

# INTRODUCTION

*If you have ever responded to anyone who stopped by to ask a question, you're transferring knowledge and that makes you a peer mentor.*

## ABOUT THIS BOOK

This book stems from my experience joining Microsoft in 1990 as a localization program manager. I arrived in time to help ship Microsoft Word 1.0 in German, French, Italian, Spanish, and Portuguese. I was singularly unqualified for the technical requirements of the job, barely knowing how to double-click, let alone having any experience in a software development environment. I was what they called a “talent” hire—someone who was reasonably bright, and a good project and people manager. Because the industry was so young, there weren't a lot of people with experience available. I appeared trainable, so they gave me a shot.

Advice about getting up to speed as a new employee at Microsoft, in those days, amounted to this: “If you're smart enough to get a job here, you're probably smart enough to figure out what your job is. Find something that needs to be done and do it!” As a result, I did what everyone does when they start a new position with no real training: I banged on doors and wandered into meetings, and I asked a lot of questions as I tried to figure out my new job. The people on my team were really terrific and made a lot of effort to

help me, but there was one big problem: When they talked I couldn't understand anything they said. It was as if they were speaking a secret language. I just couldn't follow them. After a few weeks I was so stressed out that I was seeing bugs in my sleep, my hair was falling out, and I had developed a tic under my right eye. I thought I would never survive. At the same time, I also was hiring people from around the world to come to Redmond, Washington, and work in their native languages on the software. They were having an even more difficult time getting up to speed than I was. Something had to be done.

In a fit of insomnia and frustration I decided to make a deal with my co-workers. I would teach them how to be teachers—so they could teach me (and my team) how to do our jobs. I helped them think about what they needed to teach and how they could break it down into manageable chunks, teach it, and ensure we learned—all backed by a semblance of a plan. They quickly agreed because they needed us all to be productive and take on our share of the work as quickly as possible. With all of us working together to try to solve the problem, the Peer Mentoring Workshop was born as a handful of Microsoft PowerPoint slides.

We knew the plan was working when we realized we'd cut the typical ramp-up time for a new employee in half. Instead of spending three to four months wandering around trying to figure out how to do their jobs, new employees were working independently and productively in less than two.

That was the beginning of trying to figure out what good peer mentoring was all about. During much of the past 15 years, my colleagues and I have been developing the ideas put forth in this book by teaching the workshop we now call "Peer Mentoring: A Practical Approach to Knowledge Transfer." We consult with organizations in software, manufacturing, health care, mining, social services, retail, consumer products, military, utilities, IT, sales, call centers, and more. As my colleagues and I have customized the program for each different organization, our thinking about knowledge transfer has evolved. Still, we've found that the problems and the solutions are nearly universal.

The common theme of our work is that the need for knowledge transfer stems from the *transitions* most of us experience every day. For me, the big transition that spawned this work was both being a new employee and managing new employees. This book definitely addresses the orientation of new employees, but because many other transitions also call for improved peer mentoring skills, this book is intended to support them as well.

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## TRANSITIONS CREATE NEED FOR KNOWLEDGE TRANSFER

At the heart of every transition are people, people who *know* (I call them peer mentors) and people who *need to know* (the apprentices). Everyone falls into one of these categories, and depending on the moment, they might even go back and forth from one to the other. For example, I might teach you something I know in the morning and then turn around and ask you to teach me what you know in the afternoon. Much of this is never really spelled out; it just happens during the course of working together.

Sometimes people are clear about their role as expert and peer mentor, but often they're not. Sometimes they know that they should teach but don't know how. Sometimes they know how, but don't want to. Sometimes they're the apprentice and need to learn, but aren't even aware of it. You get the idea. The opportunity for confusion is real.

How organizations understand the need for predictable knowledge transfer in the trenches as well as from the top down has a profound impact on how smoothly the transition goes. The following list includes some examples of common transitions. As you read through the list, check off how many of them you're facing today:

- New technology (such as introducing a new knowledge base or a new customer relations management system) in which some people get more training and have to bring their new skills back to the larger organization

- Reorganizations in which new teams are forming and people are transitioning from one part of the company to another, so employees have to get up to speed, as well as hand off their old responsibilities
- Recent hires of employees, contractors, vendors, partner companies, or interns
- Mergers and acquisitions, with two or more companies needing to integrate systems, staff, cultures, technology, and so on
- New process launches to improve productivity or respond to changing government regulations
- New customers requiring newly formed project teams to focus on meeting new objectives
- Recent layoffs, during which remaining employees have to pick up the work of those who left
- Recent retirements, during which workers leave before they can fully train others about the knowledge they've gained through their years of experience
- Business changes that require cross training to improve flexibility
- Outsourcing that requires having to partner offshore
- New physical space for offices or production
- New markets, products, and customers

Do any of these sound familiar to you? When I lecture, I ask this question of live audiences, and I ask how many organizations face five or more of these challenges at any given time. At least half of every group waves a hand. Transition and change are around you all the time. The question is, how are you dealing with them?

Throughout any transition much information must be known. Think of all the skills, processes, standards, tools, templates, policies, success metrics, and requirements that must be known in your department or organization, whether big or small. These tangible elements are actually the easy ones to transition from

person-to-person, because they can be seen and accomplished within tight parameters. But what about all of the other information that must be known, such as history, tribal knowledge, collaborative team issues, customer issues, culture, and communication strategies? These are all much more amorphous and loose. So, how do people get to know them?

From *other people*, that's how. They learn all of this information from the people sitting right next to them. Formal training is still important and cost effective in situations where many people need to learn one skill, but even with the best formal training, most of us will still learn the bulk of our job skills from a co-worker.

## IDENTIFY THE PEER MENTORS AND APPRENTICES

I'll bet that for every transition above, you could easily make a list of the peer mentors (subject matter experts) and the specific apprentices in your organization. They're the people who know what is going on, and how to get the work done; and the people who need to know, but don't. Now imagine how well things would go if those peer mentors were really good at explaining themselves and ensuring a transfer of knowledge and understanding to the apprentices, and the apprentices could develop and demonstrate their new knowledge consistently. It is likely that you have some of that happening already, because some people are naturally good at this. Imagine what would happen if nearly *everyone* had a baseline of skills to replicate themselves in a predictable way.

This isn't some far off utopia. It is happening already in many forward-thinking organizations. This book tells their stories.

My colleagues and I have studied and are replicating the behaviors of those great masters who are naturally good at knowledge transfer; that is, the people who already excel at teaching what they know. We've found that each time *they* face a new question, they instinctively assess the situation and respond with an eloquent repartee seamlessly expounding on only the most salient information in exactly the right format to aid their befuddled apprentice.

Then there are the rest of us mere mortals. When faced with a question, we do one of many things:

- Jump up, slap on a red cape, and leap out of the cube with a hearty “I’ll save you!” That’s easier than taking the time to teach anything. Right?
- Talk until we say something—starting in the middle, looping around through 12 years of experience, and landing with a hopeful, “Did you get all that?”
- Jump to the white board and carefully diagram the schematic of the bowels of the ACME 2000 Turbo Jumpracer, when all you asked was how to find the “on” switch.
- Grunt some unintelligible instructions and hope the apprentice will go away.

Wouldn’t it be great if a peer mentor would, when faced with an opportunity to transfer knowledge, whether it be formal or informal, be able to take this approach:

- Recognize that they have something to teach and define it in terms of a measurable learning goal.
- Quickly assess what the apprentice already knows and wants or needs to know.
- Ensure that the apprentice has the minimum required setup (vocabulary, workstation, access, etc.) to be successful.
- Organize the topic into a brief lesson plan.
- Teach from the lesson plan that matches the apprentice’s learning style, and assess progress along the way to make sure the apprentice isn’t lost.
- Send the apprentice off with specific instructions on what to do next.
- Follow up with peer-appropriate feedback.

While that process sounds great, it probably also sounds like a lot of work. After all, we're all busy people. Who has the time to be this rigorous? Having enough time is universally the biggest concern that I hear when I talk about Peer Mentoring. I promise, up front, that the individual tools or ideas that I present in this book will typically take you no more than 5–10 minutes to use on your first try. They're designed with the busiest of people in mind—people who need to teach others on the job every day, while carrying a very full workload themselves. I also promise that the results will be immediate. You can read about the tool, put the idea to work immediately, and see improvements in real time.

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## WHO SHOULD READ THIS BOOK

At the heart of this book is the person I call a *peer mentor*, because most of the time this person doesn't have any authority (they're literally peers), but they do have plenty of often undefined responsibility to help their colleagues learn how to do the work at hand. While many of the ideas in this book translate very well to the more traditional notion of mentoring, sometimes called *career mentoring*, this book doesn't try to address all of the nuances of those relationships. I see that as a topic for another book.

Every organization has peer mentors who already tackle the role with a variety of approaches, and an equally varied success rate. If you're a peer mentor already, this book was written for you. It'll help you better define your role and manage the expectations of your manager, as well as your apprentices.

The other two players in the knowledge-transfer triangle are the manager and the apprentice. This book supports the people playing both of those roles as well, partly by helping managers and apprentices better understand the peer mentors, and partly by giving direct advice to help guide the relationship from all three perspectives.

Here are some of the forms these three roles take:

**Primary Peer Mentors** are people who are regularly called upon to teach what they know in either formally or informally structured relationships, typically with new team members. They provide an “umbrella” of support for the apprentice that includes developing their skills, but also includes looking after their adjustment to the organization, answering random questions, and helping them get their feet on the ground. In this book, primary peer mentors will find a substantial menu of tools, advice, and a clear process that they can apply to this role.

**Silo Peer Mentors** are people who are subject matter experts and have a deep “silo” of knowledge. They usually don’t look after new hires or take on broad relationships, often because they don’t want to or aren’t good at it, but they do teach others about their specialty. If they’re good at transferring their subject knowledge, the organization experiences greater consistency in that area, and they reduce the organizational reliance on themselves as the only one who knows a particular skill or piece of information. Acknowledging that silo mentors exist is a good practice, but it is equally important that their skills be replicated in others to reduce risk. Silo mentors can use this book to clarify what is expected of them and then put a plan in place to make the knowledge transfer process more productive and less painful for everyone.

**Retiring Employee Peer Mentors** are people who are in their last few years before retirement and have been identified by their organizations as having “singular knowledge.” This means that when they leave, there will be a problem if they aren’t carefully replaced. Many organizations, especially union or government organizations, have 30 percent or more of their population at or within five years of retirement age at any given time. Those close to retirement can use this book to develop a plan for downloading some of their experience and skills to others before they retire.

**Apprentices** are the people who are learning from the peer mentors. There is a section at the end of every chapter for them called “When You’re the Apprentice.” In some instances the apprentice will be a really obvious person, like a new employee. Often,



though, the apprentice is someone less obvious, like a current co-worker who is cross training on a new specialty, or a client, a contractor, or even the boss. There are many ways that an apprentice can take responsibility for his own training and improve the quality of the time spent with peer mentors. Apprentices are motivated to learn so they can stop making mistakes and feeling awkward. They can use the ideas in this book to expedite their own training and development.

**Managers and Executives** should look for answers to their organizational questions at the end of every chapter in the “From a Manager’s View” section. Every company relies heavily on peer mentors to keep information moving and to develop consistent skills and competencies across the organization. Managers will learn to recognize this incredibly valuable resource and begin to support it so they can maximize the potential of their peer mentors. They’ll also find some very specific advice on how to implement Peer Mentoring programs in their companies.

As a side benefit, it turns out that peer mentoring skills are a foundation to any good manager’s toolkit. When I deliver the Practical Leader Management Series, we always start with the Peer Mentoring Workshop as a prerequisite for everyone attending. If attendees haven’t already mastered peer mentoring skills, we want to start by developing those skills before moving on to more complex management topics. Even very experienced managers are receptive to the ideas we present.

**Project Managers** (responsibility without authority) and **Team Leads** (responsibility with authority) can use peer mentoring tools and ideas to improve the overall communication and management of the people on their teams. They’ll want to ensure that all of the silo mentors are identified and have been asked to transfer their knowledge to others on the project team. They’ll also want to ensure that every new project or team member is assigned a primary mentor to ease their introduction to the team and reduce the sort of thrash that comes with new help. It is also common for leads and managers to choose several of the tools from this book to implement across their whole teams. They see this as a way to improve general communication and manage expectations.

**Aspiring Leaders** can read the book to develop their own leadership skills and style. When interviewing for their first management position, candidates can show their potential by explaining how they've demonstrated great knowledge transfer and communication skills through mentoring their peers. Having some specific stories to tell will help them stand out when they're competing for a promotion.

**Human Resource Managers** and **Training Managers** should use this book to boost their new employee orientations and to ensure that a training plan like the one described in Chapter 4, "Developing a Training Plan," is developed for every new or experienced employee. We want them to see peer mentoring as a way of creating an "army of trainers" that will stretch their training budget further than ever before. It will greatly improve the impact of their existing training and development programs if they can have ongoing support from trained peer mentors

**Small Business Owners** can use the book to ensure that they've cross trained their limited staff to stay as nimble as possible and get the most out of everyone. By implementing these ideas, small business owners can ensure knowledge is distributed effectively among their employees without formal training sessions that may be impractical in a small business setting.

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## HOW THIS BOOK IS ORGANIZED

Each chapter in this book is centered on one of the common problems peer mentors, apprentices, and managers face every day in trying to get their jobs done.

For those of you who learn best by seeing the "big picture" before diving into the details, I recommend you read Chapter 10, "Peer Mentoring in Practice," first, as a way of seeing the whole process in summary, including a case study, before reading the rest of the book.

If your primary concern is knowledge transfer to remote outsource partners or a distributed team, I recommend you read Chapter 9, “Peer Mentoring from a Distance,” first, as a way of orienting yourself to how the tools will work for you. Then, read the rest of the book for the details.

If you have new employees as your apprentices, you should read the book from cover to cover to learn a complete approach to knowledge transfer. You’ll see a path that starts with setting expectations and developing a training plan on the apprentice’s first day on the job, and goes all the way through teaching, assessing learning, and giving the kind of feedback an apprentice will want to hear as they start to develop in their role.

For those of you who aren’t mentoring new employees, you can pick up the book and browse for challenges that you’re facing at any given moment. You can read one chapter at a time and implement the ideas in that chapter, returning to the book once you’re ready to move on to a new problem.

If you’re an apprentice, I recommend that you read the entire book just like the peer mentors do. Why? Because you won’t be an apprentice long, and you’ll want to be good at teaching others as soon as you’re called on to share your knowledge. I have written some specific advice for you in the “When You’re the Apprentice” section at the end of each chapter. If you follow that advice, you’ll find yourself moving quickly from novice to strong contributor in no time.

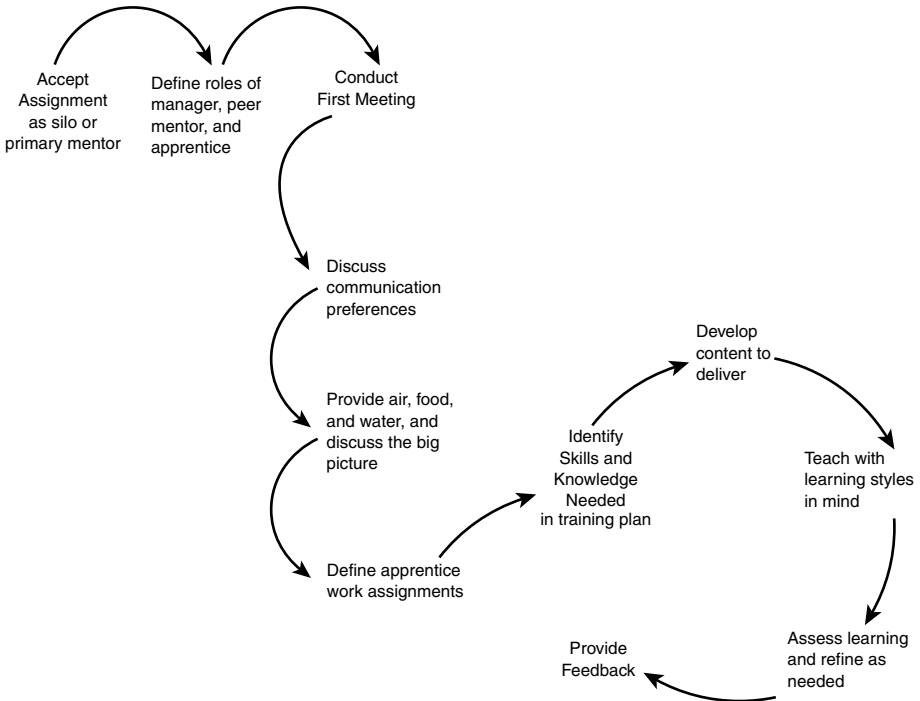
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## CONVENTIONS USED

In order to make this book more useful I’ve incorporated three conventions into the design.

## PEER MENTORING PROCESS

At the beginning of each chapter, you'll find a variation of the graphic shown here that presents the entire flow of a successful peer mentoring relationship and helps you see how that chapter's tools fit into the big picture.



## TOOLS

I use the word “tool” to describe the checklists, templates, worksheets, and standards that you can use to improve communication and knowledge transfer. Each chapter has one or more tools. You can easily identify them by looking for this icon:



## APPRENTICE AND MANAGER SIDEBARS

Each chapter ends with two sidebars. “From a Manager’s View” is directed to managers, so that they can support these ideas in their teams. “When You’re the Apprentice” is directed specifically to apprentices to help them drive their own training.

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## WHAT’S IN THE BOOK

As I mentioned earlier, each chapter in this book is centered on one of the common problems peer mentors, apprentices, and managers face every day in trying to get their jobs done. It is modular in approach, so even if you’re only interested in facing one of the issues today, you can read the related chapter and put those ideas to work before returning to read the rest. As you read through this brief introduction to each chapter, think about how it relates to your current job and how you’d benefit from using the tools provided to improve your situation.

## CHAPTER 1: ROLES IN PEER MENTORING

### *Who is responsible for what?*

Because peer mentoring is usually very informal, participants’ roles and responsibilities are often vague. This chapter provides a common language that can be used to define the expectations of the manager, the peer mentor, and the apprentice so there is less frustration and greater efficiency. Learn how a manager and a peer

mentor can tell the apprentice, “We’ve been thinking about you and we have a plan to help you get up to speed. Let’s talk about what you can expect from us and the best approach you can take for your own development.” In a matter of minutes this sets everyone’s expectations and sets the stage for success.

## CHAPTER 2: MANAGING TIME AND COMMUNICATION

*How do I stay in touch with my apprentice and still get my day job done?*

For most peer mentors, transferring knowledge isn’t explicitly on their task list. It comes under *other duties as assigned*. There is no doubt that it is harder to keep up with your own work when you’re a peer mentor. This chapter offers practical tips for keeping daily interactions useful, while still getting your regular work done. Specific topics include improving e-mail communication, controlling interruptions, improving one-on-one time, providing quick status reports, and guiding better problem-solving questions. You can pick one or more of the tips and put them to use immediately.

## CHAPTER 3: FOCUSING ON THE MOST IMPORTANT INFORMATION

*Where do I start?*

Too often a peer mentor’s vast knowledge overwhelms the apprentice. This chapter helps mentors figure out where to begin, what doesn’t need to be said, and how to organize needed information into manageable, useful chunks. The worksheets in this chapter will spark some interesting conversations about how you introduce your apprentice to the content and its relationship to the “big picture.” By using these tools, you can quickly build the foundation of understanding, or deal with an apprentice who takes far too long to stabilize in the new role.

## CHAPTER 4: DEVELOPING A TRAINING PLAN

### *What are the skills, measures, and resources needed to do the job?*

This is the most important chapter of the entire book, because it provides a way for peer mentors to “deconstruct” their jobs into a list of specific skills (things you know how to do), measures of understanding (test questions you’d have to pass to prove you learned those skills), and resources that can be used to pass the test (such as classes, peer mentors, web sites, documentation, etc.). Having a plan to use as a point of reference means your apprentice will be able to drive far more of his own development, which will keep you from bouncing all over the place.

## CHAPTER 5: TELLING WHAT YOU KNOW

### *How much should I cover and how do I deliver it?*

In order to cover information effectively, you’ll need to develop basic lesson plan and delivery techniques. This chapter explains how to identify the least amount of information necessary to make your point. It also offers tools for content development, including the 5-Minute Meeting Plan and the keys to giving effective demonstrations.

## CHAPTER 6: LEVERAGING LEARNING STYLES

### *What if we aren’t on the same page?*

Not everyone learns the same way, so peer mentors shouldn’t teach every apprentice the same way. This discussion outlines some key learning styles and helps you recognize how to teach to an apprentice who might have a different learning style than you do. Armed with this understanding, you can adjust your teaching and make the knowledge transfer process more successful.

## CHAPTER 7: ASSESSING KNOWLEDGE TRANSFER

### *How do I know if they are learning anything?*

Ensuring that an apprentice is really learning requires more than just asking, “Are you with me?” You have to determine your apprentice’s prior experience and knowledge before beginning your mentoring session and use direct assessment questions to track their progress while you’re teaching. This chapter helps peer mentors formulate simple questions that they can ask in any situation to make sure they’re not wasting time rambling on when little is sinking in.

## CHAPTER 8: GIVING AND GETTING PEER-APPROPRIATE FEEDBACK

### *When and how should I say what I am thinking?*

What does it take to create an environment where a peer can quickly and safely give feedback to a colleague? The secret is to focus on the goals that were set and to talk about whether those goals were exceeded, met, or not met. This chapter offers some simple language that a peer mentor and an apprentice can use to help each other perform at their best, using guidance received from the people who see their work most closely, their peers.

## CHAPTER 9: PEER MENTORING FROM A DISTANCE

### *What if I rarely or never see my apprentice?*

Many teams have members spread all over the globe. The key to making long-distance mentoring work is a disciplined approach to managing the relationship. This chapter discusses how you can use each Peer Mentoring tool described in the other chapters to improve communication and knowledge transfer when distance is a factor.



## CHAPTER 10: PEER MENTORING IN PRACTICE

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

None of these ideas would be worth much if they didn't change the behavior of the reader. In this chapter you'll learn to notice the "triggers" that remind you to use the skills and tools presented. You'll also learn to identify and avoid obstacles to success. Worksheets are included to guide the planning. Finally, you'll find an extensive case study that tells how one company successfully put peer mentors to work.

## APPENDIX A: PEER MENTORING TOOLS AT A GLANCE

This appendix is a compilation of all of the Peer Mentoring tools offered throughout the book. They're shown here in the order in which they appear in the text.

## APPENDIX B: SAMPLE TRAINING PLANS

This appendix includes six sample training plans for different jobs. They provide you with additional perspective on the ways others have deconstructed a portion of their role.

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## ONWARD

As you read through this book, I hope you'll find a common-sense approach to knowledge transfer and peer mentoring that you can imagine using for yourself, as well as sharing with your co-workers. There are many reasons to improve your ability to teach what you know. I hope this book will make you more successful at it right away.