Proposition 87
Conducting Peer Assists

In a Word  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.

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.

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 87.1 explains the principal differences between the two.

**Table 87.1** How does a peer assist differ from a peer review?

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

**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 outlines the method that has worked for British Petroleum. Table 87.2 shows what a meeting agenda for a peer assist might look like.

Box: Fundamentals of Peer Assists

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. 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

1Having more than five participants makes it difficult to have an in-depth discussion.
ways of thinking and working and perhaps offer a different angle, rather than looking for people who will validate your current approach. You might consider inviting people from outside your organization. The major criteria is to invite participants who have knowledge of the type of situation being faced.

**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 have not. 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* Author

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**Table 87.2 Meeting agenda for peer assists**

<table>
<thead>
<tr>
<th>Item</th>
<th>Time allotted</th>
</tr>
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<tbody>
<tr>
<td>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</td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
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<tr>
<td>3. The peer assisters consider what the activity or project team might need to know to address the problem or challenge it faces</td>
<td></td>
</tr>
<tr>
<td>4. The peer assisters are given time to reflect on what has been learned and to examine options</td>
<td></td>
</tr>
<tr>
<td>5. The peer assisters provide non-prescriptive recommendations to the activity or project team. They respond to specific questions</td>
<td></td>
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</tbody>
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*(continued)*
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\(^2\) 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.

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\(^2\)After-action reviews are a tool pioneered by the United States army, now widely used in a range of organizations to capture lessons learned both during and after an activity or project.
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