Salecology®

Sales Leader

360 Feedback Guide

Welcome

This guide has been written to provide you with all the information you might need if you are considering launching a 360 feedback survey in your organisation.

It will help you to consider whether a 360 feedback can help to solve the issues you and your organisation are facing, as well as the more practical aspects of implementing 360 feedback in your organisation.

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Leadership and Learning are indispensable to each other. John F. Kennedy

If your actions create a legacy that inspires others to dream more, learn more, do more and become more, then, you are an excellent leader. Dolly Parton

The quality of a leader is reflected in the standards they set for themselves. Ray Kroc

About this guide

At Salecology we specialise in understanding what makes Sales Leaders GREAT. Our Salecologists have over 30 years experiences of identifying, developing and sustaining High Performance in individuals, teams and organisations and we offer a wide range of Psychometric and Feedback tools to support the people highlight areas for improvement.

Whilst our 'off the shelf' tools are well regarded and adopted by industry leading organisations from around the world, we also implement a number of bespoke surveys for organisations looking to embed new frameworks, review performance and support development initiatives either on a regular basis or as part of a one off process.

We appreciate that each project needs to be carefully managed and well implemented to generate the required results and lead to real, measurable improvements in performance. Each client project we implement is impacted by a number of variables and specific requirements; there is no one size fits all approach that will suit all organisations.

This guide has been pulled together drawing on our own experiences and recommendations. We cover the following areas in this guide:

We hope you find it useful and would welcome the opportunity to discuss your specific project requirements in more detail.

Introduction

What is 360 feedback?

360 feedback surveys provide a unique opportunity for individuals and organisations to gain an insight into what has made them successful in the past and what they need to do to be more successful in the future. 360 feedback surveys are a well-established tool for organisations to:

- **Manage performance and development**
- **Manage change or culture**
- **Develop leaders**
- **Link individual performance to corporate performance**
- **Improve existing appraisal processes**

Why use 360 feedback?

There are many reasons for using 360 feedback:

- **Creation of a performance culture**
  360 feedback enables the alignment of employee behaviour/effort with business objectives by sending a clear message to employees about the behaviours it expects them to adopt and develop.

- **Improving dialogue about performance**
  360 feedback can provide the appraisee and manager with rich objective data to enable them to evaluate the extent to which performance has developed since joining the company or since the last appraisal. The rich data in a 360 feedback report encourages in-depth dialogue about development actions.

- **Improving how people work together**
  360 feedback can help improve performance in organisations by helping individuals to understand how their actions are perceived by others. By raising self-awareness and providing ongoing support individuals can develop behaviours that enable them to work more smoothly alongside their colleagues.

- **Training needs analysis and benchmarking**
  360 feedback can help review both individual and group performance in organisations by helping identify training needs and areas to focus on either on a regular basis or as part of a change project.

360 feedback enables organisations to:

- Drive a High Performance Culture
- Communicate a clear message about what is meant by effective leadership and why it is seen as being important
- Involve people in the process in developing more effective leadership across the organisation
- Identify the specific competencies or behaviours required for effective leadership at different levels and in different function
- Set standards of competency or behaviour for each role
- Assess the performance of each manager against those standards
- Identify the strengths and weaknesses of each manager and groups of managers
- Provide a sound basis for individual development planning
- Provide an analysis of training and development requirement across the business
- Start or maintain a process of cultural change- particularly around valuing feedback and open and honest communication

How does 360 feedback work?

360 surveys are designed to gather feedback from a variety of sources; people with whom the individual interacts on a regular basis i.e. manager, direct reports, peers and customers. Because the surveys are typically anonymous respondents feel free to share their true perceptions of what the individual does well and what they might not do so well.

Feedback is given in two ways:

- By rating a series of statements designed specifically to measure key behaviours and competencies that are important for effective managers and leaders
- Through open-ended questions that allow respondents to give their verbatim comment

The results are collated into a report to provide a graphical summary detailed analysis and the verbatim comments that highlight the individual's strengths and areas for development. The individual can review either the report on their own, or for greater impact can review with a trained facilitator, coach or manager who can guide, challenge and encourage the individual to take on board the information contained in the report.

What are the benefits of 360 feedback?

Organisation

- A **cost-effective and quick method** of gathering information and supporting the development of managers and leaders
- Involves people with **different perspectives** in different roles and at different levels
- Provides both quantitative and qualitative data which can **directly inform talent management and succession planning strategies**
- Provides a sound basis for **development planning and performance improvement**
- Offers a **fair and transparent** process that will encourage an open culture that values feedback
- Encourages a commitment to **continuous development**
- Reinforces the link between behaviour and performance which can help to **build a performance culture**

Individual

- Provides an opportunity to find out the **opinions of the people they work with**
- Feedback is more likely to be accepted as it is coming from a **variety of sources**
- Can **improve the dialogue** between appraisee and manager
- Encourages increased self-awareness which can **improve working relationships** with colleagues, customers, suppliers and partners
- Encourages a focus on personal development which can lead to **improved personal effectiveness and performance**
- Helps individuals to feel valued by the organisation and can lead to **increased engagement, loyalty and job satisfaction**
- **Improve team-working** by raising awareness of how others perceive individuals as a contributor to the group

Introducing 360 Feedback

Implementing a 360 feedback process

A 360 feedback process assesses very personal information relating to an individual's performance. Therefore the introduction and implementation of a 360 must be carefully planned and carried out. If handled correctly people can feel engaged and motivated. There are a number of ethical and best practice considerations that must be attended to ensure the success of the process.

Why are you using 360 feedback?

Right from the outset it is imperative that you have a clear understanding of why you are introducing a 360 feedback survey and if a 360 is the right tool for what you are trying to achieve. Most companies use 360 feedback for development as this approach is most congruent with the nature of the information that is exchanged during the survey process. It yields the most positive response from those involved as it is the least threatening.

Survey aims and objectives

Setting up and running a 360 feedback survey is a major undertaking and investment. Effective planning at the outset is crucial to ensure that there is a good return on investment.

The key questions that need to be answered to begin with are:

- Why are you using 360 feedback?
- What competencies or behaviours do you want to assess?
- Who will be subject to feedback (the ratee) and who will give the feedback (the raters)?
- What competencies or behaviours do you want to assess?
- When will you begin the survey?
- How will you publicise the process and get acceptance/buy in?
- Who will manage the process?
- How will the ratee receive their feedback?
- What information will be given to the raters?
- What follow-up action do you want to happen?
- How will the results be used for training and development?

The timing of the survey

The timing of a 360 feedback survey needs to be carefully planned. Typically we tend to recommend a week for individuals to make their nominations and two weeks for raters to complete their feedback with 1:1 feedback scheduled as soon after feedback is complete to allow for data to be current and information to be feedback in a timely way. Other timing considerations include:

- **When to launch a new survey**
- **Phasing of ratings during the year**
- **The time allocated for a rating**

1. Launching a new survey

This should, firstly, take place when most of those involved will have time to give it proper attention. This means avoiding staff holiday periods and regular pressure periods for the company e.g. Christmas in retailing, end of the financial year for accounting practices.

Secondly, many new 360 feedback surveys are linked with leadership and management development initiatives, so their introduction needs to be coordinated with the launch of new corporate training and development surveys.

2. Phasing of ratings

Through the year it may be necessary to avoid placing too great a burden on some individuals at any one time. A middle manager, in particular, can be involved in rating him or herself and in giving ratings as a direct report, peer, manager and internal customer or supplier. To avoid such problems the company should consider the frequency with which individuals have to act as raters.

3. The time allocated to ratings

If many raters are mobile rather than confined to one work location, a reasonable amount of time should be allowed for them to access the internet. On the other hand, no one will want the process to drag on either. Two or three weeks, depending on how widely the raters are dispersed, represents a reasonable compromise. Once all the questionnaires have been received, recording, analysis and report production should be as quick as possible, with a minimum target time of two days. The company needs to plan for a total turn-round time, from initialling the feedback to receiving the report, of between one and two months.

What competencies or behaviours do you want to assess?

You and the organisation need to decide what aspects of behaviours to assess. While many companies concentrate exclusively on leadership development, there are other aspects, which may be equally important for some companies or some staff, such as innovation or customer focus. The important thing is to select behaviours that are important and meaningful to the business and those who will be involved in the process. They need to be behaviours that you can link to the company's strategy and things that you are able to measure the improvement of.

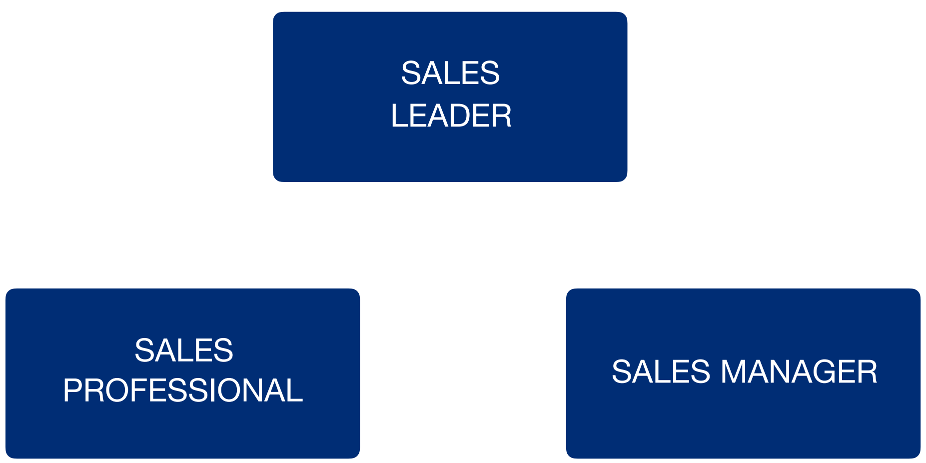
A vital element in the planning stage of a 360 feedback survey is the selection of the competencies and or behaviours against which the appraisee's performance will be managed. A competency structure may already exist in a company before the introduction of the 360 feedback survey. If so, it should be reviewed against the needs of each of the groups which will be involved in the survey.

Most companies have a competency structure to cover all their employees, which makes it unlikely that all the competencies in the structure will be suitable for all the ratees. In practice, the number of competencies included in any feedback process usually ranges between five and ten, although they are often subdivided into a much larger number of specific skills and behaviours. If the company does not have an existing competency structure it must establish one before starting the 360 feedback survey.

Alternatively you may use Salecology's 'off the shelf' 360 surveys which have been based on a behavioural framework researched for over 20 years and shown to measure high performance.
Detailed below are the two options to consider, the bespoke 360 or alternatively our 'off the shelf' 360.

Off the Shelf

Salecology offers a range of 360 feedback surveys. They have all been designed based on our strong and reliable competency framework, the Salecology High Performance Framework. The surveys consist of behavioural statements that are easy to understand and rate. The feedback recipient and their nominees rate each statement using a five point rating scale. There are also two verbatim questions, the responses to which really add value to the feedback process.



Salecology High Performance Framework

The framework has been extensively validated across a wide range of industries and job levels and have been proven to differentiate between high performers and average performers.

Tailor & Bespoke 360

Maybe you already have a 360 feedback survey that you run internally, or perhaps you have just designed and implemented a new competency framework for your organisation. In either situation it's essential that you, the organisation and the individuals taking part get the most out of any 360 feedback process.

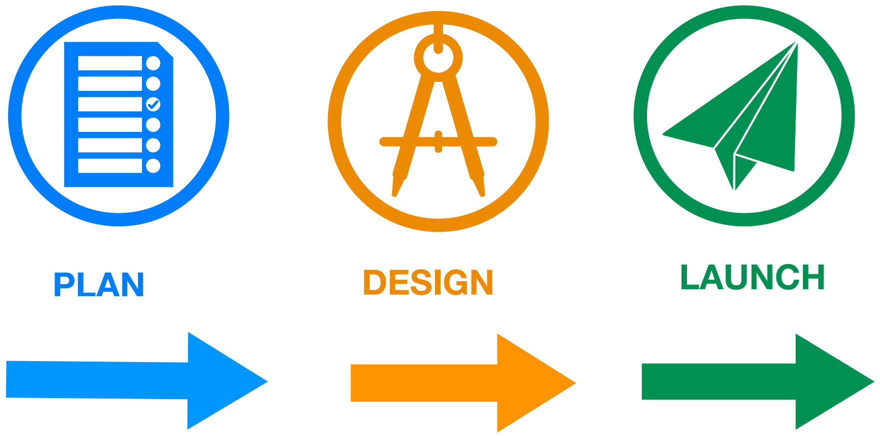
There's no denying that a bespoke survey is likely to reap the greatest benefits. A survey that uses your language and is precisely aligned to your goals is going to yield the most valuable information for your employees to work with and take action on.

Creating a survey that has the look and feel that your employees connect with can help to create buy-in as well as reinforce the company's values for its people.

There are three key elements required for creating an effective 360 tool;

- **a robust competency framework,**
- **a set of clear and insightful questions and**
- **simple and efficient survey system**

Salecology can provide all 3 or just the elements you require.



Managing the Survey

Once you have confirmed the 360 survey you are to use the next decision is how you plan to manage your survey. The successful management of a 360 feedback survey requires attention to detail, tight monitoring and time management. Survey management covers questionnaire deign and report design, selecting ratees and raters, questionnaire production and distribution, encouraging employees to complete the questionnaire, monitoring participation, data collection and processing report production and facilitating feedback.

While a small scale survey may not strain the management capacity of a company's HR department, surveys which cover the majority of managers may need to be outsourced or allocated a specific resource or owner. As an essential step in the planning process, the company must decide how the survey will be managed and who will be responsible for each part of the process whether it be managed internally or outsourced.

Successful 360 feedback implementation

Getting your 360 feedback survey right is dependent upon careful planning, preparation and management, if you are embedding the process into the organisation the steps you are going to go through will look something like the diagram below. After the initial planning and preparation, design and launch you'll move into a cyclical process whereby individual are regularly assessed and their performance, and development, can be monitored on an ongoing basis. At each stage of the process there are important questions you need to consider in order for your 360 feedback survey to be a success. The following pages detail the questions you need to ask as each stage of implementing a 360.

PLANNING & PREPARATION

Why do you want to run a 360 feedback survey?

What are you going to assess?

Who are going to be your feedback recipients and who will provide feedback?

Who is going to be responsible for which element of the project?

DESIGN

How are you going to administer the survey? Write the questions for the survey.

Write the instructions and supporting communications. What languages do you need to use?

What information do you want to report back to the feedback recipients and how (design feedback report)?

LAUNCH

What timescales are you working towards?

Do you need a phased approach?

Communicating about the project

Notifying the feedback recipients

NOMINATION

How many people should be nominated?

How should the feedback recipient decide who to nominate?

What needs to be communicated to the nominees/raters?

GATHERING FEEDBACK

- Monitor the process
- Collate the results
- Generate reports

FEEDBACK & DEVELOPMENT PLANNING

- Decide how to provide feedback-style and approach
- Deliver the feedback
- What action do you want to be taken at the end of the feedback session?

ONGOING SUPPORT & DEVELOPMENT

- Identify ongoing support and development
- Articulate how to access ongoing support and development
- Develop managers so they can support their direct reports development

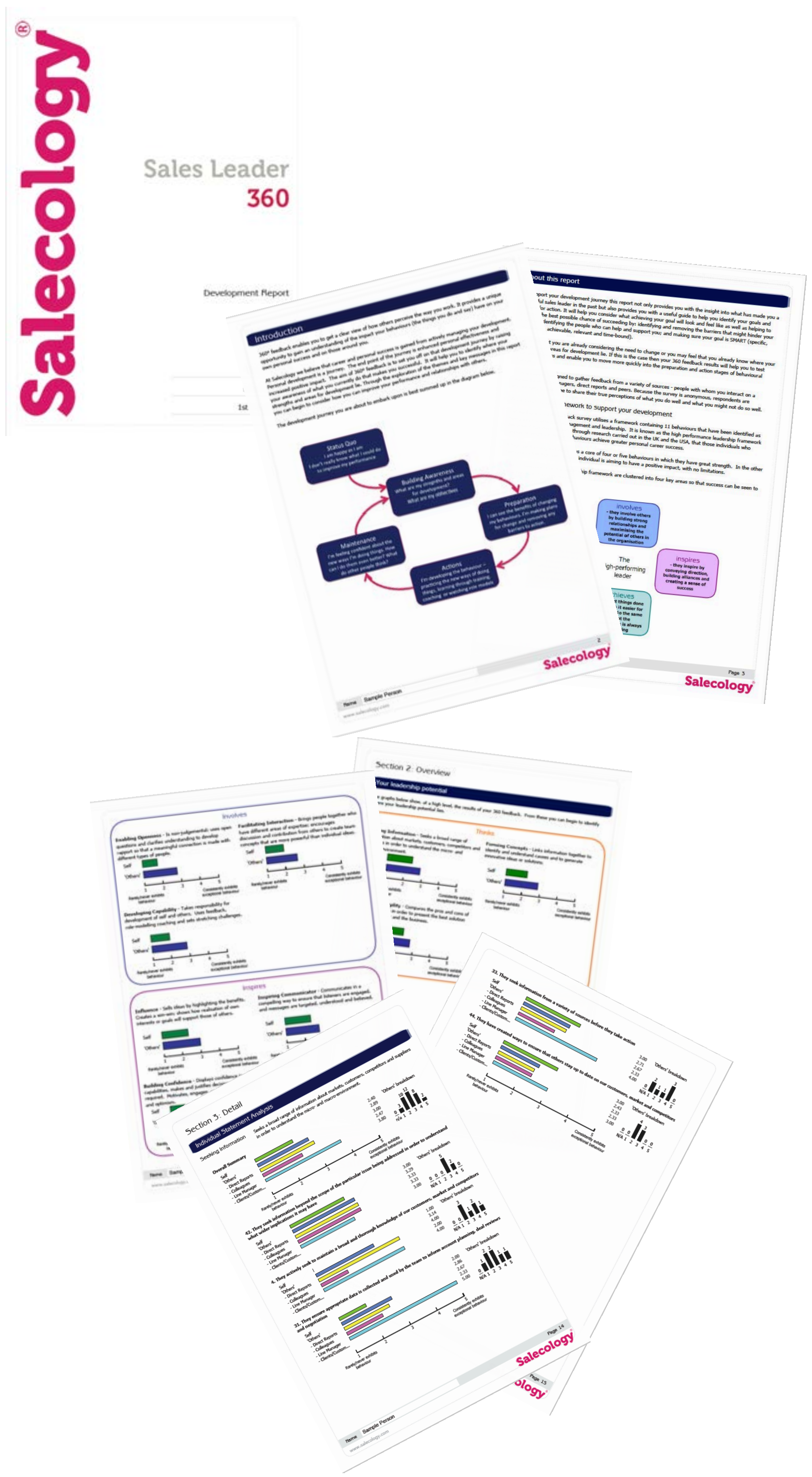
MONITOR & REVIEW OF PROGRAMME

- Carry out a project review
- Implement any necessary changes to improve the process

Reporting

Report Generation

As part of your 360 design and set up you will have identified reporting options. In order to produce individual reports ideally, all raters should have completed feedback. However, unfortunately a full set of returned questionnaires is not always possible. Much depends on how much effort is made by the ratee, managers or administrators to remind, encourage or pressurise raters to complete the questionnaires. Guidelines therefore need to be laid down on the minimum number of responses that can be accepted before a report is produced. The minimum number of responses from other raters will depend on how many there are in total and in each category. We recommend an absolute **minimum of four other raters.**



Types of Reports

Individual Reports

These should ensure the individuals receiving feedback can quickly understand their feedback. The reports should encourage the individual to consider how they can make use of their strengths and recognise where their behaviour and actions may be having a negative impact.

Group Reports

Group reports either provide information about the individuals within a group or team or compare the results of groups and teams. These reports can be useful for planning the future learning and development needs of the team as it identifies trends and patterns of strengths and areas for development. It can help you identify your role models and high performers as well as those who may need more support.

Distributing Reports

There are a number of options for distributing 360 feedback reports. Usually a single, soft copy report is sent by the survey administrator directly to the ratee, under confidential cover, for his or her personal use. It is also desirable to issue the ratee with guidelines on how to read, interpret and use the report. These guidelines may form part of the report or be issued as a separate document. We recommend that for the best results 1:1 feedback should be provided with reports.
Another option for report distribution is to involve a facilitator in the feedback process who will be sent a copy. The choice of option will be influenced by whether the ratee is expected to deal with the feedback process unaided in the first instance or if there is a formal procedure involving the ratee's manager, the HR department or a consultant.

For our off the shelf 360 feedback surveys you will have access to a range of "off the shelf" individual and group reports to give you the information you need in the way you need it. For bespoke surveys we will build a bespoke report based on our standard templates but will tailor the report so that it is bespoke to your needs and your organisation's.

Content of the SALES LEADER 360 Report

A 360 feedback survey is only the beginning of any development process. What you do with the results of the survey is where you will make change happen and bring about improvements in individual and company performance. In order to create the most effective development plans it is vital that the results of the 360 feedback survey are presented clearly, concisely, and in a way that is easy for an individual to understand where their strengths lie and where they should focus their development to get maximum results.

Salecology reports are designed to do just this. More than simply spitting out a heap of graph and numbers on an individual, our reports introduce the 360 process explain the purpose and guide individuals to think about their results and how they should use the information to begin their development journey. Our reports are also designed to be used as a development workbook which can be referred to throughout the year rather than just being read once and then put in the drawer never to see the light of day again.

The following pages detail the structure of our standard individual reports.

Introduction

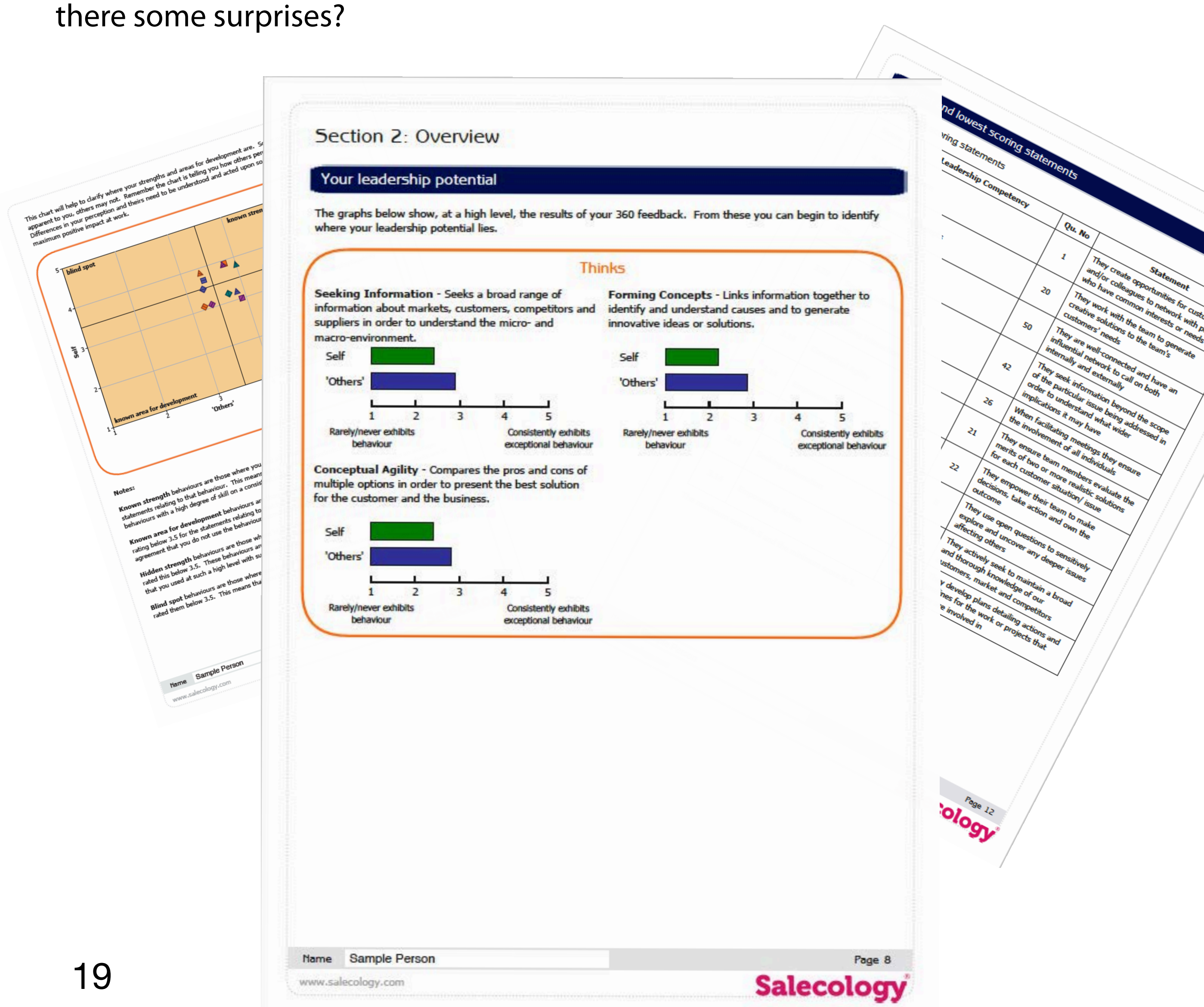
This provides the individual with an introduction to 360 feedback, helping them to understand the purpose of the survey and how it can be used as part of a development process. The introduction also introduces the framework on which the survey has been developed- in the case of our off the shelf surveys the Schroder Framework of High Performance. This begins to build awareness of the competency framework and help the individuals understand the behaviours and what high performance looks like. For introduction text can be tailored to match your requirements and competency framework.

Section 1: Using the report

The next section directs the individual in how they should approach the report and the data within it. It also provides a breakdown of the respondents per rater group so that the individual can see who have provided feedback (please note that confidentiality of responses is an important part of our 360 process. Only manager responses will be reported individually on the report. All other responses will be reported together, and if there are two or less respondents in a group they will be combined with another group to preserve anonymity.) An explanation of the raring scale is also included before a more detailed set of guidelines for how to read the report and use the data. As with the introduction these guidelines can be tailored in our bespoke reports to make them appropriate for your organisation.

Section 2: Overview

This section of the report provides the individual with a first look at their data. The overview section provides top level data comparing the individuals self-score to the overall average score provided by their nominees for each behaviour/competency. This data is also plotted on a Johari window to show very easily where and individuals strengths, hidden strengths, known development areas and any potential blind spots have been revealed by the data.
The 10 highest and lowest scoring questions from the survey are also included. The individual is also prompted to think about the data at this point and what it means to them- were these as expected or were there some surprises?



Feedback is King

Latest research has shown that it is the Sales Leaders, not the sales teams, that have the largest impact on sales performance across the business.

- People who received feedback on their strengths showed 8.9% greater profitability.
- 69% of employees say they would work harder if they felt their efforts were better recognized by the leadership.
- 14.9% Lower turnover rates in companies that implement regular employee feedback and coaching.

Gallup 2017

Forbes

Research published in Forbes has shown that ***Great leadership can double profit.***

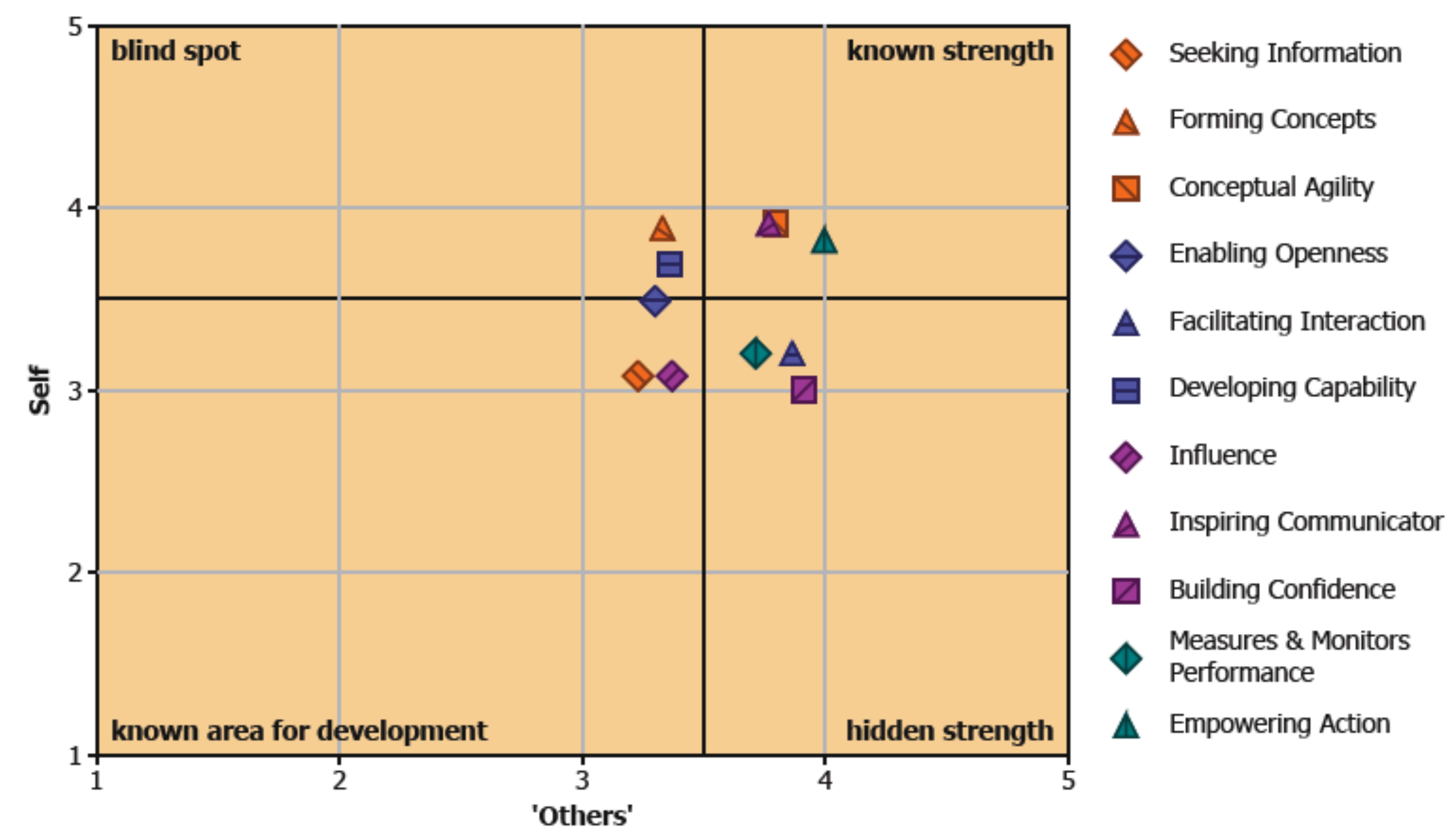
The Johari Window

The Johari window is part of the reports that we offer at Salecology and make us stand out from the rest. It was originally developed in the mid 1950s by Jospeh Luft and Harrington Ingham and the name is in fact derived from an amalgamation of the founder's first names. It is one of the most fundamental tools used in leadership training and has a natural fit with the data collected during the 360 feedback process.

In summary, the model is based on the understanding that there are areas of development that individuals are aware of, those that are known and those that are not known- both to ourselves and others. Understanding these areas and their impact on behaviours provides individuals with a greater understanding of the areas of development which will have the greatest impact on their behavioural performance.

Salecology 360 Johari window displays feedback provided into 4 quadrants:

- **Known Strength**
- **Hidden Strength**
- **Known Area for Development**
- **Blind Spot**



Johari Window displaying the 11 behaviours

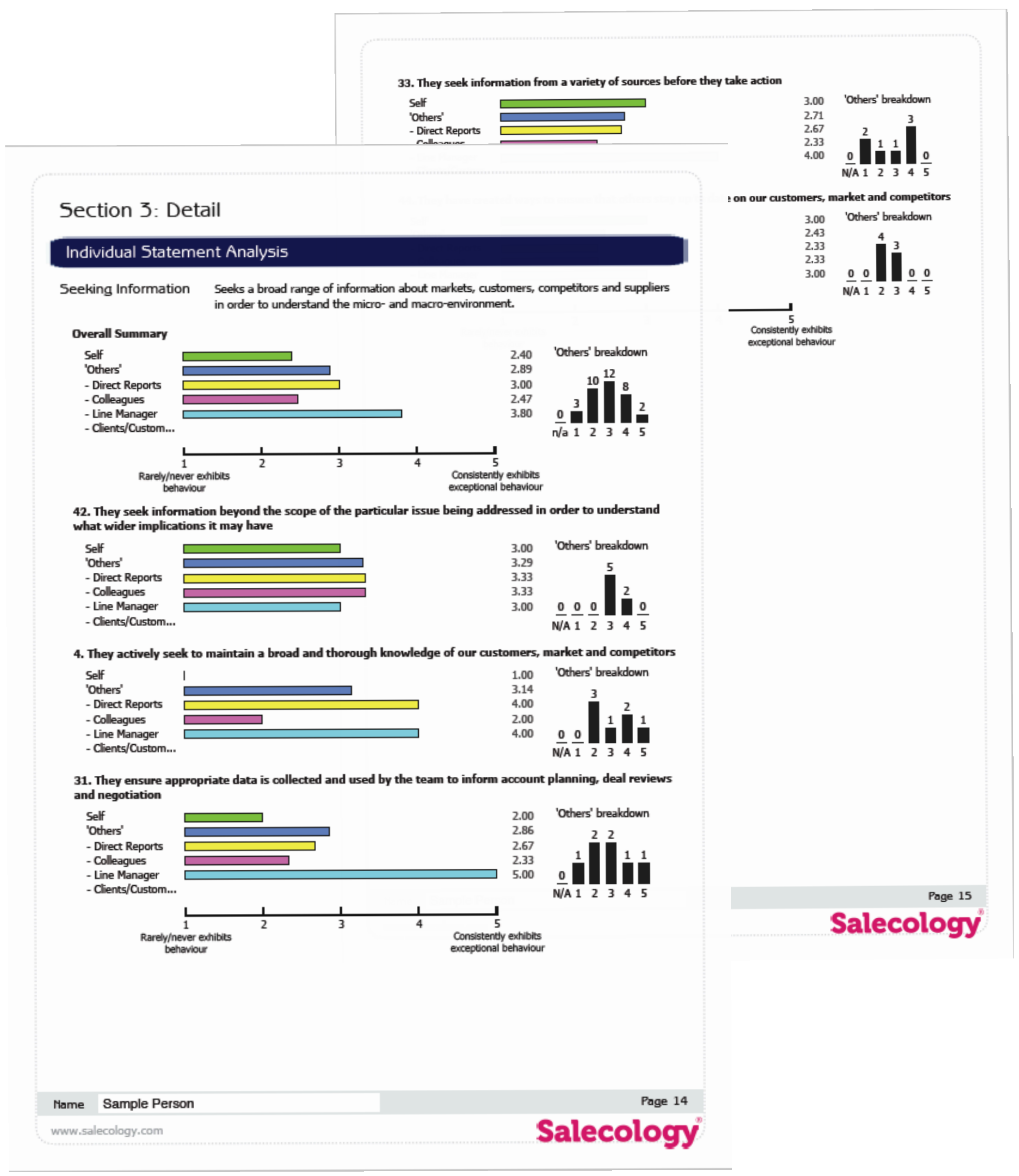
The data display is broken down against the competencies assessed. The example above is based on the 11 behaviours in the Salecology High Performance Framework.

Feedback is at the heart of understanding what's working and what's not. After all, without feedback, we tend to create our own realities.

In an age of limited development time and resources, the use of the Johari window data display as part of a 360 project leads to clearer data interpretation and understanding, which in turn allows for more meaningful, targeted development focused feedback.

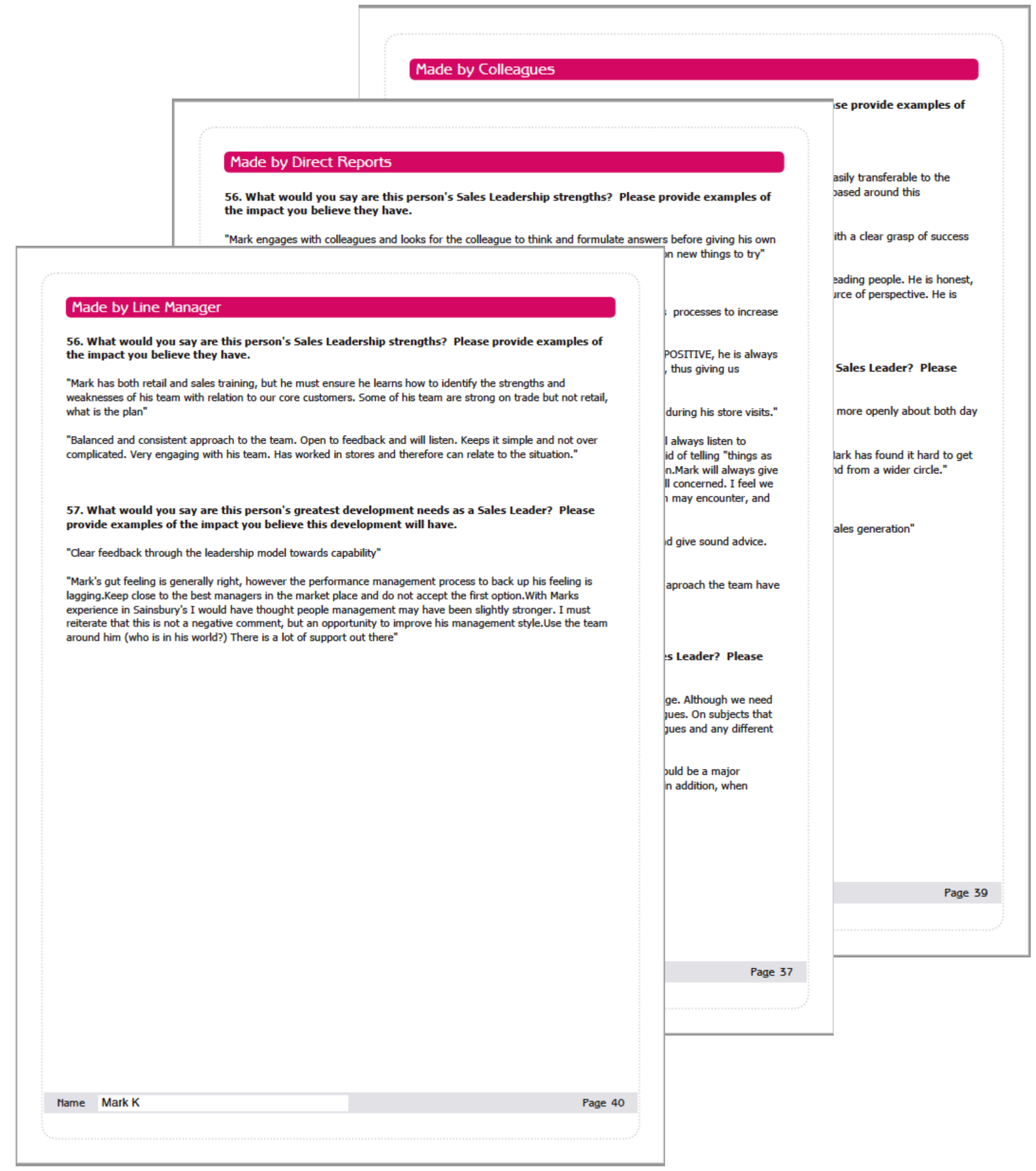
Section 3: Detail

This section breaks down each competency giving an overall score for the competency by rater group along with the breakdown of responses for each question. This allows the individual to dig into the results and gain a deeper understanding of how they are using the behaviours and explore any differences they may be seeing between rater groups.



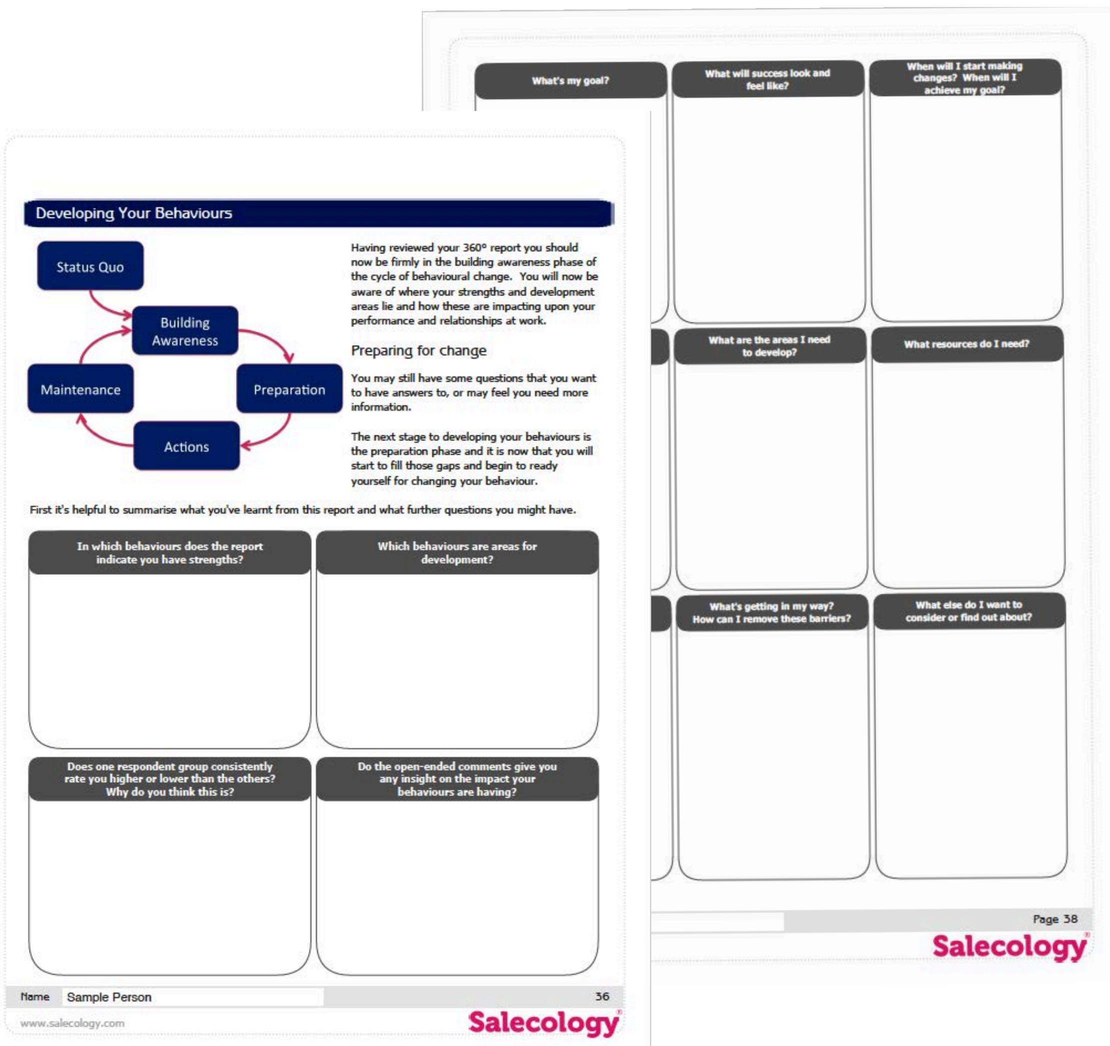
Section 4: Verbatim comments

Our surveys include free text questions as standard allowing people to add their thoughts about the individual and what they do well, and how they could perhaps change their behaviour to be more successful. This section provides those comments grouped by respondent category as they were written. This gives the individual greater insight into the impact of their behaviours.



Section 5: Development planning

Once the individual has reviewed their data the final section of the report asks the individual to think about what this means to them and decide on an action plan for how they are going to use what they have learnt to create a development plan. The report provides guidance on how to set SMART objectives and a worksheet to help them put in place a plan as to how they will achieve them. This section can be tailored in our bespoke reports to align with the development processes of the organisation.



Using the Results

Personal Development

The most popular use of a 360 feedback survey is to help guide the personal development of ratees. The first step in this process is for the ratee to understand and accept the results of his or her rating. The rate should therefore, be provided with a feedback session to help them interpret the report, or where this is not possible, a written guide. Whoever is selected for providing feedback should either be very experienced or be specifically trained for this task. Using the ratee's manager, while quite common, can raise problems if the manager has given the ratee a poor rating. The next step is for the ratee to draw up a personal development plan, which will list and prioritise the competencies which need developing, what actions he or she plans to take to achieve this and the timescales for completing each activity. Newcomers to the process may need help, either from their manager or from the HR function. In any case, the plan will need to be agreed with the ratee's manager and with those responsible for training and development within the company. The ratee will then need to implement the plan.

Training and Development Surveys

When a 360 feedback survey covers a significant proportion of a company's management the data from group reports can be used to structure or restructure the company's management training and development surveys. The reports will show areas of strength or weakness, which can be matched with the competencies the company requires in its managers. These strengths and weaknesses can then be compared with the current training and development provision, which will highlight any areas where the current provision needs to be improved. That information can then be used, if necessary, to restructure the training and development survey to meet the company's needs more accurately and efficiently. When the training and development survey has been reviewed, the needs of individual ratees can then be met more efficiently.

Conclusion

A 360 feedback survey represents a major investment in a company's employees. It can consume a great deal of stuff and should therefore be planned and managed with care to minimise the impact on employees. Fortunately technology has slashed the time and resources required to run a comprehensive feedback survey. There is no doubt that a well run 360 feedback survey can produce enormous benefits both for the individuals taking part and for the company which employs them.

Here at Salecology we are experts in 360 and improving behavioural performance.

We do this by:

- **Bringing together your expertise with ours** you are an expert on your business and we are the experts in the business of people measurement and performance. We seek to understand your challenges and business needs and to provide advice and guidance to help you make the right choices.

- **Providing customer service that is second to none** we do what we say we will, when we say we'll do it.

- **Ensuring our solutions are best in class** by continually reviewing the market and linking this with the current research in the fields of management, learning and development and occupational psychology.

If you would like to discuss you 360 project requirements or the options available please contact the Salecology team on:

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