5S Office Area

Audit Scorecard

A 15-point compliance assessment for desk organisation, document control, file storage, cable management, meeting rooms, and shared workspaces

Dealer / Center Name	
Dealer Code	
Region / Zone	
Auditor Name	
Audit Date	
Cycle / Period	

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How to Use This Scorecard

This scorecard evaluates 5S Office Area compliance across 15 criteria grouped into 4 categories. For each criterion, circle a score from 1 (not in place) to 5 (fully embedded and sustained). Do not rate where you aspire to be — rate what you observe on the day.

Score Scale

Score	Level	What it means
1	**Not in place**	Standard does not exist or has never been implemented at this dealership.
2	**Attempted**	Some effort made but inconsistent — visible gaps remain in most areas.
3	**Defined**	Standard is documented and partially followed. Some areas compliant, others not.
4	**Managed**	Standard is followed consistently. Minor exceptions occur.
5	**Fully Sustained**	Fully embedded. Evidence of ongoing compliance between audits without prompting.

RAG Status Guide

Status	Overall Score	Action
Green	60–75 (80–100%)	Compliant. Maintain current standards.
Amber	38–59 (50–79%)	Improvement required. Structured action plan within 30 days.
Red	0–37 (0–49%)	Non-compliant. Priority intervention. Escalate to regional management.

AutoSmart Tip: Office 5S is easy to deprioritise in dealership environments where workshop and showroom standards receive more attention. However, administrative efficiency — finding a file quickly, accessing a document without asking three colleagues, running a meeting without a 10-minute setup — has a direct operational impact. Treat office 5S as the support structure that enables customer-facing processes to run smoothly.

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Scorecard

Circle a score 1–5 for each criterion. Record observations in the Notes column.

No.	Criterion / Question	1	2	3	4	5	Notes
DESK ORGANISATION & DOCUMENT CONTROL							
1	Are individual workstation desks free from unnecessary items, personal clutter, and documents unrelated to current work?	○	○	○	○	○	
2	Are active documents on desks limited to current tasks, with completed documents filed or scanned rather than accumulating as a permanent desk stack?	○	○	○	○	○	
3	Is a clear-desk policy in place for end-of-day, with desks cleared of non-essential items before staff leave?	○	○	○	○	○	
4	Are document naming and filing conventions consistently followed by all staff, so any colleague can locate a document without asking the original owner?	○	○	○	○	○	
FILE STORAGE & CABLE MANAGEMENT							
5	Are physical files stored in labelled, organised filing systems — cabinets, drawers, or shelving — with no files left on floors, windowsills, or stacked on top of cabinets?	○	○	○	○	○	
6	Are retention periods applied to physical files, with out-of-date documents disposed of securely on the defined schedule rather than accumulated indefinitely?	○	○	○	○	○	
7	Are power and data cables managed — routed and tied rather than loose across floors and desks — reducing trip hazards and improving the visual presentation of the workspace?	○	○	○	○	○	
8	Are unused equipment items (redundant monitors, old printers, obsolete peripherals) removed from the office rather than stored under desks or in corners?	○	○	○	○	○	
MEETING ROOMS & NOTICE BOARDS							
9	Are meeting rooms left clean and reset after each use — chairs returned, whiteboards cleared, equipment powered off — without requiring a separate cleaning pass?	○	○	○	○	○	
10	Are notice boards current — displaying relevant, dated information — with no outdated notices, expired memos, or superseded documents remaining on display?	○	○	○	○	○	
11	Are communal areas (kitchen, break room, printer station) maintained to the same 5S standard as individual workstations, with a shared responsibility assignment?	○	○	○	○	○	
SHARED WORKSPACES & GOVERNANCE							

12	Are shared resources (printers, scanners, stationery) stored in clearly labelled locations, with consumables restocked before running out rather than after?	○	○	○	○	○	
13	Is a 5S audit of office areas conducted on a defined schedule, with results shared with all office staff and improvement actions tracked?	○	○	○	○	○	
14	Are digital workspace 5S standards (shared drives, email folders, desktop files) reviewed alongside physical workspace standards, not treated as a separate discipline?	○	○	○	○	○	
15	Is there a named 5S champion or zone leader for the office area, accountable for maintaining standards and addressing deviations?	○	○	○	○	○	
OVERALL SCORE →		/ 75 =		%			

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Category Summary & RAG Status

Transfer category totals from the scorecard. Assign RAG status and record the priority action for each category.

Category	Score	%	RAG	Priority Action
Desk Organisation & Document Control	/20			
File Storage & Cable Management	/20			
Meeting Rooms & Notice Boards	/15			
Shared Workspaces & Governance	/20			
OVERALL SCORE	**/75**			

Sign-Off

Auditor Name	
Auditor Signature	
Date	
Office Manager Name	
Office Manager Signature	
Next Audit Date	

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Action Plan Tracker

5S Office Area — Gap Closure Framework

A structured four-stage workflow to assign, track, verify, and close 5S Office Area non-compliances

Dealer / Center Name	
Dealer Code	
Region / Zone	
Audit Cycle / Period	
Tracker Owner (ASM / ZSM)	
Date Opened	
Target Close Date	

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How to Use This Tracker

This tracker is designed to be completed immediately following a 5S Office Area audit. Every non-compliance recorded must be logged here as an action item and progressed through all four stages before it is considered resolved.

Four-Stage Workflow

1. PENDING	2. IN PROGRESS	3. COMPLETED	4. APPROVED
Finding assigned. Owner & date set.	Work underway. Evidence being gathered.	Dealer submits evidence for review.	Auditor verifies and closes the item.

Stage Rules

Stage	Actioned by	Required action	Evidence required
PENDING	ASM / Auditor	Assign a named responsible party. Set a close date. Log the non-compliance description.	No evidence required at this stage.
IN PROGRESS	5S Office Area / Dealer Team	Begin remediation. Update status. Upload progress evidence as work is completed.	In-progress photos, supporting documents, records.
COMPLETED	Office Manager	Mark item complete and submit for review. Evidence must be attached before submission.	Photo of rectified item, signed procedure, supporting evidence.
APPROVED	ASM / ZSM / Auditor	Review evidence. Verify compliance on next site visit if required. Approve and close.	Auditor sign-off. Date of verification recorded.

Tracker Summary

Fill in after completing each audit cycle.

Stage	Description	Count	Notes
PENDING	Not yet started		
IN PROGRESS	Work underway		
COMPLETED	Awaiting approval		
APPROVED	Verified & closed		

AutoSmart Tip: With AutoSmart Audit, every non-compliance is automatically converted into an action item at the point of audit — with owner assignment, close dates, evidence upload, and a four-stage approval workflow built in. No spreadsheets. No manual follow-up.

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Action Plan Tracker

Log every non-compliance from the audit below. Progress each item through all four stages before closure.

STAGE — PENDING						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
P-01						
P-02						
P-03						
P-04						
P-05						
P-06						
P-07						
P-08						
P-09						
P-10						

STAGE — IN PROGRESS						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
I-01						
I-02						
I-03						
I-04						
I-05						
I-06						
I-07						
I-08						

STAGE — COMPLETED						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
C-01						

C-02						
C-03						
C-04						
C-05						
C-06						

STAGE — APPROVED						
Ref	**Non-Compliance / Gap Description**	**Category**	**Responsible Party**	**Target Date**	**Status**	**Evidence / Notes**
A-01						
A-02						
A-03						
A-04						
A-05						
A-06						

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Cycle Sign-Off

To be completed once all action items in this cycle are Approved. Both the Office Manager and the Regional Auditor must sign.

Dealer Principal Name	
Dealer Principal Signature	
Regional Auditor / ASM Name	
Auditor Signature	
Date of Review	
Next Review Date	

Cycle Notes

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