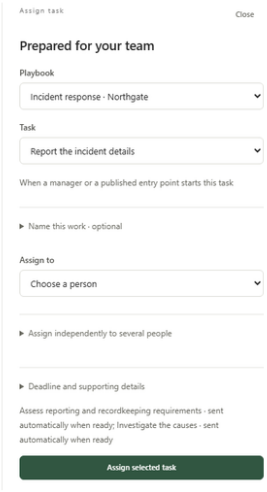
HOLD A TOOLBOX TALK AND RECORD ATTENDANCE

Carry toolbox talk concerns to the person who can respond

Give the team lead a way to answer a concern or open an owned case. Carry the discussion context into follow-up so the next person can respond without asking the team to explain the issue again.

Deliver the talk and record attendance > Confirm attendance (when selected) > Follow up a concern raised in the talk (when triggered)

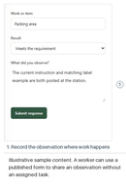
SkillSmith · Choose prepared work and its recipient — incident-response example



SkillSmith · Keep the acknowledgement with the assigned instruction



SkillSmith · Share an observation through a published form



Choose prepared work and its recipient - incident-response example

Pay only when you see results

Agree the outcome for your first workflow with our team.

SELECTED CLIENTS FEATURED BY SKILLSMITH

verizon · KEYSIGHT TECHNOLOGIES · AMERICAN EAGLE · Berkeley UNIVERSITY OF CALIFORNIA

YOUR TEAM / THE DECISIONS THAT MATTER

The people involved in the working method

Each role has a defined contribution. Your team selects the people responsible for those parts of the work.

Your role	The contribution	SkillSmith support
Team lead	Deliver the talk and record attendance; Follow up a concern raised in the talk	Respond with absent, attendees (roster), concern > case opened or answered and date.
Assigned team member	Confirm attendance	Respond with member, talk and timestamp.

Open a case with the concern's original context

In a worked example, a concern cannot be answered during the talk; the lead retains its context and assigns the next response without calling the concern resolved.

WORKED DECISION

Decision point	Information to use	Responsible next step
Working material	Topic and Attendance	Open the selected material for this occurrence.
Recorded response	concern > case opened or answered	Save the response with its work context.
Review point	a concern was recorded	Agree the next action with the person responsible for this decision.

Review the selected material, this occurrence's response and any conditional follow-up.

CONNECTED WORK / PREPARED PLAYBOOKS

Hold a toolbox talk and record attendance

Bring topic and attendance into the prepared work. Team lead and Assigned team member each receive the context needed for their part.

01 Deliver the talk and record attendance

Record topic, date, attendees (roster), absent, questions raised and photo of the huddle.

02 Confirm attendance

When the individual confirmation variant is selected, record member, talk and timestamp.

03 Follow up a concern raised in the talk

When a concern was recorded, record concern > case opened or answered.

Prepare the useful part of the workflow

Use the prepared sequence with the resources and responsibilities selected for your team.

Hold a toolbox talk and record attendance

A short, regular safety conversation at the point of work, with a topic from the library, attendance on record as a roster, and any concern raised turned into a case. Individual confirmations are a variant, one per attendee, never a task for absentees.

Monday toolbox talk · Dock (warehouse)

YOUR INFORMATION / CONNECTED WORK

The materials that make this method usable

Keep the relevant material available at the point it is used. The resource choices below support different parts of the work.

Your work context > SkillSmith > Your next contribution



Topic The task uses this material	The talk material - SkillSmith ships a library of short topics; sites add their own.
Attendance The task uses this material	Attendance and questions record.
Confirmation The task uses this material	Optional per-person confirmation beside the roster; binding it turns individual confirmations on.

YOUR DELIVERY PLAN / OUR TEAM

Prepare the first useful playbook

Start with the materials and people you already have. We help make the setup choices explicit before your team uses the method.

01 Select the working material

Choose topic and attendance from the resources your team uses.

02 Agree the responsibilities

Confirm team lead and assigned team member for this method, then choose the people eligible to receive its work.

03 Walk through the selected route

Walk through these conditional steps: “Confirm attendance”; “Follow up a concern raised in the talk”.

We are here to help



Rohit Singh
VP of Strategic Partnerships



Brent Jackson
Director of Customer Success

Prepare the method for your team

What stays with the recorded response?

The response for this occurrence retains concern > case opened or answered. It belongs to the work being reviewed, rather than replacing a different occurrence's record.

Which materials do we need to bring?

Bring topic and attendance. We use those choices to prepare the working context, then check that each task opens the material it needs.

How do the conditional steps become part of the method?

The conditional route is used when the individual confirmation variant is selected. Select the variant or respond to the recorded condition before treating that step as required.

What is the outcome for the wider workflow?

Talk recorded with its roster for the period; concerns are cases or answered; absentees visible to the lead.

WHY SKILLSMITH / YOUR NEXT STEP

Bring your work; we help prepare the method

We work with your team to organize the source material, responsibilities and review choices. Start with one useful example, then carry the agreed method into everyday work.

Without connected follow-through	With SkillSmith
The next person receives an action without the preceding result.	Keep the preceding result attached when the next responsible person receives work.
Known case details are requested again at the next handoff.	Carry known context forward and show the decisions needed for this task.

Walk through this method with us

Bring one real example and the material your team uses. We will walk through the task sequence and the decision that matters to you.

- Which concern needs an answer or a separately owned case?
- The resource choices for this method
- Each responsible person's response
- The conditional route and wider outcome

Request a demo

skillsmith.com/contact