PROGRAM OVERVIEW

About the Training Program

During recent years, organizations have sought new ways to develop performance-management systems that help employees become more effective and organizations more productive. One such technique that is becoming increasingly popular within organizations is the use of 360° feedback: providing employees with performance feedback from multiple sources. While there are several good programs on the market, many organizations choose to design their own, thus making the system more reflective of the organization’s true values and culture.

This program is designed for participants from the same organization who want to design and implement a company-specific 360°-feedback program that is uniquely their own. During this one-day program, participants will have the opportunity to learn how to develop an effective 360°-feedback program and to actually begin to plan and design their own process.

Training Objectives

Participants will have the following opportunities:

• To identify the important issues or decision points in designing an effective 360° process;
• To define the cultural factors indicating organizational readiness, understand the importance of these factors, and identify the factors in their organization;
• To construct a preliminary design for an effective 360°-feedback process appropriate to their organization; and
• To develop an implementation strategy for the process.

Designed by Charlotte Podowski.
## PROGRAM OUTLINE

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I. Opening Activities

A. Overview of the Program (Presentation)

1. Briefly explain that the benefit of a 360°-feedback process is that it provides performance feedback from multiple sources. Add that feedback that comes from a cross-section of people in the organization is generally more objective and helpful in targeting performance strengths and opportunities for improvement.

2. State that this training program is designed to help a task force create an institutionalized approach to multi-source feedback, not to teach participants how to give feedback to others.

3. Share the program goals and objectives:
   - To identify the important issues or decision points in designing an effective 360° process,
   - To define the cultural factors indicating organizational readiness, understand the importance of these factors, and identify the factors in the organization,
   - To construct a preliminary design for an effective 360°-feedback process appropriate to the participating organization, and
   - To develop an implementation strategy for the process.

B. People Scavenger Hunt (Icebreaker; Materials: Form A)

1. Explain that in order for participants to get to know one another better they will participate in a scavenger hunt.

2. Distribute copies of Form A and review the instructions. Ask the participants to mingle and find people who match the descriptions on the form.

3. After ten minutes, reconvene the entire group and conduct a brief discussion of item 6, “who has experience with 360° feedback.” Ask for volunteers to share their experiences.

C. Setting the Stage (Dyadic Discussion)

1. Begin this exercise by stating that to develop an effective process of 360° performance feedback, it is helpful to consider the current system—what works and what does not—so that those aspects that are effective can be retained and those that need
improvement can be addressed. Add that the purpose of this next exercise is to start
the group thinking about the current system.

2. Form pairs, ensuring that partners are from different parts of the organization, and
ask each pair to discuss the following questions:

- What is the performance-review process used in your department? What makes it
effective? What are its limitations?
- What feedback methods are currently available in your department? What advant-
tages and disadvantages do they have that you have observed?

3. Invite three participants to share with the full group their experiences with effective
and ineffective performance-appraisal approaches. Invite three participants to share
observations about advantages and disadvantages of currently available feedback
methods.

4. Record their statements on newsprint and post the sheet on a wall.

D. Goals for Your 360° Process (Group Discussion)

1. Explain the importance of goals to the success of a new program and challenge the
group members to come up with a list of goals that they believe are meaningful for
their 360° process.

2. Record the goals on newsprint and post the sheet on a wall.

II. Issues to Consider for an Effective Process

A. Learning the Issues (Jigsaw; Materials: Form B)

1. Tell the participants that before they begin developing a new system, it will be help-
ful to consider all the issues that go into developing an effective process. Add that
considering all the issues and alternatives will prevent the participants from having
too narrow a focus.

2. Divide the participants into five subgroups. Distribute copies of Form B and assign
to each subgroup one of the five issues listed (what, who, when, how, where).

3. Ask each subgroup to discuss its assigned issues and how those issues might impact
the organization.

4. After a ten-minute discussion period, form new subgroups by placing a representa-
tive of each of the original subgroups in each new group. Do this by asking members
of each of the original subgroups to count off numerically and then assembling in
new subgroups all of the participants with the same number. If there are unequal
numbers of subgroup members, count off up to the number of the members in the least populated subgroups.

5. Ask the members of the “jigsaw” subgroups to exchange with one another what was discussed in their original subgroups.

6. Reconvene the full group for review and questions.

■ B. Organizational Culture Factors (Trio Exchange; Materials: Form C)

1. State that to create a 360° process that the organization will embrace, it is important to give serious consideration to the organization’s culture. Add that this next exercise will start the group thinking about cultural factors that might impact the planning process.

2. Form subgroups of three members each and ask the subgroups to arrange themselves in a circle around the room.

3. Distribute copies of Form C and ask the trios to discuss the first two factors listed on the form. Ask them to define the first two factors on Form C, to determine if these are present in their organization, and to discuss how it is possible to use these factors to facilitate the acceptance and success of their 360° process.

4. Ask a member of each subgroup to present a summary of the subgroup’s discussion.

5. After a short discussion period, ask members of each trio to count off numerically (0, 1, 2). Ask the 1’s to move clockwise to the next trio and the 2’s to move two trios clockwise. Instruct the new trios to discuss the next two factors in the same manner as before.

6. Again, ask each subgroup to summarize its discussion.

7. Repeat the rotation and discussion process for the last two factors.

8. Reconvene the entire group and reinforce the importance of being able to define cultural factors, understand their importance and their uses, and identify these factors in the organization.

■ III. Designing Your Program

■ A. Constructing the Instrument (Writing Task)

1. Explain that of all the issues on Form B, determining what to assess is one of the most difficult.

2. Add that once the participants have decided what to assess, the next step is to develop questions that help in the assessment. Provide the following categories:
• Current performance
• Skills
• Commitment to organizational values
• Professional attitudes

3. Divide the participants into four subgroups and assign each subgroup one of the above categories. Ask each subgroup to develop four questions that pertain to the category. Emphasize that the questions need to be consistent with the organization’s culture, goals, and objectives. Add that the questions must be broad enough to apply to employees across the organization regardless of role or function.

4. Distribute newsprint and markers. Instruct the subgroups to choose a recorder, who will write the questions down on newsprint, and a presenter, who will present the questions to the entire group.

5. Reconvene the entire group. Discuss the difficulties the subgroups encountered while formulating questions to assess these four areas.

6. Discuss how the participants might add to their lists of questions (for example, query the employees in focus groups, interview managers, use a ready-made instrument).

7. Conclude this exercise by stating that the group has now created sixteen sample questions to assess the “WHAT” issue. Create a “hall of questions” by posting the sheets of newsprint on the wall.

B. Program Design (Panel Discussion)

1. Remind participants that one of the objectives of the training program is to design an actual preliminary 360° process that they can use in their organization. Add that they will begin doing some of this work in the next few minutes.

2. Indicate that another thing to consider in developing a 360° program is the feedback needs of the various levels within the organization. Give examples of what these levels might be using the following categories:

• Executive/Manager
• Professional/Research scientist
• Clerical/Support staff

3. Form three subgroups, each with representation from the different levels within the organization. Remind participants that a critical element of 360° feedback is for feedback to flow to individuals from multiple sources, including multiple levels.
4. Assign each subgroup an employee level (target population) for which they will design a program. Remind them to use the information on Forms B and C to guide them in constructing the design.

5. After each subgroup has had enough time to develop its design, ask each subgroup’s members to conduct a panel discussion, first presenting their program to the whole group and then explaining the basis for their design and answering questions as they are raised.

■ IV. Communicating the Process

■ A. What Employees Want to Know (Group Discussion)

1. Emphasize that a thorough understanding of any new program is important to its acceptance and effectiveness and that this is particularly true of a program that involves employee-performance feedback.

2. Add that because employee apprehension is likely to be a factor, it is a good idea to try to predict what questions or concerns employees might have about the new process.

3. Ask the participants to think about what these questions or concerns might be and to volunteer their responses as they wish. Encourage them to use themselves and their knowledge of their coworkers as the basis for these questions or concerns.

4. Record their responses on a flip chart.

5. Ask two participants to summarize what they believe are the main questions and concerns.

■ B. Communicating the New Program (Study Group; Materials: Form D)

1. State that one of the critical aspects of a successful 360° program is how well it is communicated to employees.

2. Ask the participants to form partners with a person seated next to them. Distribute copies of Form D and instruct the pair members to study it together, clarifying what each category entails.

3. Ask participants to identify what they do not understand by writing question marks next to the information they believe needs further explanation. Encourage participants to insert as many question marks as they wish.

4. Reconvene the entire group and respond to the participants’ questions.

5. Reinforce the notion that the type of communication vehicle utilized depends on the program resources available and on the program’s goals. (Refer to the 360°-program goals listed earlier and retained on newsprint.)
C. Madison Avenue (Creative Exercise)

1. Explain that in order to get employee buy-in to the new program, participants will need to develop an effective “ad” campaign that sells the features and benefits of the new 360° process.

2. Re-form the three subgroups from the “Program Design” exercise. Instruct each team to produce an ad campaign for the program it previously designed. Tell team members that they can utilize ideas from Form D or create their own.

3. Supply each team with newsprint and markers.

4. Ask each ad team to design written materials and/or oral strategies to communicate the assigned program.

5. When the teams are finished, ask each ad team to explain its campaign.

6. Reconvene the entire group to review the three campaigns.

V. Closing Activities

A. Obstacles (Dyadic Discussion)

1. State that now that the group has constructed preliminary designs and communications campaigns, members need to think about implementation of their program—specifically, to be alert to hidden impediments to successful implementation.

2. Ask the participants to form seat partners and instruct them to list as many obstacles as they can think of that might occur in implementing the three approaches designed today.

3. Reconvene the full group. Write “Obstacles” at the top of a flip chart. Solicit obstacles from the participants, record them, and post the sheet.

4. Conduct a group discussion about how to overcome these obstacles.

B. Planning to Finish (Subgroup Discussion)

1. Form three implementation teams and assign each one a level discussed during the design session.

2. Refer to the “obstacles” list and ask each team to put together a plan for completing and implementing its program. Add that the plan should include tasks or activities that need to be completed, the person(s) who should be responsible, and the time frame involved.

3. Ask each team to assign one person to present its implementation plan to the full group.
4. Reconvene the full group. Allow each team five minutes to present its plan.

5. Discuss each of the plans and garner additional input and reactions from the full group.

6. Once everyone is satisfied with the plans, discuss the importance of having “champions” who will ensure the successful completion, communication, and implementation of the 360°-feedback process. Solicit commitment from group members.

■ C. Looking Ahead (Mental Imagery)

1. Ask participants to take a few minutes to individually think about their roles in the completion, communication, and implementation of the project and to envision their individual and group success. Ask them to visualize the following:

   • They have achieved or exceeded the key goals they established.
   • The organization is delighted with their achievements with this process.
   • The development team has gained recognition and respect as an innovative team, providing leadership and cutting-edge tools.

2. After a few minutes, encourage participants to take a few notes if they so desire.

3. After the mental-imagery activity is complete, ask two participants to describe the results they envisioned.

■ D. Poster Session (Creative Exercise; Materials: Paper, Markers)

1. State that you hope that everyone feels good about the day and that they have learned how to design and implement a valuable new process.

2. Add that it is important that people see this process as a helpful way to receive performance feedback from several sources so that they can work to improve overall performance.

3. Explain that many employees may feel somewhat apprehensive about the new process, so it is important to present it in a positive light and to create a supportive environment.

4. State that one way to advertise the program as a positive and helpful new system is to hang posters in strategic locations in the workplace.

5. Distribute paper and markers and ask each person to make a poster that advertises 360° feedback. When everyone has finished, ask each participant to present his or her poster. Obtain applause after each presentation and ask the participant to place the poster on the wall.
People Scavenger Hunt

Instructions: Read the items below and then find someone in this group to whom each item applies. Write the person’s first name in the space under the item. You may not use any person’s name more than once.

Find someone who . . .

1. has the same first initial as you.

2. has the same number of siblings as you.

3. was born in the same month as you were.

4. has had a positive experience with a performance appraisal.

5. has had a negative experience with a performance appraisal.

6. has experience with 360° feedback.
# 360° FEEDBACK

## FORM B

### Issues to Consider for an Effective 360°-Feedback Process

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<th>WHAT ...</th>
<th></th>
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<tr>
<td>ARE THE OBJECTIVES?</td>
<td>• To develop people or to evaluate them?</td>
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</table>
| WILL BE ASSESSED? | • Current performance?  
| | • Skills?  
| | • Commitment to organizational values?  
| | • Professional attitudes? |

<table>
<thead>
<tr>
<th>WHO ...</th>
<th></th>
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<tbody>
<tr>
<td>WILL RECEIVE FEEDBACK?</td>
<td>• Individuals, teams, levels, functions?</td>
</tr>
<tr>
<td>ARE THE FEEDBACK GIVERS?</td>
<td>• Self, manager, peers, team, customers?</td>
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</table>
| GETS/GIVES RESULTS? | • Who collects the data?  
| | • Who provides the results? |

<table>
<thead>
<tr>
<th>WHEN ...</th>
<th></th>
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</table>
| IS IT ACCOMPLISHED? | • What is the timing?  
| | • What actions are needed?  
| | • What is the schedule of events? |

<table>
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<tr>
<th>HOW ...</th>
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<tr>
<td>WILL THE PROCESS LOOK?</td>
<td>• How is feedback given and to whom?</td>
</tr>
<tr>
<td>IS PROGRESS MEASURED?</td>
<td>• What is the definition of achievement?</td>
</tr>
<tr>
<td>IS LEARNING REINFORCED?</td>
<td>• How is learning facilitated, behavior modified, and follow-up assured?</td>
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</tbody>
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<table>
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<tr>
<th>WHERE ...</th>
<th></th>
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</table>
| WILL IT TAKE PLACE? | • Face-to-face interactions?  
| | • In automated format?  
| | • At a group meeting? |
Organizational Culture Factors

• Strong vision for the organization
• Growing team orientation
• Expanding employee involvement and participation
• Increasingly empowered workforce
• Commitment to continuous improvement
• Commitment to employee development

1. Define these factors.

2. Are these factors present in your organization?

3. How might they impact a 360°-feedback process?
Communicating a New Program to the Organization

I. What is the GOAL?
   • To create visibility and general understanding of the new program?
   • To enhance the image and credibility of the new program?
   • To change attitudes that might interfere with acceptance?

II. Who is the AUDIENCE?
   • How many people do you want to include?
   • At what level of the organization?
   • What are their attitudes? Values?

III. What other FACTORS do you need to consider?
   • How much time is available?
   • How much money will the communication process cost?
   • How much information can be meaningfully conveyed?

IV. What METHODS will you use?
   • How will you package the message to be user friendly?
   • How will you provide further information and answers to questions? Source guides? Newsletters? Phone numbers? Query center locations? Online information? Lunch chats? “All hands” meetings?

V. How will you achieve FOLLOW-THROUGH?
   • Whom will you target for follow up?
   • How consistent will you be in obtaining reactions from all stakeholders?