



# The Importance of Pre-Task Conversations

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## BACKGROUND

Good communication is essential to workplace success. It is proven to reduce downtime and the chance of errors and incidents. Many incidents and errors are the direct results of miscommunication between employees. Often, these incidents occur when employees perform a task that falls outside their typical job duties. Pre-task planning is a form of structured communication that can help improve morale, empower employees, improve quality through consistency, lead to innovations, and reduce worker's compensation costs. Pre-task communication can help employees identify hazards, potential barriers, areas of responsibility, and the steps needed to perform the task.

## STRUCTURED COMMUNICATION

Structured communication is an approach to outlining your communication methods to improve understanding and interactions between others. Implementing this at a worksite helps to guide the communication between employees to ensure that the necessary topics are being addressed. These topics include policies, procedures, job hazards, emergency plans, and shared responsibilities. Safety professionals have developed multiple ways to structure conversations through pre-task forms that guide employees through a series of discussion points that force them to think about the risks of the task and potential mitigations of these risks. The goal of these conversations should be to manage risks and have a clear mutual understanding of the process, safety requirements, hazards, emergency procedures, and responsibilities of the people performing the task.

## WHY STRUCTURED PRE-TASK/POST-TASK COMMUNICATION IS IMPORTANT

Structured pre-task communication is important because it provides a clear, concise outline for a discussion that requires employees to engage in the planning, execution, and review of specific tasks. Structured communication is proven to engage the employees at a higher level to focus their minds on the task, specific steps, their responsibility as a partner, and any potential hazards or mitigations required to complete the project. This is an excellent training device for new employees to learn from more experienced employees and can act as a check for skilled employees that may become complacent in performing a routine task. This structured way of planning also helps employees better understand their fellow employees' communication styles.

## PARTS OF THE PRE-TASK/POST-TASK STRUCTURAL COMMUNICATION

In general, when performing a pre-task evaluation, employees should review the following:

- **Scope of work:** the employees should identify the entire scope of the work to be performed and clearly understand the start points, the goals of the work, and what needs to be accomplished before ending the task.
- **Policies, Procedures, and JHA Review:** Employees should review policies, procedures, and job hazard analysis (JHA) to better understand how the work is to be performed; for example, when working on heavy machinery, the employees should be required to perform lockout/tagout procedures to ensure that all energy has been dissipated.
- **Supervisor acknowledgment:** The employees should ensure they have all required permits, trainings, etc., before performing the task. For example, if entering a confined space, the employee needs to ensure that they have a confined space permit or alternative entry process.



This Safety Alert analyzes an injury in accordance with the chain of events represented by the five dominoes above. Pioneer industry safety experts H.W. Heinrich and Alfred Lateiner developed this accident analysis system to provide a graphic sense of how injuries can be avoided. Their methodology has been accepted by safety professionals worldwide.

Safety Meeting Report

Topic(s) Discussed:

Comments / Recommendations:

Date:

Company:

Names of Employees Attending:

Meeting Conducted by:

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- **Review the area where the task is to be performed:**  
The employees should note any tripping hazards, locations where they will store parts or tools, lighting for work, etc.
- **Identify risks/hazards mitigations:** It is important that employees identify the risks and dangers associated with this work, for example, any fall hazards, slip/trip hazards, and spill hazards and their related mitigations, such as removal of trip hazards or adding lighting to better see the task.
- **Identify correct Personal Protection Equipment (PPE) for the specific task:** This could include eye protection, hard-hat, Kevlar chaps, and hearing protection. By incorporating a pre-task conversation in the process, the employees can confirm the appropriate PPE for the task.
- **Gain Consensus:** Work on the plan until there is a full team agreement.
- **After Action Review:** This is a formal process where the employees involved ask specific questions about the task, such as:
  - Was the intended result achieved?
  - Were there any unintended results?
  - In repeating this process under similar conditions, what absolutely needs to be kept?
  - Is there anything that needs to be changed?

## SOURCES

James Alexander, "Pre-Task Planning Benefits, Prep Work and Best Practices."

[https://hammertechglobal.com/onedegree/ptp-best-practices?hs\\_amp=true](https://hammertechglobal.com/onedegree/ptp-best-practices?hs_amp=true)

Human Performance Improvement Two Day Fundamentals Course, Lucas Engineering.

## EXAMPLES OF STRUCTURED COMMUNICATION

### SPEAK CLEAR Process:

#### Pre-Task

Summarize critical steps:

Past performance or experience?

Error likely situations?

Anticipated worst-case scenario.

Key controls/defenses in place

#### Post-Task

Changes: What needs changing in the instructions

Lessons Learned: What went right? Wrong?

Errors left uncorrected? Did we leave a problem?

Adequate Resources: Need anything different next time?

Results not expected? What happened unexpectedly?

### SAFE Dialogue

Summarize Critical Steps

Assess Errors and Hazards

Foresee Consequences

Evaluate and Apply Defenses

## CONCLUSION

Structured communication, both pre- and post-task, will benefit the organization through increased engagement with employees, conscientiousness in performing tasks, and communication between employees. Using this error prevention tool will help employees learn to identify risks, mitigate hazards, and develop communication skills necessary to ensure success in performing tasks outside of their routine. Each person has a different understanding of tasks, and requiring this type of structured communication helps employees effectively communicate and understand each other's role in the project.

Structured communication is one of many error-prevention tools and techniques that have helped companies improve their safety records by empowering employees to invest in safe techniques to enhance efficiencies and communication.



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