguishers, first aid stations)	
• Equipment storage areas (pallet-jacks, garbage bins, etc.)	
Floor symbols	
• Map the flow of the process (arrows, footsteps)	
• Corner markings (staging areas), T, X markings	
Store tools vertically & visually	
• Shadow boards for work tables	
• Wall shadow boards for mops, brooms, shovels, etc.	
• Overhead electrical & air supply (eliminates trip hazards)	
Organize Drawers & Cabinets	
• Create foam organizers	
• Use trays	
• Build open faced cabinets w/ right sized compartments for power saws, drills, etc.	
Label the work area (using a label maker)	
• Shelves	
• Equipment	
Hang Signs	
• Floor level	
• High level	
Other Lean / 5S / Visual Management Tools	
• Audio signalling system	
• Colour codes	
• Two bin kanban (or colour coded kanban)	
• Visible Pitch Boards / Storyboards / Dashboards	
• Heijunka box	
• Coloured folders	
• Re-order markers	
• Poka-Yoke (mistake-proofing)	
• Andon lights	
• Countdown timers	
• FIFO shelves	
• Mobile P.O.U. carts	



4. Shine

Checklist:	✓
Clean the work area (using detergents & cleansers)	
• Sweep and wash the floor	
• Clean work benches & tables	
• Polish equipment	
• Replace burnt out lighting	
• Clean windows	
• Paint the floors, walls, cabinets etc.	
Daily 5S Preparation	
• Identify the work areas	
• Assign a 5S leader to each work area	
• Create a daily cleaning checklist for each area	
• Create cleaning SOP's, where required (i.e., specialized equipment)	
• Create monthly 5S Audit form	
• Create a 5S schedule (regimented: who, what, where, when)	
Daily 5S Kick-Off	
• Publicise the launch of 5S	
• Management address to staff	
• Launch 5S – institutionalize cleaning: same time, every day. No exceptions	
• Use daily cleaning checklist. Sign off after daily clean has been completed	
• Audit 5S monthly. Publically post results	



5S ROADMAP



5. Standardize

Checklist:	<input checked="" type="checkbox"/>
Structure	
• Select a standard time for daily 5S (Start with 30 min. per day. End of day is best)	
• Create a 5S schedule (<i>who</i> will do <i>what</i>). Post it publically	
• Create daily 5S check sheets (specific to each work area). Hang on clipboard in area	
• Create work instructions (where required) for daily cleaning	
○ How to clean equipment (detergents, method)	
○ How to clean the work area (cleaning instructions)	
• Create a monthly 5S audit form	



5S ROADMAP



6. Sustain

Checklist:	<input checked="" type="checkbox"/>
Management Support	
• Department leaders must free up a block of time for daily 5S	
• Leadership must enforce daily 5S	
• Reward & Recognition (newsletters, gifts, pizza parties)	
• Annual performance reviews must include an evaluation of 5S commitment	
• 5S included in management review meetings	
• Consider a 5S incentive program	
Communication	
• Include 5S in newsletters	
• Take “before” and “after” pictures – post publically	
• Include 5S	
Audits	
• Monthly audits performed for all work areas. Post publically	
Training	
• 5S training is included in New Employee Training	
• 5S refresher training provided annually	