

## **Guide to Peer Assists – A Proven Method for Learning Before Doing**

This guide is intended to help plan, prepare and facilitate Peer Assists within and across organizations. It is based on experience gleaned from implementing hundreds of Peer Assists in the public and private sectors. It addresses the following key areas:

- Purpose
- What it Does
- Why it Works
- Who Can Help You Learn Before Doing?
- When is a Peer Assist Appropriate?
- Generational Considerations
- How to Hold an Effective Peer Assist

### **Purpose:**

A Peer Assist is a facilitated meeting or workshop where peers from different teams or organizations share & transfer their experience, insights, and knowledge with a team that has requested help in meeting an upcoming challenge or problem.

### **What it Does:**

- Targets a specific technical, mission or business challenge before implementation has started.
- Gains assistance and insight from people outside your team and identifies possible approaches and new lines of inquiry.
- Promotes sharing of learning with each other and develops strong, and often new, connections among staff. Establishment of new communities of practice and networks often emerge from the process.

### **Virtual Peer Assist: Cement Casing Example**

- Norway drilling team is two months away from setting casing in a deep water, high pressure well off the coast of Norway
- The Business Unit hasn't drilled or cased a well in this environment in 30 years
- Sought drilling engineers (visiting) peers from around the globe that have set casing (cement) in high pressure wells before – found 8 that could participate in a virtual PA
- Didn't know each other
- In 2 hours, visiting peers shared enough cementing knowledge to change the Norway plan
- Reduced their cementing costs by \$2 Million



### **Why it Works**

People are much more inclined to use knowledge and insights gained from their peers before they undertake a project or challenge. The key to a successful Peer Assist is to convene the session after a team has exhausted their internal knowledge, have created their plan, and before the start of actual implementation.

### **Who Can Help You Learn Before Doing?**

- Tap your personal network to find who might have experience in the subject area and the particular challenges you are facing. Ask people you trust who they know that might have useful knowledge to share and contact them.
- Search your company intranet for people with the skills and relevant experience that can help you. Sometimes it is helpful to involve people with diverse experience, which can push boundaries and lead to innovative thinking in the session.
- Contact people in relevant communities of practice or professional forums and ask for their help or contacts.
- Consider announcing your intent to do a Peer Assist by posting the subject on your company's intranet electronic news/announcements facility.

### **When is a Peer Assist Appropriate?**

A Peer Assist is appropriate when:

- The cost of gathering help leverages significant potential business benefits.
- A business unit is facing a challenge about which others may be able to offer experience and insight.
- The diversity of views external to the group can broaden the range of options considered.

### **Generational Considerations**

In today's workforce, it is likely that your peers will no longer all be part of the same generation. This means it is important to consider the learning, knowledge sharing and transfer preferences of all the peers involved in a Peer Assist event. As a facilitator, understanding the preferences will help to minimize barriers to knowledge flow between participants, and maximize sense-making and understanding of lessons learned and good practices that are raised in the session.

Some things to consider are:

- Younger peers are more likely to ask for help before taking on a task that they know will be challenging, whereas baby boomers typically require more support and prompting to openly ask for help;
- Gen Xers and Millennials may be more inclined to participate if the session is held virtually because they are used to interacting in a digital environment;
- Wikis provide a collaborative authoring space conducive to the PA process;
- Younger peers aren't keen on hearing long, drawn out stories that provide rich context and background to a lesson or event, whereas boomers are used to telling

stories to help others learn from their experience. Millennials will want to know the 2 or 3 things that the boomer thinks is important, and if they want to know more they will ask. So, how to *share* a story versus *telling* a story is important to understand.

### **How to Hold an Effective Peer Assist**

Define the problem or opportunity that you are trying to help and consider whether a Peer Assist is the most appropriate process. A Peer Assist should be carried out in an atmosphere of help and support. Sometimes a host team already knows what they need to do and is looking for validation. In these cases, they will still learn something new that impacts their intended plan and approach, but only if the facilitator gets them to truly listen and consider new possibilities.

1. Plan the Peer Assist early, so the help you receive can aid in delivering your business outcome. (This is not just a step in the approval process; a Peer Assist is very effective in the planning and delivery stages, too.)
  2. Share your plans for a Peer Assist with others by sharing the intent and design of your team/project learning event with those who may have similar needs.
  3. Clearly articulate the business problem or challenge for which you need help and the objective of the assist. (Be prepared for these to be reframed in the course of the assist.) Use briefing material to give the team context.
  4. Assemble a group with diverse skills and experience tailored to the objectives of the assist – people who will both challenge your mental models and offer options and new lines of inquiry. (Consider inviting people from other disciplines, businesses, and companies.)
  5. When participating as a peer in a Peer Assist, your role is to offer help, knowledge, and experience, and to reduce the workload. Your role is not to criticize or add to the workload.
  6. Design the event with enough time to build the Peer Assist team – experience indicates two days are required to build the relationships necessary for an effective team to address a significant problem or challenge. Contention will raise the level of dialogue and this will not occur if the group is being polite or have not socialized enough to create the open environment needed to share their hard-earned, personal knowledge.
- However, if the problem or challenge is very specific and technical, a successful Peer Assist can be completed in a few hours with the right people.*
7. Recommend what the host team should stop doing and offer options, alternative and suggestions on what else they could do.

8. Prepare an action list at the end of the meeting. Ask the host team to keep participants informed of progress as it is made on the items listed.
9. Have each participant consider what they have learned from the Peer Assist and how it will be applied.
10. Explore the desire of participants to stay connected after the meeting – Peer Assists often kick-start the establishment of new communities of practice and expertise networks.
11. Consider who else might benefit from the lessons learned and share them. Provide contact names for follow-up discussions.

*This guide is based on the work of the Kent Greenes & the KM Team at British Petroleum from 1995 to 1999. Sources of generational learning enhancements were developed as part of The Conference Board's Research Working Group on Multigenerational Knowledge Transfer in 2007.*