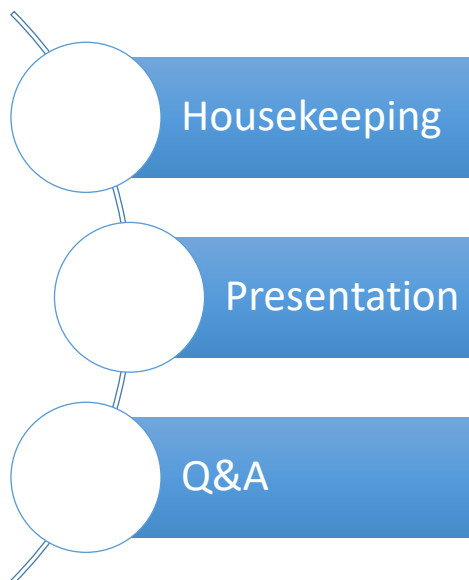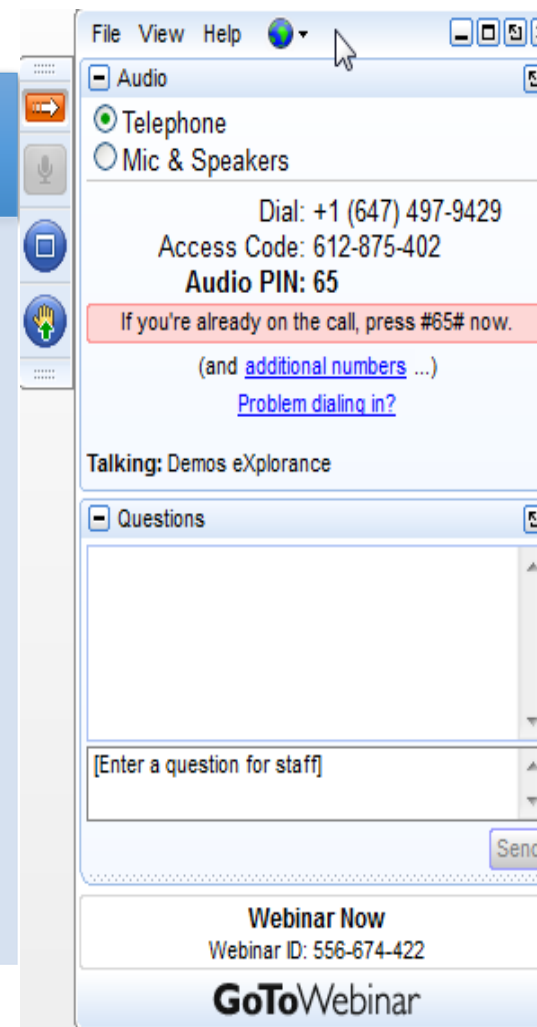# 360 Reports: Harnessing the Power of Story Telling

Housekeeping

- Asking Questions:
  - Use the little hand on the side panel
  - This alerts us there is a question
  - Type question into the chat dialogue box
  - The question will appear in the question pane

Housekeeping

Presentation

Q&A

Poll: Are you currently conducting 360-degree feedback programs? If so, are you using Blue to manage those?

1. **Yes, and we're using Blue**

2. **Yes, but we're not using Blue**

3. **No**

Agenda

- **Overview of 360-degree assessments**

- **Common types of 360-degree assessments**

- **Planning for your 360-degree assessment and reports**

- **Examples of how to tell your 360 story with Blue reports**

Note: Need or want report training after this webinar? Visit www.bluenotesgroup.com or contact learning@explorance.com.

What is a Multi-Rater Assessment?

- Definition
  - Multi-rater assessments gather feedback from multiple sources
  - Sources include employees, managers, co-workers, staff members, and sometimes customers
  - Often called 360 Assessments
    - A common approach is to gather only self and manager feedback
- Underlying assumption: Collective feedback from a diverse group provides the most accurate assessment of proficiency
- Typically multi-rater assessments are part of a broader HR or L&D initiative

Peers

Manager

Customers

Direct reports

Employee
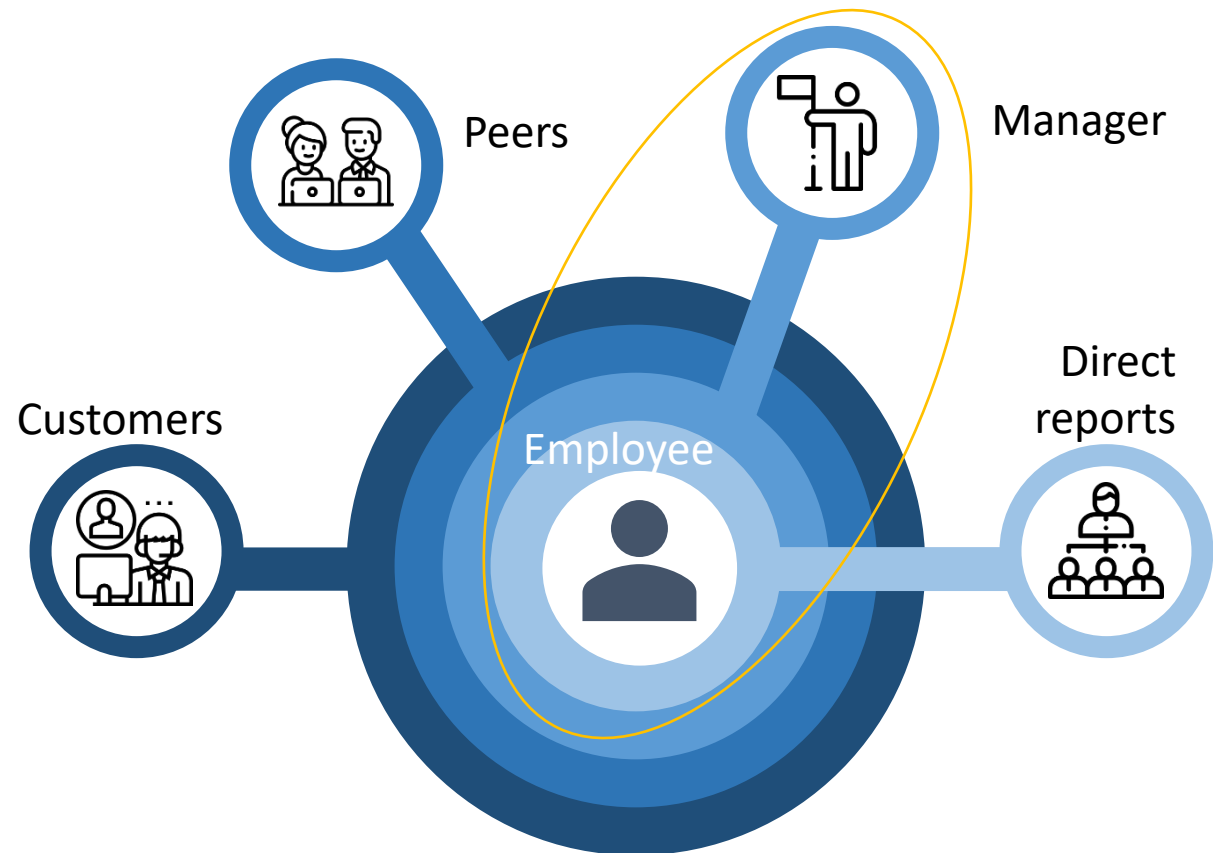
Four Common Multi-Rater Use Cases

Organizations/Institutions use multi-rater assessments for a variety of reasons.
The most common:

Training impact
demonstration

Performance
management

Workforce
readiness
planning

Leadership
development

Poll: What types of 360-degree feedback programs are currently conducted at your organization/institution?

1. **Workforce readiness planning**

2. **Performance management**

3. **Leadership development**

4. **Training impact demonstration**

5. **Other (if other, please let us know what type(s) in the Questions Panel)**

Begin with the end in mind

In order to provide the right data in your report(s) to stakeholders, the assessment needs to be configured with the end goals in mind:

- What are the objectives of the 360 assessment?

- Who is being assessed and who is doing the assessment – and why?

- What type of information are you trying to gather about your assessment population?

- Have you asked your stakeholders what type of information and analysis they want?

- Additionally, have you considered the effort to return the data in the expected way (e.g. technology vs. manual efforts; scalability or distribution)?

Consider the story

What is the story that you want your 360 Reports to tell?

For example:

- How did the training program improve individuals' performance, if at all?

- How does the data guide and inform employees' progress?

- How does one department's strengths/opportunities compare to the organizational/institutional average?

- How does manager behavior impact employees' performance, morale, engagement, etc.?

- Who are our top performers and what skill sets/competencies do they demonstrate vs. others?

- What is unique to our top performers?

Discussion Question: What's Your Story?

- Use the Question Panel to share what story/stories YOU are trying to tell with your 360 Reports.

- Note: "I don't know" or "I'm not sure" are perfectly acceptable answers. If that's your situation, "I don't know" or "I'm not sure" lets you know that the objectives of the 360-degree assessment may not be clearly defined and that you may need to have more conversations with stakeholders to ensure that needs and expectations are being met.

Initial Report Considerations

Report Considerations | Confidentiality

What's the right level of detail to provide without breaching confidentiality/anonymity?

Will you include rater's names or other identifying information?

Your Respondents

The following respondents were invited to participate in your developmental feedback.

Post Assessment*

Raters	Self	Manager	Direct Report / Team Member	Peer	Total Raters
Responded	1	2	3	2	8
Invited	1	2	3	3	9

Pre Assessment*

Raters	Self	Manager	Direct Report / Team Member	Peer	Total Raters
Responded	1	2	3	1	7
Invited	1	2	3	4	10

Report Considerations | Response Rates

What is your target response rate and what actions will you take if that isn't met?

Do you want to pre-define response thresholds (e.g. require at least two responses/group)?

If you have pre-defined thresholds for responses, and those aren't met, what is the consequence or action?

Survey Audience: **1253**
Responses Received: **1006**
Response Ratio: **80.29%**

Report Considerations | Branding & Fonts

What is the look and feel you want for your report(s) and how can that contribute to the story the report will tell?

Do you have unique branding or logos related to the purpose/objectives of the 360 assessment (e.g. competencies, departmental logos, company goals)?

Individual Report for Doug Hunt

explorance.

Survey Audience: 43
Responses Received: 40
Response Ratio: 93.02%

Report Comments

One of the great advantages of undergoing a staff and peer assessment is that it increases self-awareness. Feedback can help you discover strengths, growth opportunities and potential blind spots (areas where how you see yourself is different than how others see you). Uncovering blind spots is key for continuous improvement and enables you to focus on reaffirming your strengths while developing skills in overlooked areas.

Each person that assessed you falls into one of the following 4 categories, from which the average rating was calculated:

1. **Self**
2. **Direct Manager**

Report Considerations | Informational Text

Consider adding informational and/or instructional text to provide guidance around report interpretation and usage plus to create a consistent message:

- What do I need to know from this report?

- What should I do next?

- Explanation of scale and rater network + calculations

- Hyperlinks to additional resources

One of the great advantages of undergoing a staff and peer assessment is that it increases self-awareness. Feedback can help you discover strengths, growth opportunities and potential blind spots (areas where how you see yourself is different than how others see you). Uncovering blind spots is key for continuous improvement and enables you to focus on reaffirming your strengths while developing skills in overlooked areas.

Each person that assessed you falls into one of the following 4 categories, from which the average rating was calculated:

1. **Self**
2. **Direct Manager**
3. **Other Managers**
4. **Peers**

The graphs display the frequency with which you were observed performing certain behaviors. Each response was calculated according to this frequency as follows:

1. **Never**
2. **Rarely**
3. **Occasionally**
4. **Sometimes**
5. **Often**
6. **Always**

Report Considerations | File Format & Delivery

How do people prefer to receive and view reports?

Will people want to be able to print or view online/mobile format, etc.?

What type of effort will be involved in distributing the reports?

Do results need to be reviewed by certain stakeholders before mass distribution?

Report List - Leadership Competencies Assessment for $ENTITY

This table provides a list of links to reports in both PDF and HTML format. The PDF versions of the reports listed here are table as an accessible alternative.

[Search report title] [Clear search]

Results: 1 - 6 of 6 Item(s)

	PDF	Report Title ▲
☐	PDF	Leadership Competencies Assessment for Annette Fong
☐	PDF	Leadership Competencies Assessment for David Porter
☐	PDF	Leadership Competencies Assessment for Karen Fisher
☐	PDF	Leadership Competencies Assessment for Kent Knightley
☐	PDF	Leadership Competencies Assessment for Phil King
☐	PDF	Leadership Competencies Assessment for Yari Petrovich

[Select All] [Deselect All] [View] [Download PDF] [Download Batch Print Config File]

360 Report Examples

Individual Reports | What is the story?

We'll look at 360 Report examples that show:

- How this individual has been assessed overall

- How this individual has been assessed in individual competencies

- What this individual's strengths and opportunities are

- How this individual compares to his/her peers

- If this individual has any hidden strengths or blind spots

Individual Reports | Overall Rating

- **The story:** Overall, how has this individual performed, based on the competencies included in the assessment? Are there any significant differences between the various rater groups, including the self rater?

- **Why:** Show how an individual has rated overall for each rater type as well as an overall average across entire rater network

Overall Rating

This section displays the overall average scores across all the capabilities and skills based on the feedback received from you and your raters.

Competency	Self	Manager	Direct Reports	Peers	My Network
Overall Rating	3.07	2.75	3.13	3.11	3.04
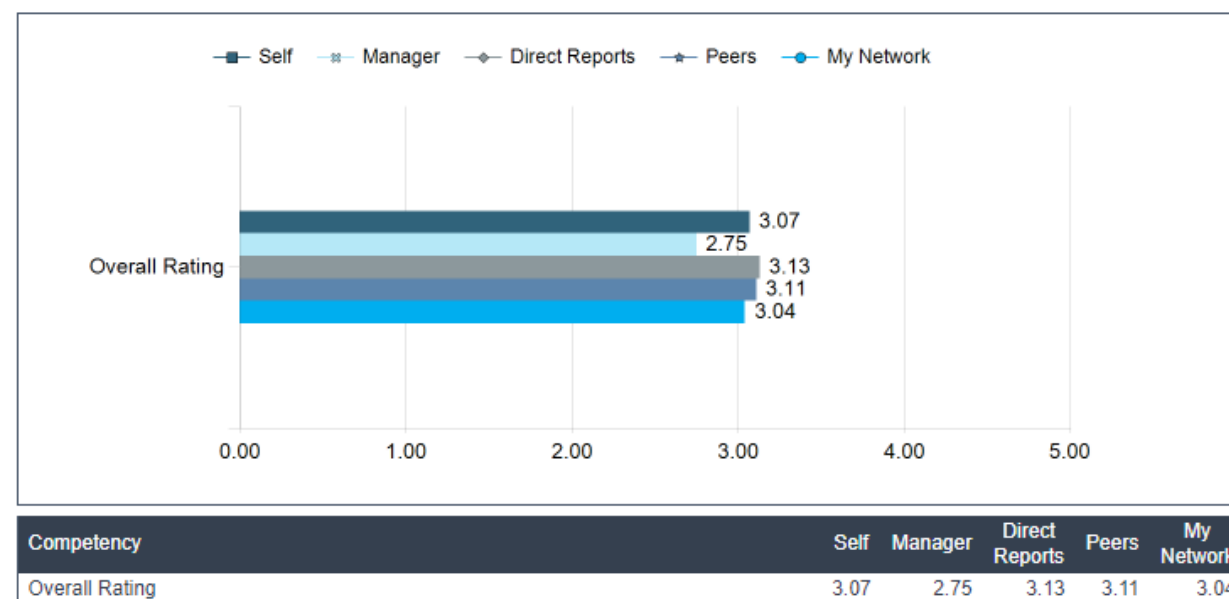
Individual Reports | Competency Summary

- **The story:** How has this rater plus their rater network scored across all competencies?

- **Why:** View all results of the assessment in a singular table format

Competency Details - Summary

Competency	Self	Direct Manager	Other Managers	Peers
Adaptable / Agile / Flexible	3.40	2.60	3.60	3.80
Collaborative	5.00	3.71	3.57	3.29
Communication: General	5.40	3.60	2.60	2.50
Communication: Verbal	5.67	2.75	5.00	3.00
Presentation Skills	5.33	3.00	4.33	4.67
Communication: Written	5.67	3.80	3.80	2.20
Creativity / Ingenuity	5.00	4.00	3.67	5.00
Decision Making	3.33	3.33	4.00	3.00
Delivering Results	5.50	2.67	2.67	3.00
Efficiency / Productivity	4.40	3.00	3.75	3.00
Initiative	4.20	2.80	4.40	3.80
Innovation	2.20	3.60	4.00	4.00
Integrity	2.71	3.43	3.29	4.71
Interpersonal Skills	1.80	3.40	3.80	5.00
Leadership Potential	5.13	3.89	3.56	5.89
Ownership and Accountability	5.50	4.33	4.67	6.00
Planning and Organizing	5.50	3.40	3.40	3.00
Problem Solving	5.75	3.60	4.80	5.25
Resilience	5.50	3.00	3.00	2.20
Technical Expertise	4.40	3.20	4.20	5.25
Thinking: Analytical	5.20	3.33	3.83	2.83
Thinking: Conceptual	4.75	4.25	3.25	4.50

Individual Report | Overall and Breakdown

- **The story:** What competencies comprise the overall score? What is this individual's areas of strength and opportunity? Are there variances in how different rater groups (or self vs. others) have evaluated this individual either overall or within certain competencies?

- **Why:** Display overall score and a breakdown of individual questions/competencies, per rater type

Overall
This chart shows the overall average ratings for each group.

All Competencies

Self (4.46)
Direct Manager (3.42)
Other Managers (3.73)
Peers (3.93)

0.00 1.00 2.00 3.00 4.00 5.00 6.00
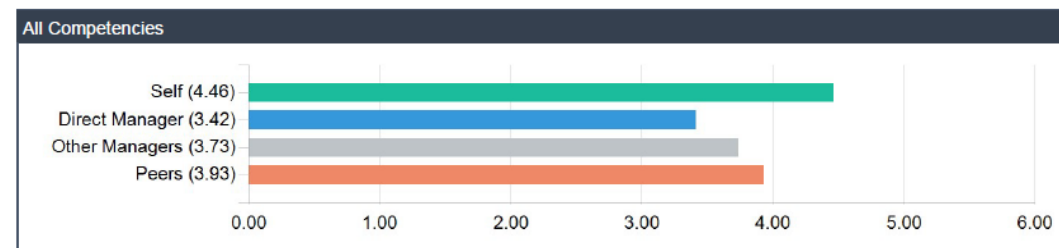
Competency Details

Adaptable / Agile / Flexible
The ability to respond & adapt to changing circumstances and to succeed in a climate of ambiguity.

Adaptable / Agile / Flexible

Self (3.40)
Direct Manager (2.60)
Other Managers (3.60)
Peers (3.80)

0.00 1.00 2.00 3.00 4.00 5.00 6.00
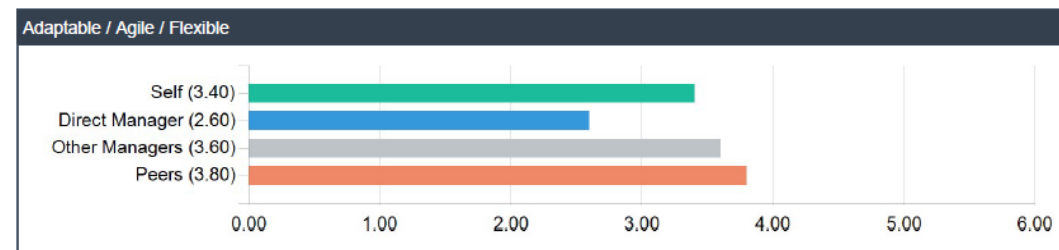
Communication: Written
The ability to express oneself clearly in business writing.

Communication: Written

Self (5.67)
Direct Manager (3.80)
Other Managers (3.80)
Peers (2.20)

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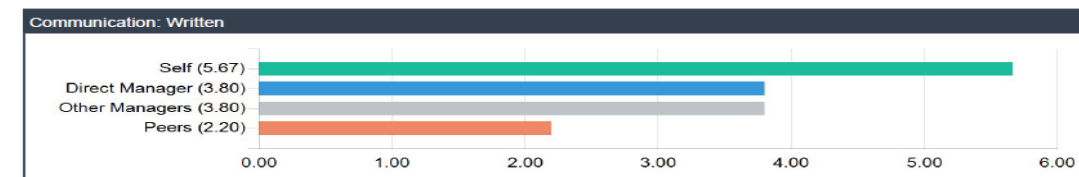
Individual Report | Gap Analysis

- **The story:** Has this individual rated themselves significantly higher/lower in any competencies? What areas, if any, are not in alignment?

- **Why:** Identify if there are discrepancies between the self rater and raters in their network

Note: Consider also leveraging a Strengths and Opportunities analysis (next slide) and comments to identify where and why any gaps might exist.

Gap Analysis

The Gap is the difference between the Self and others' ratings. A positive gap means the Self rating was higher than the others' rating. The table below the graph shows the numeric representation of the gap for each behavior.

Legend: Self / My Network

Competency	Self	My Network
Agility & Adaptability	3.75	3.04
Business Acumen	2.60	2.73
Customer Focus	3.75	3.96
Developing and Leveraging Talent	2.60	2.77
Problem Solving	3.00	3.23
Managing Teams	3.00	2.43

Self vs My Network

Rank	Competency	Gap
1	Agility & Adaptability	0.71
2	Business Acumen	-0.13
3	Customer Focus	-0.21
4	Developing and Leveraging Talent	-0.17
5	Problem Solving	-0.23
6	Managing Teams	0.57

Individual Report | Strengths & Opportunities

- **The story:** Where is this individual aligned with their rater group? Where is this individual's hidden strengths? What are this individual's blind spots?

- **Why:** Reveal the rater's strengths and opportunities, including areas that are aligned within the rater network and areas that are hidden/blind spots

Note: Consider also leveraging comments to identify why any discrepancies might exist.

Strengths and Opportunities

A useful technique for discovering blind spots is to compare your self assessment for a given competency with how others see that competency displayed by you.

Where your self view and others' views are aligned we have a confirmation -- either an aligned strength -- a competency you see yourself as strong and others agree, or an aligned opportunity for growth -- that is a competency where you feel you are currently less capable and for which others agree.

Where your self view and others' views are misaligned, we have a potential blind spot. This includes competencies where you see yourself as strong and your other raters saw you as less strong (a blind spot offering the opportunity for growth) or areas where you saw yourself as less competent and others disagreed (a hidden strength offering an opportunity to question your self-talk).

Aligned Strengths

Ownership and Accountability	
Self (5.50)	
All Others (5.00)	

Aligned Growth Opportunities

Decision Making	
Self (3.33)	
All Others (3.44)	

Hidden Growth Opportunities

Resilience	
Self (5.50)	
All Others (2.73)	

Delivering Results	
Self (5.50)	
All Others (2.78)	

Individual Report | Strengths & Opportunities

Johari Window

Façade — Known only to myself	**Arena** — Known to all
Unknown — Known to no one	**Blind Spot** — Known to others

Known to Myself (vertical axis)
Known to Others (horizontal axis)

Each Quadrant

Arena Area – Confirmed Strengths
- The Arena is the area which is known to all
- You are open about your thoughts and feelings
- Others that you are interacting with are aligned and understand your thought

Façade – Untapped Strengths
- The Facade is the area that is known to yourself but is hidden from others
- You may know that you have certain skills or abilities, but choose to not show this to others

Blind Spots
- The Blind Spot is the area that is known to others but not to yourself
- There may be behaviors that you are exhibiting or things that you are communicating that are affecting others in a particular way

Unknown - Confirmed Development Area
- The Unknown is the area that is blind to both yourself and to those around you
- There may be things about yourself that you do not know
- Others around you might also have no visibility or knowledge of these

Individual Report | Comments

- **The story:** Why was this individual rated high/low/average for different competencies? Are there any suggestions for improvement? What types of examples have been provided to "back-up" the assessment?

- **Why:** Provide anecdotal, detailed information about an individual's 360-assessment; identify the "why" behind competency scores

Comments
Carlos has been great in my transition to this role. He is very approachable and I'm able to gather real feedback from him (good and bad).
Carlos is approachable and makes himself available to hear concerns and questions.
Value, respect and trust are evident in his dealings with all employees.
Certainly I feel he trust me by not micromanaging. He lets me work and trusts my judgement. Advices me on some decision to make sure there is alignment with the organizations expectations.
Liliana shows that her trust in our team is at a high level. She doesn't micromanage us. She informs the team of what she expects and then we execute the task. She is able to have the difficult conversation on a 1:1 level and on a team level as well. She treats every person on the team the same no matter what their title may be. She is a great example to me and our team.
I feel that I can always talk to my manager about any issues.
I build my relationship with my direct reports based on trust and respect. I have a good rapport with all of them independently of their performance.
Liliana has an open–door policy and makes me feel comfortable to come and talk with her of any situation. I know that I will get the guidance required for any situation without feeling uncomfortable.

Additional Comments
Direct Reports
He created a very positive working environment for everyone in his team.
His expertise inspired me and I am very happy working in his team.
He is a great great and I really like working for him.
Managers
He has been very proactive this year to improve himself and I am very pleased with his work.
Peers
He is great coworker.
He assisted me with my projects with his expertise.

Additional 360 Report Scenarios

Training Impact Assessment

- **The story:** Did competencies improve after going through training? Did the training itself demonstrate an intended improvement?

- **Why:** Measure competency changes following a training event

Note: this would most likely be accomplished by setting up two projects and then mapping them together for comparison purposes

Competency Ranking - Bar Graph

The graphs below display the overall average scores for all competencies. The outcomes listed below are displayed in a bar graph format.

Figure 1 – Bar Graph: The name of each competency is listed on the far left side of the graph and the corresponding score (bar graph and numerical) is represented on the far right. The graph displays the average scores for all competencies ranked from highest to lowest. These results are based on the overall average of all rater types, excluding self ratings.
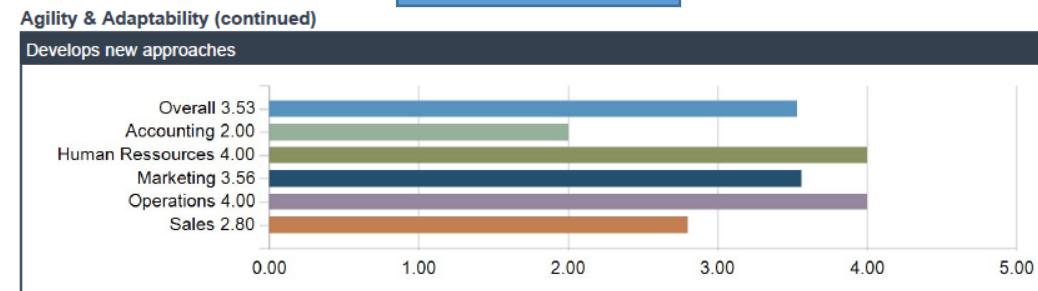
Competency Ranking
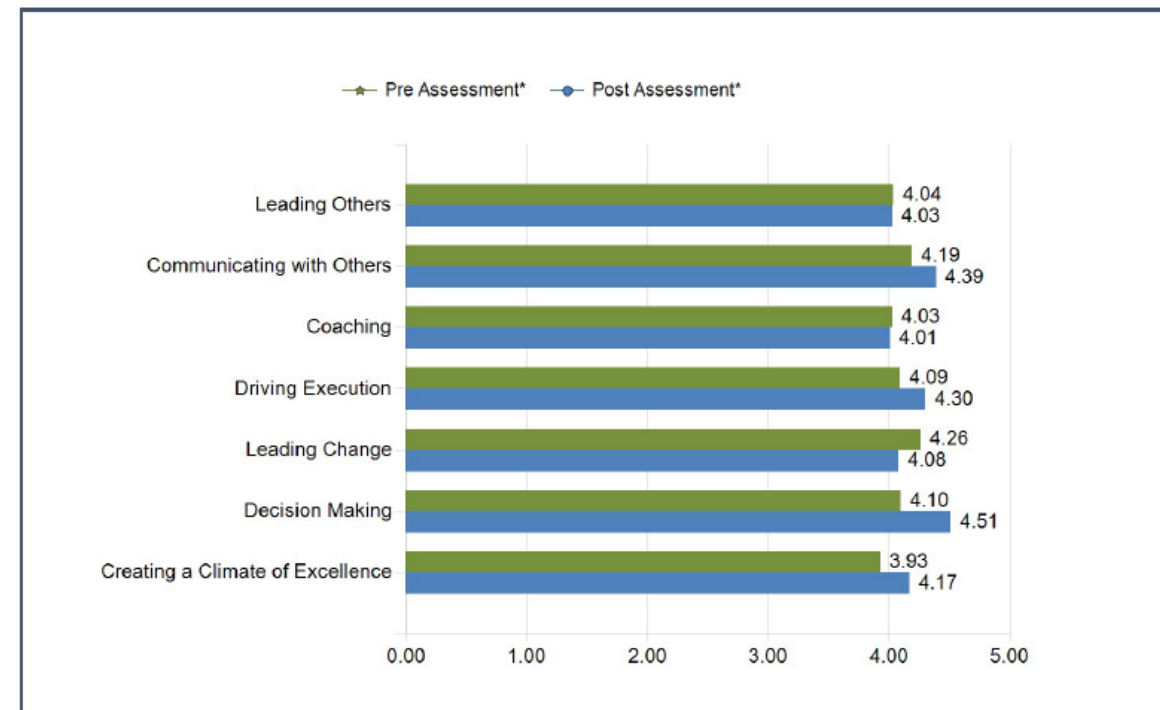
Aggregate Results by Demographics

- **The story:** Are there any differences in competencies across various demographics? Are certain managers providing better development? Are certain groups of employees performing higher/lower than the average?

- **Why:** View results of your assessment at an aggregated level (e.g. by department, location, manager, etc.)
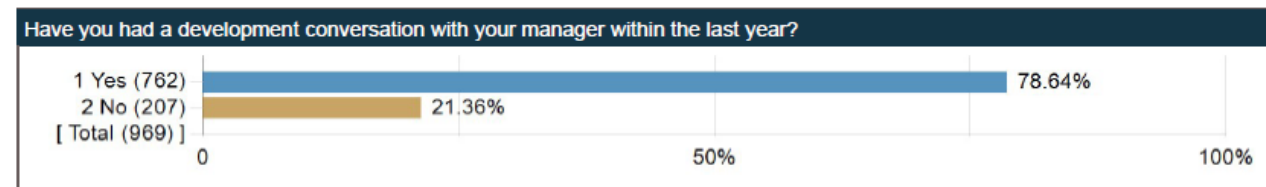
Example A

Agility & Adaptability (continued)

Develops new approaches

Overall 3.53	
Accounting 2.00	
Human Ressources 4.00	
Marketing 3.56	
Operations 4.00	
Sales 2.80	

0.00   1.00   2.00   3.00   4.00   5.00

Business Acumen

Knowledgeable about how each team fits into the organization's overall strategy

Overall 3.58	
Accounting 2.00	
Human Ressources 3.57	
Marketing 3.56	
Operations 4.00	
Sales 3.60	

0.00   1.00   2.00   3.00   4.00   5.00

Example B

My manager makes it clear how I can advance in the company

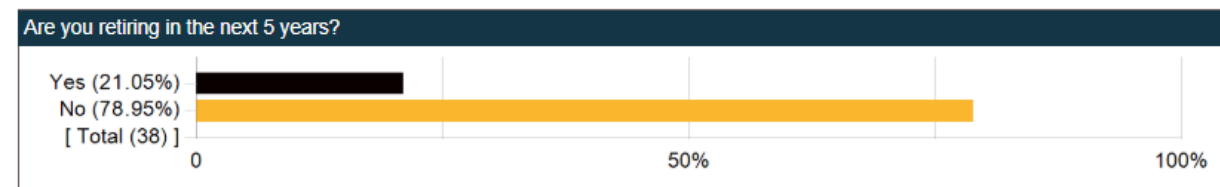| Location Name	Agreement	Neutrality	Disagreement	Mean	SD	Company Mean	Company SD
Overall	50.00%	36.84%	13.16%	3.66	1.07	3.68	1.07
London	50.00%	25.00%	25.00%	3.50	1.20	3.68	1.07
New York	33.33%	44.44%	22.22%	3.33	1.12	3.68	1.07
Shanghai	63.64%	36.36%	0.00%	4.09	0.94	3.68	1.07
Tokyo	50.00%	40.00%	10.00%	3.70	1.06	3.68	1.07

Gather Supplemental Data

- **The story:** (e.g.) Are there differences between individuals who indicated they had development conversations with their managers? Who is our rater audience? What is important to them?

- **Why:** Gather additional data or feedback from your rater population that would be relevant to your 360
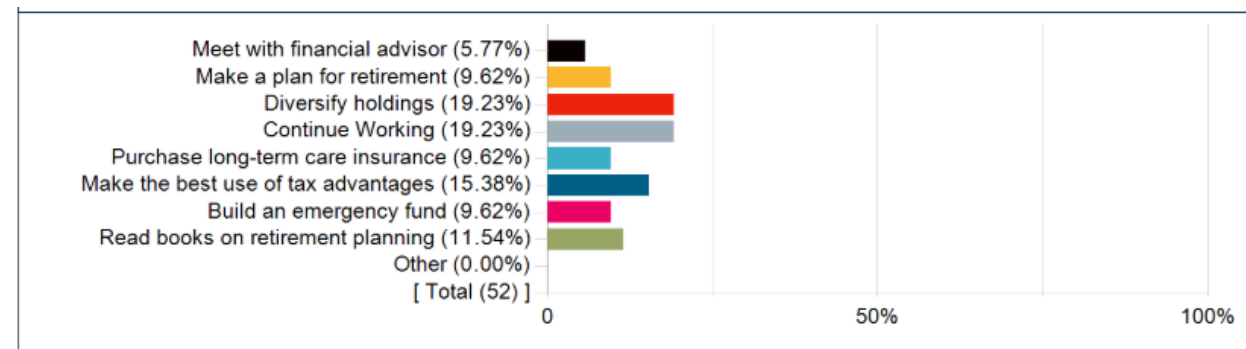

Have you had a development conversation with your manager within the last year?
1 Yes (762) — 78.64%
2 No (207) — 21.36%
[Total (969)]

Retirement Plans
Are you retiring in the next 5 years?
Yes (21.05%)
No (78.95%)
[Total (38)]

What are you planning to do to prepare for your retirement?
Meet with financial advisor (5.77%)
Make a plan for retirement (9.62%)
Diversify holdings (19.23%)
Continue Working (19.23%)
Purchase long-term care insurance (9.62%)
Make the best use of tax advantages (15.38%)
Build an emergency fund (9.62%)
Read books on retirement planning (11.54%)
Other (0.00%)
[Total (52)]

Poll: Do you include additional non-rater types of questions on your 360-degree assessments?

1. **Yes**
2. **No**
3. **No, but I'd like to**

Summary

- **Always begin with the end in mind**

- **Make sure you've defined the assessment objectives and stakeholder expectations in advance**

- **Determine what the story is that you want your Blue 360 Reports to tell**

- **Leverage the flexibility within Blue to help tell that story with your 360 Reports**

Questions?

Need Additional Support and/or Training?

- **Explorance Help Center**
- **Your Professional Services/Customer Success Support Teams**
- **Blue Report Master Certification**

www.bluenotesgroup.com

learning@explorance.com

Thank you!

learning@explorance.com