

The phases of cleaning up the office



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I've written several times about 5S. As a quick review, 5S is a tool for creating and maintaining an organized and clean workplace to eliminate the waste of searching, make problems visually obvious and instill employee pride.

5S is so named because its five distinct phases all begin with the letter S:

- **Sort:** Remove all of the "stuff" from the work area that doesn't support the job.
- **Showcase:** Clean the work area to return it to a good-as-new condition.
- **Set in order:** Return all of the survivors of the Sort phase to the work area, selecting the absolute best location for each.
- **Standardize:** Establish standards to define the above improvements.
- **Sustain:** Establish the discipline and accountability to maintain the standards.

The program originated in the factory. Unfortunately, when 5S is adapted to the office, most organizations apply it to the physical office environment. As a result, staplers and three-hole punches get outlined on desks.

But that misses the mark. Today's office work involves electronic data. I reach for my stapler about as frequently as I reach for a camera flash cube (if you were born after 1980, ask an older co-worker to explain). Office 5S should therefore address the storage of that data.

I recently facilitated a 5S event addressing the server shared by a number of departments with the city of Fort Dodge, Iowa. While I've led 5S projects on physical environments and written a book titled "5S Leader's Field Guide," this was my first 5S experience in the virtual environment.

I knew that the majority of the participants from prior activities would be engaged waste avengers. I was pumped.

The Sort phase involved deciding what data could be simply deleted and which should be moved to an archive drive. Moving archived data to a less expensive medium allowed for quicker daily back-ups of the working drive, delayed purchases for increased server capacity and, most importantly, reduced clutter, all while making archived data readily retrievable.

Examples of data that was deleted included duplicate files, poor quality photos and non-work-related files (remember the Uga Chaka Dancing Baby?).

Files moved to archives included data for closed projects, budget data from prior years and prior versions of existing documents that contained perceived historical value.

Each department was asked to determine the

retention period required for each of its generic categories of data (inspection reports, grants, etc.) before moving it from the working drive to the archive drive.

During the Set in order phase, a new clean, logical file structure was created. Agreements were made on where the single copy of previously duplicated files would reside. This aided workers who were perhaps not search engine savvy, but rather retrieved files through a traditional "hunting and gathering" approach.

The Standardization phase was especially critical in order to maximize the usefulness of search engines. Establishing standard naming conventions for folders and files was completed using consistent formats for title components such as address-

es, names and dates. Acronyms were avoided unless universally understood.

Finally, during the Sustain phase, we scheduled periodic reviews to audit that our above improvements were being maintained. Did "expired" data need to be moved to archives? Were naming conventions being followed? We also agreed to chart monthly the amount of data stored.

Throughout the event, we noted that many of our past practices for handling electronic data were outdated holdovers or habits established from paper.

For example, in order to make a paper document readily available to numerous physically separated workers, it was copied and filed in each location. That increased the likelihood of working from an obsolete copy. Since the shared server provided access to the master document to any worker regardless of their physical location, we agreed that there should be only one shared copy for all information.

In order to minimize future duplication of files, we recognized that the habit of sending emails with file attachments to numerous recipients needed to be replaced by sending emails with links to required files.

This required education on the importance of, and process for, using links.

When the virtual dust settled at the end of the three-day activity, the results were impressive. A 50 percent reduction in the number of folders, files and gigabytes of data stored was realized. The existing file structure was much more coherent. Future files created and existing files modified would use the standard naming conventions.

Perhaps most importantly, team members knew that the standards and audits established would prevent the system from sliding back, resulting in an ever-improving office.

RICK SAYS

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