Change through Smart-Mob Organizing: Using Peer-by-Peer Practices to Transform Organizations

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The ~ 140 characters recap

Want to get good ideas and decisions quickly? Tap into the wisdom of peers. Face-to-face meetings, social networks and collaboration technology all work well.

Executive Summary: Why Peer-by-Peer Now

In today's change-weary organizations, frazzled, fatigued and frustrated individuals pay attention to their peers, maybe even more so than anyone else.

As a number of surveys show, a minority of employees trust their senior leaders. For example, in the 2012 Edelman Trust Barometer,[1] CEO credibility dropped 12 points to 38 percent, its biggest drop in Edelman's Barometer history. By comparison, respondents view "A person like me" as almost as credible as academic experts or technical experts in their company. The "A person like me" peer experienced a 22 point increase in credibility, the most since 2004. "Regular employees" also saw their trustworthy numbers jump by 16 points.

The numbers for senior leaders aren't quite as low in the 2012 Global Workforce Study by Towers Watson, but they're not worthy of celebration. Just 49% of surveyed employees said they have trust and confidence in their company's senior leadership team.[2]

Rather than fight an upstream battle, many savvy organizational leaders and sponsors are switching their approach to change. They involve employees and members by empowering them to help drive transformation. The availability of relatively easy-to-use technology solutions is accelerating this movement, as well as the geographical dispersion and eagerness of employees.

Not only are individuals willing to volunteer—even though they have a "day job" in addition to their special assignment—but they're also delivering results. Individuals who have different yet complementary skills are well suited to solve large, complex multi-disciplinary problems, including figuring out how to adapt to new challenges.

This chapter examines three peer-by-peer practices: face-to-face meetings, social networks and collaboration technology. All three use elements of "crowdsourcing," "tapping into the wisdom of crowds," and "smart-mob organizing."

Note that change leaders and sponsors can mix and match all the elements to fit their situation, culture and challenges. It's also important to mention that change leaders and sponsors have discretion on the degree of involvement and openness they want to use. It is not an either/or choice. Instead, it's a sliding scale from totally open to totally closed. (Although considering the

[1] 2012 Edelman Trust Barometer Executive Summary
[2] 2012 Global Workforce Study by Towers Watson.

numbers of people who may be involved, it may be challenging to operate under total secrecy.)

The Value of Peer-by-Peer Practices as Defined

The terms "crowdsourcing," "tapping into the wisdom of crowds," and "smart-mob organizing" are sometimes used interchangeably. They are different, as explained here within the context of organizations and their stakeholders, primarily employees and members.

Crowdsourcing

Crowdsourcing is a process of outsourcing a task, generally problem-solving, to a group of people. Those who respond and work on the problem may be experts, amateurs or volunteers. The "crowdsourcer," the organization that calls for help, will own the solution. The crowdsourcer may compensate the "winners" of the best solution with money, a prize or recognition.

In its purest sense of the term, organizations use crowdsourcing more as a distributed problem-solving and production tool with strangers (or outsiders) rather than with employees. However, the volunteer aspect of these peer-by-peer change projects gives the project a crowdsourcing flavor, because many organizations count on getting employees to volunteer rather making assignments.

Tapping into the wisdom of crowds

Tapping into the wisdom of crowds involves asking individuals to share information. After collecting large amounts of data generally electronically (but also possible in other ways), the organization then aggregates the information to get a comprehensive depiction of the issue or situation, or collective intelligence.

The process is based on the idea that a group of people is often smarter than an individual. Employee surveys and brainstorming sessions are ways organizations tap into the wisdom of employees and their members.

Smart-mob organizing

Smart-mob organizing involves bringing together a group of employees for a common business purpose, generally through technology. When Howard Rheingold coined the term in his book of the same name ***Smart Mobs: The Next Social Revolution***, the concept was more about giving power to the "mobile many." Today, smart-mob organizing has evolved to mean the use of electronic media or collaborative technology as a way to coordinate people to bring about purposeful business or social change. People can still come together in person; however, their voices get amplified when they use technology.

The power of smart mobs is more than just the savvy use of technology, especially when the groups are carefully structured to solve a problem, not just brainstorm ideas. More people can participate in shorter time periods offering more diverse viewpoints, candid comments and uncensored ideas.

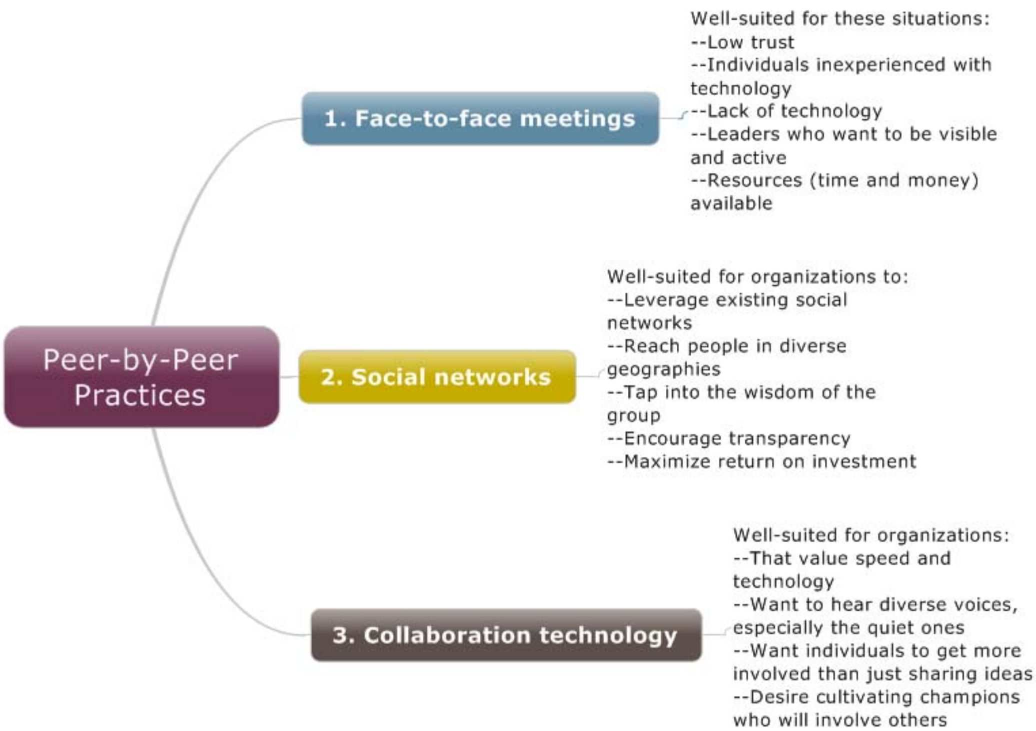
Leaders are able to gather better ideas at a fraction of the cost much faster than if they were to use traditional face-to-face meetings or even social networks. And if leaders also request individuals in the mob to develop recommendations, refine them, set priorities and start to develop action plans, the smart mob can help leaders make good decisions in a more open setting.

These definitions are adapted from Howard Rheingold, James Surowiecki, author of ***The Wisdom of Crowds***; Bob Johansen, author of ***Leaders Make the Future***; and Wikipedia. Johansen considers "smart-mob organizing" one of his top 10 new skills for leaders.

3 ways to use peer-by-peer practices

This graphic shows three ways to use peer-by-peer practices. As explained earlier, hybrid approaches are common. In fact, two of the three case studies featured in this chapter use at least two of the three practices in their approach.

A description of each practice with a case study follows.



1. Face-to-face Meetings

Face-to-face meetings continue to be the standard-bearer for involving people to shape the future. Over the years, many creative meeting processes have evolved to engage people as part of change initiatives. Appreciative Inquiry, Open Space Technology and World Café are just a few methods in which individuals come together to co-create.

The point of this chapter is not to describe these many meeting methods. Instead, the goal is to clarify the value of face-to-face meetings in a digital world where technology is playing a bigger role.

Face-to-face meetings continue to provide many tangible and intangible benefits for engaging peers and supporting them in their work. For example, participants can converse in-depth, exploring topics that excite and exhilarate them, as well as challenge and conflict them. Participants have the ability to observe each other's body language, which often speaks louder than words. And, they can experience casual encounters in the hallways, bathrooms and over meals, which lets them connect with their fellow meeting participants in informal ways that build rapport and trust.

In fact, face-to-face meetings remain especially valuable for individuals who have never met each other in person before or who haven't worked together, especially on a perplexing topic, such as a change initiative.

Face-to-face meetings also work well when participants aren't experienced or comfortable with technology. Or leaders want to play a visible and active role with participants.

And last but certainly not least, organizations sponsoring the face-to-face meetings need to set aside the time and money for travel. Even if everyone is local, the leaders arranging the meeting need to consider the opportunity cost for the individual participants. With time such a valuable asset, no one can assume these days that people will want to give up several hours or days for a meeting.

Case study: SEIU Local 1021 and its Two-Year Plan

The SEIU (Service Employees International Union) is the fastest-growing union in North America. Its members work in three primary sectors: health care, property services and public services. Local 1021 in Northern California has more than 54,000 members.

In early February 2012, Local 1021 held its first membership convention, five years after 10 locals merged into one (hence the name 1021). The primary goal of the convention was to adopt the new Two-Year Plan to shape the local's future.

As the Executive Board began to plan the convention many months earlier, they realized they wanted to take advantage of the face-to-face time during the convention to work on the plan as well as conduct educational workshops. Those workshops would fulfill another goal of the union, which is providing professional development to its membership.

To ensure the Two-Year Plan was robust and represented members' points of view, the Executive Board members along with the planning committee decided they wanted to start gathering input from members and delegates way in advance.

They devised a process that would allow them to be inclusive, be simple to execute and give them a head start for preparing a plan that delegates could discuss and vote on at the convention.

About six months before the convention, they started gathering extensive input from members. There were 400 phone interviews, 600 online surveys, 130 chapter meetings and 10 delegate meetings.

The phone interviews and the online surveys served two purposes. These two channels surfaced themes members were concerned about. Plus, the channels were easy to use, especially for members in remote places who might not be able to participate in a face-to-face meeting.

The Executive Board shared the results of the phone interviews and surveys with members both through formal communication and chapter meetings. The Executive Board also tasked a group to start drafting the Two-Year Plan that they could share with delegates in working sessions in advance of the conference.

These face-to-face delegate meetings served as the workhorses for the member involvement. The union leaders and the meeting facilitators participated in all 10 delegate meetings that covered a large geographic area of northern California over a several week period.

For each meeting, they followed the same process. Participants—who were serving as delegates for the upcoming conference—counted off into groups, which they worked in for the duration of the meeting. They reviewed and discussed each of the six planks of the Two-Year Plan in 45-minute segments, answering specific discussion questions and recording their answers on flip charts.

Next, each delegate got three sticky dots to place on the sections of all six planks that they thought were the most important to the future of Local 1021. This action helped the Board leaders in two ways: it gave them insights to help them rewrite the Two-Year Plan and it demonstrated the difficulty yet the value in setting priorities. As the old saying goes, when everything is a priority, nothing is.

This simple structure worked well for the 1021 delegates, especially considering the time restraints they were operating under. The meetings ran just two to four hours, depending on the size of the group, on the weekends or in the evenings. Delegates were participating in their free time, and so they had to fit the meetings into their schedule.

There were other challenges too. The delegates generally knew one another but hadn't worked together before. Also, in their regular jobs, the delegates don't spend much time in meetings. To make the meetings run more efficiently, the meeting facilitator presented suggested ground rules and asked delegates to add or change. Also, the meeting facilitator asked delegates to answer open-ended questions or statements during their discussion, such as "In two years, we want our organization to be known for doing _____________." This helped jumpstart the conversation, spark big ideas and keep everyone more focused.

After the meetings, the team chartered with writing the Two-Year Plan then distilled and refined all the comments. They created a comprehensive document laying out a platform that evolved to four major planks. The Executive Board shared this draft of the Two-Year Plan in advance of the convention and invited members to provide more input. "We want to hear from you!" was a regular refrain.

Members could add elements and propose alternatives in a number of venues, including:

- Communicating directly with a member of the Executive Board.
- Speaking during the member comment period at an Executive Board meeting.
- Inviting Executive Board members to chapter meetings for discussion. (The Executive Board recommended this approach because it provided optimal two-way conversations between the membership and the Board.)
- Visiting the convention website and submitting comments.

Because the process for developing this Two-Year Plan had been so inclusive, the Executive Board asked the more than 400 delegates to discuss and vote on the plan at the convention, but not amend it. Delegates agreed to this, recognizing that the plan was a living document, in a sense a framework that members' input and involvement would continue to shape once implementation began. Also, by keeping to a set schedule, delegates and other members would have time to participate in the 15 workshops being offered.

The flipcharts with the handwritten comments and sticky dots from the brainstorming meetings lined the walls of the ballroom where the main events took place.

The structure for the convention meeting was as follows. A different member read each of the now four planks aloud. The convention facilitator then opened up each plank for discussion. Delegates lined up at the microphones to make their points within their allotted time.

Delegates voiced their specific concerns, complaints and criticisms, as well as fears and anxieties. Others expressed their enthusiasm and excitement. A common theme emerged across all four planks: "These are pretty words, but how will we guarantee their implementation?" Others would stand and respond, "We the members and officers must hold each other accountable."

After each section's discussion, the Local 1021 President and other members of the Executive Board responded to the delegates' comments, especially about what the Executive Board suggested could be done immediately or looked into.

After discussion on all four planks, delegates voted separately on each. All four sections passed by a vast majority. There were just a handful of abstentions and even fewer "no" votes. So by weighing in and contributing in advance, delegates bought in at the convention.

Since the convention, the Executive Board has arranged for follow-up regional meetings. Members are actively participating, helping determine the concrete actions needed to make the plan come to life. Conversation, collaboration and transparency are becoming hallmarks of how everyone works together to support the Two-Year Plan.

2. Social Networks

By using social networks for change, organizations transfer the in-person communication to online, which changes the dynamics. More voices can join, and the voices are amplified. That's because participants—as well as nonparticipants—generally can track who says what more easily and make specific comments in response. This extra visibility plus the transparency makes this peer-by-peer practice unique.

With social networks, the technology is not the focal point; the social aspect is. The technology is the enabler to help individuals connect, collaborate and advance their ideas. Nonetheless, the use of social networks for change is ideal for organizations that have already adopted an internal social network platform and want to involve individuals from around the globe—or at least a variety of locations and time zones.

The advantages of using already existing technology are several:

- The change sponsors and the participants focus on the objectives and outcomes they want to achieve rather than playing with a cool new technology.

- The learning curve is short or non-existent, especially if participants have some experience using the technology.

- The pressure to demonstrate ROI for the technology is generally low.

Although participants lose the benefits of being with peers, enjoying down time and observing body language, social networks provide some advantages, especially in today's work world. For example:

- **Fast set up and operations.** Sponsors and facilitators can quickly set up sessions without having to schedule the large chunks of meeting times that are often necessary for face-to-face meetings. They can recruit volunteers quickly in diverse locations.

- **Greater inclusion with fewer intrusions**. Without having to worry about travel budgets, meeting sponsors can invite more people to take part. The addition of more and preferably diverse voices helps curtail the adverse effects of the echo chamber. Plus, the asynchronous aspect of social media means people can participate fully in every step without having to be in the same place at the same time. And when participants don't have to travel, they experience less wear and tear.

- **Greater return on lower investment.** Assuming the organization already has the technology, the out-of-pocket costs to host a social network meet-up are nominal. (People's time is another matter.) Also, the lack of travel costs also means the sessions are environmentally friendly. In addition to spending less for faster responses with more people, meeting sponsors and facilitators generally have access to analytical capability through their social network. This allows them to review who participates, which topics people talk about most and which individuals are most influential.

What if the organization hasn't yet adopted a social networking platform?

Is it possible to use technology-based peer-by-peer practices if an organization hasn't yet adopted a social network platform?

Yes. Organizations can jerry-rig email or other tools, such as setting up a private LinkedIn group or Facebook group. However, the meeting sponsors may not realize the full benefits of the smart-mob organizing. Plus, they need to be aware that participants, especially those savvy with technology, may not enjoy the experience as much, which can hurt the quality of the results.

Case study: Avery Dennison The Beat

Avery Dennison is a global leader in innovative identification and decorative solutions for businesses and consumers. The Fortune 500 Company develops pressure-sensitive technology and materials as well as retail branding and information solutions. Founded more than 75 years ago, the Pasadena, CA-based company operates in more than 60 countries now with sales of $6 billion.

Of its more than 30,000 employees, just 10,000 have electronic access at work. The other 20,000 plus employees work on factory floors.

In 2012, Avery Dennison introduced "The Beat," a volunteer opportunity for Avery Dennison's "wired" employees to serve as a fast and flexible source of feedback and ideas for corporate leaders.

Leaders believed that by involving employees they could hear more diverse voices, which would provide them with valuable insights to help them address key issues and meet business objectives. Also, leaders felt that it was time for the company to try to develop a more open communication culture, especially at the corporate level. This approach would be a good first step, especially since Avery Dennison had recently invested in technology that would more easily enable cross-company communication, at least with wired employees.

As for the value for employee volunteers, they could:

- Serve as a sounding board, providing real-time feedback.
- Generate innovative new ideas.
- Help champion important initiatives.

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In return, employees who volunteered to serve on the employee ambassador team as members of The Beat would benefit by:

- Learning about new company initiatives in advance of their peers.
- Increasing their networking opportunities and exposure to senior corporate leaders.
- Taking part in helping shape the future of Avery Dennison.

The time commitment is relatively low, just about two hours a month. And the volunteer gig offers great flexibility. Since almost all requests and activities are conducted online through the company's internal social network, The Beat members choose when to participate.

When corporate leaders announced the introduction of The Beat and started to recruit volunteers, they planned for about 100 to raise their hands. For most of its long history, which includes a number of acquisitions, the company has operated in a fairly decentralized manner. As a result employees tend to affiliate more closely with their business unit rather than corporate.

Informal collaboration often happens at the business unit level, especially among salaried employees. However, it was rare at the corporate level. So leaders kept expectations low for The Beat, thinking they would start small and then look for opportunities to grow the group.

Instead, leaders were pleasantly surprised when 350 employees, spanning all regions, functions, business units and levels, signed up within hours.

The volunteers immediately jumped into their first monthly "mission" —to weigh in on the strategic direction of the Avery Dennison Foundation. Through charitable giving, the foundation strives to improve the communities where Avery Dennison employees live and work.

Company and Foundation leaders were exploring whether to adjust the foundation's focus areas. They decided to solicit input from The Beat volunteers to either validate the foundation's current giving or provide rationale for a strategic change. Leaders also asked The Beat volunteers for ideas on how to evolve engagement from employees and the communities for the foundation.

The Beat volunteers shared their feedback in two ways: taking an anonymous pulse survey and commenting on the social network site. Their name and picture are attached to their comments. This collaboration with others is one of the more popular aspects of the program as volunteers have shared both informally and in formal feedback that they appreciate seeing other volunteers' perspective. It's a great way for them to connect with employees from other parts of the world whom they may have never known.

After a mission ends, the Global Corporate Communication team posts a blog, summarizing the survey results and the feedback, explaining what actions the leaders are taking based on The Beat input, and sharing the timeline for next steps. This follow through has garnered respect for the process from The Beat members, who continue their active participation.

The participation rate for the monthly "missions" among Beat members is running between 60% and 95%, which is a satisfactory rate for Avery Dennison. Leaders recognize that The Beat members must be responsible for their day jobs first, and that not all missions may appeal to them. After all, the point of the missions is to gather input for important business issues, not to find a popular topic that draws attention.

Corporate leaders also meet with local Beat members in person during their worldwide travels. The meetings either feature an informal general question and answer session or a structured agenda with a specific discussion topic. Either way, the interaction between leaders and employee volunteers further supports Avery Dennison's goal of creating a more open communication culture.

Rules of the Road for The Beat:

- Members are expected to be active participants and contribute approximately two hours per month to The Beat. Each quarter, we'll check in to see if you're still interested in being part of the group.
- When a new mission is revealed, please respond and take action in a timely manner. Our businesses and functions are counting on you!
- The more you share, the more Avery Dennison grows. In The Beat community on infoxchange *(Note: This is one of Avery Dennison's online communities)*, collaboration and open dialogue are highly encouraged.

From The Beat online community

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3. Collaboration Technology

Collaboration technology takes the social network approach to another level. With collaboration technology, organizations can bring together virtual groups of almost any size to work on a change issue.

Even with these "smart-mob" groups, the change sponsors and leaders still direct the degree of openness, the extent of the organizing, and the specific tasks of the assignments. In fact, compared to the face-to-face meetings and the social networks, collaboration technology features more structure.

At the same time, the participants in these smart-mob groups generally have more responsibilities than idea generation, as explained next.

As with the social networks, the technology is an enabler. Individuals are able to participate when it is convenient for them to do so.

Why would an organization choose collaboration technology over social networks? Organizations can certainly use both practices. However, collaboration technology has these advantages:

- Delegate more responsibilities to individuals, such as generating ideas, refining those ideas, developing recommendations, rating them, voting on the ones that best fit the established criteria, setting priorities and creating action plans.

- Provide a more structured process that keeps a group engaged and on task, which is especially important if leaders charge them with additional responsibilities other than brainstorming.

- Hear diverse, candid voices, especially the quiet ones since the brainstorming step and others can be anonymous.

- Make fast, well-informed decisions that support strategic goals, especially for organizations that value speed, technology and involvement.

- Support the cultivation of change champions who can engage others on an ongoing basis once they're trained how to facilitate with the collaboration technology.

More so than the other methods, collaboration technology distributes power to peers.

Case Study: Ideal Supply Collaboration for Improved Productivity

Ideal Supply is an Ontario, Canada electric supply distributor and NAPA's largest independent auto parts distributor. The company offers a large inventory of wholesale industrial, data communication and automation products.

The executives were exploring productivity opportunities and assumed its employees could contribute workable ideas. To tap into employees' creativity and innovation, the executives decided to use the online collaboration cloud application of another Canadian company, Powernoodle.

Powernoodle, which also is name of the application, is designed to guide faster, more informed decisions. It can help a group capture great ideas, reach a consensus and organize their data and decisions into action plans.

The Ideal Supply executives launched three special teams and charged them to come up with their top five ideas for improved productivity in their functional areas.

In particular, the teams also had to ensure their top ideas had a reasonable ROI. Plus, the team members needed to demonstrate to the executives that they met these five criteria. The team members:

- Collaborated.
- Innovated.
- Enjoyed the experience.
- Could commit to the project(s) they designed.
- Would show progress in three months with 50% of their top projects.

Each team included members from the function, a trained organizer who facilitated the Powernoodle sessions and a business unit liaison if they needed more support. No managers served on the teams.

Once chartered, each team worked on its issue at its own speed, following the seven Powernoodle steps. These steps and their descriptions are:

1. **Brainstorm.** Participants contribute ideas anonymously, and comment on each other participant's ideas. (The goal is to get a workable number of ideas that spark other ideas that people can build of off. The anonymity takes pressure off of people to present just "safe" ideas. Also by allowing people to work independently and pool their ideas, the ideas are generally of higher quality. Group Think is avoided.)

2. **Categorize.** Next participants put the ideas into buckets. These could be "stop," "start," and "continue." Or "processes/technology," "behavior," or "resources" or whatever works for the situation.

3. **Combine.** The facilitator can then take the first stab at going into the categories and merging similar ideas. Participants can weigh in as well to ensure that the ideas reflect the participants' intent and that the ideas are actionable.

4. **Vote.** Participants next evaluate the ideas on their merit to achieve the group's stated goals. Each participant has a set number of votes, determined either by the facilitator or the group in advance. Participants then vote on the ideas that they believe best meet the already established criteria. (This could be ROI, ease of implementation, speed of implementation, etc.) Once everyone has voted anonymously, the next step starts.

5. **Rate:** Now participants consider the importance of each remaining idea. For example, they can use a 10-point scale with "1"=strongly disagree and "10" = strongly agree. Again, they're basing their rating on set criteria.

6. **Prioritize.** For this step, participants set priorities among the most important ideas. To help with this step, the facilitator can assign Powernoodle money—such as $1,000 in play money—to each participant to allocate toward the ideas that they think are most important to implement immediately. This step requires the participants to consider how to best allocate scarce resources to achieve the objective.

7. **Create an action plan.** Last but not least, the facilitator generates the action plan, which is also known as the "Powernoodle Report." This report shows how the group evaluated the ideas to reach their decisions, including assigning ownership and next steps for

accountability for each priority. Depending on their instructions, they either can keep ownership within their Powernoodle group or reach outside to task others. The report, which is in a spreadsheet, also captures every idea, even those that get low ratings, decision and action for future reference for participants as well as others who review the report. This report becomes the foundation of a more detailed action plan to build commitment to get others on board and start to accelerate the change.

(Depending on the participants' assignment, the process may not include all steps. For example, if leaders were interested only in gathering ideas, they might ask participants to brainstorm and combine only. In this case, though, the Ideal Supply executives wanted to tap the collective wisdom of their teams and leverage their capabilities.)

During the brainstorming, all three Ideal Supply teams generated ideas in the double digits. After categorizing, combining and voting, they selected their top five based on ROI and the other criteria. They then presented their top five to the leaders to approve for implementation.

The executives got their wishes: improved productivity and efficiencies with employees liking the experience. In fact, the executives and employees enjoyed several bonuses.

From the executives' perspective, they said they were more confident in the team recommendations from the Powernoodle session than they were from more traditional methods they have tended to use, such as Executive Committee decisions. Why?

The collaborative effort convinced them. The quality of the teams' collaborative decisions seemed extremely sound. Plus, the collaborative effort in coming up with the ideas paved the way for a smoother implementation process.

The executives noted that the team members became highly committed to their ideas through the Powernoodle process, which extended to the implementation. The improved productivity results Ideal Supply later achieved confirmed the executives' assumptions.

From the Powernoodle participants' perspective, they told the leaders that they enjoyed their experience from several aspects. For instance, they appreciated taking part, which some described as the "freedom" to participate. They also liked the flexibility to contribute at their convenience, when they had a few moments between meetings or tasks to go online and work. The confidentiality Powernoodle provided also was a valuable feature. Participants could offer ideas without being judged by their peers or their managers. And last but certainly not least, participants relished having a solid impact on the outcome.

Executives said they were also pleased with the enthusiasm the Powernoodle participants showed as well as their demeanor. For example, executives observed that none of the participants boasted about their great idea. Instead they bragged about their team's ideas.

Suggestions for Putting Peer-by-Peer Practices into Place

The organizations featured in this chapter as well as others that successfully use peer-by-peer practices suggest taking these steps to encourage better results and improve the experience for participants as well as change sponsors and organizations.

Set-up and approval

- Be clear about the intent of the stakeholder involvement. The objectives for the peer-by-peer approach need to align with the organization's business goals. In particular, in giving directions to smart mobs for their technology collaboration, leaders should follow a "tight—loose—tight approach." This means being very clear about the objectives, flexible about how to get there and firm on the metrics to determine whether the objectives are reached.

- Adopt a narrow and deep rather than broad and shallow focus. In other words, give the participants a clear, specific task on a topic to which they are confident they can contribute meaningful ideas. This will better ensure actionable ideas that the organization can implement. Also, it will be easier to set metrics and measure outcomes.

- Choose the appropriate approach (which could be a combination of methods) that fits the culture of the organization. Consider both what's possible and what's realistic. (For example, Avery Dennison would like to extend The Beat to factory floor workers. However, because these employees don't have access to the company social network site, which is the heart of the program right now, there's not an easy or efficient way to involve non-wired employees.)

- Get buy-in from leaders before launching, including their commitment that they will actively support the initiative. This commitment signals to other leaders as well as potential participants that employee involvement is valued. Leaders' actions should include encouraging employee participation, visibly participating in a meaningful way themselves, thanking participants and using the input from participants. (If they don't use the input for some reason, the leaders should explain why.)

- Recruit volunteers. Look for active creators rather than passive observers. By appealing to the motivated minority rather than the indifferent majority, organizations improve their chances for higher quality solutions as well as higher involvement rates from those who volunteer.

- Consider whether to expand the participation to groups other than employees, such as contractors, customers and suppliers. Depending on the organization's objectives, more diverse voices may add valuable perspectives.

Launch as Well as Ongoing Administration

- Establish and share ground rules for participating, including expected time commitment and roles and responsibilities. (See Avery Dennison's "Rules of the Road for The Beat.")

- Recognize that all three types of peer-by-peer practices require a significant amount of administrative support. Finding and deploying quality administrative resources helps process management and oversight for both the leaders and participants.

- Also acknowledge that all three types of peer-by-peer practices benefit from strong facilitation. Trained facilitators know how to encourage participants to share their ideas. At the same time, trained facilitators also should be able to handle exuberant leaders who may want to jump into the process and lead rather than listen to employees.

- Think about ways to provide a “safe zone” for participants so they feel more comfortable and confident about sharing their opinions, innovating and trying new things. For example, the anonymity that the Ideal Supply Powernoodle participants enjoyed while brainstorming supported them throughout the process.

- Create an atmosphere that stimulates participants first to think big, and then to consider how to put their big thoughts into action. For face-to-face meetings, this includes choosing space that’s conducive to conversations, as well as providing regular breaks and refreshments and asking bold or even provocative questions for participants to answer. For virtual sessions, this means offering conference calls, video calls or other ways that participants who want to take part can feel more connected to their colleagues.

- Appreciate that participation in a peer-by-peer approach can be an excellent professional development opportunity providing benefits to both the organization and the individuals. It’s low cost and fairly low risk. Furthermore, it provides tangible benefits to the organization and the individuals, rather than being a theoretical exercise.

- Be prepared to provide additional support to participants if they are called upon to present their ideas or recommendations to leaders. This responsibility may be outside the scope of their regular job, especially if they’re speaking to corporate executives.

- Follow up with participants in a timely manner. This includes summarizing the input they’ve provided so participants know that the change sponsors, and hopefully the leaders, have heard their voices. This also means explaining what actions the organization has decided to take based on the input, ideas and recommendations the participants made. This follow up shows respect to the participants, as well as helps them stay engaged.

- Consider starting small with a “seed” group of users. With practice and experience, especially using the technology of social media networks and the collaboration technology, they can become champions for other users throughout the organization. By growing champions this way, an organization demonstrates the value of peer-by-peer advocacy and learning.

Implications for change sponsors and other leaders

When organizations use these peer-by-peer practices effectively, the role of the change leaders and sponsors change. Rather than act as the change experts, they need to position themselves more as peers themselves. They serve as trusted advisors—organizing others, providing facilitation and coaching. They also should be evaluating and measuring the change process and the results.

In this role, they not only serve others, but they also help organize the participants in the peer-by-peer practices. The change leaders and sponsors are leveraging their time and resources so that others can do more heavy lifting around the change. This is change through connections, conversations and collaboration, not coercion.

And in today's world, people prefer to connect and collaborate. They'll be more likely to commit to change.

Where to Find More Information

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