Create Your Own Custom 5S Audit Tracker in Excel

Assignment Overview

You've completed Modules 1–6 and now have all the skills needed to build a complete 5S Audit Tracker from scratch. This assignment helps you put everything into practice by designing your own customized version—just like a real workplace project.

Your Task

Using the techniques from the course, create a functional, formatted, and visually appealing 5S Audit Tracker with automated scoring and radar charts.

Step-by-Step Instructions

1. Start a New Excel Workbook

- Create three sheets: **Raw Data**, **Phase Totals**, **Dashboard**

- Rename and organize them properly

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2. Build Your 5S Checklist

- Add all 5S phases
  - ✓ Sort
  - ✓ Set in Order
  - ✓ Shine
  - ✓ Standardize
  - ✓ Sustain

- Add criteria text for each phase

- Insert the rating scale (0–5 with Poor → Best labels)

- Add checkboxes for each audit item

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3. Format & Structure the Template

- Apply borders, alignment, row height, column width

- Add color coding for headers and sections

- Use Merge & Center where required

- Make everything easy to read

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4. Add Scoring Logic

- Use IF formulas to convert checkboxes into numeric scores

- Calculate total scores for each 5S phase

- Build an Overall 5S Score

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5. Create a Radar Chart

- Insert at least one radar chart

- Link it to your phase totals

- Apply chart styles, colors, background formatting

- Ensure it updates automatically with new data

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6. Final Design & Theme

- Apply a color theme from Excel

- Set consistent font styles

- Make the tracker look professional and presentation-ready

What to Submit

Choose one of the following:

- Upload your **Excel file (.xlsx)**

- OR upload a **screenshot** of your dashboard

- OR upload a **short screen recording** (20–40 seconds)

Optional (For Advanced Learners)

Customize your 5S tracker for a real department such as:
Supply Chain, Operations, Warehouse, Office, Maintenance, Production, etc.
Add at least **5 custom audit points** specific to that department.

Instructor Note

If you enjoyed this assignment and the course so far, please consider leaving a review. Your feedback encourages us and helps us create even better Excel and process-improvement content for you.