360° Product Guide

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Contents

Introduction 3
Stages of the 360º review process 4
(i) Pre-Questionnaire Administration/Contracting 4
(ii) Questionnaire Administration 4
(iii) Completion of the Questionnaires 4
(iv) Analysis 5
(v) Preparation for the De-brief 5
(vi) The De-brief Itself 5
(vii) Follow-Up 6
A note on timing 6
Using the on-line system 7
Set-up 7
Logo 7
Reporting categories. 7
Emails 7
Organiser instructions 9
Email Address note 13
Participant instructions 14
Responder instructions 20
Questionnaire 21
Reports 21
Constraints 21

Revised 17th March 2014

Introduction

The use of 360º questionnaires has grown dramatically in Europe over the last decade, and particularly in the UK. A high proportion of major UK employers now use this form of questionnaire for performance reviews on a routine or demand-driven basis. It arguably provides the most credible form of feedback for a Manager to obtain a robust evaluation of their performance. There are standard and tailored materials available, depending upon the needs of the situation.

The majority of 360º questionnaires are distributed by the focal person (called the "participant" here), for direct return to the firm of advisers or consultants whether internal or external, who carry out the analysis and have a face-to-face debrief with the participant. Sometimes the participant and their Manager are present, although it is more frequently the case that the participant has a "private" de-brief with the adviser, following which the participant leads a discussion involving their Line Manager (and the adviser).

Our online 360º Questionnaire consists of 71 questions which are organised under a series of sections. The 3 main sections are

1. Delivery of Results
2. Leadership and Communications
3. Business Strategy

In addition to the questions there is an opportunity for responders to give free format comments on each of the 3 sections. These are collated in a non-attributable form and provided back to the participant as part of the de-brief (see Section VI in the notes below).

Before proceeding, a word of warning; the 360º questionnaire is not an objective measure in the conventional sense and is not a psychometric measure either, that is, one which measures behaviour and enables a valid comparison to be made between one person and a reference group. It is essentially individual data provided in a form which allows for some comparative analysis with a reference group, but the final judgement about the appropriateness of ratings as indicators of strengths or development needs etc., must rest with the participant and, frequently, their Manager. The adviser is not in a position to make an absolute judgement of any kind and this important consideration should be in the forefront of the consultant's mind throughout their work with a 360º questionnaire.

Conventional wisdom dictates that sufficient subjective views about someone constitutes a form of objectivity. While this may be true, and given the participant selects his or her responders, the important issue is for the individual participant to benefit from an insight into how other people regard their work performance. Therefore, at all times the adviser's contact with the individual should involve firm handling of the process but very little direct involvement by the consultant in the content, except to assist the participant to understand, learn from and action its implications clearly.

The Selby & Mills system provides the participant and client with full management capability, including requests for completion from nominated responders and response tracking. The participant may also chase non-responders and decide when to produce the report, given certain security and confidentiality constraints. Full details of the management of the system are provided as part of these notes.

Stages of the 360º review process

There are 7 steps in the 360º questionnaire process and each of these is outlined below:

(i) Pre-Questionnaire Administration/Contracting

This involves a meeting or conversation between the participant and their adviser in order to clarify what a 360º questionnaire involves and what the participant's expectations may reasonably be of the process. It should cover logistical issues such as:

- The selection of responders. It is important the Participant selects these people, since this maximises the credibility which the results will have. Typically the Participants are a cross-section of people who are senior to, peers of and junior to the participant and with whom the individual has regular contact. It is also common for suppliers and/or customers to be involved.
- When the survey will take place. A compact timing will produce the most useful results.
- The number of responders; it should be 3 or more from each sub-group, since this ensures non-attributable results, which encourages candid responses.
- The boundaries of confidentiality in the process. This covers who will see the report, be involved in the de-brief and etc.
- The method of feedback to responders to thank them for their involvement. Sometimes the Participant also uses the feedback to make public their commitment to action, based at least partly on the feedback, to help them to follow through.

It is very important that these issues are discussed before the questionnaire is administered, since its impact and benefit will otherwise be reduced. In fact without prior clarity on the above issues it's probably best not to embark on a 360 audit.

(ii) Questionnaire Administration

The consultant will provide the participant with the facility to set up their responders using the on-line system see the second section of this guide. The group of individuals who are responders should be structured in such a way that feedback can be provided, following the analysis, in groups. This means that it will be useful to identify a group of people who are senior to the participant, who are at a similar level (peers), who are junior and suppliers/customers who could respond to the questionnaire. There should be a minimum of 3 people in each group, so that feedback may be provided by sub-group as well as the overall "picture". These considerations are an important part of the development of the "ownership" of the survey and its results, by the participant. "Ownership" by the participant is essential for success. Careful planning and administration also protects confidentiality and ensures the non-attribution of data, without which candidness is compromised.

(iii) Completion of the Questionnaires

A deadline for the completion of the questionnaires must be identified and agreed by the consultant and participant. The participant then initiates the process by sending emails to the responders via the Management System. A minimum number of questionnaires (6) is required for analysis to be worthwhile and if, within a few days of the deadline for return, that number has not been achieved, the participant should be prompted to chase <u>everyone</u> to whom they originally emailed. This is also done via the online system.

Once enough completions have occurred to make the analysis valid, the Participant indicates to the system that they are now "Ready for the report".

(iv) Analysis

Selby & Mills will analyse the questionnaires and produce a report. A sample report may be downloaded from our web site. The report includes bar charts which indicates the mean (average) score provided by the people who responded, divided into sub-groups where this is appropriate and possible. In addition, the participant will receive a summary, organised in a similar way to the bar charts, indicating how people responded to each individual question. This data is more detailed than that provided on the bar chart, which only summarises the main sections. Finally, the participant receives an anonymised summary of the comments by the responders.

(v) Preparation for the De-brief

Prior to the de-brief the consultant should spend some time reviewing the analysis and preparing the process of the de-brief. This would involve scrutinising the data and identifying areas for discussion with the participant, as well as summarising the strengths and development needs for discussion with the participant. Issues such as the following should be considered:

- Are the strengths and development needs consistent with the general tone of the other feedback?
- Is there one sub-group who consistently rates the participant higher or lower than the other sub-groups?
- Is the participant, in the experience of the consultant, generally rated higher or lower than other participants?
- If norms exist for that organisation, how does the individual match the template?
- Are there any disturbing issues which need to be "flagged"?
- Is the overall tone of the feedback positive or negative?
- What may be the consequences of all this?

The purpose of the de-brief is to initially help the Participant to understand and consider the feedback, on the basis it is **all accurate and valid**. The suspension of judgement about the feedback, until it has all been clearly understood and considered is very important. Many Participants have a tendency to judge the feedback at the same time as reading it and this means only a portion of it is absorbed. The person managing the debrief has an important role to try to ensure understanding is achieved **before** judgement occurs.

Following understanding the next phase is about summarising the feedback in order to move onto the Judging phase, which is the preliminary to the Action phase. This frequently requires more than one conversation.

(vi) The De-brief Itself

The de-brief should be scheduled for a maximum duration of 90 minutes. It is always possible to schedule a second meeting. The de-brief process should be managed substantially by the consultant, who should begin by running through the feedback as given to the participant (who does not see it prior to the meeting), and assisting the participant to make sense of and understand what the data is saying. Implications come later.

At this stage it is the understanding of the participant which matters. The participant who is keen to move on to evaluate the implications should be encouraged to take their time to fully understand what is being said. The analysis by sub-group is very important here. Generally, superiors rate more harshly than the rest and this should be commented on if it has occurred, in order to reassure the participant that the numbers are not providing a sinister message. On the other hand, if the general tendency is to rate the participant low, this could be an indication that the participant takes little care to manage relationships upwards and this may be affecting their ratings. The end point of the de-brief may be planned or may emerge spontaneously. Things such as agreement on the meaning of the feedback prior to progressing to look at its implications, may represent an appropriate break point, in which case another meeting will need to be scheduled. It is frequently the case that 2 meetings are required before the participant's commitment to the implications of the report can valuably be converted into action plans or development plans.

There is a need to summarise the feedback in terms of positive and negative implications and development priorities. Without this summary it is often tough for the Participant to move on to consider the actions they might choose to take, arising from the feedback. Sometimes it is useful to prepare a note during the feedback conversation listing the Participants Strengths and Development Needs on a single side of paper. This provides a summary of what was agreed as the key outcomes from the 360 and leads into the consideration of action. It also provides a useful aide memoire for the 'thank-you' session or 'round robin' with those who completed the 360 about the Participant, as well as for any conversation they have with their manager.

(vii) Follow-Up

If the participant requires another meeting, then this should take place shortly after the first. The participant should be encouraged to acknowledge and thank those who were asked to respond for their effort, and to provide them with an update of the consequences of what they have provided (see vi above). Finally, it is worth following up with the participant in order to see whether plans have been developed with their Manager, whether they have taken some developmental action for themselves, or whatever. It is frequently valuable to provide a written summary of outcomes to the participant as a record of the end point that was reached when the discussions took place. This also provides a convenient tying-off of contact with the participant. It can also have benefit in the form of some summary document for their Manager, if this is appropriate for any reason.

A note on timing

It is important to 'catch the mood' with 360º questionnaires and therefore the entire process must be worked through at a fast pace. This may involve an agreement to proceed and contracting with the participant in Week 1, availability of the questionnaire in Week 2 for completion within 7 days and a de-brief 7 days later. This could mean that something under 3 working weeks elapses between commencement and completion. This kind of timescale energises participants and frequently results in action, where simply elongating the schedule could produce inactivity. This is an important consideration. Online completion and analysis of the 360 responses makes this timing a practical option.

Using the on-line system

In order to understand how the on-line system works it is important to understand the three types of individuals who are involved and their different needs.

The Organiser	This is the individual who will set-up and organise the 360 for a participant. This is usually the person who subsequently provides the feedback to the Participant.
The Participant	The person on whom and for whom the 360 review is being undertaken
The Responders	The people who complete the questionnaire with respect to the participant.

Set-up

When an organiser wishes to use the on-line system for the first time we need to go through a process to match the Organiser's requirements.

Logo

The client's logo can be placed on the on-line questionnaire if supplied in .jpg or .gif format.

Reporting categories.

We can analyse and present the data in up to 4 categories e.g. Manager, Peer, Direct report, Supplier. These need to be agreed and programmed into the system.

Emails

There are 4 emails within the system and these need to be created. Two are sent to the Participant by the Organiser and two are sent to the Responder by the Participant. The first email sets the procedure in motion and the second email is a reminder if the Participant/Responder has not started the procedure. Examples of these emails are:-

Initial email to Participant

Dear FirstName SurName,

I would like to confirm that we are ready for you to start your 360 degree feedback by entering your list of responders. You are asked to input the following categories:

- Your Line Manager
- All of your direct reports
- 4 to 5 peers some of whom can be external to the organisation as the system works on email addresses
- Ideally you should have at least 12 responders

You will need the email address of your responders which must be accurate in order for the system to recognise that individual.

Finally, please ensure that your line manager confirms your listing. Thank you in advance for your time on this important feedback exercise.

Please click here to enter your responders.

Sam Sample

Reminder email to Participant

Dear FirstName SurName,

I note that you have yet to organise your responders for your 360 degree feedback. Please click here to enter your responders. **Please ensure that your Line Manager confirms the final listing.**

Thanking you in advance.

Sam Sample

Initial email to Responder

Dear FirstName SurName,

The main aim of the 360 tool is to provide me with developmental feedback focused on work based behaviour. This feedback consists of responses from peers, direct reports, line and functional managers. The intention of the feedback is to help me reflect on my behaviour and style and make appropriate changes, which will benefit myself, our team and the organisation.

I would like to receive honest and specific feedback from you as a part of this process. All responses to the questionnaire are anonymous and you are requested to fill out the questionnaire as openly and as honestly as possible. **You are encouraged to use the full range of responses from 'Strongly agree' to 'Strongly disagree' and to add other thoughts and feedback in the comment boxes.** These comments are anonymous and will be extremely valuable to me. I will receive my feedback during a one to one session facilitated by our consultant. This will be an anonymous summarised version of all the feedback given.

I appreciate, as a 'Responder', that you may be asked to fill out more than one questionnaire. The process has been designed not to be too onerous for you and questionnaires should take no more that 15 - 20 minutes to complete. I appreciate your honest feedback and time spent on this. **Please complete this questionnaire within the next 7 days.**

You can now go ahead and complete the questionnaire by clicking here

If you have any questions on this process please contact John Smith.

Thanking you in advance.

FirstName SurName

Reminder email to Responder

Dear FirstName SurName,

I recently sent an email requesting you to fill in a 360 Degree Feedback questionnaire on my work based behaviour. The deadline for completion of questionnaires is approaching and I would appreciate if you would complete the questionnaire.

To complete the questionnaire click here

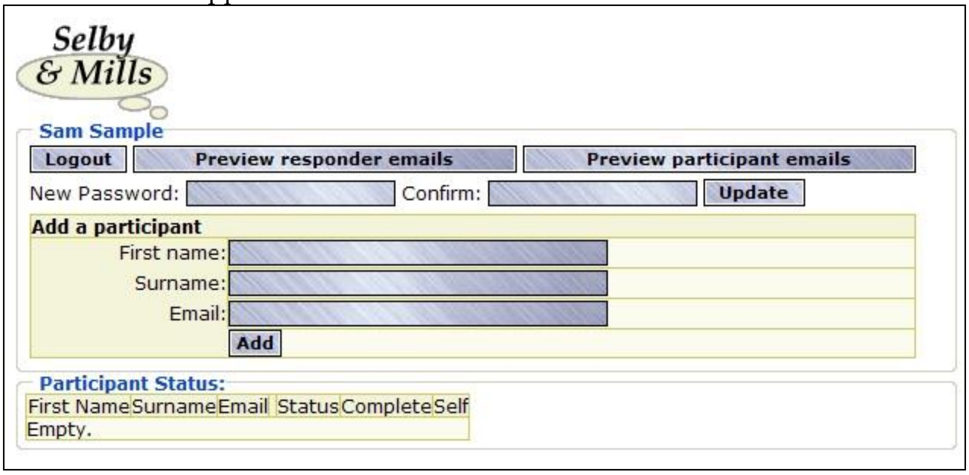
Thanking you in advance.
FirstName SurName

Organiser instructions

Once the system has been set-up for the Organiser they will be supplied with a password. They use their internet browser to view http://www.360study.com

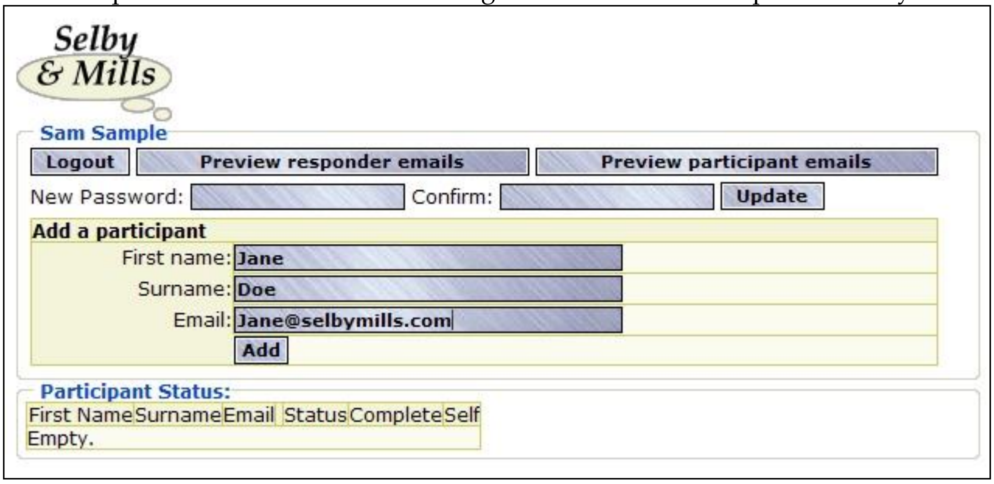
They enter their email address and password and click on the Login button.

This screen will appear:-



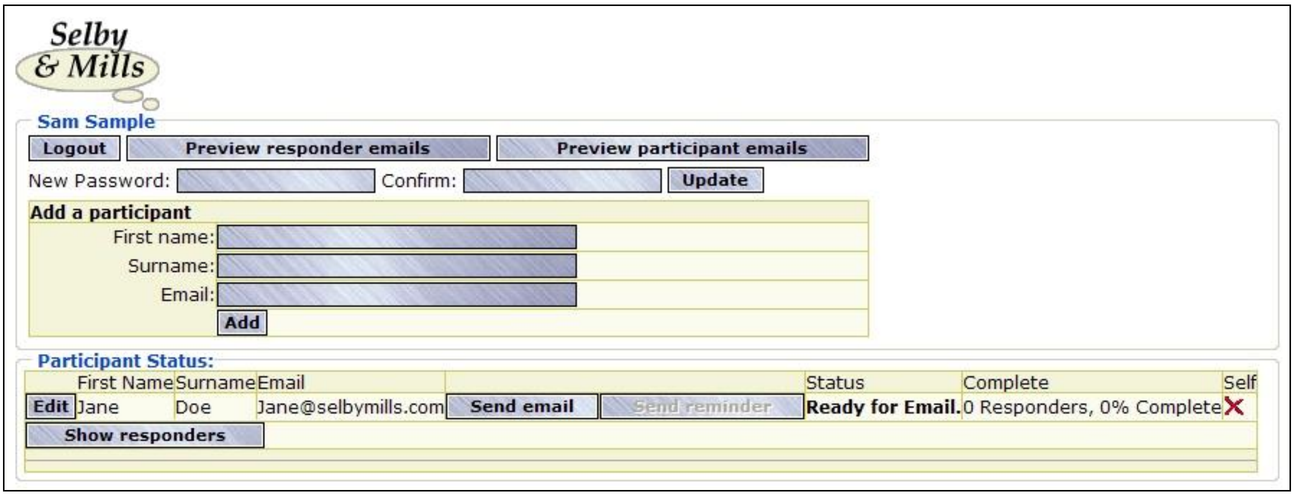
On the first line of this screen are buttons that allow the Organiser to preview the Participant and Responder emails.
The second line allows the Organiser to change their password.

The next part of the screen allows the Organiser to add a Participant to the system.

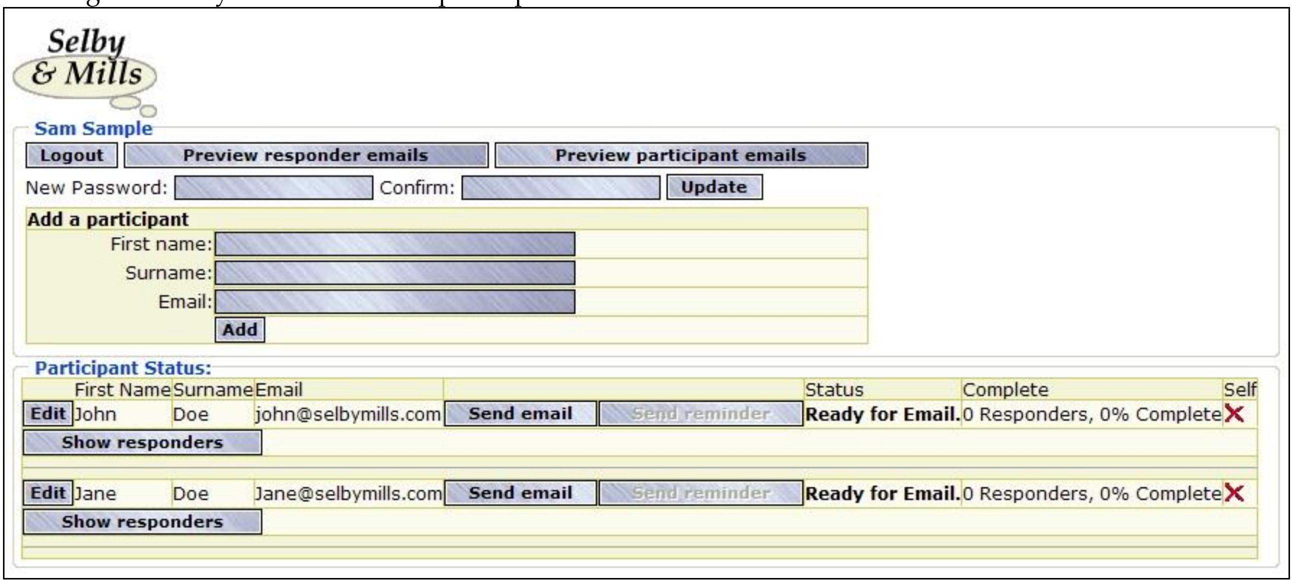


Once the Organiser has entered the Participant's details and clicked on the 'Add' button then a message will confirm the action

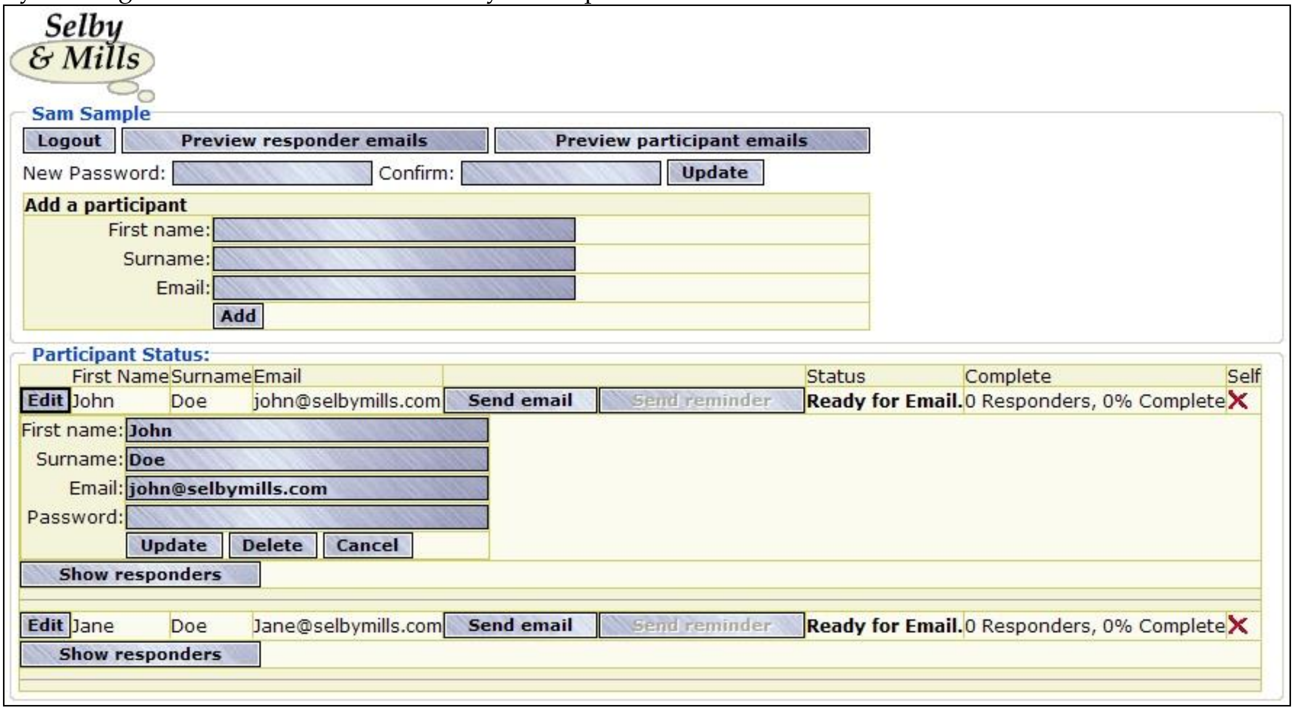
and on clicking OK the Participant will be shown in the final section of the screen.



The Organiser may now add further participants.

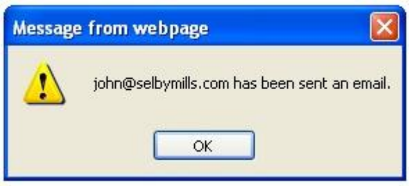


By clicking on the 'Edit' button beside any Participant's name

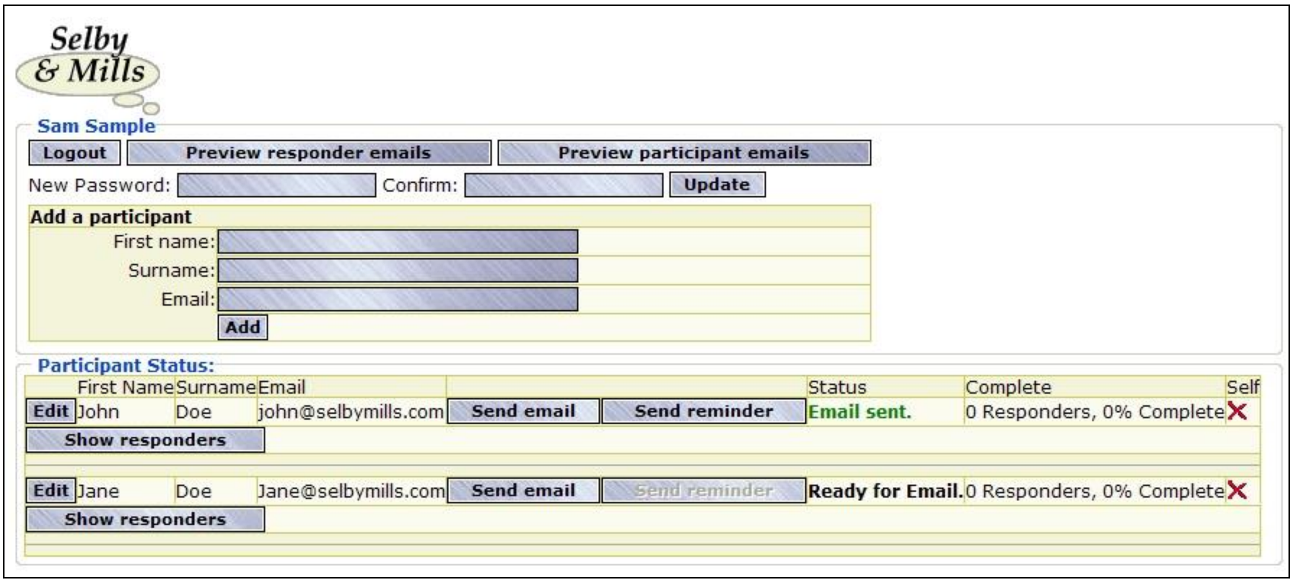


the Organiser may change any of the details or even delete the Participant. The Password is not initially set and the Participant will create it for themselves. However in the event of the Participant forgetting their password the Organiser may recover it from this screen option.

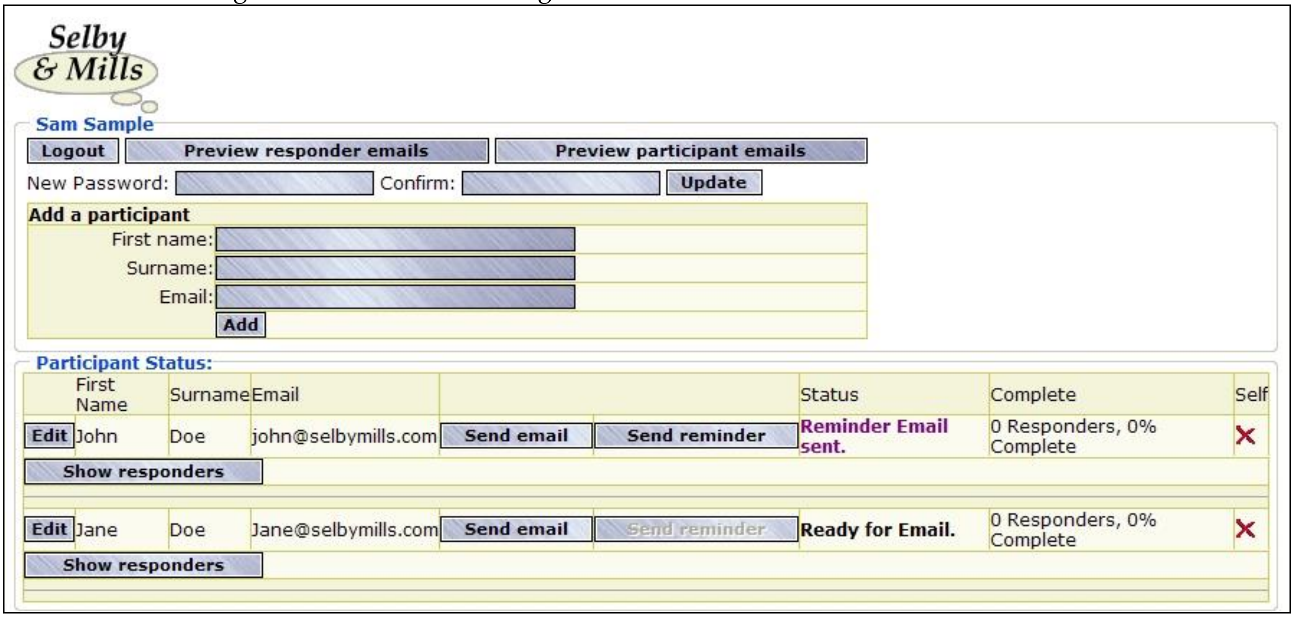
Once the Organiser has added the Participants for this review they click on the 'Send Mail' button beside that Participant's name. A message will appear indicating that the email has been sent



and on clicking 'OK' the status beside the Participant's name will change from '**Ready for Email**' to '**Email Sent**'.

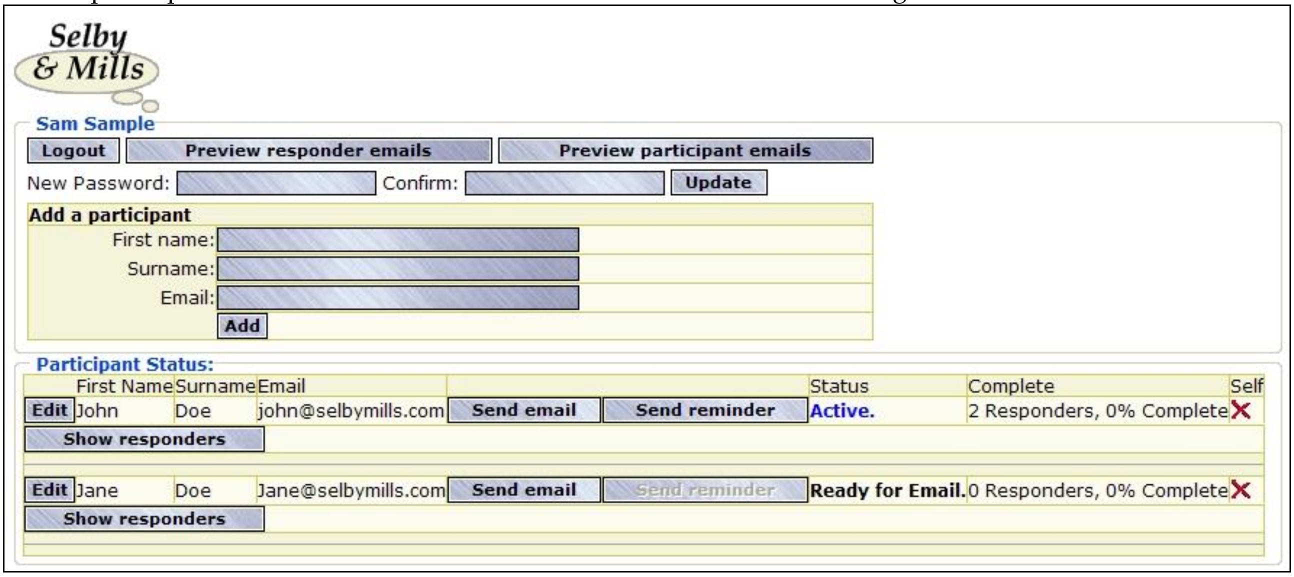


The Organiser may access the system at any time to check on progress as shown to the right of the line for each Participant. They may also send the email again or send the reminder email. If the reminder email is sent then the message on the screen will change

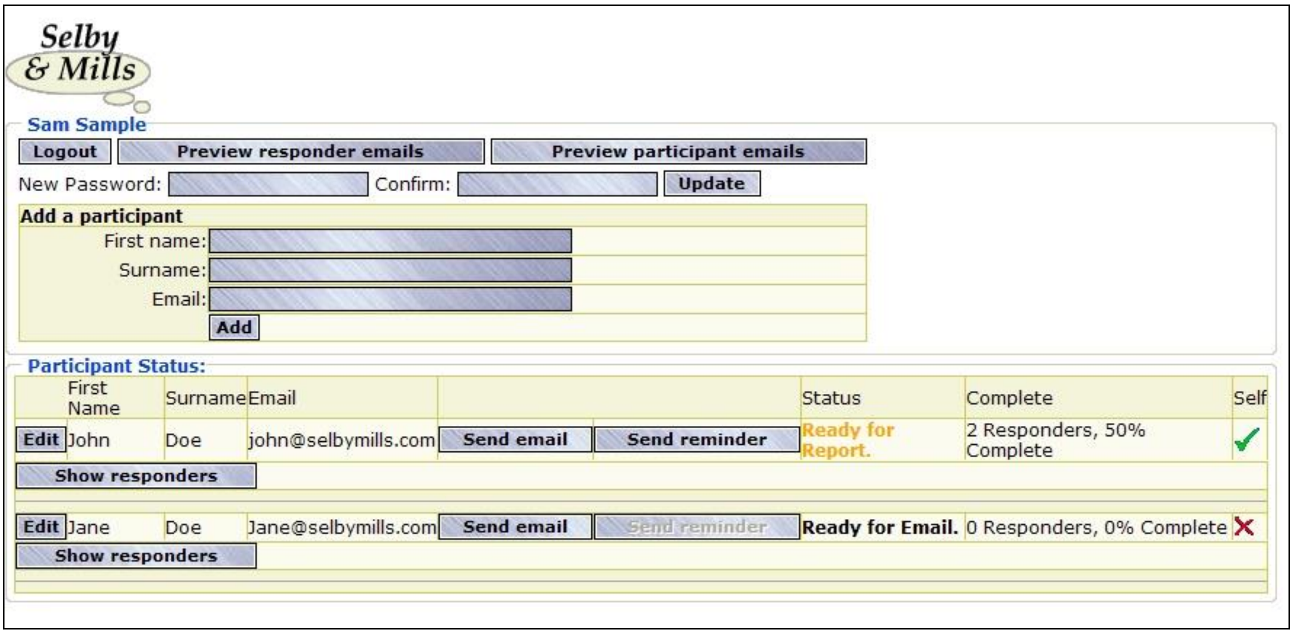


These emails may be sent as often as desired.

Once a participant has started to enter their details then the status will change to '**Active**'



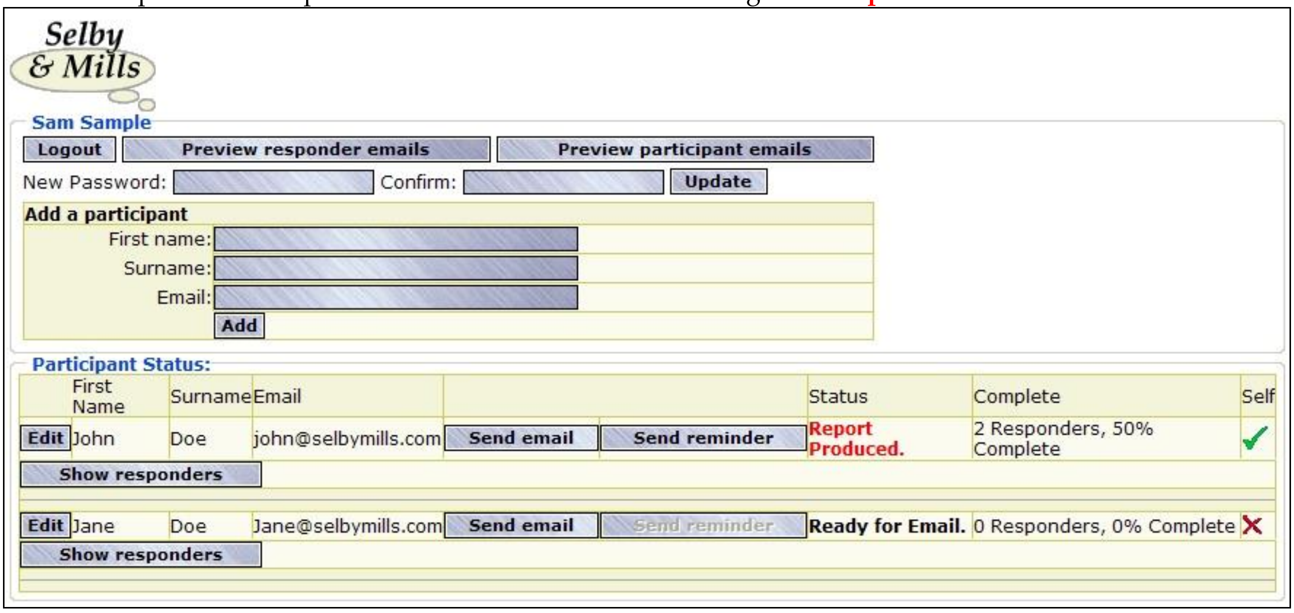
and the number of Responders entered will be shown.



In the above example John Doe has 2 responders of whom one (50%) has completed and John has also completed as indicated by the green tick in 'Self'.

John has also indicated that his report should be produced. As a result Selby & Mills will contact you to confirm that the report can be produced. If the Participant has made this indication prematurely then Selby & Mills will reset the account to '**Active**'.

Once the report has been produced then the status will be changed to '**Report Produced**'.

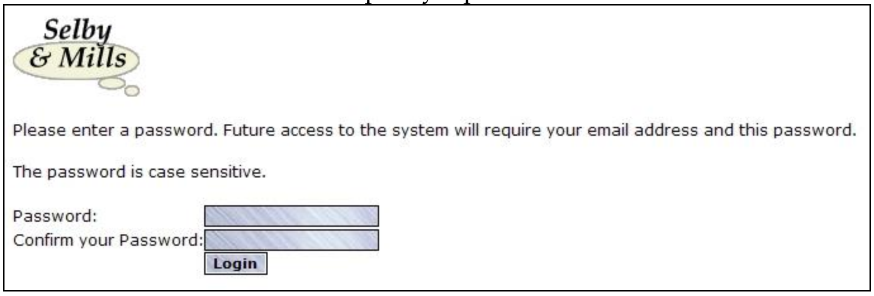


Email Address note

As will have been seen the system operates via a control system that uses an individual's email address. Therefore if an individual undertakes a review and subsequently another review is planned their details need to be deleted from the system before they are entered again as a Participant.
Similarly if an Organiser is also to be a Participant then they need to use different email addresses for the two options. The system treats case in email addresses as defining a different email so two email addresses such as john@selbymills.com and JOHN@selbymills.com will be treated as two different individuals, one of whom would be the Organiser and the other the Participant.

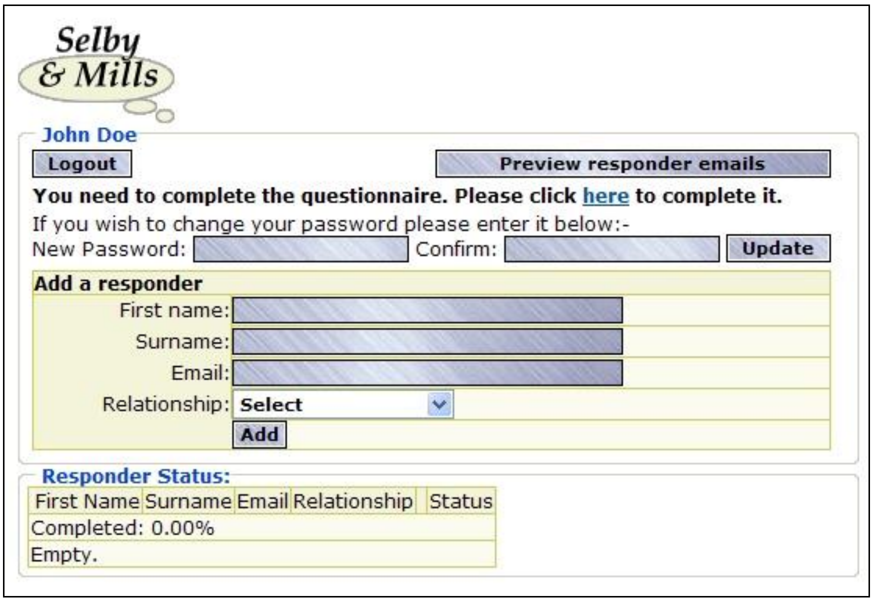
Participant instructions

Once the Participant has received their email they need to click on the link within it which will take them to a screen that will ask them to specify a password.

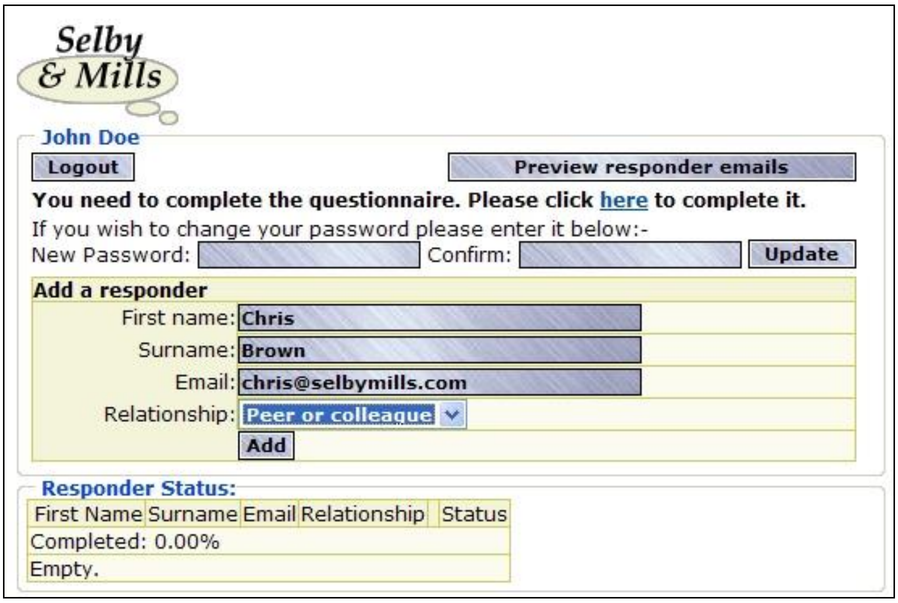


on clicking 'Login', and specifying the password the same in both instances, a message will appear confirming that the password has been set.

The main window will now be shown.

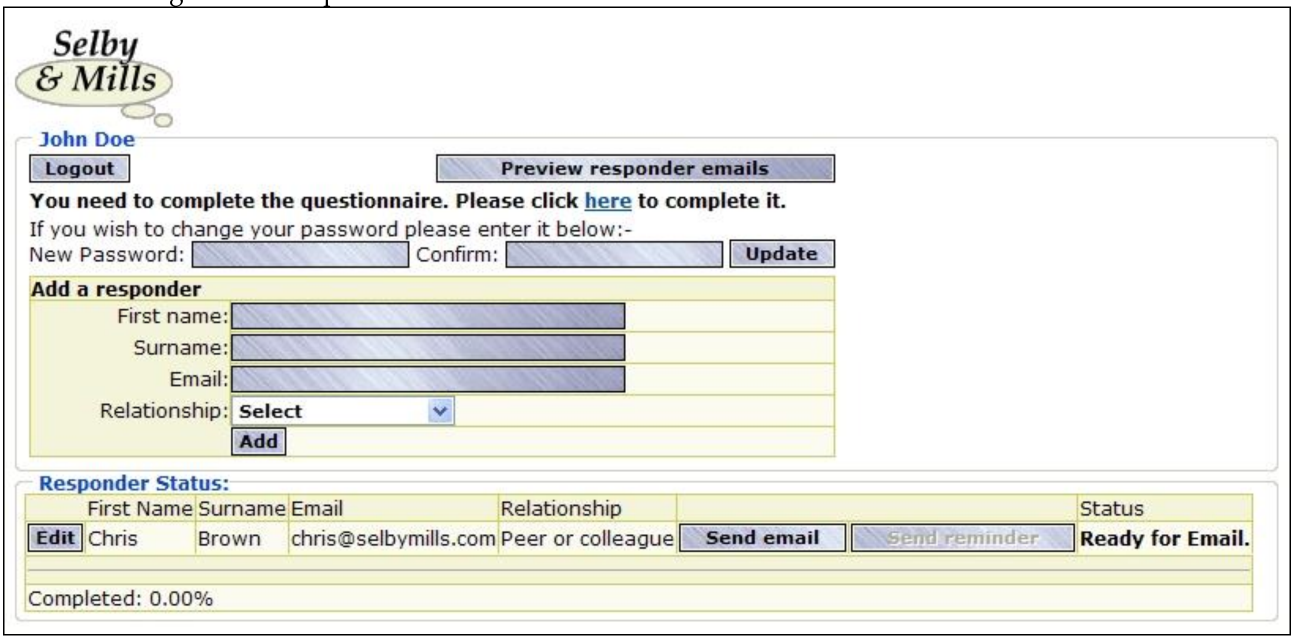


the first line contains a button that enables the Participant to review the emails that will go to his/her Responders.
The second line enables the Participant to complete the questionnaire themselves.
The next pair of lines enables the Participant to change their password.
The next section allows them to add a Responder to the system. The participant should enter the Responder's name and email address and select their relationship from the drop down box.

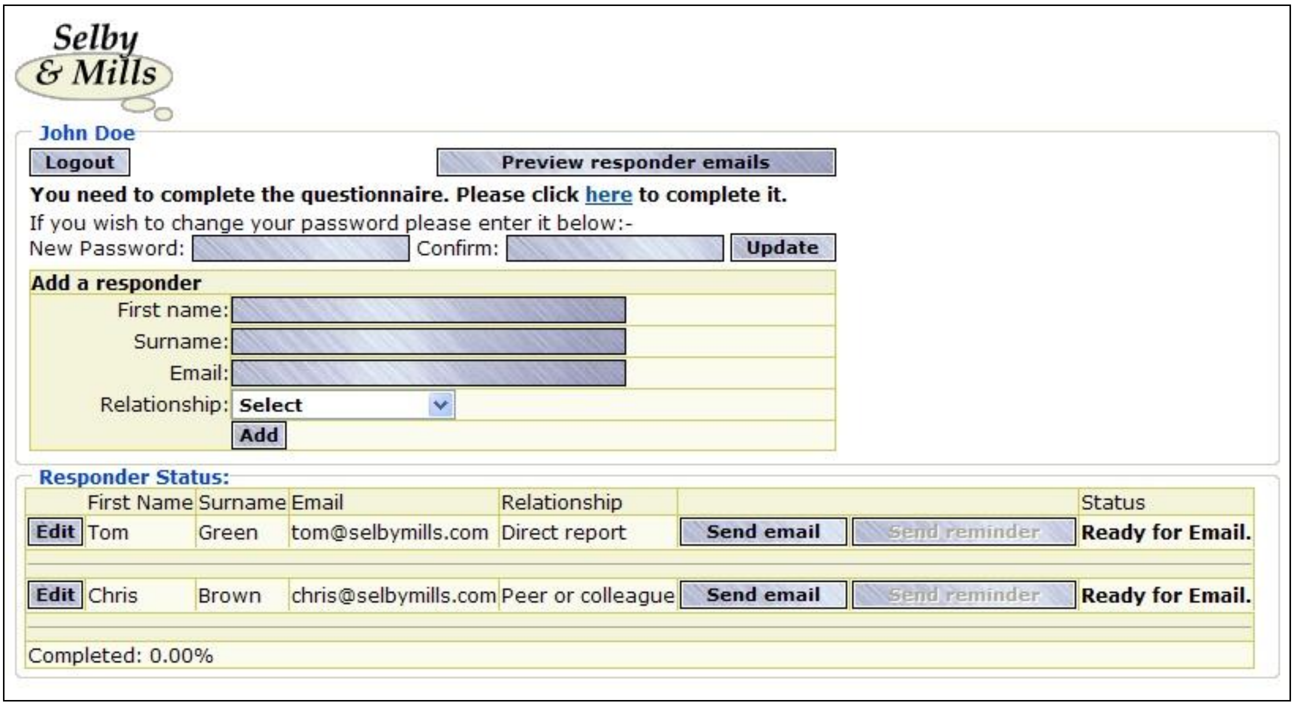


Once the Participant has entered the Responder's details and clicked on the 'Add' button a message will confirm the action

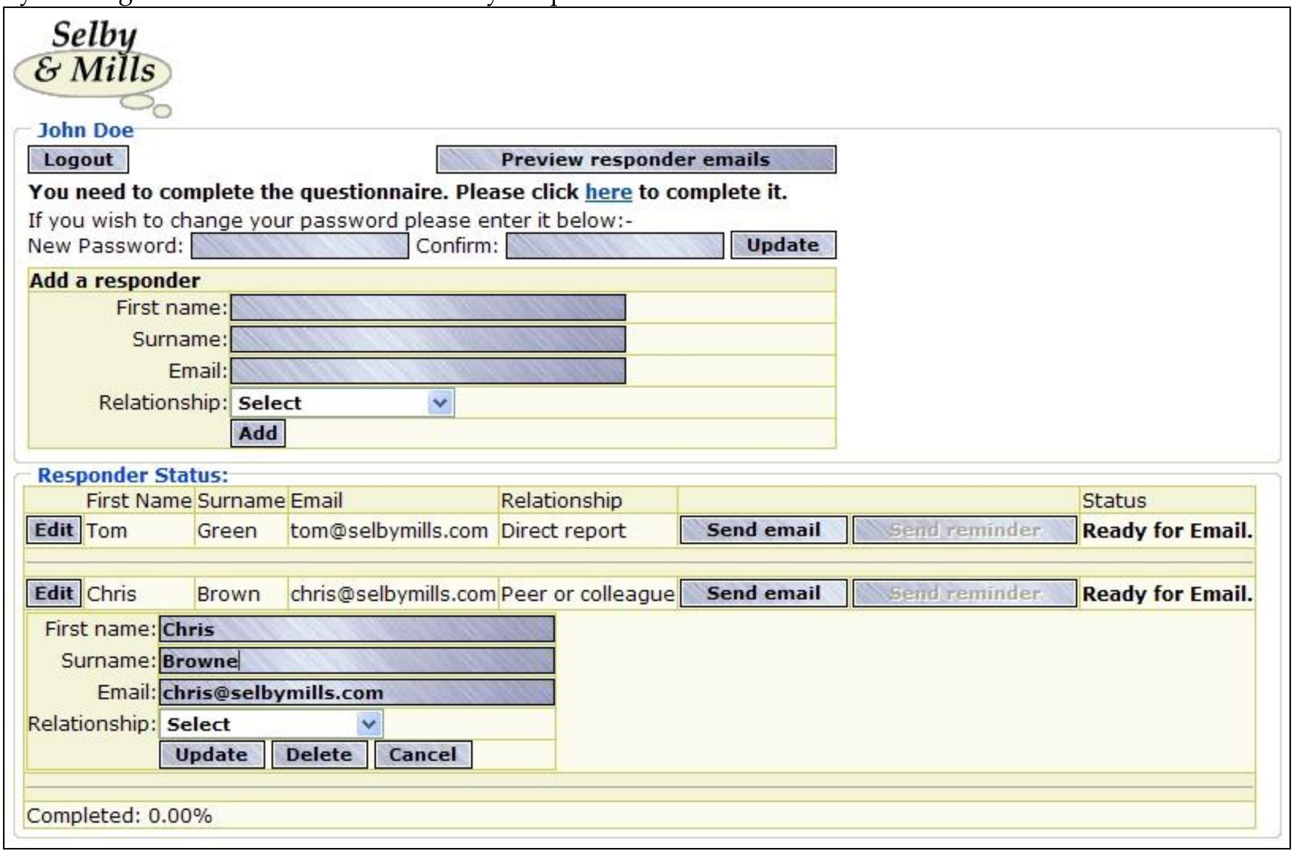
and on clicking OK the Responder will be shown in the final section of the screen.



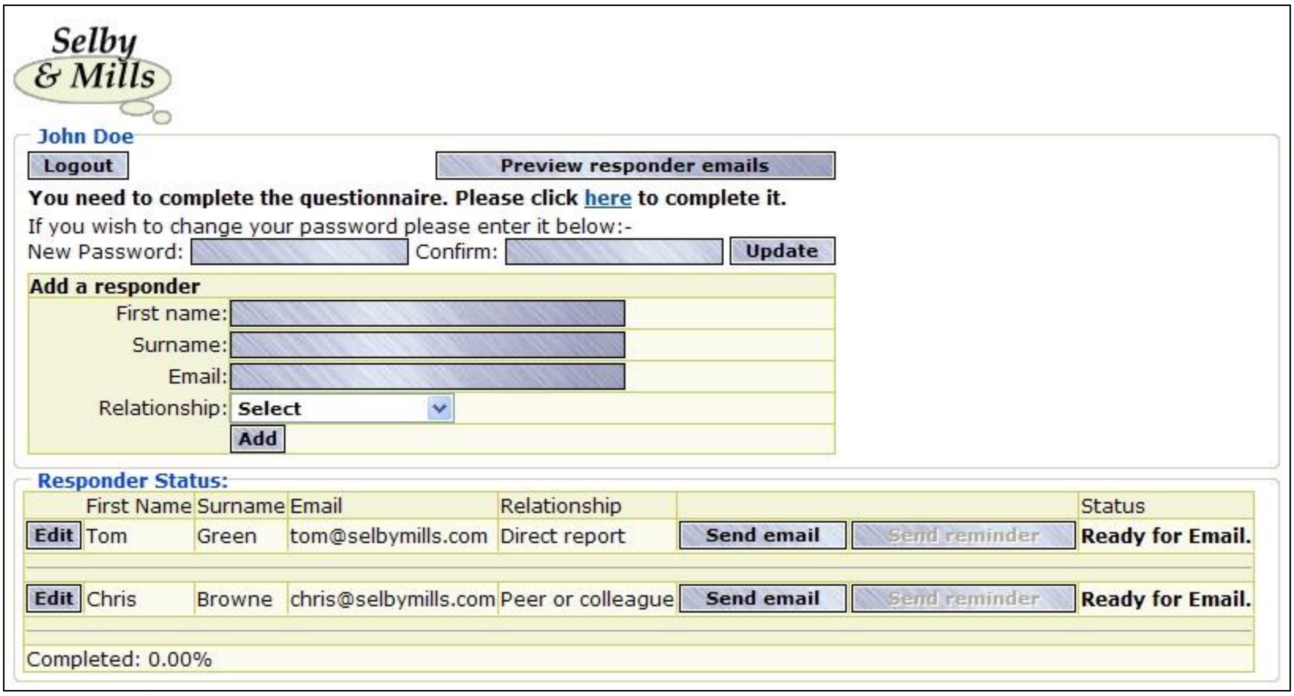
The Participant may now add further Responders.



By clicking on the 'Edit' button beside any Responder's name



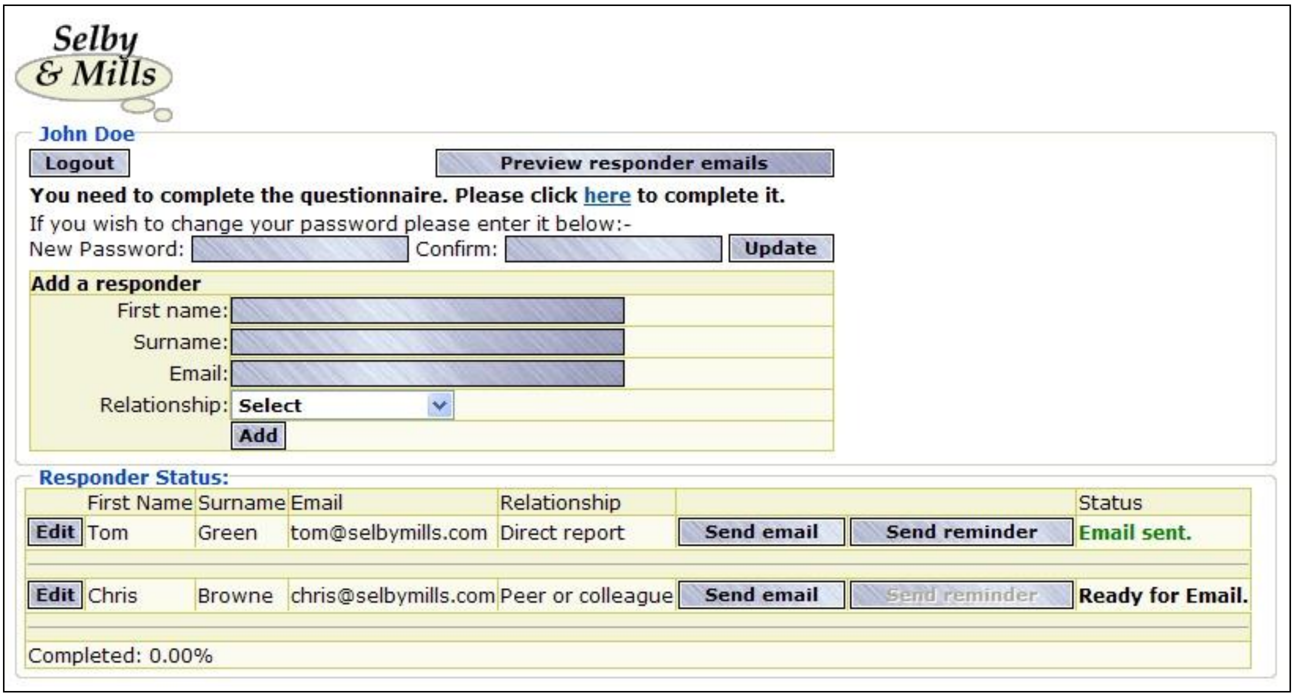
the Participant may change any of the details or even delete the Responder.



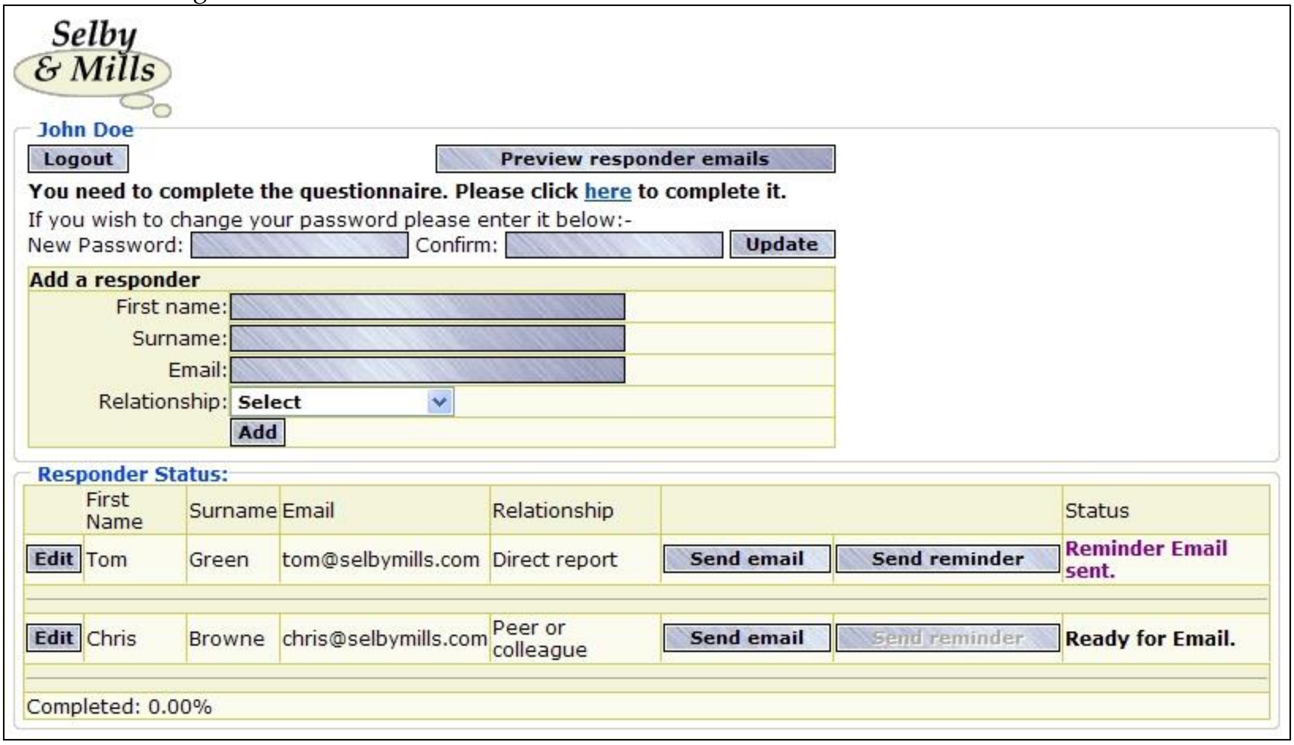
The Participant should then continue to add all of their Responders for this review.

Once the Participant has added all of their Responders they click on the 'Send Mail' button beside that Responder's name. A message will appear indicating that the email has been sent

and on clicking 'OK' the status beside the Responder's name will change from '**Ready for Email**' to '**Email Sent**'.

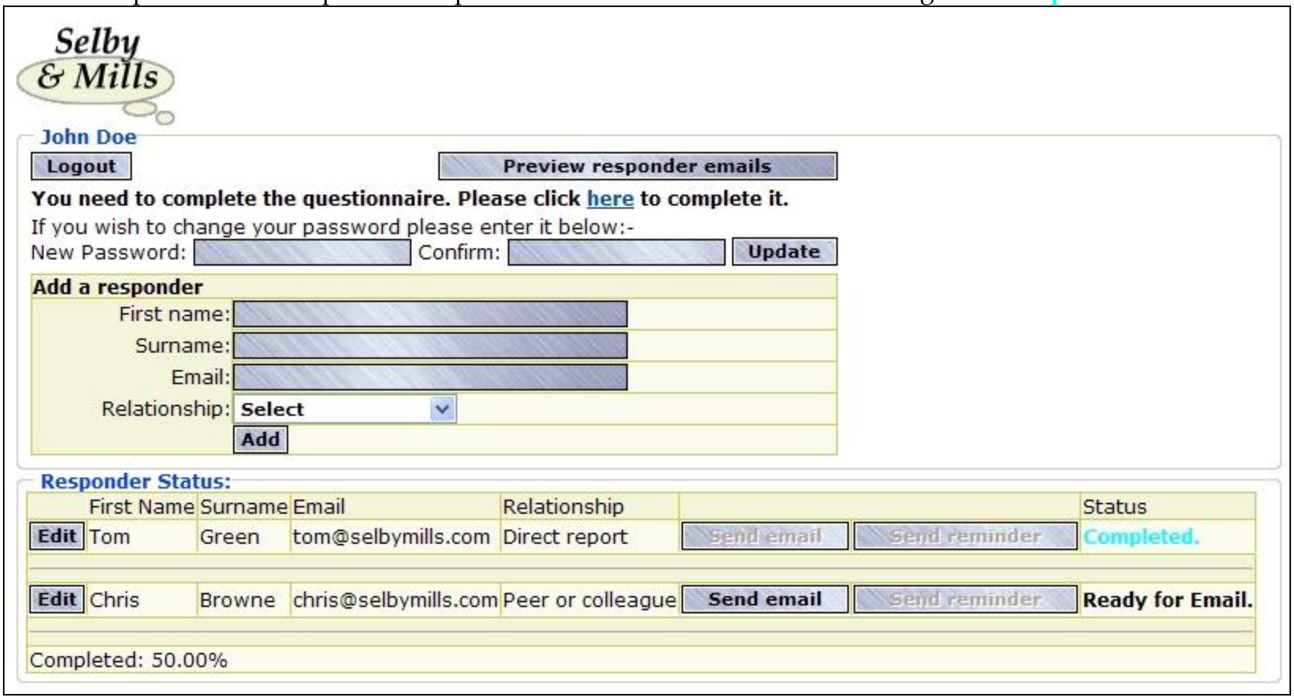


The Participant may access the system at any time to check on progress as in the status section. They may also send the email again or send the reminder email. If the reminder email is sent then the message on the screen will change.

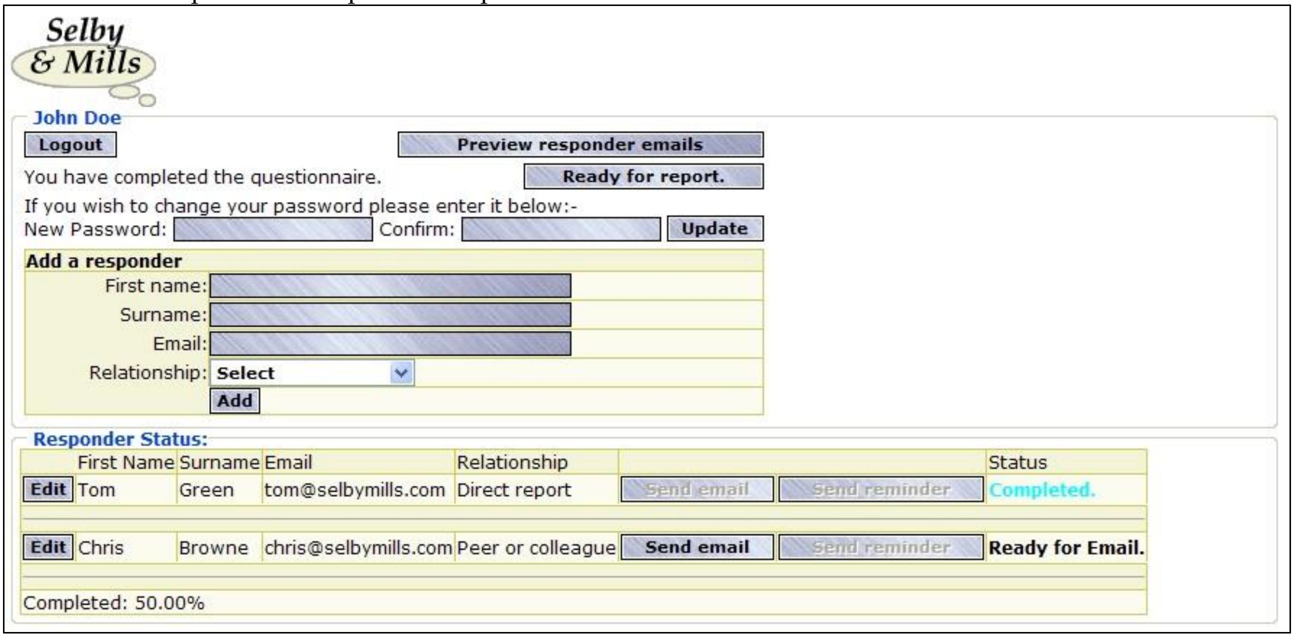


These emails may be sent as often as appropriate.

Once a Responder has completed the questionnaire then their status will change to '**Completed**'



Once the Participant has completed the questionnaire then the second line of this screen will show this fact



and the '**Ready for report**' button will appear.

This should be clicked when all of the responders who are likely to complete have done so and the Organiser will be notified that a report should be produced.
This will produce a warning message

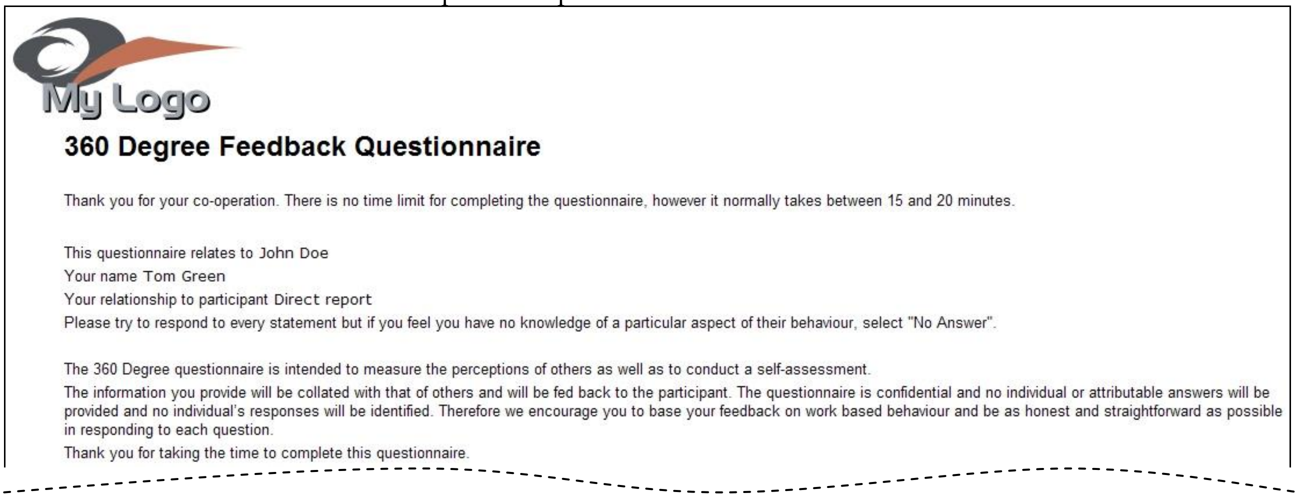
If 'OK' is clicked then a further message will appear

and the Participant will be locked out of the system. Any attempt to enter the system will produce the message

If this was undertaken prematurely then the Participant should contact the organizer to reactivate their account.

Responder instructions

Once the Participant has received their email they need to click on the link within it which will take them to a screen that will enable them to complete the questionnaire.



Once they have completed the questionnaire they will see

The logo that is shown will be that of the Client Organisation or no logo at all will be displayed as requested.

Please note that since the Responder is just undertaking this one task for the Participant they do not need to have a password for the system.

They must however click on the link in the appropriate email if they are being asked to complete the questionnaire for two or more Participants.

Questionnaire

The questionnaire may be viewed on our web site at http://360demonstration.testsdirect.com

Reports

A sample report may be downloaded from our web site.

Constraints

We can analyse the data in up to 4 categories e.g. Manager, Peer, Direct report, Supplier.
There can be up to 9 people per category.
There need to be at least 3 completions per category for that category to be reported as a separate group.