

PEER COACHING GROUPS

PEER COACHING GROUP (PCG) – an organized group of people of relatively equal status that meet regularly to provide mutual support with personal and professional development (Boyatzis et al., 2019; Parker et al., 2008).

Possible outcomes

- Cost-efficient, accessible, timely, and applicable learning (Hopkins et al., 2022; Parker et al., 2014)
- Facilitates leadership development (Kets de Vries & Korotov, 2007)
- Skill-building and knowledge acquisition process (Kutzhanova, et al., 2009)
- Fosters resonant relationships in groups (Boyatzis, et al., 2019)
- Cultivates a culture of collective creation (Lepistö & Hytti, 2021)
- Encourages the development within organizations (Basiouni, 2022)



PCG: HOW IT USUALLY WORKS?

Group composition

- Diversity (age, gender, background, function, etc.)
- Similar or relevant experience
- Perceived equal status
- Peers interestingness



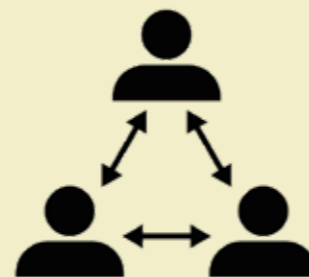
Process

- Organized, moderated process (self-moderated or professional)
- Determining the next step after each discussion
- Discussing even difficult and emotionally salient issues
- Group inquiry into an issue or giving advice



Relationships

- Supportive, caring environment
- Trust
- Peer accountability (with compassion)
- Psychological safety
- Deep mutual understanding



Which organizations use PCGs?

- Global business leadership communities (YPO, WPO, EO, Vistage, etc.)
- Companies (Amazon, Microsoft, KPMG, Adidas, P&G, Walmart, Coca-Cola, etc.)
- Non-profit organizations (from U.S. Army to World Bank)
- Prominent business schools (Harvard, Wharton, Singapore Management U., etc.)



PCG: HOW IT USUALLY WORKS?

DIVERSITY OF APPROACHES



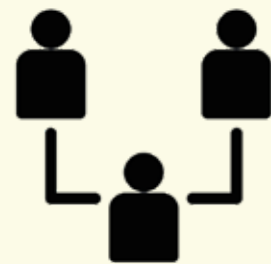
Participants

Some groups strictly target different populations, for example, entrepreneurs (EO), women (WPO), “Christian CEOs” (C12), newcomers. Some other are open to everyone.



Frequency

(weekly, monthly, quarterly)



Size

From 3 to 20 members



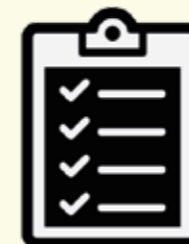
Longevity of the group

(short- and long-term)



Timing

(1 hour - 3 days)



Purpose

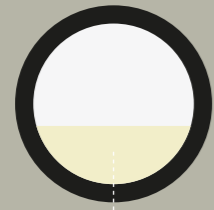
- learning, such as discussing a specific topic of interest to the participants;
- behavioral change.
- self-development;
- networking and horizontal collaboration;
- emotional support from peers who were in your shoes and understand and accept



Rules of meetings

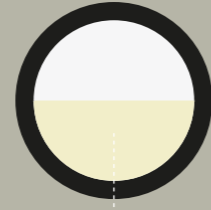
Rules of conversation structure (e.g., "giving advice is not allowed"), timing (to ensure equal time for everyone to participate), mutual respect, etc.

AOM PANEL SYMPOSIUM



10 min

Learn more about peer coaching groups in general and this symposium



30 min

Join one of three roundtables

Table 1: David Scarola + Wendy Murphy and Katherine Klein

Table 2: Heba Mahmoud + Ellen Van Oosten and Linda Argote

Table 3: Ilene Wasserman + D.Christopher Kayes and Elana Feldman

Introduction



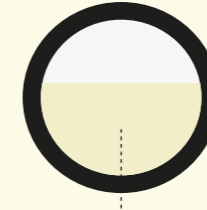
10 min

Roundtables



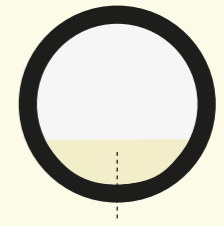
30 min

Designing Peer Coaching Groups to Foster Performance, Learning, and Well-being of the Participants



45 min

Please, return to a general discussion to share your takeaways, ideas, and remaining questions about PCGs, and listen to the takeaways of each panelist.



5 min

Wrap up the discussion with the experts

General discussion



45 min

Wrap-up



5 min

PCG DESIGNS THAT WE EXPLORE TODAY

ROUND TABLE 1 – TAB

For over 30 years, **THE ALTERNATIVE BOARD® (TAB)**, helps CEOs, business owners, and their leadership teams in over 20 countries run their businesses more strategically and achieve their vision of success. Through combinations of one-on-one business coaching, facilitated peer advisory boards, and a suite of strategic and proprietary tools, TAB brings together small- to medium-sized, privately owned businesses for a regular (monthly) exchange of ideas, challenges, and advice they otherwise could not obtain on their own. Members come from a broad range of businesses, including professional services, trades, manufacturers, and wholesalers.

While members come from diverse industries, 75% to 80% of the challenges they face are common across all industries. Common board topics include hiring and motivating employees, growing, financing, culture, and partnership challenges. A diverse group of board members support each other and help bring diverse perspectives and accountability so that all members can achieve what they want from their business and their lives.



Our boards are in the 6-to-10 member range. 8 is the best size group for us. It is usually a set agenda following our standard format. Occasionally, we will bring in guest speakers based on topics the members are interested in. The typical agenda includes: at the beginning, some opening comments by the facilitator. Then 5 to 10 minute check-ins by each member. Then, 20-25 minutes of discussion for each member topic. The time slots are adjusted based on number of members. Then, 15 minutes at the end for members to complete a survey and share their greatest takeaway from the meeting.

PCG DESIGNS THAT WE EXPLORE TODAY

ROUND TABLE 2 – MITRE

MITRE's Business Resource Groups (BRGs) are internal employee-led affinity groups that are a main source of engagement, leadership, and professional development for all employees – especially those from marginalized communities. BRGs provide our employees with a number of ways to engage with each other, as well as develop skills to help them in their day-to-day role, including:

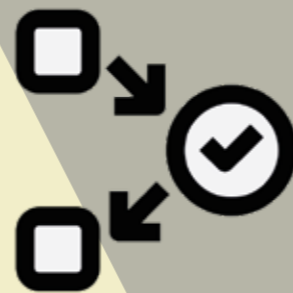
LEADERSHIP COMMITTEES - leaders of the BRGs, BRG chairs, committee chairs, and event chairs meet monthly in groups of about 25 members each. These meetings help develop employee leadership skills, support their efforts, and give them visibility with leadership across the enterprise.



MENTORING PROGRAMS – most of our BRGs have formal peer mentoring programs that match employees across various dimensions of diversity (generational, skill level & experience). Mentoring programs help BRG members and non-members learn, build their network, and help with retention.



BOOK CLUBS – several of our BRGs host book clubs with focuses on books written by authors of a particular affinity or skill. The clubs meet every 6 weeks until the book is done. These groups increase engagement amongst members of the group as well as allow people to learn from peers.



NEW EMPLOYEE BUDDY PROGRAMS – BRG members welcome and informally mentor new employees that are interested in becoming members. This helps the new employee form a network, understand the culture, and increase their sense of belonging. It also helps the BRG member with building their networking and leadership skills.



By nature the people engaged in our groups are there to support one another using one or a few of those different platforms.

PCG DESIGNS THAT WE EXPLORE TODAY

ROUND TABLE 3 – WHARTON EXECUTIVE EDUCATION

As I write this, the team I am currently working with in the Advanced Management Program at the Wharton School is presenting their proposals for their Social Enterprise Project. Each team develops a proposal they present to potential funders for a project that addresses a social problem and is self-sustaining once receiving seed money from corporate investors.

This is one of many team projects that the learning groups do during the course of a 5-week leadership development curriculum. Over 10 years ago, we revised the coaching component to this senior leadership development program. The program was designed in alignment with the program's mission: To develop leaders who act with a deeper understanding of themselves, their organizations, and their communities, and contribute positively to the growth and transformation of each. Like the core curriculum, the coaching process integrates an experiential approach that elevates learning in relationship, with developmental theory and experiences.

The program has grown and morphed over the past decade. Coaching has continued to be referenced by participants as a key component to their growth and development. We currently have an individual and group coaching session for each week of the program. The team coaching sessions are aligned with the themes of the academic and experiential curriculum. In addition to the Social Enterprise Project, the team experiences include rowing, film making, and other forms of story sharing.

The other example of the application of our Peer Coaching Model is with the Women's Executive Leadership Program. In that program, we have adapted a model based on Ron Heifetz's case study example. Finally, we use the Peer Coaching Model in two different Wharton MBA programs.

Ilene Wasserman

PANELISTS

The organizer of the symposium, **Roman Terekhin**, is a PhD Candidate at Case Western Reserve University. After 15+ years of experience as a manager at a big tech company and an entrepreneur, Roman launched his career in academia and has spent the last three years studying workplace peer coaching groups as a tool for personal and professional development.

1. Linda Argote

is a Professor of Organizational Behavior and Theory at the Tepper School of Business at Carnegie Mellon University, where she directs the Center of Organizational Learning, Innovation and Knowledge. She publishes extensively in the field of organizational learning and knowledge transfer, including co-authorship of two books and numerous articles in leading journals, such as Organization Science, Academy of Management Review, and Administrative Science Quarterly.

4. Katherine Klein

is a Professor of Management at the Wharton School of the University of Pennsylvania and Faculty Director of Wharton's Impact Investing Research Lab. Her research on leadership, diversity, innovation, team effectiveness, social networks, and employee ownership has appeared in numerous top journals, including Administrative Science Quarterly, the Journal of Applied Psychology, the Academy of Management Journal, and the Academy of Man-

2. Elana Feldman

is an Associate Professor of Management at the Manning School of Business at the University of Massachusetts Lowell. Her research on temporality in organizational contexts and relationships at work has been published in journals such as Organization Science, Academy of Management Annals, Group & Organization Management, and Harvard Business Review. She is a founder and steering committee member of the International Positive Relationships at Work Microcommunity.

5. Heba Mahmoud

is the Head of Inclusion and Diversity at The MITRE Corporation. Thousands of MITRE's employees are members of diverse business resource groups that Heba has led to serve as peer coaching groups with peer mentoring circles and other elements of mutual development and support of the participants.

3. D. Christopher Kayes

is a Professor of Management and the Chair of the Department of Management at George Washington University School of Business. He also serves as a senior fellow at the Center for Excellence in Public Leadership at The George Washington University. He authored or co-authored four books and over 30 peer-reviewed publications on learning, leadership, and organizations. His research has been featured in leading business media, including The Economist, The Wall Street Journal, and Bloomberg TV.

6. Wendy Murphy

is the Associate Dean of the Undergraduate School and a Professor of Management at Babson College. Her work on developmental networks, identity, and the work-life interface has been published in several journals, including the Academy of Management Learning and Education, Human Resource Management, Journal of Management, and the Journal of Vocational Behavior, among others. With Kathy Kram, she is a co-author of the renowned book, Strategic Relationships at Work.

PANELISTS

7. David Scarola

is a practitioner with extensive experience and Chief Operating Officer in The Alternative Board (TAB), global business advisory franchise system that organizes peer coaching groups ("peer advisory boards") for business owners in over 25 countries worldwide. In addition to being the COO, David is a coach and facilitator for a peer coaching group of accomplished CEOs himself.

8. Ellen Van Oosten

is an Associate Professor of Organizational Behavior, Faculty Director for Executive Education, and Director of the Coaching Research Lab at Case Western Reserve University. Her research has been published in journals such as Leadership Quarterly, Academy of Management Learning & Education, Human Resource Management, Management Learning, and Harvard Business Review, among others. With Richard Boyatzis and Melvin Smith, she co-authored the award-winning book, *Helping People Change: Coaching for Lifelong Learning and Growth*.

9. Ilene Wasserman

is a Lead Executive Coach at Wharton School of the University of Pennsylvania who designed a peer coaching program at Wharton to support their executive education programs for senior leaders. She is also the president of ICW Consulting Group, serving as an executive coach with senior executives and boards of directors of Fortune 100 companies. Together with Polly Parker, Tim Hall, and Kathy Kram, Ilene is a co-author of the award-winning book, *Peer Coaching at Work*.

Certainly, this symposium offers a wealth of new insights to digest. If you are interested in a summary of each roundtable and the general discussion, we would be glad to prepare it and send it to you after the meeting. To receive it, send a request to roman.terekhin@case.edu or fill out the form on the webpage with this presentation (follow the QR code below)

Web version of PCG presentation:



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We hope this symposium will nurture your inspiration in peer coaching groups, whether you are researching them, implementing them in your organization, or thinking about joining one!