

## PeerSpectives roundtables enhance leadership abilities, improve decision making, say participants

“My company is currently in the black because of PeerSpectives,” says Bill Norris, founder of Insurance Data Services, a medical billing company in Wyoming, Mich.

Norris joined a PeerSpectives roundtable in early 2006. Although IDS had been successful for nearly 30 years, the company had gotten off track and was bleeding red ink.

Many of the company’s problems were due to managers becoming “lackadaisical,” Norris says. Yet sharing his issues at the roundtable and hearing how other CEOs handled similar situations had immediate impact.

“IDS has been on an improving basis since I joined PeerSpectives,” Norris says. “We’re doing a better, faster job for our clients, and in terms of profitability, both my company and our clients are in better shape than ever.”

### Unique methodology

Based on peer learning, PeerSpectives is a CEO roundtable system created by the Edward Lowe Foundation, recognized nationally for its work in peer learning. The program was originally designed for leaders of second-stage companies—businesses beyond the startup phase that are focused on growth. Yet PeerSpectives also benefits second-tier management in for-profit companies as well as leaders of nonprofit organizations.

“Peer learning is becoming a national trend,” says Penny Lewandowski, the foundation’s director of entrepreneurship. “One of the things that makes it so appealing is the real-



time, on-target feedback. You’re sitting with a group of people who know what it’s like to be in your shoes. They’re facing many of the same issues, and you benefit from someone who has ‘been there, done that.’ There’s a sense of trust and accountability you just don’t find with a group of strangers.”

Indeed, commonality is a big attraction for Chris Willis in Grand Haven, Mich.

“PeerSpectives is a place where I can talk with other experienced executives and entrepreneurs about the special needs my company has,” says Willis, CEO of Media 1, a second-stage company that creates online learning programs for large firms.

A few months after joining PeerSpectives, Willis left a roundtable she had belonged to for several years.

“Up to then, it had been one of my favorite groups. But I didn’t have time for both, and I was getting more value out of PeerSpectives,” she says,

referring to her roundtable’s focus on second-stage companies.

One of the things that sets PeerSpectives apart from other roundtable programs is an emphasis on sharing experiences as opposed to giving advice.

### Experience-based learning

“It’s about discovering more than one right answer,” Willis says. “If someone gives me advice, it closes my mind to other possibilities. Instead, PeerSpectives members ask questions that make me think about my situation and resources, which empowers me to see things differently.”

The most valuable business lessons stem from being in the trenches, points out Steve King, president of Anderson Lubricants Inc., a lubrication distribution company based in Superior, Wis.

“Sitting around a PeerSpectives

roundtable with seven other business owners and drawing from their experiences not only has helped me get through a couple of jams but also see how to avoid some in the future,” King says.

King also credits PeerSpectives for:

- Improving his relationships with employees.
- Making policy changes with more confidence.
- Better time-management skills.
- Reassurance on past decisions.

“When I first joined PeerSpectives, my company was looking at some competitive threats,” King explains. “I was able to walk away with confidence that we were on the right path.”

### A trusted environment

Similar to the Las Vegas tourism ads, what’s said at the roundtable stays in the roundtable.

“Every conversation is confidential, so you can really let your hair down,” says Ed Amaya, president of Kenowa Industries, a custom metal fabrication company in Holland, Mich.

Amaya credits PeerSpectives for helping him work through an awkward personnel issue involving senior management, one that was “the most difficult situation I’ve faced since becoming president,” he says.

Although Amaya had some initial ideas for handling the problem, he hesitated to act because he was in unfamiliar territory. Getting feedback from the roundtable gave him the confidence to move forward. “They

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*—Bill Norris of IDS*

affirmed that my plan was the right thing to do—and gave me some ideas for how to present the solution,” Amaya says.

Besides providing a confidential forum to share problems, Amaya finds the roundtables inspiring.

“You leave meetings feeling rejuvenated because you know other people are going through the same things you are—that you’re not alone, and that they’ve come out on the other side,” he says. “It’s helped me personally

as well as professionally.”

### Trained facilitators

Key to PeerSpectives’ success are trained facilitators and a protocol that ensures balanced discussion, explains Dino Signore, manager of program development at the Edward Lowe Foundation. “No one talks too long or too little,” Signore explains. “Time is built in not only to discuss new problems, but also to give updates on past issues.”

These updates create a sense of accountability, says Norris.

“When I present an idea to the group, I’ve got 30 days to get some action going, because I have to go back and tell these people what happened,” he explains. “I haven’t had to be responsible to anyone but clients for 30 years. Yet the roundtable now makes me responsible to my peers, which is very motivating.”

And even if a discussion isn’t one he initiated, Norris says that he still learns. “We all own different kinds of companies, but our problems are the same,” he explains.

“Each time someone throws out a story, there’s a solution—or, at least, a path not to take. And that’s just as helpful—knowing what to stay away from, what to guard against.”

## PeerSpectives broadens its reach

Originally designed for second-stage entrepreneurs, PeerSpectives is now available to leaders of nonprofit groups and individuals from noncompeting organizations who have the same level of responsibilities, such as operations, marketing or finance.

“We realized that, in addition to second-stage companies, PeerSpectives could help other audiences, so we’ve created individual licenses that

open the program to more people,” explains Penny Lewandowski, director of entrepreneurship at the Edward Lowe Foundation.

For more information about joining a PeerSpectives roundtable:

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