Peer Assist / Peer Review

What are Peer Assists?

A Peer Assist is simply a process where a team of people who are working on a project or activity call a meeting or workshop to seek knowledge and insights from people in other teams. While seeking help from peers is certainly not new, the formal use of this process as a knowledge management tool and the coining of the term "Peer Assist", were pioneered by British Petroleum (BP).

What are the benefits?

Peer Assists are part of a process of what BP calls "learning before doing", in other words gathering knowledge before embarking on a project or piece of work, or when facing a specific problem or challenge within a piece of work. The benefits of Peer Assists are therefore quickly realized: learning is directly focused on a specific task or problem, and so it can 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 develop strong networks among people.
Peer Assists are relatively simple and inexpensive to do: they do not require any special resources or any new, unfamiliar processes.
It is worth using a Peer Assist when a team is facing a challenge, where the knowledge and experience of others will really help, and when the potential benefits outweigh the costs of travel.

How do I go about it?

There is no single right way to hold a Peer Assist. The following is a method that has worked well for BP.

1. **Clarify your purpose**
   Peer Assists work well when the 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).

2. **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.

3. **Get a facilitator**
   You will need a facilitator from outside the team, to make sure the meeting participants reach their desired outcome. The facilitator also may or may not record the event: be sure to agree on that before the meeting.

4. **Timing is important**
   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 long.

5. **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. Six to eight 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 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.

6. **Get clear about the deliverables**
   Get clear on 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.

7. **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.

8. **Define 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 rather than the individual people involved.

9. **Start by sharing 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.

10. Encourage the visitors to ask questions and give feedback
In the second quarter, the visitors 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 visitors 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.

11. Analyse 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.

12. Present the feedback and agree 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, presenters 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.

Are there any other points I should be aware of?

In most contexts, an important consideration is that of evidence-based practice. When conducting Peer Assists, you will need to ensure that lessons learned are based on a combination of both on-the-job experience and sound research evidence.

You might wish to carry out an "after action review" following your Peer Assist to look at whether the process went according to plan, what was different and why, and what can you learn from that for the next time.

While the Peer Assist process is designed to provide input for a specific purpose or project, consider who else might benefit from the lessons learned. Always look out for opportunities to share and reuse knowledge and learning.

A variation – the rotating Peer Assist

A rotating Peer Assist works with parallel subgroups in one room, dealing each with a part of the problem. It works especially in cases you have several questions and a lot of visiting peers. While the hosting people remain with their initial question, the visiting people rotate to the next discussion place. In each round the problem is re-explained based on the insights gained in the previous round.

Peer Review – What is the difference to Peer Assist?

While Peer Assist is a tool in a planning stage, Peer Review is the tool in the evaluation stage. Peer Review is an evaluation of the performance of individuals or groups of practitioners (hosts) by members of the same profession (guests). The status of hosts and guests are similar, there is no formal link between hosts and guests, no hierarchical, managerial or important business relationship. They are real peers.

Peer Review may be formal or informal; it may be focused on a learning process in one organization or to both sides. Peer Review may also be used in the context of multidisciplinary teams to incorporate feedback from peers with different professional background being members of the same organization.

Peer Review usually aims at:

- Self regulation within the profession (quality standards).
- Organizational development.
- Create awareness of standards and quality of performance.
- Improvement of collaboration between professionals.

Guidelines for a successful Peer Review

Structure: Plan the Peer Review thoroughly, select an experienced facilitator, and follow the planned structure of the review.

Trust: Be cooperative, supportive and non-judging in your responses and feedback. Refer to the insight that “people do the best they can with the resources they have”.

Honesty: Be as honest as you can. You do not have to look competent in front of the group. Opt for a learning culture: It is vital to learn from mistakes, not to hide them.

Conflicts of interest: Declare conflicts of interest openly and sort them out. Most often, conflicts are sources of energy and the entry point of unexpected new solutions.

Be self directed: You are responsible for yourself. Choose your own process, take what you want and leave the rest.

Diversity: Be alert to and respect differences in culture, gender, professional orientation, and personal values that may show up through differing options, viewpoints or ways of working.