

Technical Task Briefing: Clarify the Deliverable Before Work

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Why this matters

A technical assignment can influence field safety before anyone touches equipment. A calculation, specification or inspection report may be used beyond what its author intended. Clarify what must be delivered, what evidence supports it and who accepts it before the assignment begins.

Objective: Agree the technical deliverable, its basis, reviewer and acceptance requirements before starting the assignment.

Key hazards or failure points

Unclear scope; stale input data; missing expertise; uncertain review expectations; a draft treated as approved; deadline pressure; assumptions passed to the next user without limits.

Practical controls

- Name the deliverable and its intended use. Identify the applicable requirements, data sources, methods and interfaces. Explain what is outside scope and which decisions remain with the responsible technical authority.
- Assign people with the required competence and support, including the appropriate reviewer. Provide time to examine the assignment before briefing. Resolve missing resources or conflicting deadlines rather than relying on a promise to work faster.
- Have the assigned person explain the proposed approach, important uncertainties and expected output. Agree how changes, questions and draft status will be handled. Define the acceptance and release process without inventing new technical criteria.

Verify It in the Field

Use a safe document exercise. Ask the author and intended user to describe the same deliverable and its limits. Compare their answers with the assignment; record and resolve differences before dependent work begins.

Choose one consequential input and trace its origin, revision and applicability. Ask the designated technical reviewer what evidence and method are required. Record actual review findings separately from reviews merely scheduled for later.

Check that the working record names the author, reviewer, acceptance source and release authority. Have the receiving user locate the approved status and restrictions. Record checker, finding and time; a file delivered by email is not automatically accepted.

Stop and reassess

Hold the affected assignment or its release for missing criteria, inadequate required competence, contradictory inputs or a scope change beyond the approved basis. Get authorized clarification and rebrief. A completed briefing does not replace technical review or field work authorization.

Ask the crew

1. What will the next person use this output to decide?
2. Which input or limit needs explicit confirmation?
3. Who accepts the deliverable and communicates restrictions?

Use the task plan and required specialist decisions before exposure.

Sources: DOE-HDBK-1028-2009, Vol. 2, pp. 38, 39, 40; OSHA — Hazard Prevention and Control.

Free next step: [JHA/JSA planning & field-verification worksheet](#)

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

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