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# BEST PRACTICES IN UTILIZING 360 DEGREE FEEDBACK

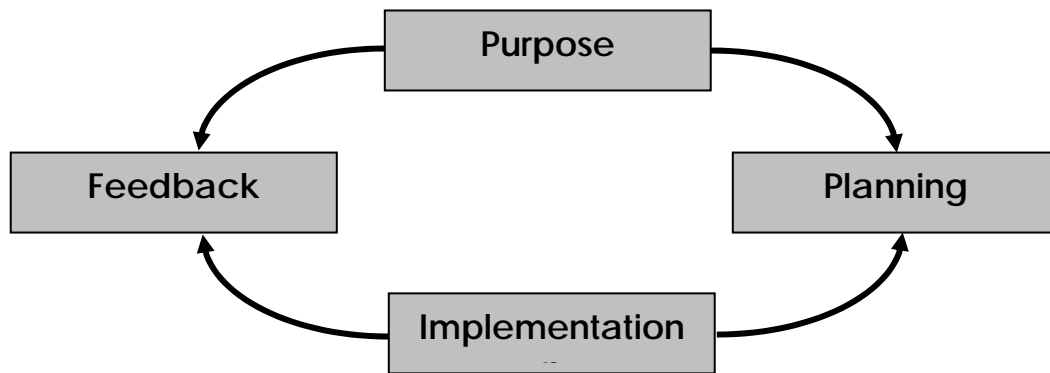
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Multi-rater or 360 degree feedback is a critical component of most talent development programs. Research on 360 degree feedback suggests some “Best Practices” that when followed maximize the use of the feedback for future behavior change. This section will provide some suggestions and recommendations (“Best Practices”) for consideration in the implementation of any 360 degree feedback process.

## 360 PROJECT CYCLE



Of the four stages in the project cycle shown above, the more time and quality thinking which go into the Purpose and Planning stages the more likely the 360 project will be successful.

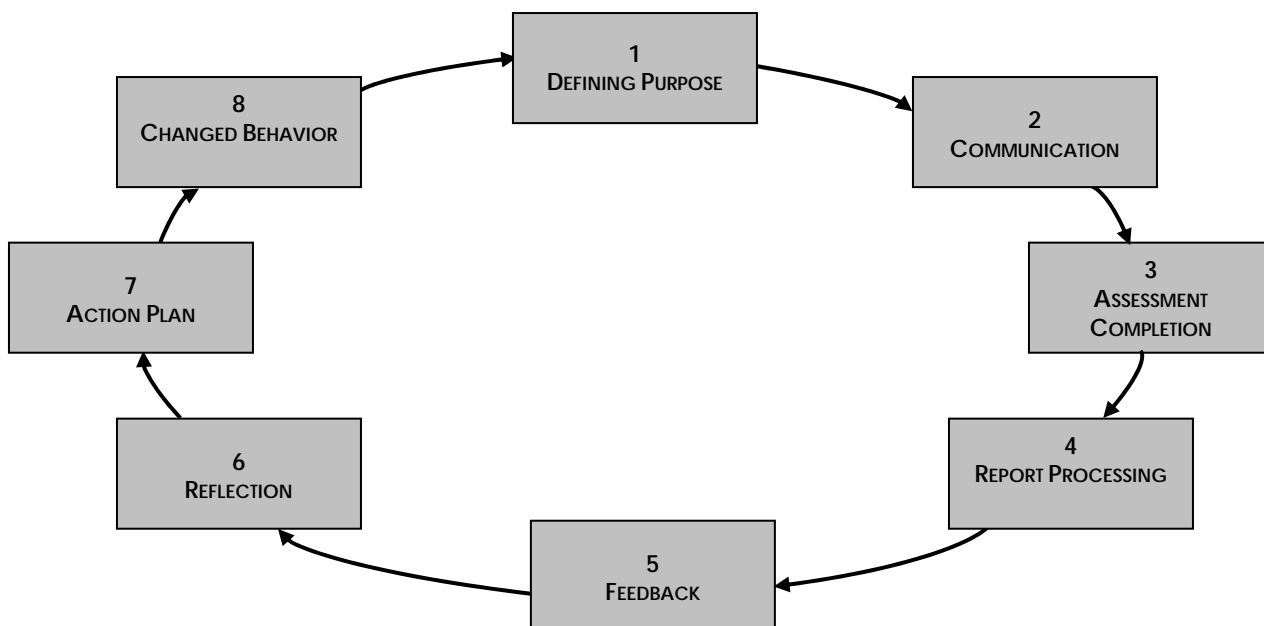
## WHAT IS THE PURPOSE OF THE 360° FEEDBACK PROJECT?

It is important to emphasize that 360 degree feedback is **not** an end in itself. It is a process to help individuals become more aware of their strengths and potential development areas to facilitate behavior change. When used for developmental purposes, it is important to adhere to “Best Practices” to maximize behavior change.

## SOME RARELY UNDERSTOOD ISSUES IN PLANNING YOUR 360° PROJECT

It must first be realized that a complete 360 degree feedback intervention will typically take longer than you think; secondly, the feedback process will be somewhat more involved than you imagine.

### A Typical 360 Degree Feedback Process



Looking at the feedback process illustrated above, what 360 degree feedback does is to formalize the natural **feedback** process (1). People observe each other all the time, often unconsciously and unsystematically. They gain impressions, some of which are remembered and some of which are forgotten. These perceptions are formed continually in any relationship and result in an impression of your client's style and effectiveness. The formalization comes from **communication** to the participant and his/her invited raters (2) to think about you in a conscious and structured way, usually by completing some form of online **360 assessment** (3). The data obtained is then processed into a formal **feedback report** (4) containing raters' perceptions expressed in numerical, graphical and narrative form, which is then presented as **feedback** (5).

The minimum time for these first five stages is often 30 days or longer, and that is after the 360 project has been planned, set up and communicated. This represents the **fastest** part of the feedback process, and many coaches may think mistakenly that the job is done when it is completed.

The key issue is what a client will do with the information once they have received it, and that part of the process does not even start until Step (6) “**Reflection**”. Reflection involves several activities including self-analysis by the client, discussion with a coach, mentor, or supervisor, sharing feedback with others, clarifying things which came as a surprise and validating things they already are aware of. Only when this has been done can the client translate the data into a meaningful and practical **action plan** (7) which will result in **behavior change** (8).

This feedback and behavior change process, from initial idea to the observation of an improvement in performance, can take 12 months or more, and if any one stage is done poorly, then the impact of the 360 intervention can result in little or no change.

Here are the key “Best Practices” questions you need to answer when setting up a 360 degree project:

### 1. WHO SELECTS RATERS?

Selection of raters is important to ensure “buy in” and acceptance of the feedback results. Typically, raters can be selected by program participants; they can be selected by management or it can be a participative process between the participant and management. When used for developmental purposes, research suggests that allowing participants to select their own raters may enhance feedback acceptance without reducing rater accuracy (Nieman-Gonder, 2006).

### 2. WHAT TYPE AND HOW MANY RATERS SHOULD BE INCLUDED?

The type of raters included in any 360 process is determined by both the purpose of the feedback (developmental or selection) and the competencies being measured. When used in a developmental capacity, it is encouraged that all raters that are available be invited to participate and that participation be voluntary (e.g., peers or team members). When the focus is on enhancing management practices and leadership effectiveness, a greater emphasis should be placed on both upward and downward feedback. Research suggests that peers, team members and other internal/external customers are often unable to provide objective feedback on many daily managerial tasks (i.e., they are unable to observe specific supervisory and managerial behaviors).

Limited research is available to guide decisions on the optimum number of raters necessary to increase validity of 360 feedback results. Greguras and Robie (1995) found that little within-source variability existed in a study of 153 managers using 360-degree feedback. Using generalizability theory, they analyzed the number of raters and items required to achieve adequate reliability in practice. These researchers suggest that if a 360-degree feedback assessment has an average of 5 items to measure each competency (common in practice), it requires at least 4 supervisors, 8 peers and 9 direct reports to achieve acceptable levels of reliability (.70 or higher).

### 3. WHAT TYPE OF RATING SCALE SHOULD BE USED?

Most 360 degree assessments use four different types of rating scales: 1) Effectiveness; 2) Potential; 3) Ranking and 4) Frequency. Effectiveness scales ask participants and raters to provide judgments about how “effectively” the individual demonstrates specific competencies and underlying behaviors. Potential scales are more commonly used for succession planning systems and ask raters to predict how well the participant might perform in the future or what potential they have to succeed. Ranking scales typically ask raters to compare to some type of standard (e.g., evaluate the participant compared to the most effective leader that he/she has experienced within their organization). Frequency scales typically ask about how often the participant has demonstrated or expressed specific behaviors.

The goal of any 360 assessment is to provide targeted feedback on critical success factors that will be included as part of a coaching, training or development program. If the program is successful, it is hoped that talent will be more effective in practicing and demonstrating specific technical, leadership, task/project management, or communication competencies and behaviors. Feedback that is less ambiguous and more behaviorally oriented will be most helpful to the talent using the 360 process. When questions measuring competencies are written to reflect effective or desired behavior, frequency scales provide more clarity about what strengths should be leveraged and potential areas for improvement.

### 4. WHO SHOULD RECEIVE FEEDBACK FROM THE ASSESSMENTS?

The goal of all 360 feedback processes is to provide clear information for professional development in a manner that motivates individuals to make specific behavioral change leading to enhanced effectiveness. The feedback from 360 assessments can be shared with the program participant, his/her manager and/or others within or outside the organization (e.g., human resources or external consultants).

Based on research, “Best Practices” suggest that motivation for behavior change is increased when feedback is perceived to be confidential and used for developmental purposes. Participants and raters who believe that the feedback will be shared with others or believe that the process is not anonymous tend to inflate ratings or “game the system” making the information less objective and candid. Senior management sometimes is a bit defensive with this option believing that he/she should also receive a copy of the assessment results. However, when used for developmental purposes, 360 feedback results shared with the participant’s manager can decrease motivation on the part of the participant due to mistrust of how the data will actually be used. In a large corporate 360 evaluation study conducted by Envisia Learning, observed behavioral change was greatest when the 360 process was used developmentally and when the feedback was shared only with program participants.

## 5. HOW SHOULD THE FEEDBACK BE GIVEN?

It is important that participants in a 360 degree feedback process be given a chance to interpret the report in a manner that enhances motivation to change behavior. Typically, feedback reports are returned to individuals during workshops or individual meetings, rather than, just mailed or emailed without facilitated discussion.

In a large corporate 360 evaluation study conducted by Envisia Learning, observed behavioral change was greatest when feedback reports were facilitated by either an internal or external consultant. Based on research, “Best Practices” suggest that 360 feedback should be facilitated by either internal or external facilitators/consultants to ensure that the report is clearly understood and any potential negative reactions are managed. The use of internal or external facilitators/consultants can help focus specific developmental areas and highlight specific training that might be most useful for the user of the 360 feedback process.

## 6. HOW CAN DEVELOPMENT BE FACILITATED?

Multi-rater or 360 degree feedback systems that have an action plan linked to them have been shown to be more successful than those that do not. “Best Practices” suggest that program participants and their own manager should meet to discuss results and to implement a development plan for behavior change.

This professional development plan should be included as part of the ongoing evaluation system to ensure it is monitored and reviewed (note that the feedback results should not be used as part of any overall evaluation rating or compensation decisions— only as one part of the developmental planning process). The professional development plan should be specific about additional training, on-the-job activities, or developmental resources that the talent will be focusing on. Finally, it is recommended that the professional action plan be written and implemented using a current web based learning system (e.g., using **Talent Accelerator**) to facilitate monitoring and tracking progress by an internal or external coach.

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**MY DEVELOPMENT**

**Welcome to Talent Accelerator**, a comprehensive online resource system equipped with competency-based references including books, web sites and other valuable development tools, to help you transfer self-awareness into real behavior change. Once your strengths and developmental needs have been identified, boost your plan for success -- create and measure goals, incorporate meaningful suggestions and sustain focus on your professional development.

**EiView360** <sup>⊕</sup> | [View Resource Library](#)

**EiView360** is a comprehensive tool for measuring individual strengths and developmental needs on critical social, interpersonal and communication competencies.

1   ENLIGHTEN	2   ENCOURAGE	3   ENABLE
<b>Hominated Raters</b> <hr/> <b>Self</b> Puchkin Craciun <b>Manager</b> andy park <b>Peer</b> nikki j ken n <b>Subordinate</b> kinchu c eff c <b>Team Member</b> cappy tan o pollack <hr/> <a href="#">View Report</a>	<a href="#">Select Development Areas</a>	

**stressSCAN** <sup>⊕</sup> | [View Resource Library](#)

**StressScan** provides an individual scorecard of important health resources and risks shown to be associated with job burnout, physical illness, depression, absenteeism and well-being.

1   ENLIGHTEN	2   ENCOURAGE	3   ENABLE
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## 7. HOW CAN THE 360 FEEDBACK PROGRAM BE EVALUATED?

The initial 360 feedback provides a benchmark and baseline for the talent. It is hoped that the results of the 360 feedback program will result in enhanced performance and effectiveness. One important metric to evaluate this type of training intervention is to compare change over time on the key competencies being measured through the 360 feedback assessment. This ensures that the 360-degree feedback is a process focusing on individual change, rather than, a one-time event which is frequently seen within many organizations.

“Best Practices” suggests that the 360 degree feedback process be repeated 12 to 18 months following the initial administration to facilitate the effectiveness of the training program and monitor individual progress on individual development plans.

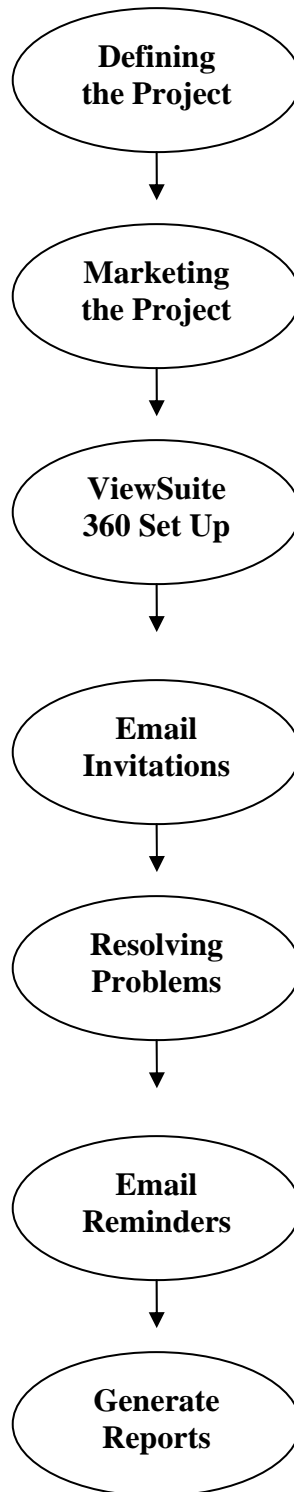
# Envisia Learning ViewSuite 360 Feedback Online Flow Process

## Step 1: Defining the 360 Feedback Project

This step includes first defining the purpose of the 360 feedback intervention with your client and answering the following questions together with them:

1. Who is the target audience (executives, managers, teams, professionals, etc.) and how many will be participating?
2. What competencies are going to be measured?
3. Which ViewSuite 360 assessment is most appropriate (off the shelf or customized)?
4. What do they want to say in email instructions that go out to participants? To raters?
5. What is the deadline date for completing the online questionnaire?
6. What date do the feedback reports need to be received to support the coaching or training intervention? Where are they to be sent?
7. How will raters be selected (participant decides, management decides, or joint decision)?
8. How many raters will be invited to provide feedback?
9. Which rater types will be invited to provide feedback (direct reports, customers, peers, team members, manager, etc.)?
10. How long a period of time should a rater work with a participant to be invited to participate in the feedback process?
11. Who will receive the feedback reports?
12. Are feedback reports to be printed/shipped or emailed?
13. Should the graphs in the reports use Envisia Learning norms, company specific norms or average scores?
14. Should the open-ended questions in the feedback report be broken down by rater group or collapsed?
15. Is the company using any spam or email filters that would prevent automated emails being sent from [support@envisialearning.com](mailto:support@envisialearning.com) to be received?
16. Who will be given permission to track and monitor online progress of the 360 feedback process?
17. Who will be given permission to access the ViewSuite administration website to send out emails, add new raters and handle any email problems?

# Envisia Learning ViewSuite 360 Feedback Online Flow Process





## **Step 2: Marketing the 360 Feedback Project**

This step includes communicating the purpose and administrative process of the 360 feedback intervention to both program participants and raters before getting started and rolling the program out. This communication can be either in a group setting or via email to all participants and raters involved. This communication should clarify the purpose of the 360 process, assure confidentiality, stress that the participation is voluntary, explain who will actually receive feedback reports and how the results will be used.

## **Step 3: Project Set Up**

This step includes setting up a 360 feedback project using the ViewSuite administration system. It is typically done by Envisia Learning staff but can also be done by a consultant or project administrator identified within the client organization with a quick orientation to how to access and use the system.

Once the specific ViewSuite 360 tool is selected for the project, our Envisia Learning staff will send the consultant or client our email template to go out to the participants and his/her selected raters. This text is typically edited and sent back to Envisia Learning along with a company or consultant logo for use in co-branding on both the online questionnaires and report covers. This text includes important information such as the purpose of the 360 process, deadline date for completion, how to select raters, assurances of confidentiality and steps for completing the online 360 questionnaire and selecting raters. The ViewSuite 360 project set up requires the following information from the consultant and/or client company which is entered into our administrative system:

1. The full names and email addresses of the participants and company.
2. Company and/or consultant logo for our online questionnaires and report covers.
3. Deadline dates for completion and reminder dates for emails.
4. Edited text that will go to program participants and selected raters.
5. Labels to be used for the rater types participating in the 360 process (e.g., standard rater labels are self, manager, direct report, team member, and peer).
6. What to say in the email "Subject Header" for the text going out to participants and raters.
7. Preference of the text to identify where the emails from Envisia Learning are coming from (the View Suite 360 administration system can specify where the emails come from so it will appear in participant/rater email as coming from the consultant or company to minimize confusing these instructions as spam).

## **SPAM Prevention and Email Testing**

Before any emails are sent out to participants, it is highly recommended that a pilot test be done to ensure that the client company does not have spam or email filters to prevent the Envisia Learning View Suite 360 administration system from working properly. It is typically done by Envisia Learning staff but can also be done by a consultant or project administrator identified within the client organization with a quick orientation to how to access and use the system.

It is recommended that a contact person be identified within the company to receive a test email from our system. If they do, it is likely that no further email problems due to spam or email filters will be the cause of receiving email instructions (since participants select his/her raters online, it is possible that the wrong email address is typed in).

**IMPORTANT:** Even if they do receive the email, some messages may be blocked by company specific spam or email filters at a later date. Whenever possible, it is important to contact the internal IT department up front, explain the situation and ask that all emails from support@envisialearning.com will be allowed through.

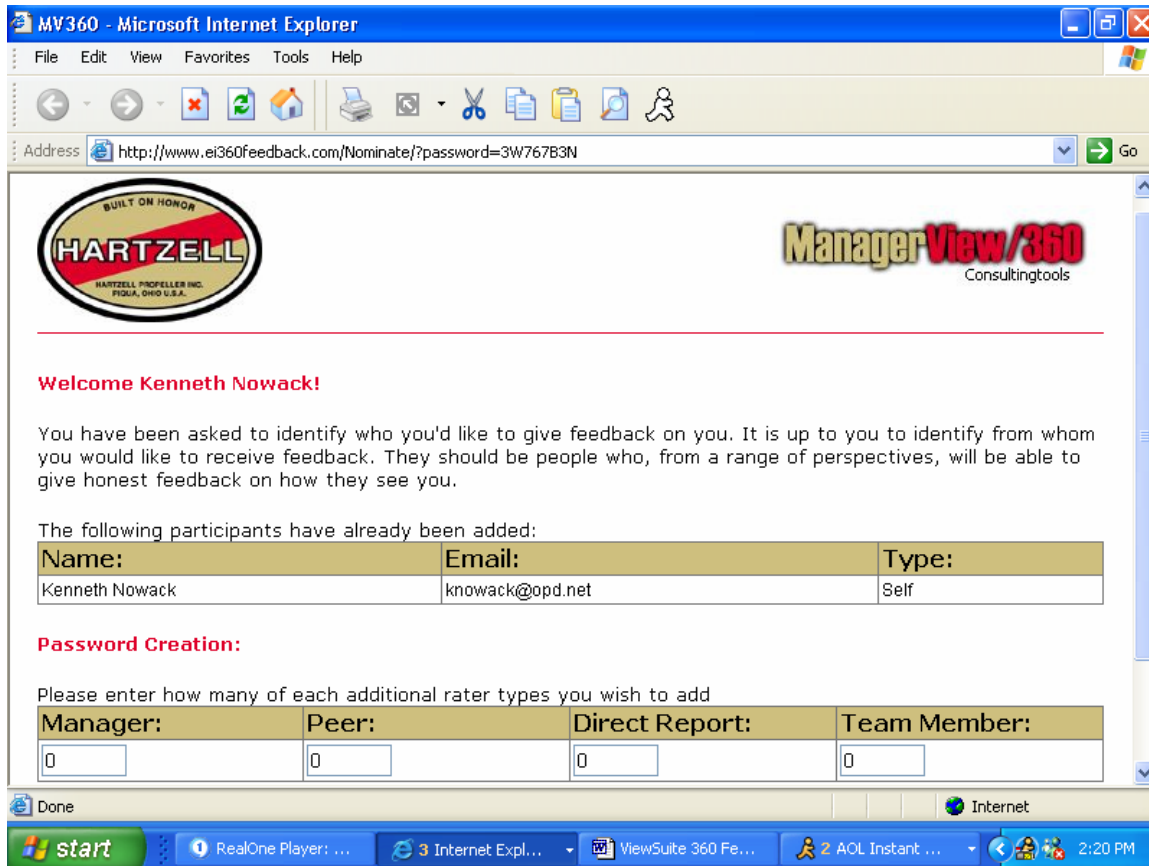
It is not uncommon for raters to delete emails received from our system thinking it is SPAM. For this reason, Envisia Learning recommends again that the project is clearly communicated ahead of time to all participants to let them know that the 360 administration is being handled by an outside consulting company. Additionally, the ViewSuite 360 administration system can also specify the name of the consultant or company as to where the email is coming “from” to minimize it being immediately deleted as SPAM.

## **Step 4: ViewSuite 360 Email Instructions**

This step includes sending out email instructions to the participants from the ViewSuite 360 administration system. It is typically done by Envisia Learning staff but can also be done by a consultant or project administrator identified within the client organization with a quick orientation to how to access and use the system.

Once the participant receives the email instructions from Envisia Learning (the text of which has been edited and supplied by the consultant and/or client company), they are asked to do two things:

1. Complete his/her own questionnaire online by clicking on the embedded link in the email or “cutting and pasting” the URL provided into their browser
2. Selecting his/her own raters by completing a very brief form online (see screen shot below).



Once the participant types in how many raters in each of the rater groups above, the page will then open to a form to type in the names of the raters and their email addresses. Once this form is completed, the participant is asked to “submit” this list by clicking on a button at the bottom of the page. Once this is done, email instructions to the raters are sent out automatically (again with text edited by the consultant and/or client) asking them to complete the 360 questionnaire online.

### Step 5: ViewSuite 360 Email Problems

The View Suite 360 administrative system works very effectively but sometimes email problems and errors can occur as discussed earlier. The typical email problems and solutions are summarized below:

1. Emails Are Not Received Because Of Filers or SPAM Blockers: A pilot test is a good way to ensure that the company is not blocking emails. If they are being blocked, asking the IT department to allow emails coming from [support@envisialearning.com](mailto:support@envisialearning.com) will take care of this problem.
2. Emails are Not Received Because the Addresses are Typed Incorrectly: The View Suite 360 administration system allows for updating email addresses and sending out new emails. Bounced emails can be sent to either Envisia Learning or the consultant and/or program administrator.

3. Participants/Raters Click on the Embedded Link and it doesn't take them to the Questionnaire: Some rarely used browsers such as Safari, very old versions of Netscape Navigator or attempts to use Lotus Notes have sometimes caused such errors. Participants and raters asked to use an alternate browser such as Internet Explorer (IE) typically have no trouble accessing the questionnaire.
4. Participants/Raters are Unable to Answer the Questionnaire after the Deadline Date: The View Suite 360 administration system allows for the specification and changing of a deadline date. If a participant or rater attempts to complete the questionnaire after this date, they will receive an error message that the questionnaire is unavailable.
5. Participants/Raters click on the Embedded Link to Take the Questionnaire Online and It Does Not Seem to Work: This is very rare and due to some temporary problem with service provided by the internet service provider of the participant or rater. Attempting to complete the questionnaire again at a later date seems to remedy this problem in most cases.

#### **Step 6: ViewSuite 360 Email Reminders**

Clients and/or administrators have the ability to track and monitor progress for each participant and rater using the ViewSuite 360 system. Sometimes, it is important to send out reminder emails to either participants or their selected raters to ensure timely completion of the online questionnaires.

The View Suite 360 administrative system allows for either scheduled email reminders or ones that can be sent out manually. It is typically done by Envisia Learning staff but can also be done by a consultant or project administrator identified within the client organization with a quick orientation to how to access and use the ViewSuite system.

The text for the email reminders can also be customized along with the initial email instructions to participants and selected raters.

#### **Step 7: Generate ViewSuite 360 Reports**

All of our ViewSuite 360 reports can be either printed and shipped or emailed in Adobe PDF format. Raters can be reclassified or deleted if necessary (e.g., the participant initially classified a "Direct Report" as a "Peer") before a report is generated. It is important to note that the View Suite administration system also utilizes a feature called Anonymity Protection (AP) to ensure confidentiality of reporting when less than a specific number of raters have completed the online questionnaires (the default is set at "2" except for the "manager" rater category). However, Envisia Learning staff or the ViewSuite administrator can modify this AP number at any time.

## GROUP REPORTS AND TIME SERIES REPORTS

1. Group Reports: All of our ViewSuite 360 products allow for both individual and group reports. The ViewSuite group reports provide for a summary of all raters within a project providing a snapshot of group/team strengths and development areas. The group reports do not include any open-ended questions.
2. Time Series Reports: All of our Viewsuite 360 products allow for time series reporting at the individual level (i.e., report summarizing an individual's results over two administrations—Example: Before and after a coaching intervention). This report feature is very useful for coaches, consultants and trainers who are looking for a way to evaluate improvement and behavior change. Each report will contain the open-ended questions gathered at the second time period.

Each ViewSuite 360 product has several options in the reporting that can be selected (e.g., use of normative scores or average scores in the graphs, classification of rater groups in the open-ended questions, inclusion of line graphs or bar graphs for the ViewSuite tools using the software, etc.). Additional information is available from the Envisia Learning staff about what report options exist for each specific 360 tool or visit the options website page at: <http://www.360online.net/reportOptions/>

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