Franchisee Resource Pack

2 – The 360° Project

Contents

Implementing a Client 360

When you wish to undertake a 360° Feedback project, select the 'Subjects' who will be participating, the type of questionnaires, reports and competencies to be used, and the desired timescales of the project. Generally 4 – 6 weeks are allowed for completion and delivery of a 360° Feedback project (from invitation of subjects to delivery of reports), but these timescales can be flexible. Some of our major clients allow:

- 10 working days for Observer selection
- 10 working days for Observers to complete feedback
- 10 working days for project extensions, chasing final feedback and generating reports

Free and Affiliate start ups are limited to using standard competencies and emails, Partner and Premium clients have complete flexibility over questionnaires, competency profiles, marking mechanisms, briefing and email text. This information is normally discussed by phone with your Account Manager, who completes a Project Check List for your approval, prior to setting up the programme (an example Check List is shown overleaf).

Invitation, briefing and reminder emails are dispatched from our system, semi-automatically to all relevant project participants, examples of standard email text are shown in the appendices (3f).

The Subject of the 360° survey (usually a middle / senior manager), is generally tasked with selecting suitable observers to provide feedback (normally 8 – 10 observers are used). These can be selected online, by the Subject, or listed and passed to us for entry to the system. In some cases the observers are selected for them, or selected with their managers agreement.

Feedback is anonymous, confidential and generally entered via a simple online form. The power of the 360 is in the detailed qualitative and quantitative report generated, which can identify training needs, skills gaps and perceptions from different areas inside and occasionally outside of the organisation. To reduce timescales, a number of our clients collect the Observer selection in hard copy, during consultancy, and pass to us for entry to the system.

Most clients choose progress reports mid and end of project, although we're always available to discuss progress and can report more regularly if required. At the project end date the 360 reports are collated, manually quality controlled and dispatched as agreed, with optional Development

Workbooks. At the end of the project, Management Reports can be called off for an overview of the project.

For a fuller explanation of what is involved in setting up a 360° Feedback project, please see the project check list and 5 Steps of a 360 Project on the following pages. Remember though that we offer a fully managed process, are here to assist at every step, and will be administering the project for you. Simply tell us what you need, and we make it happen!

The Project Check List

Client Organisation	
Project Name	

HR / Project Contact details **Pre project consultation** **Documentation required**	
IT Contact details	
Web-site Address (URL)	
Firewall check Sign off procedure Firewall check OK?	☐ No ☐ Yes (If No, when will check be performed: _____________)
Questionnaire Type Pagination Mandatory elements Survey Delivery Privacy sign off	☐ Generic ☐ Custom ☐ Single ☐ Multi (recommended) ☐ None ☐ Numeric and Final Comments (recommended) ☐ All ☐ Link By Email ☐ Word Attachment By Email ☐ Post ☐ No ☐ Yes
Reports Type Appendices Workbook included	☐ Generic ☐ Custom ☐ Gap Analysis ☐ Strengths & Weaknesses ☐ No ☐ Yes
E-mail reminders How many When Type	☐ Generic ☐ Custom
Status reports How often To whom Method	☐ Weekly ☐ Mid-project(recommended) ☐ Final Day (recommended) ☐ E-mail (recommended) ☐ Phone
Observers Selection Observer Accept/Decline Observer minimums Action if min not met. Min overall % Action for criticals	☐ Online (OSP) (recommended) ☐ Word Form ☐ No ☐ Yes
Number of Subjects	
Subject info Date	
Observer info Date	
Start Date	
Completion Date Extension to be offered	☐ No ☐ Yes (if Yes, how long? _________ Days)
Report Date	
Reports to	☐ Subject ☐ Manager ☐ HR consultant ☐ Other
Special Notes	

5 Steps of a 360 Project

1 – Client Information

2 – Technical Information

3 – Pre-project Information

4 – Project Process Information

5 – Project Timeline

1 – Client Information

Client Organisation:
By providing us with the name of your client, we then ensure that any communication from us is headed / worded appropriately. This makes your client feel that they are important to you, as communication is much more personalised.

Project Name:
We set a friendly name for your project – when you have many clients all working through the 360 process, it enables us to monitor and track your individual projects to ensure that you receive any scheduled or specifically requested updates for any one particular project without delays.

HR / Project Contact details:
By providing us with details of one main point of contact we can then ensure that all communication regarding any one project is relayed promptly and efficiently. This person would be our point of contact to send any status reports to, or to raise any concerns with if confirmation is required regarding anything unusual during the process.

Pre project consultation:
This section ensures that we have discussed with you all aspects of the project, and that you are agreeable with the full 360 process that has been agreed. We do this with every project to ensure that we meet your exact requirements for each of your individual clients. Every client requires and expects different things from a 360 process, and may require variations to any previous projects that we have run for you. We do all we can to ensure that both you and your client are happy with any process agreed to ensure all receive the most out of the 360 project.

Documentation required:

If you require any additional documentation for any client, at any stage, then please do let us know. We are happy to assist and provide you with any further example documentation that you require

2 – Technical Information

IT Contact details:

We find it a benefit to have details of a friendly IT contact within your clients' organisation. This ensures that should there be any IT type queries/issues we are able to contact them directly to resolve the issue promptly, with little disruption to yourselves, your client or any end users.

Web-site address:

We can use your client's website as a reference point if at any level of branding / integration is required.

Firewall check - Sign off procedure

To ensure that there are no issues with internal firewalls within your clients' organisation, we would forward a test link to ensure that the site can be accessed. By testing links, we ensure that any end user involved in the process will not experience any issues or difficulties with access.

Firewall check OK?

We prompt this section to ensure that the firewall check has been implemented, or if not as yet, confirm a date to complete this part of the process.

3 – Pre-project Information

Questionnaire Type:

We have a variety of generic 360 feedback questionnaires which may be used, but many of your clients may have their own bespoke company competencies. We are more than happy to integrate any of your clients bespoke questionnaires into the 360 feedback system (Partner and Premium levels only). Once integrated, we forward sample links so you could see the questionnaire from a user perspective.

Pagination:

Questionnaires can be displayed to the end user in two ways. The first display option is all on one page, where the user is required to scroll down the page to complete. The second display option, which we always recommend, is for the questionnaire to be separated into individual pages for each competency. This allows the end user to work through the pages, and save at any point without scrolling through the page to view buttons to enable them to save.

Mandatory elements:

Any part of the questionnaire can be set as mandatory. We normally recommend that all numeric responses are mandatory and the free text sections are set as non-mandatory. In addition, if your questionnaire includes a final free text question, e.g. "**And finally....What one suggestion would you give that would significantly improve the individual's performance over the next 12 months?"**, then we would recommend that this is also set as a mandatory element of the questionnaire.

Survey Delivery:

Although we are a full online service provider, we do appreciate that some corporate environments do not allow all users web access. We can accommodate this in a number of ways. If an email is available, we can forward word version of the questionnaire. In some instances, we would forward a word version to an appropriate contact within your clients' organisation, in order that hard copies can be forwarded to those end users without internet access.

Privacy sign off:
In some corporate environments, it is required that a data privacy statement is implemented to ensure all involved in the process understand the legalities of what happens to their data. We are able to incorporate any data privacy statement within the questionnaire management page interface that would require all end users to agree to participate in the process.

Reports Type:
The majority of our clients use our standard report format, as this is a simple, yet effective way to view all feedback results. Our report format is designed to be printed. This ensures that when reviewing the 360 feedback report, whenever possible, all data relating to each individual competency can be viewed clearly on a 2 page spread, numeric / quantitative data on one page, text / qualitative feedback responses on the next page.

Appendices:
We recommend that, following each report, the following appendices are included:

- Gap Analysis – This shows the greatest variance between the subjects' perception and those of their colleagues and peers
- Strengths & Weaknesses – This highlights the subjects' top ten and bottom ten behaviours from all competencies.

Workbook included:
We provide a personal development workbook, which allows the subject to create a learning plan based on their 360 feedback report. This provides the subject with an opportunity to relate their results and construct into future development. This can be included with the report as a final appendix or can be sent as an individual document. It is recommended that the workbook be sent as a separate document for convenience and to reduce email file sizes.

4 – Project Process Information

E-mail reminders:
To ensure we receive the maximum amount of feedback, we find that three general email reminders throughout the process generate a good response. These emails reminders are sent *mid-project*, *end date -3 days* and *end date -1day*, to all end users who have incomplete feedback. Although we have standard generic emails, we are more than happy to adapt these to suit yourselves or your individual clients (Partner and Premium clients only). In many cases, an extension is allowed for after the project end date, project participants are not initially informed of this to maximise feedback. After final reminders have informed of the project end date, an extension email can be sent to any critical end users to ensure we receive the most feedback.

Status reports:
These show an overall summary of the project, with % completion details for subjects, along with a full breakdown of completion for each individual subject. By providing these reports, it highlights any end users who may be having issues with completing in designated timeframes, along with general completion rates to ensure the project runs to all timeframes.

To whom:
Status reports are typically sent to the HR consultant, the project contact detailed previously, or to any requested HR contact within your clients' organisation.

Method (e-mail or phone):
All reports would be sent primarily by email, but the details can be communicated by phone, if requested. If there any particular concerns, this would be relayed by phone in the first instance, to ensure prompt action is taken.

Observers Selection:
We can provide personal links to individual subjects for them to add their observer details directly onto the system or, if preferred, we can provide word forms for the subjects to complete their observer selection details.

Observer Accept/Decline:

A project can be set up in two ways;

- An end user is sent a personal link and is requested to complete feedback with no option to accept or decline (they can of course contact us direct if they have any concern regarding their participation)
- An end user is provided with the option to accept or decline to participate (this also links with the data privacy statement mentioned previously).

Observer minimums:

To ensure confidentiality of feedback is met at all times, we always ensure that at least two observers from each relationship have completed feedback. To ensure quality of feedback, we would always recommend more.

Action if min not met:

If, for any reason, a subject is not able to provide a minimum amount of observers, we would have an agreed course of action (e.g.: concatenate relationship feedback).

Min overall %:

We generally aim to get a response rate of at least 85%, and would liaise with you directly if any concerns regarding the response rates for any individual project or subject.

Action for criticals:

If any 'critical' feedback for any individual subject is outstanding, we would have an agreed course of action. This could involve further email prompting or direct phone contact.

Number of Subjects:

This details the number of subjects who are to be involved in the 360 feedback project.

5 – Project Timeline

Subject info Date:
This informs us of when we can expect all the relevant subjects' information – we primarily require full name and email address.

Observer info Date:
This confirms the date that all subjects must have forwarded us their completed observer selections, either via the online selection tool or the word form. We typically allow 10 working days to receive completed observer selections.

Start Date:
This date confirms the date you wish for the questionnaire to be available online for all end users to complete.

Completion Date:
This date confirms the 'official' date you wish for the questionnaire to be completed by all end users. We typically allow 10 working days for questionnaires to be completed.

Extension to be offered:
As is usually the case, not all end users have completed by the 'official' deadline date. This confirms that we are able to forward an extension email and allow the questionnaire to be available for a further few days.

Report Date:
This section confirms the date that you wish for all reports to be dispatched. This also provides you with an expected timeframe for scheduling any further development/coaching following the results of the 360 feedback process.

Reports to:
Reports can be forwarded directly to yourselves, to your clients HR department, specific managers or the individual subjects, depending on the next level of action following the 360 feedback process

Special Notes:
Anything else!!!

Generic Project Check List

Client Organisation	
Project Name	

HR / Project Contact details **Pre project consultation** **Documentation required**	TBC Telecall with Account Manager before proceeding TBC
IT Contact details	
Web-site Address (URL)	TBC TBC
Firewall check Sign off procedure Firewall check OK?	 Email with link ☐ No ☑ Yes (If No, when will check be performed: _____________)
Questionnaire Type Pagination Mandatory elements Survey Delivery Privacy sign off	 ☑ Generic ☐ Custom ☐ Single ☑ Multi (recommended) ☐ None ☑ Numeric and Final Comments (recommended) ☐ All ☑ Link By Email ☐ Word Attachment By Email ☐ Post ☑ No ☐ Yes
Reports Type Appendices Workbook included	 ☑ Generic ☐ Custom ☑ Gap Analysis ☑ Strengths & Weaknesses ☐ No ☑ Yes
E-mail reminders How many When Type	Yes 3 Mid Project, End – 3 days, End – 1 day ☑ Generic ☐ Custom
Status reports How often To whom Method	 ☐ Weekly ☑ Mid-Project(recommended) ☑ Final Day (recommended) ☑ E-mail (recommended) ☐ Phone
Observers Selection Observer Accept/Decline Observer minimums Action if min not met. Min overall % Action for criticals	 ☑ Online (OSP) (recommended) ☑ Word Form ☐ No ☑ Yes
Number of Subjects	TBC
Subject info Date	TBC
Observer info Date	TBC
Start Date	TBC
Completion Date Extension to be offered	 ☐ No ☑ Yes (if Yes, how long? 5 Days)
Report Date	TBC
Reports to	☐ Subject ☐ Manager ☑ HR consultant ☐ Other
Special Notes	