

# How to Host a Peer Mentor Meeting



These meetings give people from across your organization an opportunity to compare experiences and learn from one another as they work through a shared challenge, such as a significant organizational change or major project. Peers share what they've done that worked well and challenges they're facing, then work together to identify possible solutions.

## **Purpose:**

To share strategies, solve challenges, and hold one another accountable for making the desired changes.

## **Intended Outcomes:**

Peers leave the meeting with:

- A shared understanding of current status across the organization
- New ideas about how to approach current challenges
- Additional resources to bring to their teams
- Better understanding of how they can support each others' efforts
- Clarity about what everyone is expected to do before the next meeting

## Sample Agenda

1. Check-in: Energy Meter
2. Moment of Truth: Did you get it done?
3. Lessons Learned About What Works: What did you learn that could help your peers?
4. Real-Time Agenda: What are the top priority challenges we should discuss today?
5. Closing Expectations and Appreciations

## About this Process

For some peer groups, all you need is an hour and a few starting questions like “How’s it going for you?” They’ll take it from there, giving everyone a chance to speak, sticking to the topic, and ensuring the discussion stays productive and supportive. After a group has met a few times, this kind of productive, free-flowing conversation becomes more likely.

The process outlined here provides more structure for groups who need to:

- **Form a relationship as peer mentors.** This structure helps the group share speaking time and figure out what to talk about as they get to know one another in this context.
- **Overcome dominance or balance issues,** by ensuring everyone has an equal opportunity to raise questions and share ideas

## Preparing for this Meeting

These meetings support peers from multiple departments or locations as they implement a major organizational change or large project.

To prepare for these meetings:

- 1. Review the implementation plan.**  
Participants will need enough time between meetings to work through the specified changes and form questions that they can bring to the discussion.
- 2. Form peer groups.**  
For best results, each group should include 3 to 5 peers, plus a neutral facilitator or coach who can guide the process.
- 3. Add meetings to the calendar.**  
Block time on everyone's calendars for these one-hour meetings. Schedule meetings 3 to 4 weeks apart, within a month of your project's start.
- 4. Set expectations.**  
These meetings support the changes your organization is trying to make by ensuring peers learn from one another and hold one another accountable for completing the work they've signed up to do. For best results, consider making these meetings mandatory and establishing basic [ground rules](#).

## Leading the Meeting

---

### 1. Check-in (5 min)

Greet everyone and if this is your first meeting, remind everyone about the purpose and ground rules for this meeting.

Then, ask everyone to quickly check in using the Energy Meter or opener of your choice.

To run an Energy Meter, say:

“Let's go around the room and see how we're doing today. When it's your turn, please quickly share your current energy level on a scale of 1 to 10 – where 1 is low, nearly dead and 10 is on fire! super high – and why. Who'd like to start?”

Once everyone has checked in, it's time for the moment of truth.

## **2. The Moment of Truth (1 min)**

Organizational change fails when people don't do what they said they'd do.

This quick moment of accountability encourages peers to get the work done before the meeting, so they can participate as equals on the call.

That said, you don't need to spend much time here. Simply ask:

*"On a countdown from three, let's see a quick show of hands: who completed the work we said we'd do? Three, two, one."*

Pause for a moment so that everyone can see whose hand is raised and whose is not, then move on, saying something like:

*"OK. Let's learn more about how this change is going for everyone, starting with Lessons Learned."*

If this is the group's first meeting and there aren't yet any expectations, explain how this will work in future meetings. For example, you might say:

*"Heads up. In future meetings, we'll do a quick check-in at this point about whether we've all done what we said we would in the last meeting -- no details, just a show of hands. Then we'll talk about what we learned after we get a sense for whether everyone's done the work."*

---

## **3. Lessons Learned About What Works (10 min)**

Ask each person to briefly share one lesson learned or one win since the last meeting.

Here are some questions you might ask to get the conversation started.

- What's one thing that you're really proud of that you'd like to share with the group?
- What wins have you had?
- What's become apparent since we last met?
- What's been most surprising about this work so far?
- Have you seen something recently and thought to yourself 'I wish we'd done that'?
- Is there anything you tried that you wish you could do over?
- If you were in charge, what's one thing you would do differently? Why?

Watch the time and ensure each person has an opportunity to speak. Write down any challenges or tricky questions that come up as possible topics for deeper discussion.

#### 4. Real-Time Agenda:

##### **What are the top priority challenges we should discuss today? (40 min)**

Now that the group has a sense of what they've achieved, you'll spend the bulk of your time helping each other overcome anything getting in the way of your success.

To ensure everyone has an opportunity to share their challenge and get the group's help (instead of just talking about whatever your most extroverted participant wants to cover), use a [real-time agenda process](#) to decide on topics.

Here's how.

##### **Step 1. Ask everyone to silently write down the challenges they want to discuss.**

You probably heard some of these challenges already. If so, give people one minute to compose their thoughts and write down their top challenges in a few words or single sentence.

If people are struggling to come up with topics, set a three-minute timer and ask questions like these to prompt their thinking.

- What would make it easier for us to do more of what's working well?
- Are you stuck in any way?
- What are you planning that you're not sure will work? What's doubts do you have about your approach?
- What's our biggest miss? How might we resolve it?
- What feels like a waste of time and effort? What are the alternatives?
- What's your greatest current frustration and how might we help you with that?
- Are there things you don't know about this work that you feel you should know?
- Is anything holding you back from doing the best work you can do right now?
- What about this plan is just not working? What should we do instead?

Once the timer ends, ask each person to share their topics.

##### **Step 2. Prioritize the topics using [dot voting](#).**

Give each person 3 votes, or "dots." The topics with the most dots go to the top of the list.

##### **Step 3. Discuss topics in priority order.**

Work your way through the topics until you run out of time.

To ensure you have time to talk about as many topics as possible, set a timer for 8 minutes when you begin a new topic. At the end of 8 minutes, ask the group if they'd like to continue discussion the current topic or move on to the next one.

Wrap up the discussion when there are 5 minutes remaining.

---

#### 5. Closing Expectations and Appreciations

To close the meeting, go around the room and ask each person to share:

1. A top takeaway.  
“The key value I’m taking away today is...”
2. An (optional) appreciation.  
“Thank you, (specific person), for your comments about (xyz). It helps me...”
3. Their commitment.  
“Before the next meeting, I will...”

Write down these commitments, so you can all look at them again during the Moment of Truth in your next meeting.

Then, thank everyone for their time and effort and end your meeting.

## Useful Resources

These templates and techniques show other ways to tap into the wisdom of your peers during a major project.

- Guide: [The Lucid Guide to Sensemaking Meetings](#)
- Guide: [How to Access the Wisdom of Your Group](#) by Paul Axtell
- Article: [The Real-Time Agenda Technique](#) by Elise Keith
- Technique: [Appreciations](#)
- Other techniques to consider from Liberating Structures:
  - [Troika Consulting](#) or [Wise Crowds](#)
  - [Appreciative Interviews](#)