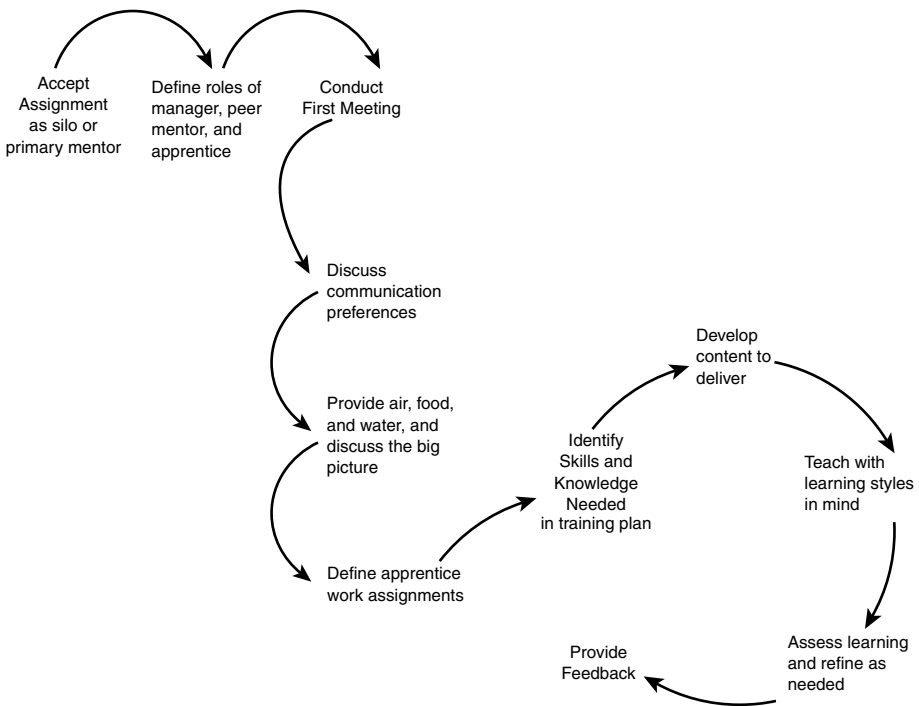


# Peer Mentoring in Practice

*What am I going to do with what I've learned?*



Welcome to the last chapter. We're almost done here, and by now you may have noticed a funny thing about this book. There aren't any new ideas in it. As you've been reading along, I'm sure that many times you've thought, "I already do that," or "I know somebody who already does that." For the ideas you haven't already seen, they seem so straightforward that you might imagine them to be familiar anyway. That familiarity is comfortable, so you bob along through the book, pleased with yourself for already being on top of so much of this. Or, it could be that you read the book and found a twist that was interesting to you. You said, "Well, now. There's something to think about. I should try that." At this point, "thinking about it" is as far as you've gone.

All of these sentiments are the loud, screaming voice of *inertia* masquerading as a whisper in your ear. It is telling you to nod knowingly and then step away from the book that might cause you to take action. Adult humans generally don't like to change anyway so we start subconsciously working on ourselves whenever we sense movement coming along. Inertia will start as a mumbling sound that will get noisier as you think about these new ideas and will, if possible, drown out any hope of change and keep you right where you are. Inertia is also telling you that if you just had enough time, you could be as proactive and on the ball as this book suggests. You're busier than most people, after all, so you can't really use the ideas, but it sure would be nice. If only your boss could free up some time in your schedule, you'd get right on it. If only you didn't have so many deadlines right around the corner, this would be perfect. Well, now is a good time to notice those excuses. Get ready to resist inertia and take action.

Every idea in this book is common sense, designed to stand alone and to be implemented in minutes. You can make progress by taking just one idea and applying it. If you string together a series of ideas over the course of a few weeks, months, or years, you'll see immediate and compounding results. You certainly don't need a Ph.D. in knowledge transfer or peer mentoring to make this happen. You just need a plan.

To illustrate how the Peer Mentoring toolkit can be put to use in the "real world," the end of this chapter features a tried and true story of one of my clients. The story is of how Electronic Arts (EA),

the largest video game company in the world, rolled out the Peer Mentoring Workshop in its Vancouver, British Columbia studios to help manage overwhelming growth. You'll see a flow for using all the tools in this book together to maximize their impact.

By the end of this chapter, you should be able to identify the tools you'll use and develop a strategy for returning to this book to build on your development as a peer mentor, manager, and/or apprentice over time.

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## SCOPE OUT YOUR ENVIRONMENT

Start thinking about using the tools from this book by looking around you and deciding what you want to see happen through improving knowledge transfer. Of course the easiest place to start is by looking in a mirror, but you're more likely to create movement if you enlist some help. This book was written with the assumption that you'd need to manage your manager, as well as the relationships with your peers, so look as broadly as you dare. In the example at the end of this chapter, you'll see that just one relatively junior employee from Electronic Arts took the Peer Mentoring Workshop and before long hundreds of her colleagues (internationally) had been trained to use these ideas! You have more power to effect change than you think.

### WHO ARE THE PLAYERS?

Consider the people who would benefit from working with you to improve knowledge transfer. Then, think about which of the tools and ideas you could share with them. You should look at the following:

- Your manager/supervisor
- Your apprentice(s)
- Other co-workers who could be primary or silo peer mentors
- Your customers
- Other collaborative teams
- Your project manager

- Your project teammates
- Your human resource or training contacts

As you think about this, make a list of the names of the people you'd like to collaborate with to improve knowledge transfer. At the very least, you should determine the names of the three people who would attend the First Meeting (refer to Chapter 1, "Roles in Peer Mentoring"): the manager, the peer mentor, and the apprentice in your "triangle." You can definitely build on that triangle if you are one of those three people.

If you have a long list of names, you might be inclined to call a meeting and get them all on board right away. Generally, I'd discourage you from calling that meeting. It could feel as if you were creating a "knowledge transfer committee." Unless you're the president of the company and can dictate what happens, I encourage you to resist the temptation to start by creating a committee of any kind. Committees are expensive, time-consuming, and can create even more inertia, because it feels like you're doing something when all you're really doing is talking about doing something.

## PICK YOUR TOP PROSPECTS

Instead of creating a committee, look at your list and rank all of the players in order. At the top, put those who have the following traits:

- The highest combination of need (they would really benefit from the improvement in knowledge transfer).
- The desire or openness to change (they have a habit of heading toward ideas like these, rather than resisting them).

Need and frustration are great motivators. Often, even the surliest among us will look for solutions if we've been banging our heads on the wall long enough. Openness and desire are additional traits that will give your efforts more gusto.

Now, look at your list and set all but the top three to five people (including those in the triangle) aside. These three to five people are the ones you should plan to work with to improve knowledge

transfer right now. Chances are, you're in a position to influence that group right away. You'll most likely benefit personally from your efforts. Don't bite off more than you can chew on the first pass. I want you to make progress for yourself before you think about tackling the larger opportunity. After you've experienced some success in transferring knowledge, you can bring ideas to the others in your original list, along with stories of the results you've seen.

In the meantime, you can put this book in the hands of the others, or point them to my website ([www.practicalleader.com](http://www.practicalleader.com)) to sign up for the Peer Mentoring Workshop. Some people learn better in a classroom.

## WHAT IS YOUR ROLE IN THE TRANSITIONS YOU FACE?

Think about the changes that are going on in your organization. For example, are there any new employees coming in? Have you launched any new technologies or processes? Do you have new customers or products? You'll find a long list of potential transitions in the introduction of this book. Which ones relate to you? Take a minute to jot down those that are likely to affect you the most. If you're the primary peer mentor or are apprenticed to someone who is, do you know what is expected of you? You should be able to answer these questions confidently. The Role Definition Worksheet and the First Meeting Worksheet from Chapter 1 will help you.

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## PLAN YOUR APPROACH TO PEER MENTORING

Now that you have a snapshot of your environment, you can start to build a firm strategy for the way you'll move information and skills around. Spend some time now deciding which of the ideas from this book you'd like to implement yourself and which ones you'll introduce to the key colleagues from the list you defined earlier. See a complete list of the peer mentoring tools in Appendix A, "Peer Mentoring Tools at a Glance."

## PICK THE COMMUNICATION TOOLS

Start with developing communication plans. So much of a healthy peer mentoring relationship is based on staying in touch, without overdoing it. Of course, you have to define exactly what that means to you. Take into account the expectations, location, work requirements, frequency of interaction, risk, and personal preferences that will affect the way you and your apprentice will work together. Then, shape a strategy for staying in touch with the managers, peer mentors, and apprentices you outlined earlier. You'll want to look for a balance between being available to them as much as possible and still having enough time to get your "day job" done.

You can use the Telling About Yourself Worksheet, Status Report Worksheet, Handshake E-mail Worksheet, and Anatomy of a Problem-Solving Question Worksheet from Chapter 2, "Managing Time and Communication," to shape the way you communicate. You will be more likely to be successful if you share some of these tools with your colleagues and ask them to use the worksheets, too.

## DEVELOP THE STRUCTURE

Next, you should set the foundation for doing the work. Chapters 3, "Focusing on the Most Important Information," and 4, "Developing a Training Plan," provide tools that help you with this. Begin with defining Air, Food, and Water so that you have the foundation (workstation, tools, vocabulary, security/access, relationships, etc.) you'll need to either teach or learn. Then develop your understanding of the Big Picture so that you're able to describe the relationships between your products, customers, process, collaborators, success metrics, and so on. The most important part of this step is to develop the Training Plan, a list of the skills, test questions, and resources, sorted by sequence and date.

## DEVELOP AND DELIVER THE CONTENT

Once you've set up the structure for the peer mentoring relationship, you should break it down further, organize it into manageable chunks, and deliver it using the tools from Chapter 5, "Teaching What You Know." The 5-Minute Meeting Plan will help you prepare informal documentation and an agenda for the times you need to lecture. The Demonstration Technique Worksheet will help you prepare to explain a tool or a process.

As you put together all the content you plan to use, keep in mind that you may be dealing with a variety of approaches to learning. You can respond to your apprentice's learning style by using the model in Chapter 6, "Leveraging Learning Styles."

## FOLLOW UP

It isn't enough to just develop and deliver solid content. You'll want to have a plan to ensure that the information is received as intended. Chapter 7, "Assessing Knowledge Transfer," offers Assessment Questions you can use to check in along the way. For the time it takes to ask and answer one question at each stage (before you teach, while you're teaching, and after you teach), you can make sure you're never off track.

Finally, make sure that you are always clear about the progress being made. The Feedback Worksheet in Chapter 8, "Giving and Getting Peer-Appropriate Feedback," offers language that can be used to make sure that everyone knows how they're doing.

This flow works for most peer mentoring situations. If you follow it, the results won't disappoint you. Sometimes I get questions about different combinations of tools for different sorts of peer mentoring scenarios. What follows are some ideas on that.

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## STRATEGIES FOR DIFFERENT PEER MENTORING SCENARIOS

Look in this section for the subtitle that best describes your situation and then read it for specific guidance. This section is designed to help you if you're trying to introduce these tools to others. It'll

help you put your finger on their role and give them some quick guidance that they can put to work right away.

## PRIMARY PEER MENTOR FOR A NEW EMPLOYEE

Every new employee—regardless of the level of chaos he walks into at your company, no matter how busy everyone is, no matter where he comes from, no matter what day of the week it is—should get five things during the first three days on the job:

- A primary peer mentor who's been briefed on expectations for the role
- An Air, Food, and Water list of the minimum setup requirements
- A First Meeting to set expectations
- A Training Plan that will take at least two weeks to implement (You don't have to have the whole job laid out, but always try to stay one or two weeks ahead.)
- A Big Picture conversation so the apprentice knows where he fits in

These five items can be delivered in a matter of a couple of hours and will shave off up to 50 percent of the ramp-up time to productivity. If it normally takes six weeks to get a new employee up to speed and working independently, you can cut that to three to four weeks by delivering these five items. It's the most powerful training investment you'll ever make.

## PRIMARY PEER MENTOR CROSS TRAINING AN EXISTING EMPLOYEE

If you're cross training an existing employee so that you can take a vacation without your beeper or just reduce the number of times you're called in the middle of the night, you probably have someone with a baseline of skills. There are still some important tools to introduce:

- The existing employee still needs a peer mentor so she knows whom to emulate.
- This apprentice needs a Training Plan to make sure she knows which skills to build, in what order, and by when.



- She needs a First Meeting to ensure that everyone is clear about expectations. This meeting “deputizes” a primary mentor to lead the relationship and helps clarify the expected outcomes for the apprentice.

It is especially important to manage expectations with cross training because the assumptions people make could be all over the map. Remember, the heart of most frustrations is unmet expectations.

## PRIMARY PEER MENTOR TRAINING AN “EXTENDED” TEAM MEMBER

If you’re responsible for training a person who doesn’t work for your manager, either because they work in another part of your company, are an outsource partner, or are a client partner, you can use these tools to get off on the right foot and manage the relationship successfully.

- Use the Role Definition Worksheet with your manager to better understand what is expected of you.
- Be sure to set up a First Meeting that includes you, your manager, your apprentice, and his manager. It doesn’t have to be a lengthy meeting, but it is a great time to test assumptions and clarify a plan.
- Be sure that you fill out the Training Plan and discuss it with your apprentice to make sure you both agree on the skill set you’re transferring.

Because you’re not working for the same manager, there is another variable: the other manager. That “other” manager makes all of this up-front work even more important. As the peer mentor, you can help reduce surprises and problems by using this framework.

## SILO PEER MENTOR

If you are a subject matter expert, the most important thing you need to do is understand what your manager and team expect of you so you can deliver it.

- Use the Role Definition Worksheet to clarify expectations with your manager. Be sure to address whether you're actively mentoring your apprentices or just passively making yourself available.
- Use the Training Plan to clarify which skills you're expected to be able to teach.
- Use the First Meeting to meet with your manager and apprentice(s). Be sure to clarify in this meeting whether you're actively pursuing your apprentices and ensuring they learn from you or passively waiting for them to come to you.
- Customize the Training Plan for each of your apprentices.
- Use the Telling About Yourself Worksheet to ensure that you can be available to your apprentices and still get your "day job" done.
- Silo mentors are often problem solvers. Be sure to introduce the Anatomy of a Problem-Solving Question Worksheet.

Remember that as a silo mentor you often have responsibility for the consistency of your team's quality within your specialty. Use these tools to clarify exactly what that means so you can stay on top of it.

## EMPLOYEE LEAVING A POSITION

If you're leaving your job, you become a primary peer mentor either for a new employee or for someone cross training. (See the earlier apprentice sections.) The big difference in this situation is that if you're leaving the company entirely, you need to work more diligently on the Training Plan and complete it at the beginning, rather than just keeping a couple of weeks ahead of your apprentice. I recommend that you keep the Training Plan at your side and continue to build on it during all of your final days on the job.

Every time you start a new task, answer a question, solve a problem, look after a customer, run a process, and so on, put it on your list. Even if you can't teach all the skills on the Training Plan before you depart, at least your apprentice will "know what he doesn't know" and can work on the skills you've identified after you leave.

## APPRENTICE

If you're the apprentice, I've been writing a sidebar at the end of every chapter for you. Read them and look for advice on how to drive your own training. If you read the sidebars, you'll probably notice that they are basically the content from the chapter, but in reverse. For example, instead of waiting to be asked for a paraphrase, the sidebar guides you to give a paraphrase proactively. In this way you can take more responsibility for getting yourself up to speed. Your peer mentors and manager are really just resources you can use to help yourself get going. If you see the process in that way, you'll impress those around you as a self-starter and a great addition to the team.

## FIRST LINE LEAD, SUPERVISOR, OR MANAGER

If you lead a team, I've been writing a sidebar at the end of every chapter for you, "From a Manager's View." Read those sidebars for advice on how to bring these ideas into your team. This book was written for people who are literally *peers*, meaning that they don't have any authority to "make" their colleagues do anything. As a manager, you not only have the authority to introduce these tools and make them stick, you also have a responsibility to improve communication and knowledge transfer within your team.

You can definitely use the tools to define roles, set expectations for the mentor's success and, ideally, drive the First Meeting yourself. Having peers train their own backups is a great way to work on distributing and balancing the workload on your team. It removes the risk of "single points of failure" on the team when an employee has a three-week medical or family emergency that brings your work to a screeching halt. I also recommend that you share this book with everyone on your team and pick the tools you'll implement

together. Then, follow up with each team member to ensure they're adopting the ideas.

## PROJECT MANAGER

Project teams often have members who come and go as their specialty is needed. When a contractor builds a house, he'll often have a core group of carpenters who stay on the job the entire time and will bring in people like plumbers, electricians, and carpet installers as they're needed. If you manage a team with changing membership, treat every specialist as either the new employee or cross training employee referenced earlier. Every additional member of a project team brings a higher degree of risk along with his extra pair of hands. Make sure that you don't take anything for granted in orienting the new apprentice. The orientation cycle might be shorter but should be no less thoughtfully developed than the orientation of any other new employee.

## HUMAN RESOURCE OR TRAINING MANAGER

Human resource professionals should see peer mentoring skills as a supplement to a robust formal training offering. A well-run classroom experience is still the best way to deliver one-to-many training. No matter how large your training budget, you'll still come up short because so many skills (more than 70 percent by some accounts) must be learned on the job. You can use this book and the ideas presented to support your internal clients and help them build an "army of trainers" in your company. For every formal training program, there should be silo mentors trained to follow up with on-the-job training support.

## SENIOR MANAGER OR EXECUTIVE

Many books have been written to help executives think about the way information moves around their companies. As an executive, you've no doubt spent a few sleepless nights reading and thinking about this issue. If you're still not satisfied that your people are talking to each other consistently and sharing their skills and

knowledge, you may be stuck thinking about knowledge transfer at too theoretical a level. I suggest that executives start to use these tools, just like every other subject matter expert in the company. When you start to notice that you're more effective at communicating and managing knowledge transfer, you can begin to tell about your own experiences. Believe me, there is no more powerful testimonial for change than when an executive says, "I learned something." When you have learned something, put this book into the hands of others in your company and talk with them about the changes you expect. You'll start to see the real results you're looking for.

## IF YOU CAN'T FIND YOURSELF ON THIS LIST

I've spent the past 15 years customizing these ideas for many different situations. If you've just read this list and still can't find yourself, you might be thinking, "I'm a little different than any of the people you described here." If so, please contact me directly through my website ([www.practicalleader.com](http://www.practicalleader.com)) and ask for advice. I love hearing from people who are trying to solve their knowledge-transfer problem and will be glad to help. Just be warned, I might use you as an example in my next class!

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## ELECTRONIC ARTS CANADA CASE STUDY: THE TOOLKIT PUT TOGETHER

I've been working on improving how people transfer knowledge in the workplace since the early '90s. During that time, I've had a chance to work with a number of different types of organizations, each one faced with a different version of the same problem: "How do we get our employees to communicate with and teach each other with more predictable results?" This wasn't a new question when I started—and there is still much work to do on the subject. The results so far are worth sharing because you can definitely replicate them in your situation.

There are many stories sprinkled throughout the book explaining how different kinds of organizations have used and adapted the tools presented. In this section, the focus is on how one company