

5S Audit Checklist

How-to guide: what the workbook does, how to use it and what every number means.

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5S Audit Checklist

Score each area against a 25-point 5S checklist every month, track the findings to closure, and see the 5S score by area, by S and by month against your target.

For: Plant and area managers, 5S and lean coordinators, team leaders and the auditors who walk the floor.

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Quick start

1. On Setup, type your plant name, target score and status date, then replace the example areas with your own (each with its owner).
2. On Checklist, keep or edit the 25 criteria, then print it as the walk sheet for each audit.
3. On Audit Log, add one row per area audit with the five section subtotals from the walk sheet.
4. On Actions, add each finding with its owner and due date; type the closed date when it is done.
5. Open the Dashboard to see the score by month, by S and by area, and the open and overdue actions.

What is in the workbook

Start Here	Read this first: what the workbook does and how to use it.
Setup	Targets, status date, scoring, floor space cost and the area list.
Checklist	The 25 criteria the auditor scores, five per S, with what a 4 looks like. Print it as the walk sheet.
Audit Log	One row per area audit: the five section subtotals from the walk sheet. Total, score and status are calculated.
Actions	One row per finding: owner, due date and closing date. Days open and due status are measured to the status date.
Dashboard	5S score by month, by S and by area against your target, and the actions raised, open and overdue.
Method	How every number is calculated, with assumptions, limits and sources.
Verify	Self-check: the workbook's formulas recomputed on fixed inputs against an independent reference.

What each number means

Quantity	How it is calculated	Units
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Quantity	How it is calculated	Units
Section maximum	Number of criteria for that S on the Checklist x points per criterion (Setup). Excel: =COUNTIFS(tblCriteria[S], "Sort") * PointsPerItem	pts
Maximum audit score	Number of criteria x points per criterion: 25 x 4 = 100 in the example.	pts
Total	Sort + Set in order + Shine + Standardize + Sustain points for one audit.	pts
Score	Total / maximum audit score for one audit. Status: On target at or above the target, Near target within 5% below it, otherwise Below target.	%
Actions raised	Count of Actions rows with the audit's date and area.	count
Days open	Closed date - raised date; for an open action, status date - raised date.	days
Action status	Complete when closed; Overdue when open past its due date; Due soon when due within the window on Setup; otherwise In progress.	-
Closed on time	Yes when the closed date is on or before the due date; the KPI is Yes / (Yes + No).	%
Plant score by month	Sum of the totals of the month's audits / (number of audits x maximum audit score): every audit weighs the same.	%
Score by S	Points for that S in the month / (audits x that S's maximum). Change = latest month - first month.	%
Area latest score and change	The area's audit with the latest date (SUMPRODUCT of MAX), and its score minus the score at the area's previous audit.	%, points
Floor space value (est.)	Space freed by closed actions x facility cost per unit area per year (Setup): the yearly cost of the space now free for other use. Not a cash saving unless the space is used or given up.	currency/yr

Assumptions, limitations, sources and the self-check (the Verify sheet, which recomputes the workbook's formulas on fixed test inputs) are in the workbook. The last page shows the Dashboard with the example data for Kestrel Fabrication, a fictional business.

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Engineering estimates for planning and improvement work. Verify the results against your own process, data and standards before you rely on them.

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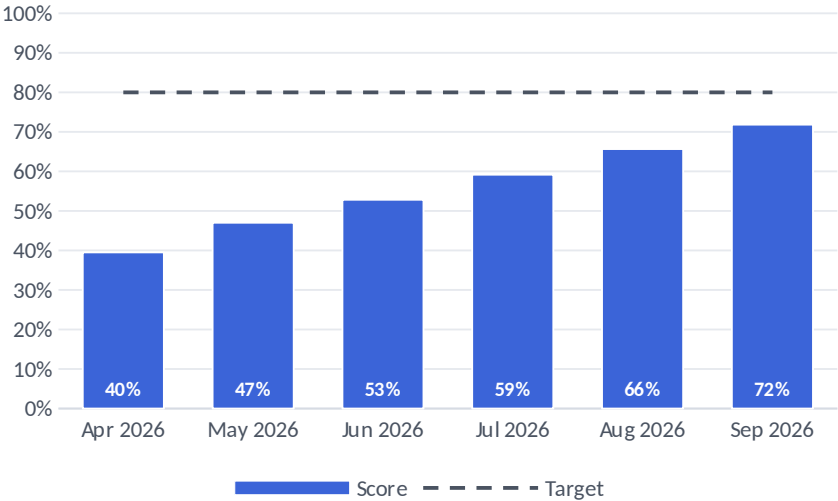
5S score by month, by S and by area against your target, and the actions raised, open and overdue.

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Kestrel Fabrication (example): 36 audits from 8 Apr 2026 to 14 Sep 2026; latest month September 2026. Actions as of 2 Oct 2026.

5S SCORE, LATEST MONTH	CHANGE VS PREVIOUS MONTH	AREAS BELOW TARGET	WEAKEST S, LATEST MONTH
71.8% Target 80.0% Below target	+6.2% Percentage points, all areas	4 At each area's latest audit	Sustain Lowest share of its maximum

Plant 5S score by month



Score by S: first and latest month

