



Leadership Development



How to Get the Most out of Peer Support Groups

by Boris Groysberg and Robert Russman Halperin





PHOTOGRAPHER LEILA JEFFREYS



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How to Get the Most out of Peer Support Groups

A guide to the benefits and best practices



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IDEA IN BRIEF

THE UNTAPPED OPPORTUNITY

Peer forums are groups of four to 10 people who meet regularly to discuss their work and lives—and learn from one another. But because of their small size and private nature, they're still unknown to many people who could get value from them.

THE BENEFITS

While their makeup, focus, and sponsors can vary, all successful forums allow participants to share concerns, show vulnerability, hear different viewpoints, clarify priorities, make decisions with greater confidence, and form connections that help them feel safe, grounded, and capable in an uncertain world.

THE BEST PRACTICES

Good forums pay careful attention to group composition, principles for participation, meeting structure, processes, and content, and use flexible technology. They also seek to continually improve the forum experience for everyone.



Fifteen years ago, Mike Novakoski, the president and CEO of EV Construction, joined a local peer support group for company leaders run by YPO (formerly the Young Presidents' Organization). At the time he doubted he would stick with it; he expected he'd be too busy to go to the meetings involved. Now, he says, "I can't imagine life without it." The group has helped him connect more authentically and build trust with others, he says—so much so that he has encouraged his family, friends, colleagues, and suppliers to find or form their own peer groups.

**ABOUT THE ART**

Leila Jeffreys's bird portraits are the result of years of research and collaboration with conservationists, ornithologists, and bird enthusiasts. Her series High Society explores the communities and relationships of flocks.



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At the consultancy Spitfire Strategies, Kristen Grimm, the founder and president, has introduced “peer pods,” self-directed, virtual peer support groups in which employees with similar responsibilities and pressures discuss their professional growth, find creative solutions to problems, and ultimately learn to operate at a higher level. Now nearly everyone in the 50-person company, including all the senior leaders, belongs to a pod. A pod “might be the first place someone says something out loud that they might otherwise hold back,” Grimm notes. “In times of change it’s a real balm for people to come together.”

For more than a decade, Nancy Parachini, the director of the UCLA Principal Leadership Institute, has organized peer groups for leaders of Los Angeles schools in historically marginalized communities. She says it’s a way to “sustain valuable peer learning” and ensure that educators can support one another in “leading for social justice.”

What exactly are peer support groups (often simply called “forums”), and why do busy executives like Novakoski, Grimm, and Parachini feel compelled not only to attend them but to persuade others to do so? Typically these groups are made up of four to 10 people in similar roles, career stages, or companies, who agree to meet regularly for thoughtful and confidential conversations about their work and lives—and learn from one another and grow. Forums differ from other types of work and business groups—like employee resource groups (typically for underrepresented populations in the workplace) and industry networks—because of their defined structure, the careful attention they pay to their composition, the training given their leadership, and the frequency, depth, and scope of the conversations they foster. Although this article focuses primarily on professional forums, they can also be used in many other settings, such as schools (for instance, for teenage children of divorced parents), health care facilities (for, say, parents of kids born through IVF), and community organizations (for people who have lost a spouse).

While their makeup, focus, and sponsoring organizations can vary, in our research over the past decade we’ve found that all successful forums serve the same important function: They allow participants to share concerns, show vulnerability, hear different viewpoints, clarify priorities, and make decisions with greater confidence. Members also build

camaraderie and form connections that help them feel safe, grounded, and capable in a volatile and uncertain world. The support they receive in forums sustains them through their toughest professional (and personal) challenges and fosters their long-term success.

Of course, there are other ways to achieve those benefits: practicing mindfulness and gratitude; diet and exercise; coaching, mentoring, and therapy; and counseling from family, friends, and close colleagues. But because members of peer forums typically have no previous substantive relationships with one another, they’re free from tricky preexisting interpersonal dynamics. Forums also offer access to a greater variety of perspectives. And their regular and carefully structured meetings ensure that members take time to think about important issues and discuss them productively.

Unfortunately, because of their small size and private nature, peer forums are still unknown to many people who could get value from them. In this article we’ll discuss the different types of forums, outline the practices that contribute to their success, and explain how leaders launch, organize, and run them.

Peer Forums Today

Connecting with other people of equal standing in small groups for collective benefit is a human tradition that goes back to the times when tribal leaders gathered around the campfire to distill the day’s stories into lessons for tomorrow.

In the business world, peer forums are offered by many firms and associations, including YPO, EGN (a partner of Harvard Business Publishing, HBR’s parent), Entrepreneurs’ Organization, and Vistage, as well as academic institutions. A number of companies organize their own programs internally. The concept has also taken root in the nonprofit world, often inspired and sometimes funded by executives who have benefited from their own peer groups. (Full disclosure: Both of us have connections to YPO. Robert has held a senior leadership role there, and Boris is a member of the YPO Learning Advisory Partner Group.)

Today’s forums tend to define themselves along three key dimensions:



Membership criteria. Some groups are limited to one industry; others include people from a mix of fields. Some encompass members at different points in their careers; others at just one or two stages. Often groups are geared to a certain type of role or responsibilities—say, CEOs, directors, or entrepreneurs—or leaders of businesses of a certain size. Still others are for people with a particular gender, racial, or sexual affinity.

Issue focus. In some forums the conversations are far-ranging, encompassing “the whole person”—business, community, family, and personal responsibilities. But many cover only business issues or even narrower topics, like career transitions and entrepreneurial growth. Then there are forums that look beyond business topics and focus on big social issues (like education, health, or economic development) or specific personal interests (children with special needs, medical issues).

Sponsorship. A peer forum may be set up and run by an individual, an organization, or an association. In-organization forums, which sometimes are part of a leadership development program and sometimes are companywide, are fairly prevalent. So are industry-focused groups, groups run by professional associations, and groups affiliated with schools or universities. (See the sidebar “The Most Common Types of Peer Forums.”)

For any individual, the right group, issue focus, and sponsorship may evolve over time as that person’s circumstances and needs change. But when you’re in the right forum, “you really feel like people are rooting for you,” Novakoski says.

“While therapists are trained to ask the right questions, to reflect back, to offer frameworks for thinking, they aren’t getting in the arena with you in the same way that your peers are,” he notes. “It’s remarkably comforting to know that my problems are being considered by some of the best minds, who care about my business as much as I care for theirs. We’ve committed ourselves to a trusted partnership, to doing life together, and that helps keep me mentally healthy.”

Peer forums offer concrete benefits to organizations as well—as a study done at the Fujitsu Social Science Laboratory, a division of Fujitsu that provides systems integration and IT solutions, found. When Ken Senda and Kentaro Iijima, two executives in the division, looked at the internal peer-group program it had set up, they found that

departments with higher participation in it experienced improved teamwork, increased employee satisfaction, and higher sales and profits than those with lower participation. “What makes peer learning such an effective means of leadership development is that the conversation is always in the context of the manager’s experience in the organization,” Senda and Iijima observed in an article for *Human Resources Director*. “Thus, the relevance and the recollection of the conversation is high. [The structure] is ideal for a group of practicing managers facing real business issues.”

The interactive entertainment company Electronic Arts has similarly realized performance and retention gains from its peer forums for high potentials. They “normalize the challenges of being a leader and help build courage to step up to them,” says Andy Billings, EA’s head of profitable creativity.

“Forums build and scale empathy at a faster rate than anything else I’ve seen,” says forum facilitator Sylvia van Meerten, who codesigned a program for Vynamic, a health care management consultancy. “Forums teach people to listen to *understand*, instead of listening to *respond*. They teach self-reflection in a safe environment, which leads to clearer communication. They teach people to value their group and show an entirely new level of loyalty.”

Best Practices

Peer forums are hard to study. Private groups don’t generally open themselves up to outsiders, and anyone who attends (even as a onetime facilitator or trainer) is generally expected to fully contribute. But we’ve been able to draw conclusions about forums’ value, best practices, and common challenges by doing deep fieldwork, including interviews with participants and leaders; analyzing program materials; surveying forum members; and mining our own experiences participating in peer forums over the past decade. In particular, we’d like to thank the hundreds of YPO members who’ve given us invaluable insights and the leaders, facilitators, and members of other forums who have shared what has worked for them. Many of the best practices we describe here are drawn from their contributions.

The right composition. To foster engaging and valuable conversations, a forum needs a diverse set of members

The Most Common Types of Peer Forums

Each has a different kind of sponsor and offers distinct benefits and challenges.

In-organization, as part of a leadership-development program

EXAMPLE: Electronic Arts' Xcelerators program for high-potential leaders includes peer forums. They meet in person three times during each of the program's six four-day training modules and virtually one to two times a month between modules and often choose to keep meeting afterward.

BENEFITS: These forums enable deeper workplace-relevant conversations within a specific cohort, including discussions of sensitive leadership challenges that are harder to raise in a large classroom.

CHALLENGES: Office politics may stifle conversation; organizational changes (like restructuring, promotions, and departures) can be disruptive.

In-organization, companywide

EXAMPLE: Spitfire Strategies, a nonprofit consultancy with offices around the United States, sets up "peer pods"—self-directed, virtual forums of seven to 10 people with similar responsibilities and pressures. The firm's employees have also organized their own special-interest pods focused on issues such as parenting.

BENEFITS: These build cohesion and resilience across the organization, serve as an all-employee benefit, and generate bottom-up insights.

CHALLENGES: They may complicate hierarchical communication and can be difficult to sustain when organizations face intense business pressures.

Industry-focused group or association

EXAMPLE: The Wine Industry Sales Education Academy has "cabinets" for members at three levels: executive leaders, direct-to-consumer directors, and direct-to-consumer frontline managers. Composed of eight to 10 members, these groups meet eight times a year for two to three hours with a professional facilitator.

BENEFITS: With experienced moderators, these forums tend to run smoothly and efficiently. They also bring collaboration to a competitive environment and produce industry-relevant insights.

CHALLENGES: Membership fees are typically required; sometimes it's difficult for participants to attend, given their work responsibilities.

Professional association

EXAMPLE: YPO, an international association of CEOs, developed peer forums as a more intimate alternative to large conferences and chapter events. It now offers industry-focused, regional, and global forums, and forums for members' spouses and young-adult children.

BENEFITS: Association forums group participants according to tight peer definitions; offer training, staff support, and facilitation; and often stay together for many years.

CHALLENGES: Membership fees are typically required; differences in business complexity, company maturity, or personal life stage can diminish their value.

School- or university-affiliated

EXAMPLE: The UCLA Principal Leadership Institute's forums are each made up of six to 10 alumni of UCLA's master's program for educators, who are district leaders or full, assistant, or aspiring principals, mostly serving in high-poverty communities.

BENEFITS: Members build from a common educational experience, going far deeper than typical alumni social or networking events.

CHALLENGES: Status as fellow alumni may not be a sufficient basis for sustained peer quality.

who are willing to listen, ask good questions, and share their experiences and feelings. The optimal group is large enough to include a variety of backgrounds and perspectives but small enough that the discussions are relevant, meetings are fairly easy to schedule, and everyone gets airtime. The sweet spot is typically four to seven people for virtual forums and five to 10 for forums that meet mostly in person.

Equally important is the quality of the members. Anyone considering joining a forum should ask: Are these people I can learn from and grow with? Can they support and challenge me? Do the issues and opportunities we want to discuss intersect in compelling ways? Are our professional roles similar in scope, tenure, and complexity? Are members

willing to make a serious commitment to protect the meeting time and to show up for one another?

The most effective forums avoid inherent conflicts from the start. Their leaders check that members won't be key competitors, suppliers, customers, close colleagues, or relatives of other members. They don't want hidden agendas, past baggage, or competing priorities to inhibit conversation.

Forum members must agree on the range of topics they'll address. In many successful groups both business and personal concerns are on the table, and no issue is too sensitive or taboo to bring up.

Members must also be aligned about the overall purpose of the forum, be it personal growth, professional and business growth, friendship and networking, or some



●● In good peer support groups, what's said in the room stays in the room. ●● Members know that they can trust one another completely.



combination thereof. At forums inside an organization, the purpose is often a mix of promoting business growth, developing leaders, and fostering a shared culture.

Principles for participation. Forums that are consistently valued by their members and organizational sponsors follow a well-honed set of rules.

→ **Protect confidentiality.** In good peer support groups, what's said in the room stays in the room. Members know that they can trust one another completely, and they restate their commitment to privacy at every meeting. Electronic communication is used only for logistical information. To avoid missteps, members preemptively discuss scenarios where they might trip up, and they have a clear process for resolving any confidentiality issues that may arise. If a forum is an in-company group, members and executives decide together what may (or must) be shared with bosses or HR.

→ **Commit to addressing key issues.** Forums should be the place to discuss your most critical topics with complete candor. Some of the richest conversations may focus not on immediate business or personal issues but on broader themes like purpose, resilience, or balance. Other subjects we've seen tackled in forums include:

- Business crises (My company is in trouble. My project is falling behind. My best employee is leaving. What do I do?)
- Feeling like an impostor (Do I have what it takes to lead my organization? How do I handle an investor, a boss, an employee, or a peer who is questioning my authority?)
- Personal finances (How much is "enough" for me? What are my goals and fears?)
- Societal issues (What current economic or political shocks are making my leadership challenges worse? How do I make decisions in situations when I can't serve all valued stakeholders equally?)

Novakoski notes that his YPO group covers "hard" stuff like strategic, financial, and operational decisions, as well as "softer" questions like, How do we hire the right kind of people? How do we become the employer of choice? At his company's own peer forums, he tells participants, "We're going to talk about the things that worked, the struggles we've had, what we are looking forward to personally and professionally."

→ **Share experiences, not advice.** In a classic *Dilbert* cartoon by Scott Adams, one of Dilbert's colleagues tells the

pointy-haired boss, "I followed your investment advice and lost all of my savings." He then asks, "How does advice actually work?" The boss's reply: "It only works for the people that give it."

When you give advice, you tend to feel smart and helpful. But no one should presume to know better than a peer what to do in that person's own unique situation. In forums, sharing advice may even inadvertently spark a competition over who can offer the "best" counsel. A better approach is to share experiences instead. This can be difficult for executives, who are accustomed to being asked for their opinions and telling people what to do. An easy rule of thumb is to stick to the first person: "Here's what struck a chord with me as I heard your story. Here's what I did. Here's what happened to me and how I felt."

→ **Be open and vulnerable.** When members of peer forums make a commitment to contributing authentically and vulnerably, it drives deeper sharing and greater value.

In successful forums, participants are encouraged—no, expected—to admit when they're questioning their own competence, priorities, and decisions; to share their disappointments, regrets, and dilemmas; and to speak candidly about positive opportunities and successes. Consider how Bonnie Godsmann, the CEO of GAMA Global, describes her association's "study groups." She calls them "a safe harbor from the vortex, a place to take a minute to breathe, to know you're not crazy, to take your mask off and not feel bad about that."

Jeff Snipes, another successful CEO, has participated for many years in his own executive peer forum and introduced forums several years ago to the faculty and students (including his own children) at Millennium School in San Francisco. He summarizes many of their best practices well: "listening, noticing, reflecting, inquiry, compassion, empathy, vulnerability."

Proven processes. The typical forum meets monthly, often on a set day and at a set time, for two to four hours in person or for one to three hours virtually (if members are geographically dispersed or it's challenging for them to gather). Of course, schedules can be adapted. We know of one group that met virtually from 6 AM to 8 AM because that's when everyone was available, another that arranged weekly 30- to 60-minute videoconferences during the



In times of crisis (like the pandemic), a forum can focus the agenda on critical or shared challenges.

Covid-19 pandemic, and others that scheduled ad hoc meetings when members faced new or unexpected challenges.

The most successful forums follow a standard structure to ensure efficient, equitable, and effective dialogue. Snipes says he has been struck by how similarly his own executive group and both teacher and student forums operate. “The content is different, but the agendas, tools, and language are all the same,” he explains.

Here’s what usually happens at a good forum meeting in YPO and many other groups:

→ **Check-in.** Members show up on time and silence their devices. The moderator or facilitator reminds everyone that the conversation is confidential and asks if any members are unable to be fully present, trusting, and vulnerable.

→ **Updates.** Members each give a brief (three- to five-minute) overview of the most significant issues on their minds. A helpful YPO template we’ve seen some groups use is to ask all present to share the things that are in their “top 5%” (biggest opportunities) or “bottom 5%” (greatest challenges). Alternatively, some groups prompt participants to answer questions like: What’s keeping you up at night? What gets you up in the morning? Which issue causes the greatest emotional stress for you?

Updates are the source for the forum’s “parking lot,” an evolving list of topics to be explored at the current meeting or in the future. From it, the forum will select subjects that are urgent or important or reflect common themes.

→ **Member presentations.** In-depth presentations are at the heart of most meetings. All participants should be given regular opportunities to make them, though usually only one or two people will do so at each meeting. The selected member begins by giving some background on a situation and then describing his or her feelings about it, potential courses of action, and desired outcomes. Other members may ask clarifying or thought-provoking questions and then share how they connect to the issue and what emotions or experiences it calls up for them. At the end of the presentation, all participants reflect on their takeaways: new insights, perspectives, questions, or to-do items. Often members find that they get as much out of others’ presentations as they do from their own.

→ **Topical exercises.** Sometimes forums substitute a thematic exercise—which may involve assigned reading,

How Effective Is Your Forum?

You can assess how it’s doing by asking these questions.

Purpose and content:

Does the forum address my personal objectives? Are the issues discussed worthy of my and other members’ time? Do I gain new perspectives on my blind spots and life choices?

Membership: Is this the appropriate, right-size group for me, balancing common interests with a diversity of perspectives? Are most, if not all, members showing up on time to every meeting?

Group norms and processes: Do the forum’s structure and norms

support vulnerability, learning, and trust? Is conflict addressed in a timely and effective manner?

Management: Do the forum’s leaders help foster a psychologically safe space? Are we following a clear agenda at every meeting?

Technology: Are virtual platforms used appropriately and effectively? If possible, do we prioritize meeting in person at least occasionally to sustain deep connections over time?

If you (and other members) can answer yes to all these questions, you’re in good shape. If you see some weak spots, work with your peers to improve in those areas.

assessments, case studies, and guiding questions—for members’ presentations. Common topics include transformational change, crisis management, alternative business models, effective hiring, being a good boss, attitudes toward money and financial planning, childcare and eldercare, confronting mortality, and religion and spirituality.

→ **A shift into crisis mode.** In times of crisis (like the pandemic), a forum can also focus the agenda on critical or shared challenges. The questions addressed often include: How can the forum help each of us today? What issues are most urgent? What feedback, ideas, or leads can you take action on immediately? Looking at longer-term personal impact is also key. Questions here might be: What part of your life needs the most care right now? How can you turn the current situation into a personal growth opportunity? Says Godsman, “Forums help us navigate the ‘now’ and the ‘next.’”

Effective leadership and training. Typically forums rotate leadership responsibilities. The member serving as



the moderator will set the agenda, guide the group through the scheduling and parking-lot processes, and model deep sharing as an inspiration for others. Grimm emphasizes that it's crucial for the leader to set high expectations for sharing so that a forum can address anxieties, build "connective tissue" between members, and become "a real learning laboratory."

Frequently, an assistant moderator keeps notes and handles meeting logistics and is designated to take over as the leader when the current moderator's term ends. And though forums may be launched without any professional support or formal education, they can benefit from the following:

→ **Orientations.** In these a volunteer or paid professional facilitator introduces new members to the forum's principles and processes and takes them through a sample meeting in which they prepare and share an update and experience a full presentation.

→ **Annual retreats.** These allow members to get away from their usual meeting venue, which is often around a formal conference table, and interact in a more relaxed and intimate setting. With or without professional facilitation, retreats help forums go deeper, reinforce best practices, clear the air on any issues that may be holding them back, and recommit to the shared journey.

→ **Moderator training.** This can help members keep their forums operating at a high level. It also allows participants to make connections with fellow moderators, share best practices, and address common challenges.

Flexible technology. A variety of electronic tools, as well as paper-based agendas and templates for updates, presentations, and exercises, can help make meetings more effective. Forums don't need to reinvent the wheel but can adapt materials used by other groups.

While peer support groups traditionally were conducted in person in a quiet space free from interruptions, virtual participation and all-virtual meetings are now an essential part of the forum process as organizations have become more distributed and the global pandemic has prevented people from gathering. Phil LeNir, president of Coaching-Ourselves International, notes that a virtual peer forum is better than no peer forum, especially during periods of social distancing. He says the pandemic has led people to seek more human connection, including new professional



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relationships, and that organizing groups online can be easier—and more sustainable over the long term—than requiring in-person meetings.

When participating remotely, members should meet via a videoconference platform, be on camera, and give the conversation their undivided attention. When appropriate, they can make use of features such as chats, digital whiteboards, and screen sharing. Forum moderators must proactively manage the discussion flow, calling on people by name. To protect confidentiality, the group should require a password to log in to the meeting space, use headsets, and prohibit recording or screen capturing.

Common Challenges

The performance, efficacy, and value of forums can't be taken for granted. Members and sponsors must be alert to signs of trouble. Perhaps the peer group doesn't gel because of inadequate vetting of members at the start. Maybe there have been breaches in confidentiality or discussions have become less candid. It could be that meetings feel inflexible, or too packed to tackle deep issues, or consistently dominated by a handful of people—or that participants are having trouble really connecting through Zoom. (To assess your current forum or one you are considering joining, see the sidebar "How Effective Is Your Forum?")

While challenges can be addressed one at a time, a holistic approach is more likely to identify key problems and their causes and help you find long-term solutions. We recommend three approaches:

Cultivating a spirit of continual improvement.

Members must regularly ask themselves individually and as a group: What did and didn't work in today's meeting? Is everyone aligned about the forum's purpose, values, and norms? What changes would make our forum more effective and valuable? How can we further advance both individual and shared objectives? Are we all carrying our own weight—participating fully, expressing appreciation for others' contributions, and raising concerns when we have them?


Clearing the air early and often. When a forum is functioning at its highest level, each member can honestly say, "There's nothing holding me back from being fully attentive, engaged, open, and trusting today." But sometimes members

may be distracted, irritated, angry, or sad because of issues within or outside the group, personal or professional. Rather than letting small annoyances build into bigger problems, forum leaders should schedule time at the start or end of every meeting for members to raise any concerns. Says Novakoski, "Sometimes I'm the one who needs to give an example for others, to demonstrate that admitting errors or failures is the kind of vulnerability we must all be willing to show."

Engaging an outside expert. Sometimes challenges are so disruptive or the combination of issues is so complex that the forum may need an outside facilitator (a professional or a veteran of another forum) to help the group go deeper, reinforce best practices, introduce new approaches, open dialogue, and support members in recharging and recommitting.

AN EDUCATOR IN a Millennium School forum summed things up well in an end-of-year update, calling forums "a place where you find a sense of peace and calm that allows you to become anything and everything you've ever wanted to be, because of the support, guidance, and encouragement you receive." We firmly believe that most people—and certainly many leaders—can benefit from being in a confidential group that's designed to help all its members meet their toughest challenges and achieve their highest aspirations. Having laid out the benefits that make peer forums a worthy investment of time, described the many forms they can take, and outlined the best practices for conducting them, we conclude with a call to action: Join or start a peer forum today. Find an existing group that's right for you, or work with others within or outside your organization to convene one. Create your own circle of trust; share, grow, and learn with others; and then spread the gospel of forums to the rest of your personal and professional network. ☺

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