Toolbox Talk - Briefing a Technical Task

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What and why

A technical task briefing establishes what must be produced, from which inputs and under whose review. An unclear desk-based assignment can create hazards later when others rely on its output.

Objective: Explain the deliverable, critical inputs, review boundary and hold conditions in your own words.

When and where

Before a new technical assignment, a review, a handoff or a significant restart. Where the preparer, reviewer and task owner can examine the same current information.

How to use it

- Define the deliverable, intended use and consequences of an incorrect output.
- Agree current inputs, methods, applicable criteria, interfaces and qualified review responsibilities.
- Have the preparer explain the plan back. Resolve gaps and allow time for review and correction.

Verify It in the Field

Trace one critical input to its current source and identify how the required reviewer will verify it.

Paper practice: a drawing assignment lacks the equipment revision. Explain why the input must be resolved.

State who approves release and what field verification remains necessary before implementation.

Failure points and stop triggers

Unclear scope; stale inputs; missing reviewer; hidden assumptions; a deadline that excludes review. Hold the affected output for missing inputs, uncertain scope or unavailable required review. Rebrief when the basis changes.

Toolbox talk questions

1. Who will rely on this output?

2. Which input is most consequential?

3. What must be resolved before release?

Use the separate supervisor field check and attendance sheet. Practice is not qualification or work authorization.

Source: DOE-HDBK-1028-2009, Vol. 2, printed pp. 38–40. References and task-specific limits on the webpage.

Next step: Apply this skill to one step on the free JHA/JSA field-verification worksheet.

Expanded guidance and separate forms: toddjeromejenkins.com/toolbox-talks/technical-task-briefing-deliverable

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