



The Guidelines Required for a Successful Peer Advisory Council

CREATING EXPECTATIONS AND DESIRED BEHAVIORS

PaCs (peer advisory councils) are built on a foundation of collaboration and trust. Learn more about how rules for your councils guide a successful experience!

PaCs run best and are easier to moderate when there are guidelines. Guidelines are a set of expectations and processes that guide meetings and members in a productive interaction. There are two types of guidelines:

1. the behaviors everyone can expect from each other, and
2. the specifics of how the group will run.

This article focuses on the behaviors of a group.

Guidelines for how to run a group are addressed in a separate article.

Why create guidelines?

Guidelines create the culture of your group. If you are not explicit about creating guidelines, your group will create them on their own by default, and they may be different from what you want. Guidelines are necessary for running a high-functioning group. Guidelines make up the culture of your group. A lack of intentional culture will create dysfunctional groups, ultimately leading to a turnover.

What are the benefits of guidelines?

The benefits of having guidelines, or what we will refer to as rules of behavior, affect both you as the group leader and those who participate.

The primary advantages for putting this in place:



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Leading the group is easier to facilitate.

- The members know what is expected, resulting in less time spent coaching them as undesirable behavior occurs.
- It is less stressful for you and them when you have been proactive about what is expected of them as members since you can refer back to the behavior agreed to.
- When there are guidelines to refer to in the selection process, adding the right fit member to the group has a higher success rate. If a prospect wants to avoid committing to the guidelines, then you know they will not be a good member.
- The group participation is elevated, so you moderate at a higher level, making it more enjoyable for you and your personal development. It will feel like a team in sync.

The member experience is heightened.

- They understand what ideal behavior looks like and can practice modeling it, making the meeting more effective and efficient.
- They become better members by encouraging one another and modeling appropriate behaviors.
- A higher level of trust is created by knowing what is expected.
- There is a sense of ownership and a deeper connection because of established norms.
- It alleviates the member's stress from figuring out how to act in a meeting.
- Your members will see a greater return on their time investment in the meeting because you will be able to conduct a more meaningful agenda.

When is the best time to create PaC guidelines?

There are two critical times when it's important to create guidelines for your group: with a new group and with a group that has been operating for some time.

With a new group, begin the definition of guidelines by including them in the process and starting with a clean slate of expectations and what good behaviors look like. This is the ideal time and a necessary step to illustrate the formality of the experience they are about to embark



on. Your group will look more professional and like it has a plan and is paying attention to the members' experiences.

With an existing group meeting, the ideal time is when they have adopted less-than-desired behaviors. These behaviors can look like:

- Arriving late, leaving early, or being absent frequently
- Interrupting conversations
- Not being fully present and engaged.
- Lack of listening with intent and understanding
- Offering ideas or solutions too early in the process
- Not adhering to the process, you have already laid out
- Not preparing for the meeting
- Not following through on a commitment made to others in the group
- It can also be a good time when you are trying to nudge the group toward a higher level of operating as a peer group. It may be time to shake things up a little to keep them on their toes so they are not complacent.

What are examples of guidelines?

There are soft guidelines and hard guidelines. The soft guidelines are characteristics, and the hard guidelines follow more of a rule structure. You need both to run a successful meeting, and both are essential for the other to work properly.

Hard guidelines take the form of tangible actions that can be easily seen and experienced. For example:

- Be on time for meetings.
- Attend 80% of all meetings in a year.
- Respond to other peer inquiries in a timely fashion.
- Don't tell, but offer experiences and perspectives.
- Keep commitments



- Let the leader know in advance if you need to be absent or are running late.
- Keep all discussions and documents confidential, and have everyone sign a non-disclosure document.
- Prepare an annual presentation or any other reporting commitment.
- Share financials (this may be optional for your groups).

My favorite illustration of soft guidelines is from People Fuel by Dr. John Townsend, who wrote that there are eight characteristics (guidelines) necessary to have for a high-functioning mastermind group. Note the difference between soft and hard guidelines: soft guidelines are values that are illustrated by behaviors. We use these in all our PaCs to gauge the emotional intelligence, or EQ, of the group. The goal is to get the group to embrace and master these guidelines.

8 CHARACTERISTICS OF A HIGH FUNCTIONING GROUP

Shared essential values

1

- *Not everyone should believe or think exactly like you.*
- *Give and take mentality.*
- *Share important values like integrity and confidentiality.*

Engagement and growth on some structured level

2

- *Are you trying to move forward and progress in some way; grow.*
- *Committed to doing self-improvement behaviors.*
- *Challenge each other in a positive way.*
- *Apply learnings.*

Stand "for" you

3

- *Even if you make a bad decision or mess up, the group will be honest with you.*
- *Your peers will pick you up and want you to win.*
- *Not judging mistakes; seek to understand*



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4

Truthfulness

- *Be honest; no rubber-stamping.*
- *Don't stand by and let things happen; speak up.*

5

Mutuality

- *Sharing of successes and failures both*
- *Share learnings*
- *No secret pockets*

6

Chemistry

- *You genuinely like each other.*

7

Availability

- *You genuinely like each other.*
- *Monthly interaction to stay connected*
- *Have and make time for each other*

8

Vulnerability ****TRANSFORMATION HAPPENS HERE****

- *Unpack weaknesses, failures, and insecurities both ways*
- *Mutual, two-way*
- *Acknowledge shortcomings*

How do I implement these guidelines?

The process for implementing guidelines for new groups is different than with existing groups.

This is because new groups have a clean slate to start with and can proactively create buy-in and positive behavior initially. Existing groups are about reinforcing good values and behaviors and addressing the poor ones that have emerged.



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FOR NEW GROUPS WITH FOUNDING MEMBERS

Two key aspects of implementing successfully are having your thoughts outlined on what you know is essential for a successful experience and, second, asking your founding members to participate and add their insights. This will create ownership and excitement, bonding your members to the group and your process.

In the first meeting or at the group's first gathering, ask the founding group members to brainstorm and talk about what would be important to them to expect from each other and themselves. After discussion and agreement, create a document or visual of the guidelines for reference at each meeting. They will become a charter for the group and the beginning of creating the culture you desire.

FOR EXISTING GROUPS WITH OR WITHOUT A DEFINED SET OF GUIDELINES

Ask the group what they think their group norms are. What are normal behaviors that show up regularly? What behaviors do they like, not like, want to change, and want to add? Have them brainstorm what behaviors they personally need from their peers and you to have the best experience possible for themselves. Then brainstorm what behaviors they believe they need to improve upon to make the experience better for their peers.

AN ADVANCED EXERCISE FOR GROUPS ALREADY FAMILIAR WITH THE GUIDELINES

At some point, existing groups that have been together for some time should revisit and evaluate their guidelines. Some guidelines become out of date for where the group is operating, and others need to be added. This is especially true with the hard guidelines mentioned above. It's especially interesting to see how well they're doing with the soft guidelines.

An advanced exercise is to take the guidelines created by the group and the 8 Characteristics of a High-Functioning Group above and ask every member to quietly reflect and rank how well the group as a whole is doing in each, and then rank how they personally are doing in each. Two rankings emerge, which are then openly debated. Determine which ones should be improved or changed as a whole. Then have each member choose the soft area they are committed to improving. Usually, most members choose #8, vulnerability.

The last step is to always memorialize by creating an updated document for reference. Consider having everyone sign it as their commitment to each other and themselves.



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Are the rules for a virtual PaC the same?

The rules for virtual, online councils are similar in concept. There are both soft and hard guidelines, as discussed already, but there will be a few nuances in the hard guidelines. For example, a virtual norm might have the following:

- Raise your hand when you want to speak.
- If we need to move on, a white flag will be waived.
- Stay focused and present on screen; do not do email.
- Video is to be on at all times, unless for small moments of time.

Your role as a group leader will be so much easier, and the experience of your members will be much more positive, if you have both these soft and hard guidelines to live by.

Additionally, you will appear professional to your members and send a message that you value their time and ensure they will receive value by participating in your well-run group.

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