Five steps to more efficiency during shift handover

The process is to go quickly, routinely and as smoothly as possible: How to optimise handover processes without compromising safety?
Five steps to more efficiency during shift handover

In one refinery, handover meetings are considered a standard procedure that is supposed to work simply and easily – in another, however, communication during shift change is considered an important tool for quality assurance. The extent of dedication and care staff invest into carrying out shift handovers depends decisively on the signals of management concerning this issue – and how this attitude is reflected in the instructions for operational implementation:

- Is sufficient time allowed for the shift handover, do the shifts overlap?
- Are the work steps well structured, are there clearly defined minimum requirements?
- Can meetings be held without interruptions?
- Does management use effective training and regular booster workshops to show how important they think the quality of handover communication is?

Handover meetings are usually formal and structured. Many experts recommend

- discussing the various topics in order of relevance to take into account the (falling) attention span of the staff involved – especially when working 12-hour shifts
- identifying the criteria for “simple” and “high-risk” handovers and defining suitable sequences for both types.

Some shift handovers take more effort and therefore require more time, for example, when maintenance takes place during operation and is not finished at the end of the shift, with new or inexperienced employees, after a long absence (e.g. vacation) and in exceptional situations such as during a standstill – especially if contractors’ staff are involved.
When a refinery hires new employees, professional qualifications are one of the key factors for the selection of candidates – their communication skills are usually less of a focus. It is therefore too much to expect that they are able to create well-formulated entries in logbooks and records on the fly or give perfect feedback and master sophisticated questioning techniques during the shift handover process. But: communication skills can be trained!

Suitable training concepts are those that motivate and involve employees – e.g. through film and text material that is jointly analysed and discussed. With best practice, as well as worst-case scenarios, causes and strategies can be worked out to avoid errors.

Motivating forms of training may seem more expensive and time-consuming than conventional training sessions based on the traditional lecture principle. However, their lasting effect compensates for the investment. However: Newly acquired behaviours associated with soft skills become more blunted over time due to the daily routines; a periodic refresher course – especially in light of striving for zero accidents – is therefore essential.

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Is all of the relevant information communicated during the shift handover at your plant? Even a small, informal survey of your employees can provide the answer – as well as a look at your safety statistics. The basic rules for reliable communication:

- Redundancy and diversity in the exchange media: It is ideal if both written as well as verbal communication channels are used.
- Personal conversations are the richest information channel: Active face-to-face dialogues are the easiest and most effective way to avoid or clear up ambiguities and misunderstanding.
- Direct feedback is the most effective method to check mutual understanding – and correct any possible misunderstandings.

A logbook can be a conglomeration of any collated data or a strategic tool. The quality of the collected information is determined by the ergonomic work design, among others:

- The content structure should be logical, self-explanatory and easy to understand. Unclear, unnecessary or excessively general categories cost time. The “decoding” of entries made by the replacement crew takes longer as well.
- User-friendliness: a mixture of open and closed questions with multiple-choice options. Important: Allow space for observations and comments.
- Make design and functionalities intuitive and with a clear structure – this facilitates navigation and makes the filling out of forms easier.
- Experts suggest not to determine the structure of the logbook without input of the employees and to consult with employees to optimise the logbook layout.

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SOURCES (EXCERPT):

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