

Pre-Job Briefing Card

Five minutes. At the asset. Before the first tool comes out of the bag. Four items the crew lead reads aloud.

Companion to: *Fix the System*, Chapter 8. **Who uses it:** the crew lead, at every job. One card per crew member, or one card for the crew lead to read from. **Print format:** quarter-letter (fold A4 into four), laminated. Pocket-sized so it stays in the crew lead's vest pocket and actually gets used.

FRONT OF CARD — THE FOUR ITEMS

1. SCOPE

What we are actually doing today.

The lead reads the scope of work aloud from the job plan. Specific. Not "work on the pump" — "replace the mechanical seal on Pump-43, including checking alignment and running a pressure test before return-to-service."

Crew confirms understanding. Questions at this stage are good — better than questions at minute 40.

2. LOCKOUT

Which isolation points. Which permits. Which locks.

The lead names the specific lockout points and assigns who hangs each lock. Names are stated out loud. Permits are held up — confined-space, hot-work, or other permits required for this job.

Rule: no work begins until every required isolation is verified with a test. Not "locked out." Verified. See the *Safety Lockout Discipline Checklist* companion.

3. ASSIGNMENT

Who is doing what.

The lead assigns each crew member a primary task for this job. Common assignments:

- Lead: directs work and verifies lockout
- Tool position: operates wrenches, meters, drivers
- Assist position: holds components, fetches tools, stages parts
- Safety observer (required for elevated work, confined space, hot work)

Cross-assignments ("Luis will be on tools for the first half, then we swap") are stated now, not improvised mid-job.

4. QUESTIONS

Explicit invitation for anyone to name a concern.

The lead asks — out loud — "Any questions? Any concerns? Anything anyone saw on the way over that we should know about?"

Waits for silence. Waits longer than feels comfortable. The newest member of the crew is usually the one who has noticed the thing nobody else caught, and they need three extra seconds to decide to say it.

If someone raises a concern, the crew pauses and addresses it before starting. A concern raised in the briefing takes five minutes to resolve. The same concern raised at minute 30 of the job takes an hour.

BACK OF CARD — RULES OF THE BRIEFING

- **Five minutes. Not fifteen.** The briefing is a discipline, not a meeting. If it takes 15 minutes, the scope is wrong or the crew isn't ready.
- **At the asset, not in the shop.** Briefing happens where the work happens. Not in the conference room. Not in the break area.
- **Every job. Every time.** Skipping the briefing "because it's a routine job" is how routine jobs produce injuries. The habit is binary.
- **The newest member speaks last.** The lead asks open questions ending with "does anyone else see anything we should know?" and looks at the newest crew member when asking.
- **Record it.** Check the box on the work order: *briefing completed*. Your close-out rubric (Chapter 9) should require this field.

SIGN-OFF FIELD (for work order)

At close-out, the crew lead confirms:

- ☐ Briefing completed at the asset
- ☐ All crew members present for briefing
- ☐ Any concerns raised? _____ (Yes / No)
- ☐ If yes, concern addressed before start? _____

Crew lead initials: _____

From Fix the System by Ivan Getov. Companion to Chapter 8: Execute. getov.xyz/toolkit/fix-the-system/ch08/pre-job-briefing-card. Free. No email required.