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Conducting Peer Assists

Abstract

{Excerpt} The experience that an organization has gained is its most important asset. Exit interviews are a way of capturing knowledge from leavers, but can only be relied upon once. Peer assists capture knowledge before employees leave, and in such ways that can repeatedly apply and strengthen good practices as well as consistency across an organization.

The formal use of peer assists as a management tool was pioneered by British Petroleum to help staff learn from the experiences of others before they embark on an activity or project. Put simply, a peer assist is the process whereby a team working on an activity or project calls a meeting or workshop to seek knowledge and insights from a good mix of people in other teams. From the onset, the distinction between a peer assist and a peer review should be made explicit: without it participants will fall into the familiar patterns of peer reviews and little knowledge will be transferred.

Keywords

Asian Development Bank, ADB, poverty, economic growth, sustainability, development

Comments

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Conducting Peer Assists

by Olivier Serrat

Rationale

The experience that an organization has gained is its most important asset. Exit interviews are a way of capturing knowledge from leavers, but can only be relied upon once. Peer assists capture knowledge before employees leave, and in such ways that can repeatedly apply and strengthen good practice as well as consistency across an organization.

Peer assists are events that bring individuals together to share their experiences, insights, and knowledge on an identified challenge or problem. They also promote collective learning and develop networks among those invited.

Definition

The formal use of peer assists as a management tool was pioneered by British Petroleum to help staff learn from the experiences of others before they embark on an activity or project. Put simply, a peer assist is the process whereby a team working on an activity or project calls a meeting or workshop to seek knowledge and insights from a good mix of people in other teams. From the onset, the distinction between a peer assist and a peer review should be made explicit: without it, participants will fall into the familiar patterns of peer reviews and little knowledge will be transferred. Table 1 explains the principal differences between the two.

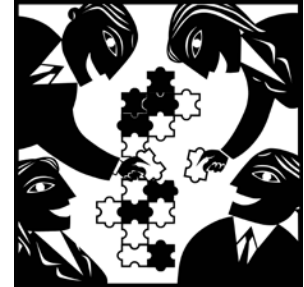


Table 1: How does a peer assist differ from a peer review?

	Peer Review	Peer Assist
Goal	To judge the work of others	To transfer knowledge to others
Purpose	The purpose of a peer review is evaluative.	The purpose of a peer assist is collaborative.
Task	The core task of a peer review is to critique the activity or project.	The core task of a peer assist is to learn with and through the team that calls the assist.
Participants	Peer reviewers are selected by others.	The team that calls the peer assist selects the assisters, i.e., those whom they think could be of help to them.
Nature	Peer reviews can be a “dog-and-pony” show aimed at receiving a good evaluation.	A peer assist is a problem-solving, working session.
Roles	Some people are always peer reviewers. Others are always receivers.	The role of participants to a peer assist is reciprocal. Members of the team calling the assist may themselves assist others.
Reporting	The peer review report is sent to management.	The peer assist report is sent only to the team requesting the peer assist.

Source: Adapted from Common Knowledge Associates. 2007. *Peer Assists: Guidelines for Practice*. Available: www.commonknowledge.org/userimages/resources_peer_assist_guidelines+.pdf

Benefits

Peer assists are part of the process of “learning before doing.” They are about gathering knowledge from knowledge brokers before embarking on an activity or project, or when facing a difficulty in the course of related events. The benefits of peer assists are quickly realized: learning is focused directly on a specific issue and can therefore be applied immediately. A peer assist allows the team involved to gain input and insights from people outside the team, and to identify possible new lines of enquiry or approach—in short, reusing existing knowledge and experience rather than having to reinvent the wheel. Peer assists also have wider benefits: they promote sharing of learning between teams, and help develop strong networks among people. They are relatively simple and inexpensive to organize: they do not require special resources or new, unfamiliar processes. It is worth using a peer assist when a team is facing a challenge, where the knowledge of others will really help, and when the potential benefits outweigh the costs of travel.

Process

There is no single way to hold a peer assist. Box 1 outlines the method that has worked for British Petroleum. Box 2 gives an example of a peer assist at British Petroleum in the form of a story. Table 2 shows what a meeting agenda for a peer assist might look like.

Box 1: Peer Assists at British Petroleum

Clarify the Purpose of the Peer Assist. Peer assists work well when their purpose is clear and you communicate that purpose to participants. Define the specific problem you are seeking help with, and be sure that your aim in calling a peer assist is to learn something (rather than seeking endorsement for a decision you have already made).

Has the Problem Already Been Solved? Do some research to find out who else has already solved or tackled a similar problem. Also, share your peer assist plans with others, as there may be other teams who are currently tackling a similar problem who could also benefit from participating in the peer assist.

Enlist the Help of a Facilitator. You will need a facilitator from outside the team to make sure participants to the meeting reach the desired outcome. The facilitator also may or may not record the event: be sure to agree on that before the meeting.

Pay Attention to Timing. Ensure that you plan a date for the peer assist that is early enough in your project to make use of the input you receive and to do something different on the basis of what you have learned. A frequent mistake is to hold the meeting too close to the decision date to make a real impact. Consider that you might get a different response to the one you expect: will you have time to do anything about it? The length of a peer assist depends on the complexity of the problem and tends to be somewhere between half a day and two days.

Select the Participants. Once you are clear on your purpose, select participants who have the diversity of knowledge, skills and experiences needed for the peer assist. Four to five people are a good number.¹ Look “across” the organization rather than “up” it—hierarchies can hamper the free exchange of knowledge whereas peers tend to be much more open with each other and can challenge without feeling threatened. Avoid the temptation to select “the usual suspects.” If the same experts are selected for peer assists again and again, you may be limiting the number of fresh ideas and perspectives available to you. Similarly, seek to select people who will challenge your ways of thinking and working and perhaps offer a different angle, rather than looking for people who will validate your current Reports drawn up on the lines I propose may first seem rough as compared with the flat surface of “officialese” jargon. But the saving in time will be great, while the discipline of setting out the real points concisely will prove an aid to clearer thinking.

¹ Having more than five participants makes it difficult to have an in-depth discussion.

Be Clear about Deliverables. Be clear about what you hope to achieve during the peer assist and then plan the time to achieve that. The deliverables should comprise options and insights rather than providing an answer. It is up to the person or team who called the peer assist to then make the relevant decisions, based on what is learned. Provide the participants with any briefing materials in advance so that they have adequate time to prepare.

Allow Time for Socializing. Allow time in your agenda for the teams to get to know one another; this might be a dinner the night before or time for coffee at the start of the day. It is important to build rapport so that the group can work openly together.

Describe the Purpose and Set the Ground Rules. At the start of the meeting, ensure that everyone is clear about the purpose of the peer assist and their roles within it. The role of the host team is to listen in order to understand and learn. The role of the visiting team is to share knowledge and experience to help resolve the challenge without adding to the workload. Agree that where there are areas of contention, you will focus on the activity or project rather than on the individual people involved.

Share Information and Context. Divide the meeting time roughly into four equal parts. During the first quarter, the host team will present the context, history, and their future plans regarding the problem or challenge in question. Keep this part short and sharp—you only want to say enough to get the visiting team started in the right direction. Remember that the purpose of the peer assist is to learn rather than tell. When communicating the problem or challenge about which you are seeking input, be prepared for it to be redefined as part of the peer assist process. It may be that the problem you have identified is in fact the symptom of a further problem and the peer assist will help you identify the root cause.

Encourage the Participants to Ask Questions and Give Feedback. In the second quarter, the participants consider what they have heard, and then begin by discussing what they have heard that has surprised them, and what they expected to hear but haven't. The host team should take a back seat at this stage and simply listen; in some cases they may even opt to leave the room. The participants then consider what else they need to know to address the problem and where might they find that knowledge. It may be that they want to make some telephone calls and talk to some other people, or request some data or reports. Remember, they are not seeking to solve the problem but to offer some options and insights based on their own knowledge and experience.

Analyze What You Have Heard. The third quarter of the meeting is for the visiting team to then analyze and reflect on what they have learned and to examine options. Again, the home team remains largely in the back seat; it might be appropriate to involve one or two of them, provided that they continue to listen and learn rather than closing off options or seeking to draw conclusions too early.

Present Feedback and Agree on Actions. In the fourth and final quarter of the meeting, the visiting team presents their feedback to the host team and answers any questions. The presentation will be along the lines of “what we have learned, what options we see, and what has worked elsewhere.” As with all feedback, this should start with the positive—what has been done well, and then what options there are to do things differently. When presenting what has worked elsewhere, participants should simply tell the story rather than prescribing “you should...” In closing, the person who called the peer assist should acknowledge the contribution of the visiting team, and also commit to when he or she will get back with an action list of what the team are going to do differently. Finally, invite the visiting team to reflect on what they have learned and what they will take away and apply. Learning is never one-way.

Source: Adapted from National Library for Health. 2008. *Knowledge Management Specialist Library. Peer Assists.*

Box 2: Peer Assist at British Petroleum

Helen is a team leader for British Petroleum's Barden Exploration site. She has four people reporting to her, two geo-physicists, a geologist, and a petroleum engineer. The team has spent several months collecting and analyzing a great deal of data about the possible well site off the coast of Norway known as Barden. The team is at a point where they need to make a decision as to how they will proceed. Should they commit to a rig? Should they make firm commitments to their partners in the exploration license? These are important decisions because of the money involved; a rig, for example, can cost up to \$200 a minute.

Helen's team has decided it would be useful for her to call upon the knowledge that other people in British Petroleum have learned about this type of prospect. They are going to call a peer assist. That means identifying people from other parts of the world who have experience with the kind of issues facing the Barden team. Helen identifies about 15 possible candidates; people she has worked with before or knows about through the grapevine. She makes the calls. She finds some are too busy on other projects, but she ends up with six people from her original list that she thinks can be very helpful, three from the Norway office, one from Scotland, one from South Africa, and two from London. They have agreed to meet on Wednesday, one month from now, in Stavanger, Norway to spend the day.

On the meeting day, Helen starts by defining what her team wants from the peer assist. She lays out their objectives for the meeting. The peer assist members have received a packet of material to read through in advance. The walls of the conference room where Helen's team and the peer assisters are meeting are covered with pictures of the ocean bed, seismic lines, and charts. More are spread several layers deep on the tables around the room. As Helen finishes her introduction, the peer assist group asks some clarification questions about the objectives, and then Helen introduces Knut who begins to talk through the data and his interpretation of it. Before long everyone is up looking more closely at the wall data. There is a lively discussion about the implications among all the participants.

After a coffee break, Martin, another team member, is introduced and he begins to show the data for seismic velocity. Again within minutes the whole group is back on their feet examining the charts more closely. The discussion flows back and forth with the peer assist members asking each other technical questions about the data and often challenging each other's responses.

After the lunch break, Helen says that they have finished presenting the data they planned. The peer assist group again returns to questions about the original objectives for clarification in light of what they have just heard. One of peer assisters notes that: "I'm uncomfortable with the discussion because there are some strategic decisions to be made before we can give our opinion on whether to drill the well." The group decides they need to develop criteria for drilling the Barden well. Collaboratively the two groups develop these criteria, gaining additional insight as they talk through each point.

About three o'clock Helen says she would like to excuse herself and her team to give the assist team a chance to talk through the response they want to make. Once the Barden team leaves the room, the peer assist group designates one member to keep track of their ideas on the flip charts and they consider who should make the report when the team returns. As the group gets down to work on their recommendations there is an animated exchange. For nearly every assertion that is made, someone wants to know why that is needed or why it should be given preference over other points. The member from Scotland suggests a new technique they have just developed west of the Shetlands that could provide useful additional data on a prospect like Barden. He offers to send the specifications for that process and to spend some time helping the Barden team go through it the first time. The discussion is technical but it is very open and lively. It is obvious that the members are interested in this situation and want to be of help.

About five o'clock the Barden team returns to hear the ideas of the assist team. The spokesperson thanks the Barden team for giving them a chance to work on such an interesting problem and notes they have all learned from the exchange. The verbal report is given with the promise of a more formal written report later.

As the report proceeds the Barden team asks a few clarification questions, but mostly they listen to the thoughtful response this team is providing. When the report is finished, Helen says that the report is very clear and notes that it has given her team a great deal to think about as they move toward the decisions they must make. She acknowledges that the Barden team was nervous about whether it was too early in their investigation to call for a peer assist, but she is now convinced that the timing was right. The team can take the recommendations into account before they are fully committed to a course of action. The day ends with a dinner at a local restaurant. The dinner is relaxed and people have time to talk through how the peer assist went. The dinner is a way for the Barden team to express their gratitude to those who came to lend their knowledge.

Source: Adapted from National Library for Health. 2008. Knowledge Management Specialist Library. *Peer Assists*.

Table 2: Meeting Agenda for Peer Assists^a

Item	Time Allowed
1. The participants introduce themselves. The activity or project leader presents the context, history, and ideas regarding the activity or project at hand. He or she states the objective of the peer assist and enables possible redefinition of the session.	
2. The participants consider the problem or challenge the activity or project team faces. They present or discuss what has been covered and whatever information was not included in the pre-documents. ^b	
3. The peer assisters consider what the activity or project team might need to know to address the problem or challenge it faces.	
4. The peer assisters are given time to reflect on what has been learned and to examine options. ^c	
5. The peer assisters provide non-prescriptive recommendations to the activity or project team. ^d They respond to specific questions.	
6. The activity or project team acknowledges the contributions of participants. It responds to the peer assisters, noting what it found particularly useful. It may commit to a timeline for delivery of an action list, emphasizing the different things that it will do as a result of the peer assist. ^e Follow-up interviews may be considered.	

^a Complex problems or challenges may require time for the peer assisters and the activity or project team to socialize outside of meeting times. The establishment of good rapport is fundamental to the learning process.

^b Participants should be given material in advance so that they may prepare for the peer assist.

^c This may require that the activity or project team leave the premises.

^d Participants share knowledge to help resolve the problem or challenge without adding to the workload.

^e This is not the time for decisions. The team will make these on a separate, team-held occasion.

Source: Adapted from Common Knowledge Associates. 2007. *Peer Assists: Guidelines for Practice*. Available: www.commonknowledge.org/homepage.asp?id=19

Others

An important consideration is that of evidence-based practice. When conducting peer assists, staff will need to ensure that lessons learned are based on a combination of both on-the-job experience and evidence. They might wish to carry out an after-action review following the peer assist to look at whether the process went according to plan, what was different and why, and what can one learn from that for the next time. While the peer assist process is designed to provide input for a specific purpose or project, they should consider who else might benefit from the lessons learned.

For further information

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Asian Development Bank

ADB, based in Manila, is dedicated to reducing poverty in the Asia and Pacific region through inclusive economic growth, environmentally sustainable growth, and regional integration. Established in 1966, it is owned by 67 members—48 from the region. In 2007, it approved \$10.1 billion of loans, \$673 million of grant projects, and technical assistance amounting to \$243 million.

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