

4 Great Ways to Conduct Peer Assists: Transferring Knowledge Effectively

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In [The Dixon Knowledge Transfer Framework I](#) described a framework for Knowledge Transfer and explained that the choice of knowledge transfer process differs depending upon 1) what transfer problem the organization is trying to solve, and 2) the type of knowledge (e.g. explicit, implicit or tacit) that needs to be transferred to solve that problem.

Knowledge Type	Transfer Process	Transfer Method
Explicit	Explicit	Documentation, Training, etc.
Explicit	Implicit	Coaching, Mentoring, etc.
Explicit	Tacit	Coaching, Mentoring, etc.
Implicit	Explicit	Documentation, Training, etc.
Implicit	Implicit	Coaching, Mentoring, etc.
Implicit	Tacit	Coaching, Mentoring, etc.
Tacit	Explicit	Documentation, Training, etc.
Tacit	Implicit	Coaching, Mentoring, etc.
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In this post, I want to focus on one row of that framework; “Adapting what has been learned in one team for team members in another context.” I use the term “adapting” in the label of that row because always what a team has learned in one situation cannot just be copied to a different context, it has to be adapted.

Following are four examples where team members, with in-depth experience, assist a team that is facing a difficult problem. Although it is unlikely that any of these examples will fit your exact context, I’m hoping one or more will inspire some new ideas about how peers can assist each other in your organization. In each of the four examples I bolded the **problem** the Peer Assist is addressing. Peer Assists are specifically designed to transfer tacit knowledge, so in all of the examples it is primarily tacit knowledge is being transferred, that is, knowledge that is drawn from the Assisters’ own wealth of experience in similar situations. But in several of the examples both implicit knowledge and explicit is transferred as well. I start with a British Petroleum (BP) example that was my first introduction to Peer Assists while I was conducting research for my book, Common Knowledge.

Peer Assist at British Petroleum

Helen is the team leader for British Petroleum’s Exploration site, called Barden. The site is located in deep water in the North Sea. Helen 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. 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 that would allow them to know for

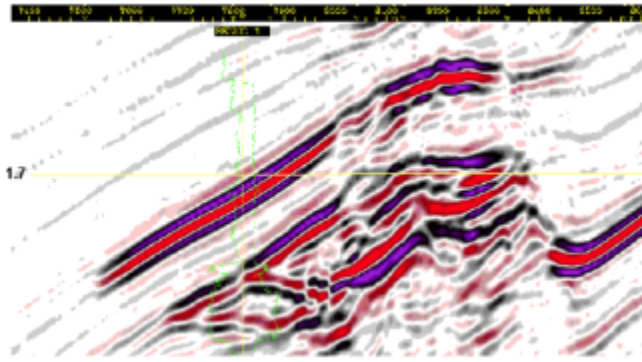
sure that there is oil under the deep water at this site? Should they make firm commitments to their partners in the exploration license to protect their investment in the hoped for

oil? These are important decisions because of the money involved; sinking a rig, for example, can cost up to 200 dollars a minute!



Helen's team has decided it would be useful to call a Peer Assist. They wanted to **bring the latest learning that has occurred at other deep water sites to the table to help them make the best possible decision.** Helen and her team identify fifteen possible BP colleagues, from other parts of the world, who have experience with the kind of issues facing the Barden team. She makes the calls and finds some are too busy on other projects, but she locates six people from her original list, 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 Assisters have all received a packet of material to read through in advance. The walls of the conference room, where Helen's team and the Assisters are meeting, are covered with geological pictures of the ocean bed, seismic lines, and charts. More are spread several layers deep on the tables around the room. After Helen finishes her introduction the Assisters ask some clarification questions about the objectives. Then Helen introduces Knut, the geologist, who begins to talk through the data on the wall charts, offering his interpretation of it. Before long everyone is up looking more closely at the wall data. There is a lively discussion, among all the participants, about the implications of what they are seeing.



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. The discussion flows back and forth with the Assistors, 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 explaining the data they gathered. The Assistors return to the original objectives, asking questions for clarification in light of what they have just heard. One of Assistors notes that: "I'm uncomfortable with the discussion because there are some strategic decisions that need 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. As the group gets down to work on their recommendations there is an animated exchange. 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 for the Assist team 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. A verbal report is given with the promise of a more formal written report later. As the verbal report proceeds the Barden team asks a few clarification questions, but mostly they listen to the thoughtful ideas the Assistors are 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, because her team can take the recommendations into account before they are fully committed to a course of action.

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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. The Barden team is not obliged to take the Assisters' recommendations and interestingly the written report will be sent only to the Barden team members, no report is sent to their bosses, because this is an assist from their peers, not a formal review.

Police Crowd Safety in the EU

In Europe football matches too frequently end in death or injury to fans, often from fights and as often from trampling or suffocation in the stadium. After such a tragedy, there is sometimes an investigation by the government, which can even end in firing the police chief. But such investigations have not resulted in making events safer – they seem aimed at culpability rather than help.

In 2005 the Netherlands police made a suggestion to the European Union Police Cooperation Working Party (PCWP) that the police from all the EU countries begin to conduct Peer Review Evaluations in order to **reduce the death or injury to football fans**. This was agreed to and for three years such evaluations were conducted. Evaluation is the wrong word in our nomenclature, because these reviews were conducted only at the request of



the commander when a football match was to be held in his city - so I will reference them here as Peer Assists. If requested, a team of six, made up of four police chiefs from other countries and two researchers, would travel to the city where the match would be held, arriving on the day before the match. The Host commander would have thought through a list of what observations would be

helpful to him. The Host commander and the Observation team together would then make a plan for the next day. The day of the match the Observation team, in pairs, would observe and conduct interviews according to the plan. Some might observe an area where the "away team" were scheduled to exit their buses, others might observe how the fans moved in and out of the stadium stands, still others might observe the interaction at the local bars. The Observation pairs would not interfere or try to control what was happening - that was the job of the local police. The Observation pairs were there only

to observe what occurred and to try to understand why it was occurring - both good and bad.

On the day after the match the Observation team would meet to discuss what they had seen and to prepare a draft report. In the weeks following, the report would be finalized then sent to the host commander for his use. He could share it with others or keep it private, although most choose to share it with their officers and many with the whole community. The police chiefs, who participated as observers, learned as much as the Host commander and could then implement the "best practices" in their own cities.

These Peer Assists occurred over a three-year period; twenty in all were conducted. An EU manual on crowd safety resulted from the Peer Assists. And many of the ideas were also embedded in local police training programs. Later, the practices that were learned about crowd safety at the football matches were extended to other types of crowd events, for example, concerts, protests, and the Queen's birthday.

While working with the Police Academy in the Netherlands, I interviewed one of the initiators of the Peer Assists at the EU. He proudly reported that there had not been a football death in the EU in the 3 years since the report had come out.

Mars Inc. Sales Force

In 2004 Mars Inc., the company known for its candy, identified a challenge in the newer markets in the developing world. These were markets where the bulk of consumer spending occurred in small local shops, unlike the European/US model of large supermarkets. **The challenge was to achieve a step-change in the number of small retail outlets which sold Mars products in order to drive a rapid increase in sales in these markets.** The challenge covered twelve markets, in which there were approximately 12 million shops, and 3.5 billion potential consumers of Mars products. The Mars Global Practice Group (GPG), which was comprised of the Sales Directors of the twelve markets, was given this challenge.

To address the challenge the GPG met every six months, face-to-face, hosted by one of the twelve markets. The meetings were focused on sharing, learning lessons, and discussing. There were no formal presentations - numbers and details were covered outside the meetings. Instead the meetings were based around activities designed to encourage the GPG to share its lessons and to build a knowledge base of successful processes and principles.

One day of each meeting was spent as a Peer Assist with the attendees from the other eleven markets working with the salesforce of the market in

which the meeting was being held. The day began with a briefing about the local market and its structure, including learning about the top three challenges which the local business unit was currently facing. Then the GPG members would divide into smaller groups to spend the day with an experienced local sales associate, each group observing in local retail outlets. At the end of the day the GPG would reconvene to give detailed feedback on 1) what



they saw as working well in the market, and 2) how to build on the successes they saw. They also offered their top ten ideas on how to address the challenges, based on lessons and experience learned in their own markets. In this way the Host market received positive confirmation of their success and how to build on it, plus around 30 ideas and improvement suggestions targeted at their key challenges, based on lessons from proven, practical experience elsewhere in the world.

In the five years this network existed, sales in the small retail channel in the twelve markets trebled and the percentage profit more than doubled, adding around \$250 million to the bottom line. (Milton and Lamb, the Knowledge Manager's Handbook 2016)

USAID – Introducing Expert Patients into Health Facilities

In 2011, the USAID Health Care Improvement project (HCI) in Tanzania wanted to **introduce expert patients into health facilities to address patient self-management for HIV in order to shift many of the tasks from overburdened healthcare professionals.** Expert patients are people living with a chronic disease who are successfully managing their disease, and who provide support and services to other patients in facilities and at the community level.

Having not done this type of work before, the team from Tanzania decided to visit the HCI team in Uganda, who had already been working with expert patients, so that they could learn from Uganda's experience. The team was made up of the Chief of Party, four Quality Improvement Advisors and the Knowledge Management advisor. When the team arrived in Uganda, they went with the Uganda team to a facility to discuss with the clinic staff and expert

patients what they had been doing and how they made it work. They saw that the Ugandans were using expert patients as a conduit between communities, facilities, and patients and they asked about the systems Uganda had put in place to make that happen.

When the Tanzania team returned home, they were able to make a number of adjustments to their plans and communication tools based on the Ugandan's experience. Additionally, after the visit, the Uganda team realized they had learned more about their own work through explaining it and answering the Tanzania team's questions. In addition, the Tanzania team showed them some patient self-management tools they had developed which the Ugandans were able to adapt for their own use.



In August 2013, another technical exchange visit was held, this time with the team from Uganda visiting the team from Tanzania. Similar to the first visit, they went on site visits together. While on this visit there was a growing recognition that while the two countries had different health systems, there were many similarities, for example, the Ugandan team saw certain registers that could be adapted and used in Uganda to help their work. Dr. Humphrey Megere, Chief of Party in Uganda, said, "We realized that we have resources in Tanzania that we can tap into. We can call on them for help."

As a result of these exchange visits, the two countries started working together to develop patient self-management guidelines for health workers. Additionally, the next year when the project in Uganda was asked to begin work **to improve the quality of services for orphans and vulnerable children**, something Tanzania had been involved in for a number of years, the Ugandan's called upon their neighbors to provide them with experience and guidance, for which they were happy to oblige. (Based on a report by Kate Fatta, URC 2012)

Summary

These four examples differ in many respects. Two are corporate examples, BP and Mars; one is an international development example, Uganda/Tanzania; and one a government example, the Police Chiefs. BP, the Police Chiefs, and Mars, all three brought together assisters from several different teams or

locales, while the Uganda/Tanzania exchange was one intact team meeting with another intact team. The Police Chiefs, Mars and Tanzania examples were site visits, where observation was critical to gain an understanding of the context, while the BP example was not so much observation as it was looking at data.

As varied as those examples are, they all follow a set of principles that make Peer Assist useful, particularly for the exchange of tacit knowledge:

- A Peer Assist is initiated by the Receivers because they have a specific real world problem that they want help with – teams are not told to have a Peer Assist, rather they choose to do so.
- The Receivers are in charge. They decide what help they want and who they want to receive that help from – it is their agenda.
- Peer Assists meetings are face-to-face and usually last a day or more. The format is primarily conversation, and the knowledge that is generated is created in the exchange between the Assisters and the Receivers.
- The Assisters are given the time to learn enough about the Receiver's context to be able to adapt their knowledge to the new context.
- There is mutual learning - both the Assisters and the Receivers learn and gain from the exchange.
- What is learned does not become an evaluation of the Receivers or a judgement - the only purpose is to assist the receivers.
- The meeting is between two groups of team members, that is, it is not a team learning from one expert. When the two groups come together for a Peer Assist, participants who are in different roles are able to ask questions related to their own role.

As the Framework for Knowledge Transfer illustrates, Peer Assist is only one of many ways to transfer knowledge. But for team to team transfer it is one of the most effective. If you try it you don't have to call it "Peer Assist," you can give it your own name, but the principles outlined above are useful guidance for success.