360° Feedback
Strategies for Success

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INTRODUCTION

360° feedback has been used in organizations for many years to measure various aspects of performance – skills, styles, and competencies – from a variety of individual/group perspectives. These usually include the *participant*, who self-assesses, his/her manager(s), direct reports, peers, and internal/external customers (the *respondents*). Results are summarized and shared with the participant, with an eye to development of an action plan to capitalize on strengths and resolve gaps in performance.

A successful 360° feedback process is more than a questionnaire and feedback report. It includes solid planning, administration, questionnaire design, feedback reporting, and development planning and follow-up. Commitment to the process must be demonstrated and fostered right from the outset. Successful 360° feedback programs involve all stakeholders. When management, participants and respondents are involved in all stages of the process, success can be seen not only in a better 360° product, but in payback from open communication, continuous learning, and honest feedback that come from a successful development process. This also follows in terms of participation in the program itself. How better to endorse a 360° feedback program than if everyone from the top down participates?

This paper provides an overview of key issues to consider when selecting and implementing a 360° feedback program.

SOLID PLANNING

Organizations must consider why they want to embark on a 360° feedback process. Reasons include:

1. **Addressing the development needs of individual employees who have the potential to significantly impact organizational results.** A 360° feedback process can provide the employee with valuable specific information about how they are perceived by all the respondent groups with whom they interact. This information is most valuable early on in participants' careers when they are in the best position to establish a positive "reputation" with peers, clients, and direct reports as well as the boss.
2. **Career self-management.** A well thought out 360° questionnaire identifies and assesses the fundamental job competencies of a position. Complementary processes that support individual analysis of results, action planning, and personal and professional development provide employees with the tools they need to develop professionally and personally and enhance their relationships with their respondents.

3. **Bringing all employees up to a defined standard of competency/performance,** by integrating the 360° feedback process with the organization's performance appraisal methodology. We do not see this as a viable rationale for implementation of a 360° feedback strategy, as it compromises the confidentiality and anonymity of the process.
4. **Changing organizational culture** by identifying, assessing, and providing development support for the skills, styles and competencies the new organizational culture will need, 360° feedback can be a valuable tool in facilitating individual development to meet the changing needs of an organization.
5. **Changing organizational norms around giving and receiving feedback.** People (and organizations) are often uncomfortable providing face-to-face feedback. A 360° assessment can act as a substitute for what people cannot or will not do directly. Ultimately, though, the goal of a successful 360° feedback process is to eliminate the need for an instrumented approach to feedback. Over time, people should become accustomed to the fact that the 360° simply provides information that can facilitate professional and personal development. With support and encouragement, individuals can learn to provide this feedback directly.

A successful 360° program is:

- **Relevant** to the needs of the individual, focusing on the most important aspects of his or her job.
- **Oriented toward generating commitment** – to following through on the 360° process and to using the information obtained to plan for and implement action that will foster change, personally and professionally.
- **Goal focused**, encouraging the individual to set targets for change and improvement.
- **Safe**, for the participant and his/her respondents. This process has the potential to provide very accurate and candid feedback to a participant. Information does, after all, come from a variety of sources, all with a significant stake in the participant's success. *Participants will only be honest if they believe the anonymity of their responses is protected.*
  Safety also relates to the potential impact of the 360° on the participant. Frequently, participants are surprised, sometimes pleasantly, but often less so by information that is unfavourably at odds with their self-perception. It is very important for participants not to be "left alone" with their results. They need to be guided through their review of the data by individuals who are qualified to facilitate reaction to, analysis, and interpretation of feedback.
- **Confidential**. Participant results must be shared only with the participant, who must in turn have the option to share their results with others as they see fit. It's important to note that the focus of the 360° process is on *individual development*, not job assessment, compensation, or other external factors. The important information is not the assessment itself, but the action the participant decides to take as a result of the feedback they receive.

- **Challenging**. The outcome of a solid 360° program should be an individual who is motivated by the knowledge of what his or her goals are, informed about the activities and skills needed to achieve them, and encouraged to be self-directed in achieving results.
- **Focused** and **supported,** by an organization's willingness to provide the employee with the time to participate in the program, plan developmental action, and access the necessary resources and support to achieve their goals.

Ensuring all these requirements are met involves significant planning and effort. The payoff though, is an elevated level of feedback among individuals and within the organization as a whole.

Administering 360° Feedback

The administration process includes communication of the 360° feedback initiative, respondent selection, and management of participation in the process. Here are important guidelines to consider.

1. **Communicate the purpose of the 360° feedback program to every member of the organization.**
    a. Explain the rationale for the program.
    b. Describe *what* will be measured, *how* it will be measured, and *why*.
    c. Explain how the information will be used – and be clear about what will *not* be done with it.
    d. Outline what follow-up development support will be provided. Be clear about the expectations for follow-up activity beyond report review.
2. **Clearly explain the extent to which information is confidential and anonymous.**
    a. Explain how the process will support and protect participants and respondents.
    b. Set out the minimum number of respondents required to produce reports.
    c. Explain what information will be shared, and at what level of detail.
3. **Allow participants to select their respondents, and provide information and support to help them make the best selection.**
    a. Choose respondents who know the participant well and have worked with him or her enough to provide informed assessments.
    b. Select respondents who will provide candid, balanced feedback. Strive for a balance between supporters and individuals who may be more critical.
    c. Identify enough respondents from each group – peers, clients, direct reports, etc. – to ensure confidentiality will be preserved and data will be reportable. We generally recommend a minimum of 12 respondents, with no less than 3 in any category; bearing in mind that not everyone selected may complete a questionnaire.

   d. Build in a review process to validate the participant's selection of respondents. For example, the manager might be allowed to add, but not remove, respondents from the participant's list of candidates.

4. **Ensure the 360° feedback program is accessible to participants and respondents.**
   a. Ensure information and instructions are clear to all participants and respondents. Indicate who to contact with questions and concerns and ensure this contact person has all the answers.
   b. Ensure time is made available for uninterrupted completion of the questionnaire.
   c. Provide sufficient lead time for questionnaire completion. We suggest no more than two weeks, to maintain a feeling of momentum while providing time to accommodate workloads, vacations, etc.
   d. Don't schedule a 360° feedback program during busy periods or during crises within the organization.
   e. Provide alternative questionnaire delivery processes where possible. For example, provide paper-based questionnaires, as well as web-based, for individuals who do not have access to or are not comfortable with computers and/or their perceived sevurity.

360° Feedback Questionnaire Design

The quality of feedback the participant receives will relate directly to the quality of the questionnaire. There's nothing that contributes more to a sinking sensation than the realization that instructions were misunderstood due to lack of clarity or that questions were open to interpretation. There is no going back to "correct" the data, so it's critical to ensure everything "works" the first time out. Here are some ideas to help ensure there are no unpleasant surprises:

1. **Provide clear instructions.** Participants and respondents will receive a variety of instructions on ways to select participants, orient them to 360° feedback, access the questionnaire site, complete forms, answer questions, and interpret results. Be brief, uncomplicated, and to the point. Cover all the bases, use illustrations, and use the active voice.
2. **Use unambiguous, behavioural questionnaire items.**
   a. Evaluate observable behaviour rather than intangible values. For example, behaviour such as "My manager relates expectations of me to department goals" is easier to assess than "My manager has a global perspective."
   b. Use terminology everyone will understand – speak the organization's language.
   c. Evaluate only one behaviour per statement.
   d. Keep statements neutral in tone, and let the assessment scale measure quality. For example "My manager is excellent at linking my performance objectives to department goals" won't provide as meaningful data at the

“strongly disagree” end of a rating scale as “My manager links my performance objectives to department goals.”

   e. Test questions to ensure that over the short term, the same respondent will respond in the same manner. This will ensure your questions are clear and provide valid and consistent measurements.

3. **Select an appropriate rating scale, and use it consistently throughout the questionnaire.** Consider the following questions when selecting a rating scale:
   a. Do you intend to measure quality (strength vs. weakness, for example) or frequency (not at all to always)? We prefer quality, because frequency does not indicate skill or strength, nor do respondents apply consistent selection criteria to frequency.
   b. Do you want respondents to select a neutral midpoint, such as “neither a strength nor a weakness” or “neither agree nor disagree” or take a firm position on agreement or disagreement/strength or weakness? Odd numbered scales provide a midpoint, such as 1 – 5, while even numbered scales don’t.
   c. How wide a range of possible ratings do you want? 2 point scales (agree/disagree) provide a clear assessment, but don’t show progress over time, or significant variances among respondent groups. We favour a 5 to 10 point scale, to provide latitude in the assignment of ratings, clearly display variances, and allow for progress where participants carry out the 360° process repeatedly over the long term.
   d. Do you want to know which items are most important to respondents? We ask them to identify the top 3 items on which an individual should focus, to help the participant identify priorities for action for each respondent group.
4. **Consider requesting qualitative comments.** Written comments can provide participants with important background information about ratings they receive, as well as possible directions to take in terms of improvement and development. Comments may need to be edited before being included in the Feedback Report, to preserve respondents’ anonymity. We ask 3 questions, to facilitate categorization of responses:
   a. What should the participant continue doing?
   b. What should the participant start doing?
   c. What should the participant stop doing?
5. **Test everything.** To ensure the questionnaire and report provide the desired data and calculate results correctly:
   a. Test the questionnaire and report using predetermined input, to ensure input is processed correctly, and results tabulated correctly.
   b. Use a small pilot group to ensure participants and respondents understand the instructions, interpret the questions appropriately, and that any glitches are resolved.
   c. Have a backup process in place to ensure that the potential for loss of data is minimized. For example, if responses are recorded in a web database, also have them sent to the administrator by email as a backup.

THE FEEDBACK REPORT

From a professional and personal development perspective the Feedback Report is as important as the questionnaire. The goal of this document, and related discussions, should be to provide participants with information that will help them develop strategies to capitalize on their strengths and resolve gaps in performance or perception. To do this, the report must clearly and concisely summarize ratings, identify priorities, and list comments. Here are factors to consider when developing or selecting a feedback report:

1. **Clearly explain how to interpret the results.**
    a. Explain how many responses were received, and the criteria for inclusion/exclusion of data.
    b. Provide examples of report data, with supporting comments to explain how the charts and summaries work, and what the responses might imply.
    c. Suggest how to compare data from different parts of the report to facilitate action planning.
    d. Designate a contact to answer questions about the report.
2. **Establish how feedback will be displayed.**
    a. We favour a series of bar charts, supported by the actual numbers, which compare averaged results from each respondent group, for each questionnaire item. We don't compare results to group averages of industry norms, as we feel the primary comparison should be between the participant's and respondents' responses.
    b. We also indicate the number of individuals, by respondent group, who have selected given questionnaire items as priorities, by actual frequency of selection and percentage of all priorities selected.
    c. We provide a transcript of all qualitative comments, grouped by respondent group and the nature of the question – i.e., start, stop and continue.
3. **Be concise.** The opportunity to tabulate and interpret the wealth of data in many different ways is tempting, but a complex report can be overwhelming for the reader, particularly if they're receiving feedback that doesn't match their perception. Consider how inclusion of a particular table or summary will facilitate interpretation. If it won't add anything to the report, or the participant's development, drop it.

Follow-up and Development Planning

360° feedback questionnaires and reports compare participants' and respondents' perspectives in terms of what has happened to date. Follow-up and development planning takes that information and moves forward with facilitated discussions and activities to help the participant develop strategies for capitalizing on strengths, resolving gaps in perception, and ultimately, moving toward a more direct, less instrument-based feedback and development model.

We believe that a 360° feedback program should not be undertaken if facilitation of report interpretation and development is not included in the process. Our experience and research leads us to believe that simply handing a report to participants and leaving it to them to plan frequently results in skewed interpretation of feedback, and no planning. In fact, the lack of support and coaching may negatively affect a participant's confidence and jeopardize relationships with respondent groups. We follow these steps when conducting a discussion with individuals or meeting with groups of participants:

1. Review the data gathering process.
2. Explain why data was included or excluded in the report.
3. Walk through the sections of the report, explaining how the data is organized.
4. Using samples, discuss what the potential comparisons (higher/lower, the same ratings, etc.) between participant and respondent data might mean.
5. Allow participants to review their reports. We tend not to intervene except to respond to comments and questions, or to ask questions where we see an "interesting" comparison.
6. Discuss next steps, and plan action to take for development. We typically provide planning templates and tools. We suggest participants develop an action plan and discuss it with their respondents to gain their input and support, rather than discussing "the numbers." Our preference is to emphasize "moving forward" with plans rather than spending too much time "looking back" at results. As part of this discussion we also explore how participants and their respondents can plan support and follow-up activities to maintain the momentum of any plans made.

Where we have been able to repeat the 360° process with participants, we have found that this approach has produced positive results in terms of improved working relationships. This is often supported by improved 360° feedback results.

Summary

It's important to see 360° feedback as a process, rather than simply a questionnaire and report. *How* the process is introduced, administered and followed-up has far greater implications for the success of any feedback program than *what* information is obtained.

FOR THAT THINKING FEELING

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