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5S is a process for creating and maintaining a safe, organized, clean, high-performance workplace. Promoting 5S doesn't mean just picking up the trash, though that's certainly a part of it. The emphasis is on being organized, designating a place for necessary items, and on being disciplined, ensuring that all items and equipment are always returned to their proper place.

—*Mike Serena*

Implementing 5S in an office environment is a challenging and sometimes daunting task. Associates tend to take it very personally when anyone trespasses into “their” area and begins to dictate the items within their workspace needed to do their job and how they are supposed to organize it.

We experienced this feeling when it became evident that we at the TBM office needed to “practice what we preach” and get serious about implementing 5S. First, we conduct many Institute training courses at headquarters, which means we have clients coming into the Durham office at least a couple of times a month. Our workspace is very visible to all who participate in events throughout the week.

Another reason for our concern was the fact that many of us travel to support off-site events, which leaves the people remaining in the office to cover many of our daily responsibilities. That can be difficult when files and other items that need to be reviewed are handled differently by individual employees. We often tell our clients that standardization of work areas and work practices make it easier for one person to step in and take over the duties of another as needed, so it only made sense for us to follow that practice as well, and thus began our journey.

Where to Begin

Many people probably assume that the administrative staff at TBM has the same in-depth knowledge about the lean tools and their implementation that our consultants have, but this is not always the case. We are sent out to participate on a team at a public kaizen event as part of our orientation, and for most of the staff, that is the only exposure we have to what TBM consultants really do in the field.

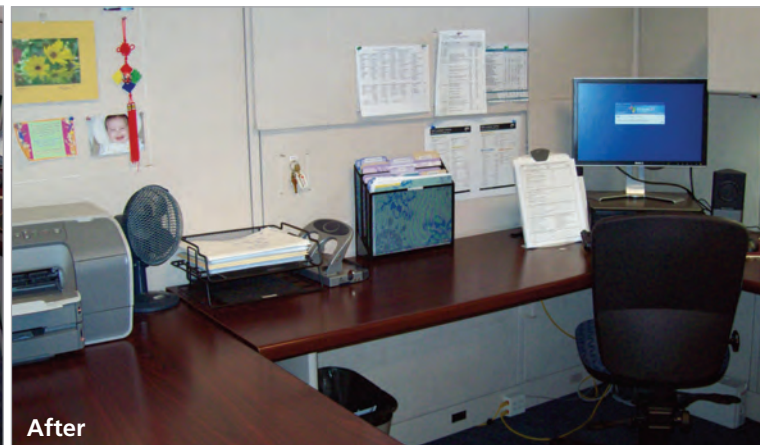
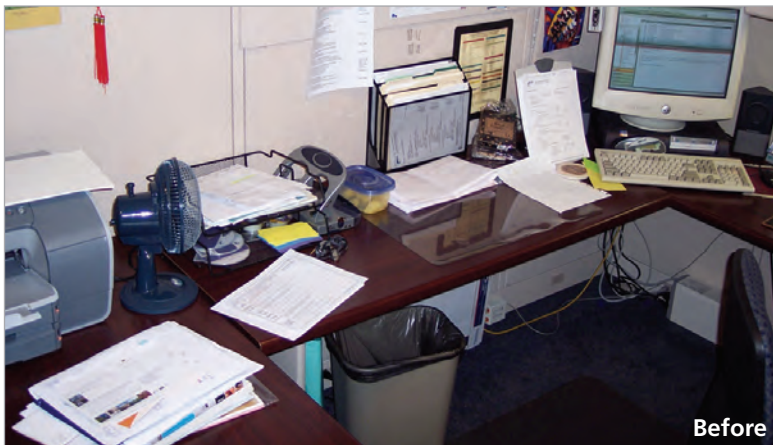
We had to keep this fact in mind when we set out to implement 5S in our office. This meant we had to start with 5S training for the office staff. We chose to use “Progressive 5S.”

The essence of Progressive 5S is to pair each step of the process with a specific task or activity along with a key discipline or behavior that would need to be performed for that step. By focusing on one level at a time, it becomes significantly easier to both implement and monitor results. In short, we could not only reduce the amount of time to progress up the ladder to full compliance, but also quantify results for performance tracking and aid in ensuring sustainment.

—*Mike Serena*

Our 5S journey started with the Business Development, Marketing, and Institute departments, all of which are housed on the second floor of our building. Because of the aforementioned travel and other responsibilities, we decided to implement 5S in stages starting with our individual workstations. The intent was to work toward getting to a level of 2.0 before moving on to the common or shared areas.

After we all completed our initial 5S training, we met as a group to ensure a full understanding of program expectations as well as our roles and responsibilities. Our first task was to agree, as level 1 indicates, what items in the areas were necessary and unnecessary as well as the exceptions based on different requirements for different jobs. For example, some individuals have laptops and docking stations while others have desktop units. We used the following system to



Before After

| Decision | Time Frame | Disposition |
|---------------------------------------|-------------------|---------------------------------|
| Cannot be used or unlikely to be used | | Get rid of it |
| Can be used, necessary items | | |
| | Used twice yearly | Store in a distant place |
| | Used monthly | Store near process |
| | Used weekly | Store near operation where used |
| | Used daily | Keep in work area |

help us make these decisions.

Also, we agreed that we needed to reduce the clutter in our areas. Consensus on this issue proved more difficult than expected. We learned that the word “personal” included a wide variety of items and in a wide variety of locations. Gaining consensus on both item and location led to a few spirited discussions.

The next step was to modify the level 1 5S score sheet to fit our office. Our level 1 (sort) audit sheet included the following 10 categories:

- Furniture and equipment:** desk, chair, etc. Empty bins/shelves are okay.
- Plugs, outlets, and safety equipment:** extension cord, surge protector, power cords.
- Documentation:** phone list, Institute calendar, standard work, Personalis chart, bulletin board items, working files.
- Floors and workstation surfaces:** pencil cup, paperclip holder, stapler, calculator, tape dispenser, trash can, recycle bin(s). No clutter allowed and cords should be tied away from feet.
- Cleaning equipment:** cleaning wipes, tissues, cleansers.
- Storage bins/storage cabinets:** clear of excess material, stacked items, outdated items, and unnecessary equipment.
- Wall surface materials:** nameplate, in box, signs, pictures, coat hanger, and job aids. No outdated material or clutter allowed.
- Personal items:** Personal photos and knick knacks should be limited to 10 items per person (other than what is included in your personal bin or drawer which will not be audited). Do not include President’s Award and Service Awards as personal items.



Before



After

9. **Filing cabinets, bookshelves, drawers and other shelves:** must be clear of excess materials/files, stacked items, outdated items, unnecessary equipment, and excess duplication of items. Empty drawers are okay if part of multiple drawer filing cabinets. Area specific items: Do not review personal drawers.
10. **Excess materials:** areas must be clear of material in excess of specified limits as well as clear of excess containers, shelves, or office supplies.

To ensure the program's continuous improvement, an audit team and targets were created. Our initial team included one person from Marketing and Business Development and three people from the Institute.

Audits were conducted on a weekly basis with reports going out to everyone on all three teams, our managing director, Mike Serena, team leader, Joe Panebianco, and our Institute consultants. The reporting included the score sheet, a run chart of our progress, and the countermeasures. The documentation communicated our results as well as where we needed to improve before the next audit. Within three weeks we reached a 1.0 in all 14 workstations and the change was highly visible to all.

Level 2

After achieving level 1, we moved on to level 2 (creating and labeling a home for everything). Typical 5S foot printing in a shop floor environment is to clearly mark where everything goes. We agreed in our office that it was not necessary (or attractive) to see the foot printing when the item was in its proper location. Therefore, we chose to use a more discreet method using a foot print just inside the edges of the item. This way when the item is correctly located, the labeling is not visible.

For desktop and personal item storage, the area was foot printed and labeled as "personal," but the individual items in the area were not foot printed. We designated a wall area 2 feet wide by 2 feet high to be used for personal items. Creatively, associates employed the use of white string and "T" pins to foot print personal wall space in cubicles.

Further, labels were applied to the center of the foot printed area. For uniformity, we chose to use 1/8-inch black vinyl tape for foot printing, and white label tape with black lettering.

Overhead bins were labeled on the outside front. Contents of overhead bins must be neat (bookends used where applicable), and empty overhead bins were labeled "empty."

For the inside of bins, we use several visual labeling methods. For binders, labels should have a large font size and all capital letters.

We use photos in place of foot prints for the inside of overhead bins. The photo can be placed in a sheet protector and hook-and-loop fasteners or mounting tape can be used to attach it to the inside of the door.

The outside of each file cabinet was labeled with the contents and the inside of file cabinets/pencil drawers were sectioned and labeled. All file folders in file cabinets were labeled for ease of reading. If an associate must have file folders in an organizer on the desk, those folders were labeled using the small-size standard font. Associates were encouraged to keep as many file folders as possible in a cabinet rather than on the desk.

Items on the floor were “shadow boarded” and labeled. We did not include chairs, floor mats, file cabinets, or lateral cabinets in this requirement. Our directions for shadow boarding were to simply type the name of the item in a word document, print, laminate it, and use black gaffers tape to secure it to the floor under the item.

Level 3

At the implementation of our 5S program the feeling among office staff was that we would run into issues when it came to level 3 (sustain). This ended up not being the case. By the mere act of creating a home for everything, we found that we were automatically putting items back when we were through with them. Putting things in their proper place was beginning to be a way of life for us.

One idea we came up with to help with sustainment was a “buddy system.” When someone is out of the office, their buddy keeps an eye on their area. If a guest uses the area, the buddy ensures that they leave the area as they found it. Buddies also assist if packages are delivered while people are out, and make sure that they are placed in the right location.

| Milestones – Individual workstations | |
|--------------------------------------|---------|
| First Audit | 2/19/08 |
| 1.0 | 3/3/08 |
| 2.0 | 5/5/08 |
| 3.0 | 5/19/08 |

Moving On

Common areas such as meeting rooms, printer areas, and kitchen areas were a bit more of a challenge for us. Getting buy-in from all of the different users was the key. The common areas are used by all associates, as well as by consultants when they are working at the office. As you can see from the chart, it took a bit longer to reach our goals in those areas.

| Milestones – Common areas | |
|---------------------------|---------|
| First Audit | 5/19/08 |
| 1.0 | 6/30/08 |
| 2.0 | 8/29/08 |
| 3.0 | 9/15/08 |

Looking Forward

Reaching level 3 in the areas we’ve tackled has resulted in a great deal of pride and a sense of accomplishment, but we know that we still have a long way to go. We have plenty of room for improvement, and more areas to cover, including extending the program out to all of our storage and shipping areas. But we’ve proven that we can create and sustain an orderly and visual workplace that is conducive to greater productivity and an overall better workplace atmosphere. As we continue up the Progressive 5S ladder, we expect to make even greater changes in our office and the way we want to portray ourselves to the clients who visit us. More importantly, we found that it takes effort and consensus to get everyone to “sing from the same choir book” and certainly “practice what we preach!” ■