

Peer Assist

Guidelines for Practice

What is it?

Peer Assist is a meeting of a project team with colleagues the team has invited to assist them with a significant issue the team is facing. The request is initiated by the project lead when he or she thinks peers could be of help to the team. Usually 4-5 colleagues, from other sites, meet together at the site of the asking team. An assist may last from $\frac{1}{2}$ to 2 days, during which the asking team and those who have come to be assisters, are in dialogue about the project. The asking team gains the insight of colleagues. The assisters gain as well, learning both from the project and from each other. Teams who call for an assist are not required to use the suggestions that others make, although most find the insights of their peers of considerable value to their on going work. Some Peer Assists are called early in a project and some are called later, depending on the needs of the team.

How does a Peer Assist differ from a Peer Review?

A Peer Assist is different from a Peer Review. The organization may have had a history of using Peer Reviews, if so it is important that both the team calling for the assist and the assisters understand the difference between the two concepts. Without the distinction made explicitly, participants are very likely to fall into a familiar pattern and less transfer of knowledge will occur.

Peer Review	Peer Assist
Goal: to judge the work of a team	Goal: to transfer knowledge
Evaluative	Collaborative
Task is to critique the project	Task is to learn with and through the team that called the assist
Reviewers are selected by others	The team selects their own assisters; those whom they think could be of help to them
Often a "dog and pony" show with the goal of getting a good evaluation	A problem-solving/working session
Some people are always reviewers and some are always receivers	Reciprocal. In a few months members of the team asking for the assist may fly off to assist colleagues themselves.
Report is sent to management	Report and suggestions go only to the team asking for the assist

Guidelines for the asking team

This is your team's meeting. You call it when and if you want, ask who you think would be helpful, set the objectives you would find useful, and make your own decisions about what to accept out of the advice you get. You manage the meeting to get what you want.

- Be clear about the objectives you want the peer assisters to address. Your team may want to meet ahead of time to think through what would be of most use to them. The more specific you are, the more effective the meeting will be.
- Ahead of time send the objectives to the assisters as well as a limited amount of background material for them to read.
- Stop part way through the meeting to identify what is and is not being helpful to you. It is your meeting, if you are not getting what you want you need to redirect what is happening.
- Think of this as a working session, not a presentation session.
- Have your whole team at the meeting (or representatives of each area if the team is large) so they can learn and ask questions.
- Give the assisters some time on their own. You will get better recommendations if the assisters can talk freely among themselves without your team present.
 - Consider the meeting as a discussion among your team members and the assisters. These suggestions may facilitate a discussion format:
 - As the leader refrain from responding after every, or most comments - that limits the discussion to a serial exchange between the leader and individual assisters.
 - When an assister has made a suggestion, ask "Who has a different perspective on this issue?" or "I'm interested in hearing the thoughts of others about this issue."
 - Intersperse members of the asking team around the table with assisters.
 - Arrange the room so the focal point is not the leader - the leader may want to start the meeting in the front of the room, but later sit at another place at the conference table in order to visually demonstrate that he/she is not the focus of the discussion.

- It is critical for the team to come back together a few days later to review what they learned from the Peer Assist and what they will now do based on it. Without this sensemaking meeting, much of the energy generated in the meeting will disappear.

What does the meeting agenda look like?

- Introductions: it helps the discussion if participants know about the experience and knowledge of others in the room. Even if only one or two participants do not know each other well, spending time on introductions will assist the group.
- Objectives: as project leader state your objectives for the meeting and how you have framed the time schedule.
- Presentation and discussion: present any information you have that was not in the pre-documents - concerns and issues that are critical to you. It is often helpful to have different team members present the areas they have been working on. The word "present" is not intended to imply a formal PowerPoint presentation, but rather providing enough information to initiate the dialogue on a particular topic.
- Time for the assisters to work on their own: Once all the issues and data are on the table, the asking team needs to leave the assisters to themselves to think through their recommendations. There may be a strong pull by either the asking team or the assisters to stay together - groups rarely choose to separate. But time for the assisters to think together is very critical to, 1) getting well stated and agreed upon recommendations, and 2) enhance the assisters' own learning.
- Providing recommendations: The two teams come back together so that the assisters can offer their recommendations.
- Response to assisters: The asking team makes a response of appreciation and perhaps noting what they found particularly helpful. This is not a decision time - the asking team makes its decisions at their own meeting at a later time.

Who should we invite?

- Aim for 4-5 assisters. If you have many more than 5 it is difficult to have an in-depth discussion.
- The major criteria are to invite those who have expertise and knowledge to share about the TYPE OF SITUATION you are facing in this project.

- It is important to invite people who are "good colleagues," not people who are overly critical or who dominate any discussion.
- The members of your team may have names of colleagues that they think know a lot about the topic they are working on - there is nothing wrong with asking friends if they meet the qualifications.

You may need to call 10-15 people to get 4-5 people for a particular day.

What do assisters do?

- Come in person, assisters learn much less if they try to come in through a teleconference; the asking team may be helped, but the assisters will gain little learning for themselves.
- Select someone as team captain to help the group reach its recommendations and to make the report back to the asking team.
- Come as a learner as well as a giver of knowledge. Share experiences, both successes and mistakes that might be relevant to the project.

Should we use a facilitator?

Whether you use a facilitator depends on how skillful you, as project manager, are in managing your own behavior. You may want to have a facilitator if you have a:

- Tendency to be the dominant voice in meetings, that is, find yourself responding to every statement someone else makes
- A tendency to get defensive when something you value and have worked hard on is challenged
- A concern that assisters may be reluctant to be straightforward because of your position or knowledge.

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 dollars a minute!

Helen's team has decided it would be useful for her to call upon the knowledge that other people in BP 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.