click-360

online feedback tools

THE ULTIMATE CHECKLIST FOR 360-DEGREE FEEDBACK HACKING

TABLE OF CONTENTS

INTRODUCTION

Congratulations! You made it through to the ultimate checklist for 360-degree feedback hacking. With this guide in hand, you're sure to supercharge your 360-degree feedback/multi-rater appraisal programs. This checklist is based on 100+ success stories from our users – from chief people officers through heads of talent to leadership development specialists. All these people have managed to successfully capitalize their implementation efforts around 360-degree feedback.

Our own marketing teams and coaching community further refined this guide with inputs from their experiences, experiments and trials from implementing 360-degree feedback to develop human potential. The steps explained in this guide are 100% practical, coherent and results-oriented.

360-degree feedback, a talent retention and development tool, offers organisations and their employees an excellent opportunity to grow human capital. Correctly positioned in your marketing comms and on your website pages, it becomes a magnet for talent attraction and retention. As an HR professional or leadership development specialist, you know that every organisation relies on talented, confident and committed staff to achieve their objectives and key results. While not a new idea, 360-degree feedback programs (sometimes referred to as multi-rater appraisals and peer reviews) are still part and parcel of what makes for a robust human capital development strategy. That's why you will find this guide of great help in deciding on an optimal approach to implementation.

Make this checklist a part of your HR and Learning & Development tactics and you'll be amazed by how much your people blossom.

Our founder, Colin Newbold, is on a personal mission to improve the capability of leaders and managers right across the globe – wherever he can touch them – and he's not going to rest until employees – wherever they work and at whatever level – get the bosses they deserve.

Step 1:

360-Degree Feedback – Who's It For?

360-degree feedback is a development tool and is most successful when used in this way. At its core, it's really no more than an opinion survey and should be taken in that context. It's definitely not a psychometric test. However the maxim to remember here is:

How I see myself is all very well, but it is the way that others see me – the people I work around – that will likely determine the results I get.

360-degree feedback is a behavioural survey. Behaviour is best defined as:

Something I'm doing (or not doing) and/or something I'm saying (or not saying).

Using 360 feedback to 'fix' people who are underperforming, or to gather evidence that can be used to force someone out, is not recommended. Why? Because you want the individual being measured (let's refer to them from hereon as 'the participant') to be up for the process, to be motivated to answer the questions honestly and to genuinely welcome the feedback from colleagues (let's refer to the feedback contributors from hereon as 'raters').

The two most popular uses of 360 feedback are:

M/LDP: Management and/or Leadership Development Programs have traditionally been classroom-based and made up of numerous modules that teach the optimal characteristics of world-class leaders. As well, participants learn from each other and not just the course facilitators. Practical application through role play is encouraged. Implementing a 360 feedback program at the beginning of the M/LDP means that each participant can start their training with a clear set of behavioural objectives. Running a repeat 360, some weeks after the training has finished, will show just how much the leadership needle has shifted for each participant.

Performance Appraisal: traditionally, these are formal discussions held annually between employees and their line managers about the employee's performance. Two things have changed in the last 10 years: 1) a shift towards more frequent, less formal appraisals, and 2) seeking opinions from a cross-section of colleagues who work around the employee – that is 360-degree feedback.

Pro Tip:

It has been observed that those who most need 360-degree feedback are the least likely to get it. Certainly the least likely to change as a result. The most successful implementations are with younger talent that is hungry to grow and develop. Consider this approach as a must-do for bright young things (rising stars and future leaders). If you are new to implementing 360-degree feedback, we suggest you start with them. Later on, you can roll the process out to existing managers and leaders...maybe all staff in time.

Step 2:

What Questions To Ask?

All the steps in this Guide are about maximising your results with 360-degree feedback. One of the most powerful actions you can take is to use a questionnaire that is customized to your organisation, tailored to the specific things that are important to you as an organisation and to the individual role-holders you are selecting as participants.

If your organisation already has a competency framework, or a values framework, or a leadership standard, then can it be turned into a questionnaire? Maybe it's a combination of all three. Most 360-degree feedback providers can undertake this task, for example **click-360** has access to organisational psychologists who will turn this around in 1 or 2 days. We allow up to 3 iterations before a final version is agreed.

Remember, 360-degree feedback is NOT a psychometric test, it doesn't therefore have to be subjected to the same level of scrutiny, however it should be robust and reliable nonetheless.

Try to avoid long questions, questions that ask more than one thing at the same time, ambiguous questions, and questions that use jargon (unless its specific to your organisation and used widely).

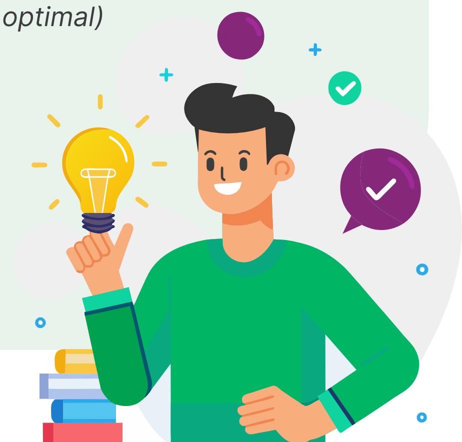
If you are designing from scratch, give the final questionnaire to a few of your intended participants before you go live and let them give you feedback on how they experienced it.

Pro Tip:

*We generally try to apply the **Rule of 7** to questionnaire design:*

- *No more than 7 clusters (competency headings or sets of questions)*
- *No more than 7 questions per cluster (actually 4 is optimal)*
- *No more than 7 words in a question*
- *No more than 7 letters in a word*

Obviously, the above advice is very idealistic, but it's good to remember that in questionnaire design, less is generally more!



Step 3:

The Importance Of An Awareness Briefing

Out of all the Steps in this Guide, and the hacks described within them, we suggest that this Step has had the most important impact for our client organisations over our 20+ years of 360 feedback experience. That's why it's the longest Step in this sequence. When we first started using 360, we pretty much left it to the software (invitation emails) to do the inviting and then our clients complained of poor responses (a low number of completed questionnaires, many scores around the mid-point and very few comments of real quality). Over time, this led us to experiment with different approaches to briefing and we eventually came up with the following approach. We call it an 'Awareness Briefing' and we deliver it (usually virtually) just to the participants (this assumes that a 'cohort' is going through the 360 at the same time, although the same approach should be used for ad hoc implementations with individual participants). Here's what we recommend:

1. We start with understanding how the audience is feeling about 360-degree feedback. Have they ever heard of it? Have they done it before? If yes, as a participant or a rater (or both)? What was that experience like (we ask them to choose a number between 1 – poor experience – and 10 – good experience). If the number given is less than a 10, what would have made it a 10? This usually allows any fears or concerns to be voiced and to be successfully dealt with. As a result, your planned implementation may need to be subtly tweaked in order to plug any gaps.

2. Next, we advise having a senior manager (ideally the CEO) explain why the organisation is doing 360 and what it hopes to achieve. It will be impractical to have the CEO show up for every briefing, so why not put her/him on video and play the recording? Just make sure you help the CEO 'script' their recording to maximize the benefits.

3. Talk in an overarching way about what the outcomes will be: each participant gets a comprehensive report, together with a workbook and learning suggestions. If you can afford to have a coach (maybe someone internally) to work with each participant to help them interpret their report and to build a robust and time-lined development action plan, even better.

4. If you choose to work with **click-360**, then you will be offered a two-stage feedback approach (see Step 6) and this should be explained in the briefing.

5. The timetable should be shown and gone through and all participants must agree to those dates...if for any reason a participant can't make the timetable work for them, they should be offered an alternative cohort.

The importance of who to select and how to invite them is the most crucial part of this briefing. You will have decided beforehand which rater categories will be involved and the optimal numbers in each. The two main rules for rater selection are:

1. The participant should only invite people that have worked with them for a sufficient period of time to have observed their *consistent* behaviours (usually months, not weeks). Otherwise the rater hasn't got enough data to contribute.

2. Make sure that a broad cross-section of raters is invited, *not just* those with whom the participant has a super relationship already. 360-degree feedback can be a powerful catalyst to 'mending fences', building better relationships with colleagues that are important for the participant's success.

In terms of rater categories, there will typically be:

Self (a given!).

1. **Manager:**
   Usually only one person but consider adding others into this category to whom the participant has a 'dotted line' responsibility – like the manager of a project they're involved in…there should be no upper limit.

2. **Peers:**
   Anyone on a similar pay grade or rank to the participant, probably from a different function inside the organisation, and that regularly interacts with them. Research and our own experience suggests that the optimum number of raters in this category is four (also true for the last category – Others). The minimum must be at least 2, so that anonymity can be protected. We have seen programs where there are as many as 20 raters in a category and this has three significant disadvantages: #1 it is very disruptive to an organisation; #2 it adds no significant data to the trend line; and #3 it makes for a hugely over-long report if all raters are offering written examples to illustrate their scores.

3. **Direct Reports:**
   All people that report directly to the participant (their team) – where relevant. Experience again tells us that all team members should be invited, no matter how the current relationship is perceived. Otherwise, favouritism or exclusion will be levelled as an objection…anyone left out will rightly feel aggrieved. The exception to this rule: maybe anyone who has only joined the team in recent weeks and doesn't have enough data to go on. What if the participant only has 1 direct report? Their feedback should be welcomed and included but it should be merged with the Other category, so as to protect anonymity.

4. **Others:**
   Anyone who works closely with the participant and doesn't fall naturally into any of the other categories. These people might be internal or external…consider inviting customers, suppliers and/or people in partner organisations. Again, like the Peer group, the optimum number of raters is 4, and the minimum is 2.

Adding these together, the likely number of overall contributions (excluding Self) is likely to be 9 plus direct reports.

How to invite? Our biggest lesson has been to encourage each participant to have a 1:1 verbal 'invitation conversation' with each rater, although when it comes to their own team, this can be discussed with the whole team together and tacked onto a team meeting agenda. We have a recommended script for this conversation, please reach out to info@click-360.com with the Subject 'Rater invitation script' if you'd like a copy. The conversation should be held face-to-face, over a virtual meeting platform, or by phone. An email just doesn't cut it. There's no need for this to be a lengthy conversation, usually 10 minutes is enough.

Pro Tip:

A virtual Awareness Briefing can be recorded, so it's not absolutely necessary that every participant attends the live event, though it is highly recommended – if, for no other reason, so that the participant can ask questions or alleviate any concerns. Any participant unable to attend then gets sent the recording (actually, that gets sent to every participant and acts like a reminder, a virtual coach). Better that everyone is singing off the same song sheet.

Step 4:

360-Degree Feedback Software – How Do You Choose?

You'd expect us to be biased towards **click-360** and we are 😊 ! But seriously, most 360 feedback software products will do the job. It will be a lot easier than you having to construct a questionnaire in Excel or something, and then collate all the results as they come in.

Some pointers you might like to consider when choosing a supplier:

1. Is the software 'attractive' and easy to use? As an administrator adopting a self-managed approach, is the 360 program easy, logical and intuitive to set up? As a participant or rater, is the questionnaire interface (QI) attractive and easy to complete? Can the user leave part-way through completion if they are distracted? Will it return them automatically to where they left off?

2. Is the tool optimised for mobile devices? Does it display properly on a tablet or a smart phone? Can the writing be easily read? Is an internet connection always required?

3. Does the QI software allow for simultaneous as well as individual completion – in other words, as a rater invited to contribute feedback to more than one colleague, can I do all my feedback on the same screen or do I have to do each participant individually, one after the other? At the time of writing, this is the one **click-360** feature that has never been copied, yet it's the most loved by clients!

4. Are the individual reports digital, or *only* available as .pdfs? **click-360** reports are not only digitised (making them easy to carry around on a hand-held mobile device), they are integrated with an inter-active workbook complete with learning suggestions. They're bright and colourful too, making them easy to read and interpret. **We also offer pdfs if a hard copy is required.**

5. If this is important to you, does the back end of the software platform offer organisational intel, i.e. OI reports that collect themes and trends across the organisation (counts, league tables, comparisons, competency strengths and weakness trends, etc.)

6. If important, does the software offer multiple language choices and if so, exactly where are these different languages seen? Throughout the user interface (UI pop-ups, dialogue boxes, prompts, etc.)? The report? Just the questionnaire? Be sure you know what you're buying.

7. Cost...how competitive is the supplier's pricing, how easy is it to understand? Are there any hidden extras? At **click-360** we offer you a very simple explanation of our different *products*, complete with price guide.

Pro Tip:

It kinda goes without saying that you will want to work with a supplier that has a great track record. ***click-360*** *can offer you reference sites for referrals and the website has a* ***full client list*** *with reviews, testimonials and downloadable case studies.*

Step 5:

Feedback Coaching
– Optimal Approach

After STEP 3 – the Awareness Briefing - this is the next most important Step. We're giving away the crown jewels by sharing these hacks in the Guide. Most organisations will only allow (or pay for) one feedback coaching session per participant and that misses a huge benefit. And if you are an organisation that refuses to pay for any kind of coaching, then shame on you. We would go so far as to argue that you're wasting your money entirely by implementing 360-degree feedback…what are you expecting? That the participant will devour their report, build their own action plan and magically change their behaviour over time? Our three-stage double feedback coaching approach has been tried and tested multiple times and with multiple clients all over the world and won numerous awards. In this section we lay out exactly how we do it and why.

Feedback Coaching Session #1

Use this session to share with the participant their individual report. Mostly these days this is done using a virtual meeting platform. Another advantage of the **click-360** digital report is that it can be sent to the participant shortly ahead of the session and by the start of the session they already have it opened on their desktop, where they can then share their screen with the coach.

Start with strengths, the things they are doing well, and let the participant bask in their glory. Really help them to feel valued. Ask what they can do to reinforce those strengths and make sure they don't get complacent with all of those good behaviours.

Now move to areas for development. Ask the participant to focus on the most important behaviours – maybe just the top 3 or 4 that are perceived by the majority of raters as holding them back, getting in their way. Encourage them to concentrate on the ones that are most likely – if improved - to have the biggest impact on the participant, on their team, on their organisation overall. More development objectives than that and you risk giving the participant indigestion.

Look for areas of conflict, where potentially one category of raters is perceiving the participant very differently from the rest. Even within one category, there may be disagreement around one or more questions.

Gather all this up with the participant and move to the next stage.

Drilling-Down

This is so-called because you're going to ask the participant to go away and seek further depth and clarity from a majority* of the raters who completed the feedback online. This needs to happen before Feedback Coaching Session #2, which is where the action plan will be built. The participant is encouraged to have 1:1 verbal conversations with a representative proportion of the raters and the role of the coach in this stage is to coach them how to run these conversations. Basically the 'Golden Question' the participant needs to ask of each rater and about each area for development is:

If I was doing this <area for development> the best way it could be done/to the best of my ability, what would I be doing (or not doing) and/or saying (or not saying)?

The participant should not interrupt the answer given (defend or justify their behaviour) UNLESS IT IS SIMPLY TO ASK FOR FURTHER EXPLANATION, i.e. they don't understand the answer. The participant should also ask if the rater has any ideas or advice about how the new behaviour could be done, some examples of what good looks like. Drilling down with their own team can be done in group and tacked onto the end of a team meeting. For a more complete guide to this stage, email info@click-360.com with the Subject 'Drilling-Down Guide'.

**At least a representative proportion of raters*

Feedback Coaching Session #2

So when the participant returns to the coach, they will have a lot more clarity and depth about how they need to change, which makes the action planning a lot more intense and meaningful. It actually makes this stage easier.

Any sort of goal-setting template can be used, maybe your organisation already has something suitable? At **click-360**, the integrated workbook in the digital report carries an interactive template that looks like this:

Specific Action, (together with relevant Behaviour)	Success Criteria	Support Needed	Obstacles to Success...	...and How to Overcome	By When?
Listen to others (Model the Way)	*Feedback from the team to say that I am listening to them more*	*From the team to give me honest feedback*	*Time - often do not have time to listen to views but just need to give instructions*	*If this is the case I need to tell people at the beginning of the meeting*	*In team meetings starting from today and ongoing*

This three-stage double feedback coaching approach should become the industry standard, we hope you will adopt it straight away.

Pro Tip:

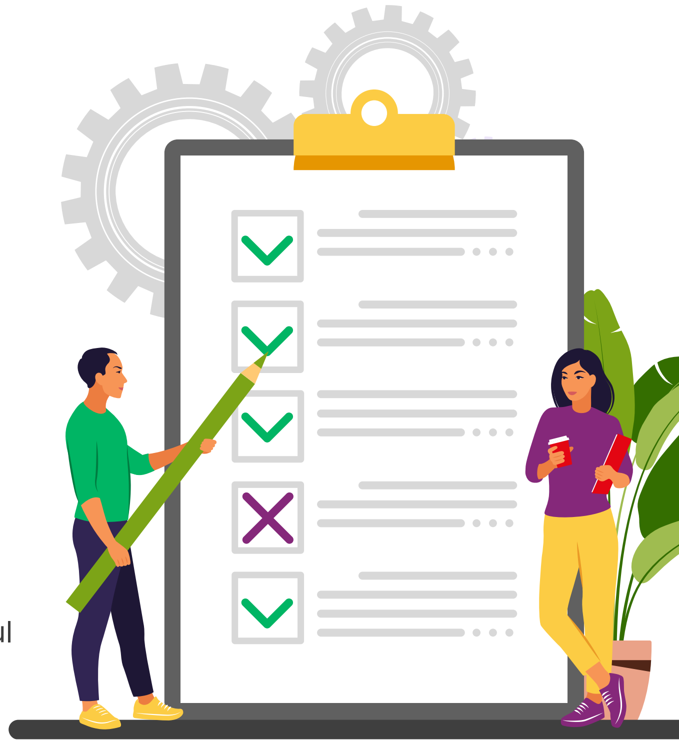
When we first came up with this approach, we had some participants who were really sceptical. Apart from the amount of time they could see it taking, there was real anxiety about opening up around their weaknesses - a fear that it would make them more vulnerable and might even be exploited. But participants soon realised that it was a lot easier than expected and that the process actually improved colleague relationships no end. Especially with those people where the relationship hadn't been so good in the past.

We have materials available that go into each of these steps in much greater depth. Please email info@click-360.com with your requirements. Keep an eye on our Linkedin page for regular training events.

Step 6:

Checking-In

There's often an expectation that the only way to measure if a participant has improved since their 360 program is to run a repeat 360 feedback program. That of course is the most comprehensive approach. But 360-degree feedback implementations are time-consuming...they're expensive not because of the software costs but because of the amount of time and effort they take and the disruption they can bring to an organisation.



But there is another way, kinda like a half-way house or an interim hack.

Checking-In is a simple process that asks the participant to check in with as many raters as they can to see what each has noticed since the participant started their 360 journey. It's another 1:1 verbal conversation. Not the preferred method of some of our younger colleagues, we know, but still the most powerful way to strengthen relationships. One day, there'll be a balance between the number of automated self-service supermarket checkouts and people manning the traditional check-outs – you'll see!

So let's expand on this. Going back to the Drilling-Down conversations that the participant had when they first saw their report, there will have been at least 3 development priorities that they discussed. Assuming these development priorities haven't changed, the participant simply asks each rater:

1. "It's been several months since I shared my 360 feedback development priorities with you and I wonder what you've noticed? In respect of <development priority>, what have you seen (or heard) me doing better? What could I still do differently?"
2. And again, the participant can ask if the rater has any suggestions for how they might do that thing differently, have they got any learning suggestions.
3. Carrying out this brief check-in with a representative proportion of the original raters will help the participant gain positive strokes about what they're doing better and plug any remaining gaps.
4. For the most comprehensive check-in however, there really is no substitute for a repeat 360, which is what the final Step is all about...

Pro Tip:

If you face reluctance from your participant to carry out this Checking-In step, see if you convince them to check in with at least their manager and their team. The manager check-in can be tacked on to a regular 1:1 boss/subordinate meeting and the team check-in can be tacked on to a regular team meeting, in other words: 1:group. Success here may encourage the participant to check in with more raters afterwards.

Step 7:

Repeat and Don’t Give Up!

A repeat 360 is the ultimate measure of how much each participant has raised their game. How much improvement there has been in their leadership capability, or their emotional intelligence, or their ability to be a team player – basically, whatever goals your questionnaire sought to achieve.

No matter how diligent and comprehensive were the participant's Checking-In efforts, nothing comes close to a repeat 360-degree feedback program. How long should you leave it before repeating? Anywhere between one year and eighteen months since the previous 360. Any less than this and there may not have been enough time for the participant to improve, plus a full-blown 360 feedback program consumes a lot of people's time and effort. Any longer than 18 months, and there is every chance that the improvement has become so engrained that raters don't see it. Alternatively, there is the chance that, because nobody seemed interested, the participant has gone back to their old ways.

Don't give up! It may seem tiresome to repeat the whole process – Steps 3-6 – but there is no better way to measure improvement. You'll be looking for higher scores in most areas, certainly in the ones that were singled out for development, and you will want more positive comments than negative ones. Look closely for improvements in any rater category where one rater was consistently scoring lower than the others in that category.

Pro Tip:

A 360-degree feedback implementation is a powerful addition to your organisation's development strategy and your people's development plans – a repeat 360 is one way to measure the success of those plans.

CONCLUSION

If you've got this far, with a clear intention to make changes to the way you implement 360-degree feedback, then congratulations! If at first the 7 Steps seem cumbersome, you'd be forgiven! As we shared in Step 1, our advice would be to always start with the low-hanging fruit…ask yourself: "Who are the employees most likely to engage with 360?". The answer is likely to be your younger talent that is hungry to grow and develop - your bright young things (rising stars and future leaders). If you are new to implementing 360-degree feedback, we suggest you start with them. But please don't implement 360 without thoroughly understanding what you're getting into. You could do more harm than good. Later on, you can roll the process out to existing managers and leaders…maybe all staff in time.

*We have materials available that go into each of these 7 Steps in much greater depth. Please email **info@click-360.com** with your requirements. Alternatively, we are happy to talk to you at no charge and with no pressure, why not call us on +44 (0)203 988 6666. As well, keep an eye on our **Linkedin page** for regular training events.*

Thank You

www.click-360.com

info@click-360.com

+44 (0)203 988 6666