Guide to Mini-Peer Assist:
A Meeting Tool for Gathering Experience *before* Doing

This guide in intended to help plan, prepare and facilitate Mini-Peer Assists in a meeting environment. It is based on experience gleaned from implementing over fifty mini-peer assists in the public and private sectors. It addresses the following key areas:

- Purpose
- Key Players
- How it Works
- Sources for Potential Topics
- Topic Selection Criteria
- Summary

Purpose
A Mini-Peer Assist is a facilitated session aimed at helping a team or individual gather helpful practices, learning and insights <u>before</u> they undertake an activity, task or project. It is designed to be held in a meeting or work-session as part of a broader agenda. One hour is typically required to produce meaningful results.

The mini-peer assist is a shorter variant of the formal Peer Assist method, which is typically a longer session designed to not only gather experience from peers but to also *transfer* some of their learning & good practices in a manner that actually changes what a person or team was planning to do.

Key Players
As the name applied, this tool is intended for use by peers, that is, people who share similar status, ability, etc, usually within a specific practice area or domain.

The three main roles participants play are:
1. <u>Home Peers</u> – a meeting attendee that has a specific challenge or problem, and has already exhausted what he or she knows about solving it.
2. <u>Visiting Peers</u> – meeting attendees with relevant expertise to share, who want to help and are available.
3. <u>Facilitator</u> – someone to guide the peers through the mini-peer assist process of inquiry, sharing and transfer, and observe / act to ensure delivery of the intended outcomes.

How It Works
A mini-peer assist is accomplished in 5 steps:

Before the Event
Step 1. Home Peer Challenge – In this step, the home peer provides a brief summary (a couple paragraphs and no more than one page) of their upcoming challenge, including the business context and their planned approach for solving or dealing with the challenge. This should be provided at least one week prior to the event to enable people to determine and prepare any relevant input they can share in the meeting.

During the Event

Step 2. What the Home Peers Know – After a brief introduction by the facilitator, the home peer briefly presents their business context, their key challenge, and their current plan & approach. This is deliberately short to maximize the time available for the visiting peers to respond in the following step and place emphasis on their input, not the home peer.

Step 3. What the Visiting Peers Know – The facilitator asks the following question to prompt for contributions by the visiting peers, "What relevant practices or approaches have you taken in addressing similar challenges?"

As the peers respond, the facilitator uses the following questions to probe their 'experience' for more detailed information and insights:

- What were you trying to achieve?
- What were the key drivers that led to success or failure?
- What information & knowledge helped to set your objectives and develop your plan?

Step 4. What We All Now Know Together – The combined group of peers now knows more than they each new as individuals before the session started. The facilitator uses the following questions to draw out this collective knowledge by asking questions to create shared understanding among the peers:

- What did you learn that surprised you?
- What haven't you heard that you expected to?
- What else do you need to know?
- Other Sources?

Step 5. Home Peer Response – In this final step, the home peer shares what they learned from the visiting peers. To help prompt feedback, the facilitator asks the home peer the following questions:

- What did you learn that might help you with your challenge?
- In what ways might you consider doing things different based on what you heard?

The home peer provides feedback and thanks the visiting peers for their contributions.

The facilitator asks if there is anything anyone heard that people would like to know more about, and encourages the relevant people to connect after the session.

After the Event (an optional, additional step) - At the next meeting, the facilitator asks the home peer if they had any follow-up conversations with the visiting peers. They may also ask what the home peer did different as a result of the mini-peer assist session and/or

Sources for Potential Topics

- Meeting 'Round Robin' sessions where attendees share their challenges and issues
- 'Takes' from a 'Gives & Takes' session where participants share information & knowledge they need ("Takes") and want to offer ("Gives")
- Strategic or operational need mentioned by a meeting member

Topic Selection Criteria
Not everything is appropriate to address in a mini-peer assist. Topics that work best are those that fit the following criteria:

- Something that is about to happen (not maybe);
- Real planning has already begun by home peer;
- Relevant experience on the topic exists within at least some of the meeting members;
- Relevance to multiple meeting members.

In summary, a mini-peer assist is a brief meeting of peers that:

- Targets a specific business challenge
- Seeks knowledge from outside the formal team
- Improves plans before they are implemented
- Is early enough to make a difference
- 'Visiting' peers often learn something new to take away