



# PROJECT CHECKLIST



Organize your 5S teams, assign responsibilities and set completion deadlines.

Select your 5S team; list names.

Sort	Owner	Due Date	Complete
1. Set boundaries for the area			
2. Identify a Red Tag Area within close proximity to the work area			
3. Take BEFORE pictures of the area			
4. Develop sorting and disposition rules			
5. Sort, tag and remove unneeded items			
6. Take AFTER pictures of the area			

- Waste can be hiding as:
- Excess tools & equipment (totes, bins, shelves)
  - Outdated information (documents, manuals, samples)
  - Unnecessary furniture (carts, desks, chairs, cabinets)
  - Obsolete or excess material/inventory

Set in Order	Owner	Due Date	Complete
1. Team members that work in the area set locations for the value-added items			
2. Place needed items in locations that eliminate unnecessary motion			
3. Think ergonomics and safety			
4. Create a border and address for each item that casts a shadow			
5. Measure and document the improvements made			
6. Take AFTER pictures of the area			

- Look for improvements and demonstrate the power of workplace organization:
- Missing information
  - Eliminating obsolete information
  - Time spent searching
  - Walking or bending

Shine	Owner	Due Date	Complete
1. Team identifies opportunities to improve cleanliness			
2. Cleaning supplies/tools are gathered			
3. Sources of contamination are identified and eliminated			
4. Area is cleaned			
5. Develop daily/weekly/monthly checklists to maintain cleanliness			
6. Create standard work instructions for all cleaning processes			
7. Create a smart place for cleaning items that include borders and ID labels			
8. Take AFTER pictures			

- Cleanliness must become a part of our standard work and should include:
- Transportation equipment
  - Racks, desks, chairs, walls and lights
  - Work surfaces
  - Equipment, tools, fixtures

Standardize	Owner	Due Date	Complete
1. Develop a standard 5S tool kit/cart			
2. Create standard work instructions and train team on all workplace processes			
3. Develop 5S audit procedures (who, what, where, when, and how?)			
4. Implements management feedback system to evaluate adherence to standards			
5. Establish a visual display to communicate 5S progress and current levels			

- Tool Kits should include products for maintaining borders, ID labels, work instructions and cleanliness.
- Abnormal conditions should be visible at a glance.
  - A formalized feedback system with ownership and accountability will encourage continuous management participation.

Sustain	Owner	Due Date	Complete
1. Create a 5S area map and assign owners for accountability			
2. Create a storyboard to illustrate the workplace organization journey			
3. Benchmark ideas from other departments, divisions and industries			
4. Schedule quarterly team meetings to review current state and identify progress			
5. Display all 5S communications, audits and feedback locally in each area			

- Management support/communication is crucial to the sustainment of an organized workplace; use many means to communicate:
- Newsletters
  - Employee feedback and suggestion programs
  - Dedicated 5S facilitators
  - Benchmarking