

Peer Teach Back Planner

Use the method

Check understanding by having a learner explain and demonstrate one task to a peer. Use this after a lesson, procedure walkthrough, or practice session. The output is a short explanation plan, observed gaps, and a correction followed by another attempt.

- 1. Choose a bounded topic.** Pick one task or decision the learner should understand. Name the audience and the result the peer should be able to reproduce.
- 2. Prepare the explanation.** Include purpose, required inputs, ordered steps, one decision point, a common mistake, and how to check the result.
- 3. Explain in the learner's words.** Use a short demonstration and a realistic example. References may be used, but reading a procedure aloud does not alone show understanding.
- 4. Have the peer apply it.** Ask the peer to explain the key decision or perform a safe practice case. Invite questions about what is unclear.
- 5. Record gaps without blame.** Distinguish a missing step, a wrong explanation, and a confusing example. Check the authoritative procedure when participants disagree.
- 6. Correct and repeat.** Revise the explanation, repeat the unclear part, and use a slightly different case. Record whether the peer can now apply the method.

Worked example

Illustrative topic: turning a customer request into a complete intake record. The learner explains why contact details, desired result, needed inputs, and timing matter before scheduling.

Practice request: "I need these files cleaned up soon." The peer asks which files, what finished means, who reviews, and the actual requested date. The learner demonstrates where to record those answers.

Gap: the explanation implies that a requested date is already a promised date. The peer spots the ambiguity. The authoritative intake map requires a capacity check before confirming delivery.

Correction: learner adds the capacity decision and repeats with a new request. Success evidence: the peer records a requested date separately from the confirmed delivery date and explains who authorizes the commitment.

Before you put it to work

- [] The learner explains the purpose and method in their own words.
- [] The peer applies a decision or performs a practice task.
- [] Disagreements are checked against an authoritative reference.
- [] A corrected explanation is tested again.

If the problem keeps returning

If teach-back stays superficial, use a case with one exception and ask why the next step changes. If neither person can resolve the exception, return to the task owner before teaching it as settled practice.

Connect the tools

Use AI-05 for captured knowledge and LS-03 for a formal demonstration record.

First use

Use the worksheet on the next page for one real task. Complete the decision fields, name the person responsible, and choose a review date. Duplicate the worksheet when you need another record.

Working worksheet

Name or team _____ Date _____

Topic and participants

Task, learner, peer, date, and authoritative reference.

Purpose and inputs

Why the task matters and what is needed to begin.

Explanation plan

Main steps, decision point, common mistake, and result check.

Complete and review

Practice case

Safe example, peer action, expected result, and evidence.

Questions and gaps

What was unclear, missing, or incorrect; reference used to resolve it.

Correction and repeat

Revised explanation, different case, observed result, and next practice date.

Review after use

What question exposed the most useful gap? _____

What changed in the explanation? _____

Could the peer apply the revised method? _____

What procedure or training note should be updated? _____

Next action _____ Owner _____ Due _____