Head Light

# A practical guide to running a successful 360 programme

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# Foreword

Achieving good practice should be the aim of all 360 degree feedback users. Too often though day-to-day practicalities dictate that processes do not flow as we want them to, or challenges are faced which bear no resemblance to the 'best practice' we read about.

As part of our commitment to share and explore the use of 360 degree feedback across organisations, we have built on the collaborative work from the Police Talent® User Group which originally developed the *Good Practice Guide for the Use of 360 within the Police*. We have progressed this further to take into account the usage of 360 within other sectors to create this Practical Guide.

We made a clear decision not to present this as a 'Best Practice' guide as the term itself suggests a single paramount approach to adopt. Instead, we see this as an evolving set of principles which will be refined, adapted and amended as working practices develop and review situations change.

Throughout this guide, you will find signposts (🗎) to other Head Light resources which are available in the Useful Documents section of this Guide, or on our website (www.head-light.co.uk).

We welcome any learning points or insights to progress this Guide and to build a better resource of shared practice thus enhancing good practice in using and applying 360 degree feedback.

Please contact us should you have any comment or addition to make and, to learn more about how we work with organisations, please visit our website.

Ian Lee-Emery, Founder and CEO, Head Light Ltd

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# What is 360 degree feedback?

*360 degree feedback is…*
*… the process or practice through which feedback ratings and comments are provided to an individual by his or her colleagues, clients and work partners.*

Typically it involves: the immediate line manager, a range of peers and colleagues and direct reports and, in some instances, external partners, suppliers, clients and customers.

The results from a 360 review are often used to plan and map specific paths for development, and for some organisations, are also used to identify high potential, and used as part of a wider assessment process.

## The benefits of a great 360 programme

In our experience, a successful 360 process:

- **Articulates the competencies** and sometimes values needed for each role;
- Recognises areas of strength in behaviours and competencies for a role;
- Pinpoints areas needing **further development**;
- Provides a foundation on which to build an individual development plan;
- Identifies those with high potential or promotion capability;
- Provides an opportunity for **open, honest feedback**;
- Increases **individual self-awareness, capability and performance** on an individual, team and organisational level;
- Supports the development of a **feedback culture** across the organisation;
- Provides **data to enable the organisation to evaluate progress** on learning and development initiatives and demonstrates return on investment in talent management.

Supporting a great 360 programme of activity typically requires an easy-to-use, flexible online 360 system which provides access to all those taking part and gives self-sufficiency to the organisation.

## Useful reading

Resource: *Checklist for a 360 review system* – a checklist to help you look for the features in an online system that will give you this can be found in the Useful Documents section at the back of this Guide.

Resource: *The Impact of Feedback* – available in the Resources section of our website.

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# Starting out

Whether you are embarking on 360 for the first time in your organisation or updating a current process, spending time at the start of the programme with the right people leads to good engagement, strong buy-in and solid support amongst the important line manager population. So, invest time in identifying the key stakeholders, explaining the process, and outlining the outcomes and impact on the business.

## Engage with and obtain support from senior stakeholders for 360

### Identify your 'targets' – and use your networking and influencing skills to engage

Identify the people you need to reach, list them and then arrange face-to-face meetings with each one of them early on in the project to explain what it is you want to achieve, how it will impact the organisation and the timeline you propose. It will be easy to list the obvious senior stakeholders, but also take time to consider broader groups or associations with whom you need to engage.

### Tailor information to resonate with your audience

When starting to talk with your stakeholders, position the 360 in terms which are specific to your organisation to help senior stakeholders understand and 'buy into' the planned activity.

For example, if the term 'talent management' is not a well-liked or used term, try selling a 360 positioned around succession planning. Provide an example to 'paint a picture' which highlights the importance of succession planning in your organisation. This may require you looking at the age distribution across the business and the retirement plans and by having 360 reviews in place, identifying the leaders of tomorrow and working with them to develop the skills needed is seen as a sensible succession planning activity.

In addition, more senior people may require a different approach as they may have quite differing views of 360; some more senior managers and leaders may not recognise the value of this for lower levels of staff. Furthermore, there will be different exposures to, and experience of, 360 amongst your audiences; you will need to understand, and build on these.

### Embed a culture of feedback and coaching

Embedding a feedback friendly and coaching culture takes time – and requires support and investment from the senior team.

Some steps to support this include:

- **Shaping the structure of the HR or L&D department** so that anything related to personal performance and development – all the development psychometrics, high potential, development plans, talent management, 360 – is drawn together.
- **Ensuring that managers and leaders are supported in their understanding of talent management** – and in their feedback skills. Courses such as Head Light's *Talent Management for Managers course* and *Facilitator's Feedback course* can support you in this.
- **Utilising partnerships with other organisations** or across your organisation to share and develop coaches and coaching skills.
- **Starting at the top and cascading** by engaging early in the 360 degree feedback process, your leadership team can send a clear signal to the rest of the organisation about their openness to feedback and personal development.

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### Encourage the implementation of a 360 review process to be an objective of one of the key stakeholders

A difficult action to influence but when a senior leader has a vested interest in seeing the successful implementation and embedding of a process, the road will be smoother.

## Build the case for 360

For some, you will need to demonstrate clearly the Return on Investment in adopting a 360 review programme.

Head Light's research in 2013 revealed that 46% prepared a business case to support their bid to obtain the budget needed – and 14% of those that did this, did so even though it was not required of them. 44% commented that whilst they did not prepare a business case, they thought it would have been interesting to go through this exercise.

Collect case studies and stories from organisations similar to yours and demonstrate the impact and benefits that 360 has had within your competitors' businesses or in other divisions or locations of your own business.

## Take stock of where you are as an organisation

Before you embark on a 360 programme, it may be useful to read the Head Light checklist *(Ready for 360? Think Again)* and understand how ready your organisation is to take on 360 degree feedback – and our view on what makes for a successful 360 programme.

## Start small

Good practice suggests that your journey to adopt a 360 approach is smoother when you run an initial pilot study. This becomes even more beneficial if you use this as an opportunity to obtain buy-in from senior managers and focus the pilot around them.

It is also a useful exercise to test and confirm the validity of your assessment.

## Establish how often you will carry out a 360 review, with whom and a clear rationale for its purpose

Research what other organisations do, discuss with your team internally and take external advice if necessary.

Typically, 360 reviews are carried out no more frequently than every two years unless you are looking at benchmarking and change.

To get the maximum value from an online 360 tool, consider the groups with which it can be used. The management and leadership population is usually the main target, but also consider your talent pools, key successors, customer-facing staff, graduates and business support groups.

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## Communicate

Part of the success of the 360 programme will be based on the communication plan that you put in place and deliver. Consider using a variety of tools to get your message across remembering to tailor the message, language used and channel of communication appropriate to your audience.

You may want to consider:

- Including an article about the benefits of 360 in your staff newsletter;
- Utilising your Intranet pages;
- Hosting 'all hands' meetings about 360;
- Recording a webinar with a senior manager explaining process;
- Preparing an FAQ document, covering all the questions and concerns raised through your discussions with stakeholders;
- Amending induction materials to include your 360 approach;
- Designing a timeline with key dates so that everyone understands the schedule.

### Suggested timeline

| | |
|---|---|
| Initial conversations with participants | Day 0 |
| Participants decide on reviewers | Allow 2 weeks to consider and nominate reviewers |
| Participants brief reviewers | Allow 1 week to make contact and brief reviewers |
| Invites sent to all reviewers | Allow 1 week to send invitations |
| Reviews completed | Allow 2 weeks for reviews to be done |
| Carry out feedback review session | Allow 4 weeks after reviews completed |
| Create action and development plan and hold follow up call or session | Allow 2 weeks after initial session |
| Check-in with progress on some actions | Allow 4 weeks after development plan created |
| Check-in with progress | Allow 6 months after initial session |
| Review plan | 1 year after initial review |

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**Key points**

- Arm yourself with the facts to build the case for investing in 360
- Tailor your message to the audience
- Find a champion
- Carry out a pilot
- Be clear with purpose
- Communicate widely, clearly and reach everyone

## Useful reading

Resource: *360 – Keys to success* – available in the Resources section of our website.

Resource: *Ready for 360? Think Again* – available in the Resources section of our website.

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## Designing the 360 assessment

Plenty has been written about designing a good assessment for 360 reviews. In our experience, good practice suggests that you will want to consider:

- The **length of the assessment** – in your assessment design, aim for it to be completed within 15-20 minutes. If you want to encourage the provision of qualitative feedback, then consider keeping the number of 'rated' questions to a minimum so the whole assessment does not become overly long.
- The **language used** – reflect the language of your organisation and minimise the use of acronyms and jargon. In addition, remember that this is an output focused exercise and not an input-focused, tick box exercise. If you begin to refer to the feedback as merely 'completing a questionnaire', you are reducing the feedback to a 'tick-box' exercise.
- The **competencies reflected** and their relation to your own organisation's competency framework – if you have your own competency framework look to use this as the basis for the assessment, and again ensure that the system you chose is able to include this. Work with an internal or external consultant to map competencies to roles if this has not yet been done.
- Whether to include **specific questions designed by the participant** for specific reviewer groups – including question items written by the participant, which can increase ownership of the process. Before considering this, make sure that your online system offers this functionality.
- How those with **high potential will be highlighted** – to strengthen the Return you may see from your investment in a 360 programme, look to use the information to reach beyond creating development plans and use it to identify those with 'high potential'. Check that the online system you are using can be tailored to flag (to the Administrator and not the participant) the items which predict potential specifically in your organisation. The Talent 360 system is one such system.
- How you can **judge the quality of the feedback** as it is returned – getting the most from 360 requires good quality feedback from the reviewers. How does your online system alert you to the quality of the feedback being given?
- The **rating scales** used – much has been written about the most effective rating scales for 360, and you need to consider the scale to be used and the ability of your software to incorporate this.
- The use of **negatively phrased indicators** against the scales – in our experience, examples such as '*Relies on one influencing style or tactic*' or '*Disregards feedback from others'* can often provide some of the greatest insight.
- The **use of free text fields** – and phrasing them as you wish them to be answered. For example, *"Please provide an example to justify your ratings"* asks the reviewer for evidence to support the scores given in the assessment. Whereas *"Please provide a specific example"* may suggest that the reviewer needs to detail only a specific situation rather than it being in general support of the ratings given – and he or she may tend to give an interesting rather than relevant example.

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## Key points

- Invest time in designing a good 360 assessment
- Incorporate your competencies and the language your organisation uses
- Tailor the questions asked
- Decide how you will identify those with 'high potential'
- Ensure you can determine the quality of the feedback
- Select appropriate rating scales and indicators
- Make use of free text fields

## Useful reading

Resource: *Competency Frameworks: 10 lessons learned* – available in the Resources section of our website.

Resource: *360 - Keys and Eyes* – available in the Resources section of our website.

Resource: *Review Scales Tool* – available in the Resources section of our website.

Resource: *Maximising ROI on 360* – available in the Resources section of our website.

Resource: *Open-ended questions* – available in the Resources section of our website.

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# Prepare the participant, reviewers and line manager for the 360 degree feedback process

## The participant

At the start of the 360 programme, you will need to ensure that the participant understands clearly the rationale for the process and the timeline of the events which will take place.

### Develop a briefing document for the participant

Write a briefing document for the participant – *A Participant's Guide to 360 degree feedback* – covering:

- Key aspects of the process;
- The timeline;
- How to select reviewers and how many;
- How to brief the reviewers;
- The follow up.

### Confirm understanding of the reason for the 360

You need to ask why he or she believes the 360 is taking place – and confirm or correct the thinking.

### Confirm understanding of the process and timeline of key activities

Check that the participant understands the entire 360 process: what will happen, where and when. This typically includes:

- The contact he or she can expect from the facilitator;
- The timeline for events;
- When he or she should expect a copy of the report;
- Who will see the report;
- The arrangements for a more detailed feedback discussion about the results.

### Confirm understanding of his or her role in the process

Clearly the participant needs to understand the contribution he or she makes to the success of the 360 process in:

- Choosing the right reviewers;
- Speaking with them prior to the review and briefing them appropriately and adequately so that they will do their job as a reviewer;
- Being honest and open in their own self-assessment;
- Following up or chasing reviewers when needed;
- Taking part actively in the review / feedback session;
- 'Owning' the development actions which arise and implementing these;
- Respecting the confidentiality and anonymity of the process; accepting that feedback will be given in good faith and what sort of follow up would be appropriate for reviewers (e.g. thanking them for their feedback);

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### Obtain commitment to the post-review process

The participant needs to understand, and commit to, the next stages after the review itself. This includes:

- Setting objectives;
- Writing the development plan;
- Owning development actions;
- Working with a mentor or coach (if appropriate).

### Explain how to get the most from taking part in the 360 programme

Whatever the participant's history of taking part in a 360 review, you may want to inform or reiterate how he or she is able to maximise the benefit they get from 360. This will include:

- Being open to feedback;
- Being positive;
- Investing the time to understand the report after the initial feedback conversation and discussion;
- Creating a development plan;
- Planning and implementing development actions;
- Taking ownership of your development;
- Talking with the manager about development;
- Requesting coaching and mentoring where needed.

## The line manager

The line manager plays one of the central roles in the success of 360 reviews as it is with him or her that the participant will need to discuss development plans and manage the individual development plan. The role played by the line manager in a 360 will reflect whether the participant has requested to be part of a 360 review for his or her own development or consideration for promotion, or whether this has been initiated by the organisation.

The line manager needs to:

- Understand his or her role in the post feedback process;
- Commit to investing time with the participant;
- Provide considered feedback and examples as part of the review process.

### Participant-initiated 360

When the individual has chosen to take part in a 360 process, typically he or she has discussed with the line manager the reasons behind wanting to participate and what he or she wants to achieve. This is also the opportunity for the line manager to share his or her thoughts on development goals or areas of focus which may be later referred to and discussed in the planning session.

### Organisation- or line manager-initiated 360

Whilst not driven by the participant, he or she should still aim to meet with the line manager to understand the process, the benefits and the outcomes with regard to development planning and any sharing or aggregation of data.

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### Does the line manager 'approve' the reviewers proposed by the participant?

Some 360 systems, such as Head Light's Talent 360, allow for the participant's selection of reviewers to be considered and approved by a 'trusted' third party. In the case of small, senior level cohorts, this role is often fulfilled by the HR Director or Business Partner. This can also be the responsibility of the line manager, or the line manager's manager. It very much depends on the purpose of the review and the culture of the organisation as to whether reviewer selection is moderated; it may be advisable to give complete discretion to the individual participants if you are seeking to encourage ownership of the process and to build a climate of trust within the organisation.

## The reviewers

### How many reviewers are needed?

The type and number of reviewers included in any 360 process is determined by both the purpose of the feedback (developmental or selection), the competencies being measured and the size and structure of the organisation or team within which the participant works.

In our experience, the optimal range of the number of feedback providers (other than self) would be between 7 and 25. However, we find that the higher the number gets within each category, the more likely the ratings are to average out in the middle. In some online systems such as Talent 360, the Administrator is shown the range of scores within each respondent group, which still allows for useful interpretation of the data, but the summary graphs and charts can become less useful. Certainly when reports combine 30 reviewers' feedback, the data can become unwieldy.

Good practice suggests that, when used in a developmental capacity, it is encouraged that all reviewers that are available be invited to participate (e.g. all of a manager's direct team), but that participation be voluntary, especially for peers or direct reports. When the focus is on enhancing management practices and leadership effectiveness, a greater emphasis should be placed on both upward and downward feedback. Research suggests that peers, direct reports and other internal/external customers are often unable to provide objective feedback on many daily managerial tasks (i.e. they are unable to observe specific supervisory and managerial behaviours. However, feedback to these groups is still extremely valuable, especially on behaviours relating to collaborating and influencing. It is useful to develop tailored versions of the assessment for each respondent group, keeping the length to a minimum and the focus on those behaviours which are relevant and observable by each group.

There is limited research available to guide decisions on the optimum number of reviewers necessary to maximise the validity of 360 results. However, Greguras and Robie (1995) found that little within-source variability existed in a study of 153 managers using 360. They analysed the number of reviewers and items required to achieve adequate reliability. Their findings did suggest that if a 360 assessment has an average of five items to measure each competency, it requires at least four superiors, eight peers and nine direct reports to achieve acceptable levels of reliability (.70 or higher). That would mean an optimal number of 21 reviewers, plus self.

### Develop a briefing document for reviewers

Write a briefing document for the reviewers – *A Reviewer's Guide to 360* – which covers:

- Why the participant is selecting this person as a reviewer;
- The reason for the 360;
- The content of the 360 assessment;
- How the process works;

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- Anonymity and confidentiality; it is critical to be clear on how the reviewers' identity will be protected;
- What the participant needs from the reviewer; especially the responsibilities of a reviewer such as being honest, supportive and constructive;
- The need to offer examples to support the scores given rather than giving a specific example which isn't typical and therefore does not support the scores given. Explain that the approach is to look for an holistic picture rather than a one-off event which does not reflect usual behaviour;
- The need for feedback to be focused on areas that the person can change i.e. be behavioural-based;
- The need for timely feedback.

This can be sent with a covering e-mail. It is good to try to create a 'moral contract' with reviewers, so that they understand their responsibilities and how they will be helping the participant by providing feedback. You may choose to allow the reviewer the option to decline the invitation to review, if they feel they are unable to meet the responsibilities of this role.

## Encourage the participant to verbally invite the reviewer – as well as e-mailing

Instead of – or as well as – sending the briefing document to reviewers, the participant may like to talk to each reviewer before the requests for feedback are issued formally via the online system. This helps to position the 360 and may encourage greater buy-in.

## Confirm anonymity with the reviewer

Protecting the anonymity of the reviewer is important – although you may find that reviewers provide comment in the open text areas which identifies them. By emphasising this anonymity at the outset of the process, you may encourage those who may not otherwise give feedback, to give considered and honest comment.

### Key points

Prepare briefing guides for the participants and reviewers

Confirm and correct understanding of the process and timeline with all stakeholders

Confirm anonymity with reviewers and encourage participants to engage with the reviewers

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## Useful reading

- Resource: *A Participant's Guide to 360* – an example can be found in the Useful Documents section at the back of this Guide.
- Resource: *Selecting Feedback Providers* – available in the Resources section of our website.
- Resource: *A Reviewer's Guide to 360* – an example can be found in the Useful Documents section at the back of this Guide.

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# Managing the programme or review process

Having invested time and energy into briefing reviewers and participants, you will want to ensure that the programme runs smoothly and the reviewers complete the 360 assessment when asked and giving it the attention and consideration needed.

## Make use of the functionality within your online 360 system

Much can be done to ensure the smooth running of a review or programme if you have selected an easy-to-use and accessible online 360 package. Usually online systems allow tailored reminders to be issued at specific times as well as monitoring completion rates.

### Get to know your online system

If you are not sure of what your system can and cannot do, request a refresher or update session from your supplier: it may be that the functionality has changed during the time you have had the system.

### Tailor the online 360 system to support the briefing of reviewers

Where possible, look to your 360 online system to issue an e-mail to the reviewer before the invitation to take part is issued formally from the system. This then allows for separate conversations to take place or changes to reviewers invited before the final invitation is sent.

### Tailor, timetable and issue reminders

Decide these at the start of the review programme and then monitor the completion and submission rate of the reviews as they are completed.

## Improve 360 response rates

Typically 'lack of time' is the main reason that 360 reviews are not completed by a reviewer: 'filling in questionnaires' is often not high on the list of 'things to do' and demeans the purpose of the assessment. There are practical steps that can be taken to make sure as many are completed as possible.

### Position the assessment

Positioning the assessment as merely a 'filling in of a questionnaire' downplays the role of the 360 in the development of your people. By using this 'questionnaire'- type language suggests a tick box, compliance exercise.

360 degree feedback can be a collaborative and culture-changing process – but when you ask someone "*Can you just complete this questionnaire?*" it fundamentally diminishes the importance of the activity - and it changes the context of your project into something that can be dismissed as a low-priority. Instead think about: "*We'd like you to go online to a website to provide constructive, structured feedback*". Ensure that how you describe the process, is aligned with your overall objective.

### Set realistic deadlines

Allowing reviewers sufficient time at the outset of the project is the initial step to getting reviews completed on time. Coupled with this, avoid times which are particularly busy for the organisation or when many may be away from work. This includes holiday seasons but also internal conferences, end of year reporting, annual review or budgeting periods or other business-driven busy times.

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## Remind those who are 'slow' to respond

Research has shown that direct reports are the quickest at completing a review: they usually have plenty of observation to draw on for comment. However, line managers are the slowest to respond – and you may need to remind participants that they too need to complete a self-assessment.

## Keep it short and focused

As stated earlier, keeping the 360 assessment length to a minimum by including only the important questions and tailoring 360 assessments to the respondent groups can help to maximise completion rates.

## Avoid bottlenecks

Within any business, there are people who touch a large number of people across the organisation and who tend to be in demand as a reviewer when 360 review time comes around. Be sure to select software that enables to you to identify these people, and then ensure they don't get overloaded by setting a maximum number of reviews they can perform, and encouraging people to be selective and considerate when inviting their reviewers. Speaking with the prospective reviewers initially and inviting them to give feedback provides busy reviewers with the opportunity to spot potential overload, or difficulties in adhering to the timetable and giving feedback due to holiday periods or other obstacles.

### Key points

- Get to know your online 360 system – what it can and cannot do to support you
- Position the process strategically supporting your talent management activities
- Timetable realistically – taking into account business-driven busy times
- Track and monitor progress of the programme
- Remind and follow up when necessary

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# Generating the reports

Once the review is completed, reports are generated and feedback discussions and personal development planning can take place.

Many 360 systems allow feedback recipients to access their reports directly online. Others enable distribution of reports through third parties such as HR business partners, line managers or coaches. However your system works, there are a number of things to consider:

## Decide who will have access to the reports

It is best practice to allow participants to have access to their own reports and to take responsibility for using the feedback to generate positive behavioural change and performance improvements. However, many organisations do this through a third party such as a 360 feedback facilitator, line manager, coach, mentor or HR professional. Often these individuals see the reports before the participant does, and the report is given to the participant during or after a one-to-one feedback session.

Often it is useful to generate a colour, paper copy for the purposes of such a session; most people find it more engaging and interactive to have a visual prompt for the discussion, to highlight key areas of agreement, difference, strength and development, and for both parties to make notes. At the end of this session, what happens to this report needs to be agreed; it can be given to the participant as their copy or retained by the coach/feedback facilitator for purposes of follow-up, then destroyed at an appropriate time.

If there is no feedback session, it still needs to be made clear through your communications as to who will have access to the report; generally it is advisable to give participants the responsibility for sharing it with key individuals, since the feedback is theirs and it is potentially sensitive information. However, 360s contain useful data which can, when reviewed at a trends and themes level, provide valuable insight into collective training needs and organisational risk and strength areas.

As part of the communications strategy, access needs to be made clear:

- Who will see the reports;
- When will they see them;
- For what purposes will it be used; and
- What controls are in place to ensure that the feedback is kept confidential and private, seen only by those who need to know.

## Maintain security and protect confidentiality

Many 360 systems have high levels of security, allowing access to reports strictly by invitation only and with each individual having a personal log-in name and password, to reduce the chances of others seeing potentially sensitive feedback. However, often the process will require reports to be e-mailed or hard copies sent by post, and in these instances it is wise to take appropriate precautions to prevent them falling in to the wrong hands (e.g. password protecting documents, marking e-mails PRIVATE AND CONFIDENTIAL in the subject line, warning people to keep these documents safe (e.g. don't leave them on trains when preparing for a feedback session) etc.).

Most organisations also encounter challenges around printing and caution should be taken here; is the printer shared by others in the office? If there is a print queue, how will you ensure others do not pick up the report by accident? If printing fails, make sure you cancel the print job so the printer does not start printing off a report when you are not there to take it. Are you sending it to the correct printer? And so on.

Comparison reports (which show the data and scores from a group of individuals, showing who got the highest ratings on the various competencies) are seen to be particularly sensitive, especially when the

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review is focusing on the most senior individuals in the organisation. Put protocols in place to ensure that reports and comparison reports are kept private and confidential, and are treated as sensitive documents.

## Stipulate how reports should be used

Generally, 360 degree feedback is used strictly for the purpose of personal development, but increasingly organisations are recognising that, if carefully communicated and managed, a good 360 degree review can provide valuable, less subjective information which can feed into review processes and talent management decisions.

The purpose of the review needs to be clearly articulated at the outset, but it is worth reminding those involved again at the report-generation stage. Be clear how the reports should be used, what the expectations are of the feedback recipient and those they discuss or share the feedback with, and what the intended outcomes are (e.g. a focused personal development plan). If the process is purely for personal development, make it clear to line managers that the feedback should not be considered when making other decisions regarding the individual, such as end-or-year appraisal score or bonus payment.

## Storage of reports

As discussed, confidentiality and security are paramount concerns, and how the reports are kept and stored form part of that picture. All personnel data is subject to the same considerations and 360 data is part of the personal information that an organisation can hold on their employees, subject to the same legislation as pay details, medical history and pension arrangements. The organisation's policies regarding data protection, freedom of information and network security all need to be considered and incorporate this kind of data.

A clear policy needs to be agreed and adhered to. Generally, 360s are not kept as part of an individual's personnel file and sometimes the sole responsibility for storage is given to the recipient, with advice to keep it on a private drive. However, 360s do contain useful information which needs to be acted on, and reviewed, if organisations are to gain value for money and return on their investment. Restricted access drives, periodically removing data belonging to employees who have left, and deleting data which is out of date (some organisations use a 2-3 year timeframe, after which the feedback is likely to be no longer relevant, accurate or valid) are all good practices to consider.

### Key points

- Consider and decide who will access reports – and communicate this
- Put in place measures to maintain security of reports
- Take action to protect confidentiality
- Be clear how reports can be used
- Make arrangements to store reports appropriately

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# Preparing for the feedback session: the facilitator

## Decide and agree the overall format and structure of the session

It is important that the participant understands how the face-to-face session will be structured.

From experience, feedback sessions tend to have the following in common:

- An emphasis on balance between the positive and the negative;
- Time and space allowed for individual reflection;
- Consistency and fairness between individuals, but enough flexibility during the meeting to encompass personal preferences and personalities.

### A suggested approach to the structure of the feedback session

Before the session, you need to make a decision as to whether the report is or is not passed to the participant for him or her to take away – and be careful to adhere to this decision regardless of the comments and/or pressure from the participant.

A suggested outline is to:

- Spend 20-30 minutes **setting the participant at ease**, establishing the context and an agenda for the session, talking through the background to why the 360 was carried out and the rationale for its use before looking at the report.
- Check what the participant would like to get out of the discussion.
- Explain **how the report is set out** and what he or she will see.
- **Explain the diagrams** and what they mean – and explain this from the participant's perspective. This helps him or her know instantly when moving on in the report where the strengths and development needs are – and the average scoring. It also has the advantage of helping him or her to settle and relax – knowing the feedback is not going to be as bad as he or she may have thought.
- Show the participant how to interpret the report.
- Pick up on some **highlights** - some strong areas and some developmental places.
- Allow the participant to then **take the report and read the report** him or herself while the facilitator leaves the room for approximately 20 minutes.
- Return to discuss the participant's reactions and reflections and pick up on:
  - any areas of concern;
  - strengths which need highlighting;
  - areas to address within the development plan.

### Build in time for reflection

As you will see from the above suggested approach, it is good practice to include a 'reading gap' during the feedback session.

### Follow up after the initial session

The feedback session can be taken a step further with the facilitator making a follow-up call some time after the initial discussion to check on the participant and his or her plans now that more time for reflection has occurred.

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There is likely to be an expectation on the participant to do something in the time between the two feedback meetings – and this needs to be emphasised.

Typically, he or she is asked to:

- Reflect on and select parts of the feedback which are meaningful and useful;
- Put the comments into context and consider these;
- Highlight and extract both the strengths and development needs
- Begin to look at the areas of development in terms of taking action.

## Decide how and when the report will be accessed by the participant

### Send the report before the session?

There is strong debate about whether the participant receives the report before the feedback session and there seems to be no right or wrong approach to this. That said, the general practice, seems to be not to send the report out before the session itself.

#### *Don't send the report out before the session*

The case for NOT sending out the report prior to the meeting is strong. This is because:

- The participant may not understand it as reports do tend to need some interpretation.
- The participant may misinterpret or over interpret the scores.
- The participant may not understand the responses to some of the non-standard questions such as negative questions being answered in a non-negative way. Furthermore, some of the question scores may look skewed, and to find out what this means, the reader needs to dig down further and the participant may not be able to do that from just reading the report.
- The reaction to the free text comments at the back of the report cannot be managed. This seems to be the biggest danger as, by the time the free text is reached during a feedback session, the facilitator is able to position it so that the individual is ready for what's going to be said. If the report is sent out without any positioning or preparation, then the facilitator has no way of managing the reaction to this section.
- As a facilitator you cannot predict how a person is going to react to the report as a whole. Whilst you may think that a person, based on his or her report or your prior knowledge of the individual, will accept and understand the feedback, this may not be the case – and you cannot foresee this.

#### *Do send the report out before the session*

It seems that the key argument supporting the sending out of the report before the session is one of time saving. If the participant is reading the report for the first time in the feedback session, then time needs to be allowed for this review.

### Access the report in the session only?

For some users, leaving the report with the participant even after the feedback session isn't contemplated. This is usually when the report is seen as a coaching tool to start the coaching conversation, rather than it being an end in its own right. In such instances, the session sees the facilitator working through the report and interpreting the data for the participant – but using this as a starting point and asking important questions along the way.

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### Leave the report with the participant?

For others, the report is given to the participant for him or her to take and read through before meeting with other key stakeholders at a later date. At this time, the participant can also be given a soft copy of the report, in case they wish to share with their mentor, coach or line manager; it is the participant's decision.

As some participants may get 'stuck' on the narrative, free text at the end of the report, some organisations may decide not to include this free text in the copy of the report that the participant takes away.

### Aim for consistency; one rule for everyone

Whatever your view on when to send out the report, best practice seems to be that a standard approach is applied across everybody, rather than taking an individual approach. People talk to each other, and they all get a view as to what's going to happen during their 360 feedback. You need to make the process as consistent and as fair as possible – and avoid 'bespoking' the process.

## Structure the content for the feedback session

Select key areas or take the participant through every question? A decision needs to be made but it seems that this is a matter of personal preference.

### Focus on the more important questions…

Some facilitators do not go through every question in detail. Instead, whilst they may read through each question, they stop only at those which are more important than others. This means that the participant gets a complete overview. Essentially, both facilitator and participant are reading the report together and then if the participant expresses interest in a certain area, or comments or questions, then this is further explored and the coaching leads from that.

### … or go through every question

Other facilitators work through each and every question. The main reason cited for this approach is the time delay between completing the assessment, and the feedback session: some people forget what it is they were asked six or seven months – and in some cases 12 months – previously. Therefore to do the review process justice, a brief skim over, especially if promotion is being sought, is not seen as appropriate. If the participant is looking for promotion, you are able to say "*you're already scoring really highly on all of these key areas, so we don't need to talk about them, so let's look at these other areas.*" This gives the participant the confidence the scores are in the right area that they need to be so, whilst each area is talked through, there isn't a conversation held around each one.

Whichever approach you use, it is very important to ensure that the participant's attention is drawn to both positive and constructive feedback; some individuals may want to only focus on the higher scores and will need to be encouraged to give due consideration to their development needs. Others will hone in on the low-scoring items and will need to have their attention drawn to those areas in which they've done well.

### Consider changing the approach for more senior people

It may be that you consider changing the approach you adopt based on the seniority of the participant. A more senior person may have a more focussed, key conversation-based approach and for those at lower levels may receive a more procedural approach taking them through all areas and helping them to understand it in more depth especially if they have not been through the process before. You will need to make that decision.

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## Prepare by reviewing the report

### The role of the Facilitator is pivotal

The role of the facilitator is key to a positive outcome from a 360 discussion. Essentially, the role is to:

- Help the participant to make sense of the feedback; to help him or her understand what it means;
- Support the participant as he or she prioritises aspects of the feedback and considers how to respond;
- Assist the individual in identifying courses of action; development activities, conversations that need to be had etc.;
- Provide an experienced eye; for instance, helping the individual navigate through the report, interpret the ratings, see patterns in the feedback and to put things into perspective;
- Offer an unbiased, professional (and sometimes unemotional) interpretation of the feedback, where necessary.

Before the feedback session, the facilitator will need to thoroughly understand the report and draw out the areas he or she will cover in the feedback conversation.

### Put aside at one to two hours to prepare

It seems that at least a couple of hours reading the report, making notes and highlighting trends on the report greatly helps a more productive hour-long feedback session with the participant. It means that the time in the session can focus on the key areas and trends rather than reading the report itself.

### Highlight low scores

Highlighting low scores during the preparation helps to focus on the areas worthy of conversation for development.

### Highlight high scores

Equally, look at the areas in which the participant is scoring highly; these are areas of strength and should be included to reinforce what the participant is doing well.

### Flag any major discrepancies

Discrepancies need to be fed back to the participant carefully and so preparation for these – and thinking about likely reaction – is important.

### Look at any skewed scores

You may find that some of the more ‘negative’ items in the 360 are answered in a ‘non-negative’ way; i.e. the reviewer may have misread or misunderstood the question. This leads to some of those particular question scores being a little skewed and there being seemingly contradictory ratings on similar items. To manage this, you need to dig down and find out what’s going on, investing time to do this.

One option may be to look at removing the reviewer if one score is changing significantly the overall average of the scores.

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### Organise the information

To be prepared for the feedback session is to have organised the information as part of the preparation.

Often a tool, such as the Jo Hari Window, is used for this purpose but even the most sophisticated of 360 degree feedback processes is unable to identify things of which neither the individual nor others are aware, so it does require a certain amount of skill and experience in order to uncover aspects of behaviour or performance that are in the 'unknown' pane.

Look for and make use of the tools within your online 360 system to help with this.

For example, Head Light's Talent 360 system includes the analytical feature PAPU NANU (Positive:Aware, Positive:Unaware, Negative:Aware, Negative:Unaware). PAPU-NANU is useful when reviewing a 360 report, either in preparation for a feedback conversation or during a session, to help the participant to understand their data. You may like to read our *We Think…* paper – '*Making Sense of 360'*.

### Make use of the free text

It is important to use the free text fields and the information this gives: it substantiates the scores and gives some greater depth as to why the scores are as they are. Qualitative feedback can also provide valuable insights as to how the individual could respond to the feedback, and the behavioural changes that could result in changed perceptions. Prepare yourself as to how you are going to feedback and position the free text comments at the end of the report – especially if this contains 'difficult' comments. It may be that you choose not to include the specific comments in the report for the initial feedback session but hold them back until a later meeting.

### What to do if the profile doesn't raise any concerns

When the report doesn't flag any concerns or issues then it may be that you choose to mention every item in the feedback session. To do this, you'll need to be prepared and so, whilst this may appear a more straightforward profile to prepare, the time still needs to be invested so that you are prepared. However remember that, as a facilitator, you will read and receive the feedback very differently to the participant; it is highly likely that the participant themselves will find something of concern or surprise in the report. Always seek to encourage a focus on, or capitalisation of, strengths or development in areas which are generally good but relatively lower compared to other ratings.

## Prepare beyond the report

### Take into account previous exposure to 360 process of the participant

Preparation plans will differ depending on whether the participant has been through previous 360s and understands the concept of the process, or if this is his or her first experience. For example, for those participants at manager level and below, this may be the first time that they have been part of a 360 review: above this level, senior managers may have been through the process several times. This impacts the preparation focus.

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### Draw on background information

As part of your preparation, as a facilitator you need to know:

- Why a person is going through the 360;
- The current situation of the person;
- If there is there anything significant happening in his or her life of which you need to be aware;
- If he or she is 'in the right place' to receive the feedback;
- Key or influencing issues within the organisation, such as change programmes, restructuring, development and promotion opportunities and options.

### Make final checks

- Ensure you are prepared to bring forward any models you are wanting to include e.g. TGROW or development plan forms you intend to introduce: can you talk through them appropriately?
- Make sure you are 'in the right place' to deliver the feedback.
- Ensure that the location and timing of delivery of the feedback is suitable.
- Decide how you will make notes.
- Think through the plan of the session.

## Prepare the participant

### Get in touch before the feedback session

There are various ways to touch base with the participant before the initial feedback session – e-mail or phone call – and this is an essential part of the feedback process.

Getting in touch with the participant will enable you to:

- Introduce yourself if necessary and establish your credibility as facilitator;
- Check the understanding of the participant regarding the next steps;
- Build rapport to help set the participant at ease more quickly;
- Understand the participant's view of the process to date and any concerns to help you prepare;
- Deal with any misconceptions;
- Confirm logistics;
- Ensure that the participant arrives at the session itself ready for the feedback discussion;
- Reiterate how the feedback session will operate.

You should allow 15-20 minutes for a telephone call to cover these points. If you decide to get in touch via e-mail, you may want send to a guide explaining and outlining what to expect from the 360 feedback session. It can provide a number of example questions to give a flavour of the feedback and to get the participant to start thinking about what the development areas might be. Whilst it does not offer great detail, it can help to prepare people.

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**Key points**

- Allow time to review the report
- Plan the structure of the feedback session and how you will manage the time and review
- Decide how you will use the report
- Consider how you will introduce and present information
- Organisation information using a tool such as PAPU-NANU
- Prepare beyond the report drawing on background information
- Get in touch with the participant before you meet

## Useful reading

Resource: *Making Sense of 360* – available in the Resources section of our website.

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# The feedback review session

## Manage reactions to, comments on or questions about the content

### Position the narrative, free text with the participant

The way in which you position the free text with the participant is crucial. To help you do this, consider:

- The participant's ability to contextualise and position the comments he or she reads;
- Investing the time to work out whether a comment is relevant and recent - and the only way to do this is to explore the comments with the participant;
- Explaining to the participant that:
  - some reviewers will always include a comment or text in the open text field even if this means that they are commenting on something from many years ago this may bear little relevance to that individual now. Ask the participant to reflect on the comment and ask of themselves if this is a comment of a five minute snapshot, or is this relevant the majority of the time.
  - it is one person's perception of you and possibly on only one occasion.
  - sometimes examples given are extreme cases – either positive or negative.
  - different people write in different ways, with differing levels of time and attention paid to the process.
  - the important thing is to consider the value of each element of the feedback, and to determine a constructive response to it rather than wasting time working out 'who said what'.

### Refer to the narrative, free text section during the review session

The free text comments form part of the narrative section and there is often debate about how and when this is introduced into the feedback session.

For some participants, reading these comments can lead them to focus solely on the 'words' regardless of the scores in the rest of the report and this therefore 'colours' the feedback session.

You may want to consider the following.

- Familiarise yourself with the free text during your preparation time as facilitator so that you are able to add context to the feedback as you give it and draw on examples but do not mention specific feedback. As you then pass through the report, you then draw the participant's attention to the feedback section in the report.
- Start the feedback session without the narrative component, bringing this in later in the session once the overall feedback has been positioned.

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## Take care in comparing with others – and against a competency framework

If the 360 is being used as an assessment tool (rather than for development), the participant may look to compare his or her scores to others in a similar role or at a similar level. If there is no benchmark available, focus on the individual participant and the context of that specific feedback for that specific person.

Should you have a benchmark in place, you need to consider how to manage those participants who are 'below the line' or who haven't reached the level determined. The information from the feedback can help to highlight the areas which are priority for the individual – either for his or her formal development plan career planning: even when used initially as an 'assessment' tool, using benchmark data can inform the areas needed for development.

You may also find that more senior leaders are looking to understand how their people measure up to those in other organisations.

## Manage difficult conversations

Some of the areas for feedback may be more awkward or difficult for the facilitator to feedback. If this is the case, consider:

- Providing the context for the feedback, referring to the report and free text appropriately;
- Encouraging questions from the participant so that a breakdown in communication is avoided: invite him or her to talk;
- Allowing the time and space to reflect and talk;
- Focusing the comment on the participant and do not get drawn in to discussing the shortcomings of others;
- Acknowledging his or her point of view;
- Recognising the positive strengths and the development opportunities;
- Confirming the resources available to support development;
- Understanding that there could be a cycle of 'shock', 'anger', 'resistance' and 'acceptance' and you may need to work through these areas with the participant.

## Barriers to self-awareness

One of the hurdles to an effective and valuable feedback session may be the result of a lack of self-insight by the participant. This may display as one or more of the following.

- A **negativity bias**. There is a natural inclination of participants to highlight and focus on the areas they do not like – or the areas of development need. There is a skill for the facilitator to develop in drawing participants towards the positive so that, whilst the development or coaching areas are highlighted, they are balanced with the more constructive comments and findings. To help in this, ask the participant to take a pen and emphasise in different colours the areas of the report which they recognise as being good, correct, true or a strength.
- **Irrationality** as feeling threatened. An irrational reaction may need additional time given to reflect on the comments before continuing with the feedback session.
- A **self-serving bias**. A participant may seek to explain away failure or add further weight to any success.

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**Key points**

- Understand the free text comments before the feedback session
- Explain the use of free text and position this in context
- Refer to the free text when appropriate
- Prepare how to handle difficult conversations
- Understand that there may be limited self-insight

## Useful reading

Resource: *Feedback session question prompts* – available in the Resources section of our website.

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# After the feedback session

## Timeline

Two-three weeks after the session

- Make a 'light touch' contact – by phone or e-mail.
- Check that three or four objectives have been identified.
- Ensure that he or she is starting to take action for some of these objectives.

Three months after the session

- Ask about the objectives - which should have been completed.
- Discuss the next set of objectives - which should be discussed with their line manager and/or mentor.
- How this final contact is done will depend on the participant, but ideally a face-to-face meeting is held, where the objectives can be discussed fully, successes celebrated and further development objectives discussed.

## Share feedback headlines with others

### The line manager

The line manager has a significant role to play in the 360 beyond that of completing the assessment. Although not usually present in the feedback session or necessarily given access to the full report, it is suggested that it is good practice to share the 'highlights' or 'headlines' of the feedback report so that support and development can be planned for the participant. Some organisations include a facilitated 20-30 minute session at the end of an individual feedback discussion, with both the participant and their line manager. This enables the manager to help co-create a focused and achievable development plan, as they may be aware of training, development and promotion opportunities and will be instrumental in its implementation.

If the 360 review is used as part of development planning and the PDR process, and the line manager is required to sign off on this, then the more proactive of line managers will want to sit and talk through the key headlines.

There are circumstances in which you may choose not to provide the full report to the line manager include:

- **Confidentiality** and the manager does not need to know the detail ;
- **Maintenance of 'dignity'** as the participant may not wish to have specific negative or critical feedback shared with the line manager;
- The **rate of 'churn'** within the manager population as investment time may be fruitless should the manager be posted elsewhere within a few months;
- **Not all managers are 'generous'** in their time and support of direct report development.

### Mentors or coaches

Where mentors are involved in the development of the participant, he or she is typically given access to the full report providing that the participant agrees.

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You may want to ensure that your online system is capable of giving report access to the nominated coach or mentor even if he or she is external to the organisation.

## Translate the feedback into meaningful development plans

### Ensure participant ownership of the setting of SMART objectives

After the feedback session, the participant is typically asked to set three or four SMART objectives based on what is discussed at the review and agreed with their line manager and/or mentor.

### Support the participant to do this

It is not an easy task for the participant to set his or her own objectives. The facilitator may need to offer support to identify, verbalise and make note of the areas for development and the associated goals. The facilitator needs to do this in whatever way works for the participant. This could be through:

- One word prompts;
- Bullet points;
- Using coaching tools such as GROW to identify and select options;
- Encouraging creative thinking around the opportunities for learning and sharing experience;
- Diagrams/pictures;
- Allowing the participant some time to explore solutions and goals without the facilitator filling the silence;
- Guiding the participant and giving feedback on his or her development plan but allowing him or her to ultimately create a development plan that has meaning.

### Create a template of the development plan

A straightforward development plan template can be handed to the participant at the end of the feedback session asking him or her to complete it including:

- What do you want to achieve?
- How are you going to do it – and by when?
- How are you going to measure it?
- How is it going to help you?
- What impact are these changes going to have on others?

The onus is on the participant to complete this template although they may need support in knowing how to do this.

## Take action

### Link development options to areas of development need

If your online system offers development options or your own tailored development resources available as part of the development planning creation, this can be a valuable first step. Whether your organisation has a standard list or not, the emphasis is on discussing with the participant *how* he or she may develop and improve in a certain area and exploring the full range of development activities from reading a book, attending a training session, shadowing, or talking to those who are skilled in a specific area.

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## Ensure the participant owns the development actions

Whilst the line manager needs to be part of the development planning it is important for the participant to understand and embrace that it is him or her who actions and implements the CPD plan. The line manager's role is to support this process.

Should the participant be reluctant to do this and is part of a self-nominated review (and not therefore one 'imposed' due to organisation need or standard process), you should query why he or she chose initially to take part in a 360 review.

## Involve others to work with the participant

### The line manager's role

It is part of the line manager's responsibility to develop his or her people and as such he or she needs to be involved in the setting of objectives and, if possible, in the coaching.

Part-coaching along with the manager is a useful approach to adopt. This tri-partite approach (line manager, coach, participant) can work positively as it encourages development opportunities as well as providing some external coaching distance. The line manager could be asked – "*what have you done to help your coachee? how have you supported him or her in using their 360 feedback? where is the shared responsibility?"*

### Work with an external coach

At more senior levels, it is common to have an external – rather than internal – coach. After an initial 360 feedback review with a facilitator, the information can be shared with his or her coach who ca then work with the participant across a number of coaching sessions (often between four and ten). The line manager may attend, for example, the first and last session so that he or she understands what is to be done and what has happened.

### Utilise contacts and share resources to develop a 'pool' of coaches

Coaching will help participants to make the most from the 360 review but resourcing this can be an issue. Investigate whether there can be a reciprocal arrangement with other partner or network organisations to draw on each other's 'pool' at certain times.

# Discourage the participant from following up with reviewers after the session

The question of whether to encourage the follow up with reviewers after the initial feedback session has promoted debate. Some participants may ask to follow up the feedback given in the 360 assessment with those people who have rated and commented on them. Is this to be encouraged?

## Discourage individual follow up

Good practice suggests that this is discouraged – although it may be difficult to mandate that this is not done. Going back to the reviewers for specific follow up may not only limit the initial comments made by the reviewers in future reviews for concern that this will be followed up, but may also lead to a reviewer perceiving him or herself as being 'picked on' should the participant follow up the review session with specific people only.

Reviewers' comments are usually anonymous – although in practice it is likely that some of the comments are identifiable either by the nature of what situation or example is given or by revealing job role or team information and guidance to avoid this can be included in the initial briefing document for reviewers.

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## Avoid adapting your 360 system to accommodate an option for reviewers to offer a follow up conversation

Whilst online systems may have the capability to offer a field or question for a reviewer to indicate if he or she is happy to have a follow up conversation, this is to be avoided. This is because continuing the discussion after the more formal review session, takes comment out of the formal review process and there may be an unwillingness by the reviewer to give open and honest feedback next time if he or she believes that follow up will take place.

## But be aware that 'informal' follow up takes place

Some participants will take their report and share it with close colleagues and, in doing so, may learn from the reviewer voluntarily which comment he or she has submitted. In doing this, other reviewers' comments may be identified by a process of elimination.

## Team feedback may be more open for wider discussion

When a 360 review has featured comments from a wider team or group, the participant may choose to feedback to the group on how, as a group, they perceived him or her and the actions arising. Often though this sharing with the wider team is thought to be when the feedback is at its most valuable.

If this route is followed, it is good practice for the participant to:

- Thank the broader team for its input and feedback;
- Summarise some of the key headlines from the report;
- Explain the areas that he or she recognises that the team have said are areas for development;
- Share the action he or she is taking to achieve this;
- Ask for support in developing these areas;
- Let them know how the development is progressing and ask for informal feedback.

### Key points

Decide with whom the feedback will be shared

Support the creation of SMART objectives and the development plan

Encourage ownership of the development plan by the participant

Brief others who will be working with the participant to support as development progresses

Discourage following up with reviewers

Encourage sharing with the team if appropriate

Schedule follow up conversations

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# Applications of 360

## More difficult, or challenging uses of 360

### Multiple perspectives support challenging conversations

With a participant displaying behaviours which are not as you wish, the multiple perspectives gained from a 360 can support what can be quite difficult feedback. The participant may be less able to argue as it is not just one person making a comment or taking a view.

Example:

An individual perceived a personality clash between him and his manager. After speaking to the manager about the situation, it became clear that there were a number of individuals within this one team who found working with this one individual difficult, and that it was not a line manager-to-individual issue. Using 360 in this situation was a valuable independent source of information. Having a person outside of the normal day-to-day contact facilitating the review meant that some independence was introduced and the facilitator was able to make comments such as "*This is what I'm seeing… This is the position that I see you're in… Would you agree with that?"* The result was that insights were more readily accepted.

### Use alongside other assessment tools

360 can be used with poor performers specifically to illustrate particular behaviours in order to help increase self-awareness and identify areas for change and improvement. Furthermore, 360 can be used in conjunction with other tools such as emotional intelligence or personality questionnaires. When used together, these assessments will provide a backbone to a conversation about behaviour and how this is being seen by others.

### Share with the line manager

The information from a 360 tends to be shared with the line manager when used as part of a more challenging issue and when it is important that an early intervention or development plan is drafted. This could become a formal action plan to improve behaviours.

## For high stakes review

A 360 is traditionally used to help an individual gain a greater self-awareness of their performance and how their behaviour affects others they work with. It enables them to identify specific actions they can take to improve their overall performance. Used in this way, for personal development, there is little motivation for collusion or bias, and relatively low consequence. However, if the only reviewers selected are those that will provide positive feedback, then less will be learnt with lower benefit.

As an assessment strategy, a 360 degree review is increasingly being used as part of other 'high stakes' Talent Management processes including performance management, succession planning and selection for promotion. Common drivers for doing so include:

- The need for greater objectivity and transparency in decision-making;
- A desire to implement assessment methods that are well suited to the purpose and the culture of the organisation;
- A desire to find more robust ways to address difficult performance issues within the organisation.

A 360 degree review offers some attractive characteristics in these respects and with suitable controls

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in place it can be a very effective way prompting and providing evidence to enable 'difficult' conversations about current performance.

The problem can be that if you think the outcome of a review could affect your performance appraisal or promotion prospects, would you be prepared to ask someone to be a reviewer when it might highlight some of your weaknesses?

There is a temptation for collusion, where participants mutually agree to provide only positive feedback. The reverse, where the review is used as an 'axe to grind', is also a possibility. However, with the right checks and balances in place, both of these elements can be managed-out making 360 a powerful tool.

The challenge is to recognise the points in the 360 degree review process which are vulnerable to bias and to introduce suitable controls.

- **Explanation of the purpose of the process** including why you are doing it, the benefits for the individual concerned, how the results will be used and the process controls that are in place to demonstrate and ensure it is a fair process for all involved.
- **Independence** as the early involvement of an independent, trusted person to moderate the selection of reviewers and to identify and eliminate evidence of collusion, bias or grudges.
- **Anonymity controls** so that vulnerable reviewer groups are able to give anonymous feedback.
- The **use of psychological moral contracts** so that everyone involved in the process so that they sign-up to role, process and values and ground rules of the review process.
- The **use of well designed, validated and 'bought-into' assessments** which are designed, piloted and reviewed with internal groups.
- A **process by which the 'quality' of feedback provided can be monitored** and the capability for the reviewer to reconsider their feedback if appropriate.

## Key points

Consider how 360 reviews support other activities such as supporting difficult conversations or being used alongside other assessment tools

Explore how 360 can be support performance management, succession planning and promotion

## Useful reading

Resource: *Understanding High Potential* – available in the Resources section of our website.

Resource: *360 for High Stakes Review* – available in the Resources section of our website.

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# Ongoing use of 360

## Understand the value of 360 in your organisation

### Use an evaluation form with participants

With each participant, look to use an evaluation form which covers the areas of Kirkpatrick's Level 1 evaluation. You will obtain the participant's personal reaction to the 360 process so you can understand whether you have met his or her expectations.

### Ask for feedback on the perceived value – and document

At each 'touch point' whether it is initial feedback, coaching session or subsequent follow up, a feedback sheet can be developed and issued. This means that after every session, you can get an idea how the participant values the session, what he or she has got from it, and what the intended next steps are going to be. Record everything in the PDR.

### Use a snap survey to gather feedback

There are many online survey tools which will help you to gather feedback and comments on the 360 process. You can choose to have this feedback provided anonymously or offer the opportunity for verbal more qualitative feedback.

### Use 360 as a repeat measure

Consider using the 360 as a repeat measure – and a way of documenting behavioural change. Of course, no control group is used so no definitive statement can be made that the behavioural change is due to the 360 – or that those not taking part in a 360 review, would not have undergone behavioural change.

### One year on

Consider having a further session with the individual to cover their thoughts on the process. Ask:

- What has helped you?
- What wasn't so helpful?
- What do you want us to change?
- What don't you want us to change?

This helps to subsequently target time – theirs and yours – on doing the things that add value.

### Measure and demonstrate a return on our investment

Go beyond the short-term evaluation to take a further look 18 months-2 years after the programme.

Ask:

- What impact has the 360 / the course / the coaching / the development plan / the entire time and resource spent had on the organisation?
- What has been put into place?
- Where have behaviours changed?
- Where has performance changed?
- What have you done to feed that back down into your team?

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### Measure the outcome of 360

It would seem sensible and pragmatic to evaluate the benefits of using a 360 process both on the individual participants and the organisation as a whole.

Head Light is researching how to measure the return on investment of 360 as part of its wider understanding of talent management investment.

## Ensure consistency, fairness and standards between facilitators

In organisations where there are many people delivering feedback, best practice dictates that you should be confident that the feedback is consistent across the group. Training and qualification takes this so far, and you need to be sure that the process is followed and the same level of 'service' is offered by each facilitator.

### Evaluate the coaching capability of your facilitator pool

Look to adopt an evaluation of the facilitator based on the five core coaching competencies which Head Light has identified. Head Light's *Coaching Capability* tool is available as an additional assessment to all users of the Talent 360 system. Bear in mind, as well as these competencies you may want to also consider other areas such as establishing credibility which may impact the feedback session.

### Peer support and peer supervision

Investigate ways to use peer support for 360 feedback sessions whilst preserving participant confidentiality. One widely used option is to discuss informally with colleagues how the session went. This may include suggesting what worked well and what worked less well in the session itself, but you need to take care as this may lead to inconsistency if not implemented across all facilitators. You may want to look at introducing peer supervision which is a more formal way to discuss generally sessions without talking about the content.

## Refresh your skills and learn from others

### Update the skills of the facilitator

After initial training it is important to maintain your knowledge of the 360 online system as it gets enhanced and understanding any changes to your internal processes. One option is to take advantage of master classes held on the IT system used, new analytics and reporting options and functionality.

### Make use of User Groups to share ideas and develop good practice

Whilst the principles of feedback will be the same across all organisations, there will be adjustments made because of the very different cultures operating. Groups such as Head Light's Talent® User Group is a good way to hear how other organisations are working and to take away ideas or actions to try out.

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# Useful documents

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## Checklist for a 360 review system

To gather, collate and review 360 degree feedback information requires an easy-to-use and tailorable online system. You'll want it to:

| | ✓ |
|---|---|
| **Reflect the competencies of your organisation** | |
| **Adapt to the branding, colours and language of your organisation** | |
| **Accommodate the workflow of your organisation** | |
| **Create your own assessments** | |
| **Allow you to define and include your own rating scales eg BARS and Likert** | |
| **Generate feedback quality scores** | |
| **Allow you to amend all standard e-mail text and set times for reminders** | |
| **Enable you to define anonymity and confidentiality settings based on respondent group** | |
| **Allow respondents to 'save as they go' as they work through the assessment** | |
| **Provide useful reporting options which can help participants and feedback facilitators to make sense of the data and prioritise areas for action** | |
| **Connect review outcomes directly to other talent management activities** | |
| **Highlight those with high potential** | |
| **Include suggestions for development linked to areas of development highlighted** | |
| **Monitor and manage the progress of review campaigns through an at-a-glance dashboard** | |
| **Create benchmarks for teams and individuals** | |
| **Allow for generation of group or cohort comparison reports** | |
| **Allow for data exports so you can evaluate and use the data for purposes such as Return on Investment (ROI), training needs analysis and assessment validation** | |
| **Run analytics and reports as you need them** | |
| **Enable you to be self-sufficient and make changes quickly and easily** | |
| **Have a strong service availability record to be sure the system is available when needed** | |
| **Be supported by a Helpdesk which knows the system inside and out** | |

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# A Participant's Guide to 360 – *example*

You have been selected as someone who could benefit from developing your skills further and as such we would like you to participate in a 360 degree programme. You may have also been asked to provide feedback on others who are taking part in this review, and there is separate Reviewer's Guide for you.

This Guide aims to give you the information you need in order to get the most from the 360 feedback process, but if you require further information please contact [*insert contact details*].

## Why use 360 degree feedback?

360 degree feedback is the process or practice through which feedback ratings and comments are provided to an individual by his or her colleagues, clients and work partners.

Typically it involves: the immediate line manager, a range of peers and colleagues and direct reports and, in some instances, external partners, suppliers, clients and customers.

The results from a 360 review are often used to plan and map specific paths for development.

We have decided to invest in 360 degree feedback as we expect the constructive feedback received by those taking part will inform their development plans and support their performance improvement.

360 degree feedback will help them to gain a much richer and more holistic picture of their strengths and areas for development regarding their capabilities, behaviour and performance in key areas.

It will help you understand where best to focus your efforts, where change will have the biggest impact, how you come across to others and what you can do in order to be even more effective.

Feedback is important but often in our day-to-day lives it isn't given the priority it deserves. With 360 degree feedback, we are giving this priority.

## Your responsibility as a participant in this 360 review

You will need to nominate reviewers to provide feedback as well as complete your own self-assessment honestly. As you do this, please think carefully about the questions included in the review.

A facilitated feedback session will be arranged with you and you should approach this with an open mind and be ready to explore the feedback you have received. As this is an anonymous assessment, you will not have access to who has made which comment or allocated which score.

Confidentiality and anonymity are key concepts in 360 degree feedback as people tend to feel more comfortable and so will provide more honest, open and constructive feedback if they are assured that it cannot be attributed to them. 360 reviews are generally designed so that the reviewer remains anonymous and we do this by [*insert how you have designed the assessment to be like this e.g. few groups of people so larger number of people per group; minimum number of reviewers per group; scores are used to create a composite score*]. The system we are using contains high levels of security, encryption and protection, which allows all feedback provided by you to be completely anonymous. All data will be stored electronically in line with the Data Protection policy.

## How does it work?

360-degree feedback works by gathering the honest opinions of a number of people anonymously. A series of carefully structured questions has been designed and compiled into a single review. You will be asked who you would like to nominate to complete this and thereby give your anonymous feedback about you. You too will be asked to complete this review about yourself as your view of your skills in a number of key areas can then be compared to the views of others. All those people giving their view

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and perception of you will answer the same set of questions. Their answers are then compiled into a report. You will get detailed feedback of the report during a facilitated session.

The questions will cover the following competencies which we have identified as being important to your role:

- [insert competency]
- [insert competency]
- [insert competency]
- [insert competency]

The resulting report and feedback conversation with a facilitator will help you to:

- Gain a more in-depth and all-round understanding of how others view your performance and how their opinion compares with your own view;
- Produce a more focused personal development plan;
- Develop a better understanding of how your work and performance impacts others and how by adjusting your style promotes more effective team working;
- Ensure your style promotes more effective team/partnership working.

## Your reviewers

### Choosing your reviewers

Deciding who you will invite to give you comment and feedback on you at work is important. You and your line manager will automatically be invited and you need to consider which of your team, peers and colleagues you ask. Also consider if there are external suppliers, customers or partners who will comment meaningfully on your work.

To ensure balanced and useful feedback, you should avoid inviting just those people with whom you get on best. This is for your personal development and own benefit and people usually find that the more constructive and useful comments are provided by people who are not close friends. You can invite external contacts and partners to provide feedback as long as they have a reasonable amount of contact with you and will be able to comment on most of the competencies.

### Some questions to ask yourself when deciding whom to ask for feedback:

- With whom have you worked most closely over the past year?
- Have you worked on any projects or matters that are outside your normal remit? Who could provide feedback in this context?
- Have you been trying to improve or develop your performance recently? Who might have observed your efforts in this area?
- What achievements are you most proud of this year? Who would have been in a position to observe and comment on those?
- What aspects of your work could be improved? Who might be able to give you helpful and constructive feedback in these areas, to help increase your future performance?
- Looking at the list of people you could ask, do they all have sufficient contact with you to comment on most of the questions included in the assessment?
- Have I just picked my ‘best friends and closest allies’? Am I really giving myself the opportunity to collect balanced and useful feedback?

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There are no hard and fast rules as to how long you need to have been working with someone before they are able to provide you with meaningful feedback; this does depend to a certain extent on the depth of contact they have with you. However, people who have had only a couple of weeks' interaction with you may end up rating many of the items 'not observed/don't know' which can lessen the usefulness of the feedback. If you have only been working with an individual for a few weeks, but in this time they have seen you in a number of contexts, have worked very closely with you or will have useful feedback on specific areas of your performance, it might be worth inviting them to rate you anyway. If in doubt, you can discuss this with the individual – highlight the areas that are being measured and ask them whether they feel they could comment appropriately and provide you with meaningful feedback.

### Inviting your reviewers

Once you have decided who to invite, it is useful to have a conversation with each one to explain the process. This is important as he or she may not have taken part in, or be part of, a 360 process before.

The invitation to complete the 360 review will be sent by e-mail but experience shows that you are likely to receive more considered review and feedback when you have spoken with the reviewer before he or she begins the review process. You may like to cover:

- Why you are selecting this person as a reviewer;
- The reason for the 360;
- What the 360 covers;
- How the process works;
- What you need from the reviewer;
- The need for timely feedback;
- The need to offer examples to support the scores given rather than giving a specific example which isn't typical and therefore does not support the scores given. Explain that the approach is to look for an holistic picture rather than a one-off event which does not reflect usual behaviour;
- The need for feedback to be focused on areas that the person can change i.e. be behavioural-based.

If you are not able to speak with your reviewers, please tailor and send the *Reviewer's Guide to 360*, with a covering e-mail.

### Following up or chasing reviewers

You may need to follow up with your reviewers and remind them of the importance and value of their feedback.

## The online process

Our 360 degree feedback process will be delivered online. The URL is [*insert URL*] and you are able to access this site at any time, from anywhere you have Internet access.

You will be given a log-in code via an e-mail sent to you from [*insert e-mail address*]. If you do not receive any e-mails, please check your Junk e-mail. When you receive the e-mail and are ready to begin the review, click on the link within the e-mail.

To log-in to the site, you need to [*insert instructions*]. If you have forgotten your password or require a new password, please [*insert instructions*].

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This will direct you to a screen where … [*insert text as appropriate*]

[*insert screen shots as appropriate as well as details of setting passwords*]

There will be full instructions given as to how to complete, progress through and submit the assessment.

## Your commitment to the feedback and planning

Taking part in this 360 feedback process is a valuable opportunity for you to understand how others see you and your areas of strength and need. You are asked to commit to this process openly and to participate actively in the review or feedback sessions.

After the review session, you will be asked to consider the areas for your development and to plan how you will acquire these new skills or behaviours. The implementation of your individual development plan is your responsibility: you will have support from your line manager and others, but the ownership lies with you.

If you have been allocated a coach or mentor you are asked to work closely with that person to get the most from your sessions.

## The timeline

The following is a timetable of events relating to this 360 programme. All reviews must be completed by [*insert date*].

| | |
|---|---|
| 360 Assessment to individuals | [*insert date*] |
| 360 Assessment feedback to be completed and submitted | [*insert date*] |
| One to one facilitated feedback session arranged | [*insert date*] |
| Creation of development plan | [*insert date*] |
| Follow up session | [*insert date*] |

## Questions

If you have any questions please contact [*insert name*] on [*insert telephone number*] or e-mail at [*insert e-mail address*]

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# A Reviewer's Guide to 360 – *example*

This Guide is to support you as a reviewer within the 360 degree feedback programme.

You have been asked to provide feedback to your work colleagues and it is important that you read this Guide before responding to the invitation e-mails and completing your review.

This Guide aims to give you the information you need in order to provide useful and meaningful feedback.

## Why use 360 degree feedback?

We have decided to invest in 360 degree feedback as we expect the constructive feedback received by those taking part will inform their development plans and support their performance improvement. 360 degree feedback will enable them to gain a much richer and more holistic picture of their strengths and areas for development regarding their capabilities, behaviour and performance in key areas. It helps a person understand where best to focus their efforts, where behavioural change will have the biggest impact, how they come across to others and what they can do in order to be even more effective. For the organisation, it can help to support more objective and well-informed decision-making about the individual and their future career and development.

Feedback is important but often in our day-to-day lives it isn't given the priority it deserves. With 360 degree feedback, we are giving this priority.

## Confidentiality and anonymity

Confidentiality and anonymity are key concepts in 360 degree feedback as people tend to feel more comfortable and so will provide more honest, open and constructive feedback if they are assured that it cannot be attributed to them. However, anonymity may lead to reviewers providing inappropriate, or feedback on an isolated incident rather than looking at performance over time or reviews being made to 'get your own back'.

360 reviews are generally designed so that the reviewer remains anonymous and we do this by [*insert how you have designed the assessment to be like this e.g. few groups of people so larger number of people per group; minimum number of reviewers per group; scores are used to create a composite score*].

So, while the participant knows who has been invited to provide feedback, they do not know who has actually completed it.

The system we are using contains high levels of security, encryption and protection, which allows all feedback provided by you to be completely anonymous. All data will be stored electronically in line with the Data Protection policy.

Please remember that while the responses are anonymous, the text you type into the open ended questions is provided verbatim and you need to think carefully how you write your comments and be aware that you may identify yourself by the comments you make.

## Your responsibility as a reviewer in this 360 review

You have been asked to provide useful, honest and meaningful feedback as you are positioned well to observe and comment on the person's performance and their interactions with other people.

Please think carefully about the questions included in the review. Being open, constructive and supportive in your feedback will help those receiving it to build their self-awareness and will form the basis of their development plan.

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A 360 review is not the opportunity to air grievances and ratings should be based on someone's overall performance and impact, not based on one isolated incident which doesn't reflect usual behaviour.

We recognise that takes time to provide 360 feedback, and we have kept the assessment length at a reasonable level to avoid impacting too much on people's time; it should take you about [*insert number of minutes*] to complete.

We have focused on the key competency areas of our organisation. These are:

- [insert competency]
- [insert competency]
- [insert competency]
- [insert competency]

## The online process

The person inviting you to feedback may like to brief you about the 360 and why he or she has invited you. In our experience, we have found that more constructive and beneficial feedback is given when there is this time invested to understand what is needed so please do take the opportunity to talk if asked.

Our 360 degree feedback process will be delivered online. The URL is [*insert URL*] and you are able to access this site at any time, from anywhere you have Internet access.

As your invitation to complete a review on a specific person, an e-mail will be sent to you from [*insert e-mail address*]. If you do not receive any e-mails, please check your Junk e-mail. When you receive the e-mail and are ready to begin the review, click on the link within the e-mail.

To log-in to the site, you need to [*insert instructions*]. If you have forgotten your password or require a new password, please [*insert instructions*].

This will direct you to a screen where … [*insert text as appropriate*]

[*insert screen shots as appropriate as well as details of setting passwords*]

There will be full instructions given as to how to complete and progress through the assessment.

When you have completed your review, click on [*insert text*]. Please note, you will get a reminder e-mail from the System Administrator before the deadline if you do not complete your review.

## Completing the review

You will see that there are text fields throughout the assessment where you are asked to supply evidence to support your ratings. Please give careful consideration to these and provide comments if you are able.

Research carried out by Head Light, the talent management software provider, has shown that over 90% of 360 degree feedback recipients found that the qualitative feedback provided by their colleagues was the most interesting, informative and valuable aspect of their feedback report.

To make best use of your time:

- Try not to spend too much time on each question. Often the first answer that comes into your head is the most accurate one, and even if you change your mind about a rating later, you can go back and change it. But move quite quickly through the questions and use as much of the rating scale as possible.

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- Save your responses as you work through the assessment and return to it when you have more time. You don't need to complete and submit it in one sitting.
- Try to do this at a quiet time as the process seems to be much quicker without interruptions and distractions.

Some hints and tips to consider when providing feedback:

- Provide a rating when you can. A [*Not Applicable*] option is provided but please use this only when you are not in a position to comment on this behaviour.
- Be honest. The participant will gain most benefit from feedback which reflects accurately their behaviour as you have observed it.
- Use of the range provided in the rating scale. Don't avoid using the lowest rating as this provides useful developmental feedback and similarly don't avoid using the highest rating as this provides valuable motivational feedback.
- Adding in text in the open fields is not mandatory. Any feedback will be valuable, and it is better to provide some well-considered comments to some of the questions than it is to give short responses throughout.
- Remember that the participant will see all the open ended question text.

Finally, your feedback on completing these reviews is valuable; please contact [*insert name or team*] with your comments and suggestions.

## The timeline

The person who has nominated you needs you to complete the assessment within the timescale allowed so that your feedback may be collated with that of other people.

All reviews must be completed by [*insert date*].

The participant will get a copy of their feedback report which collates all the responses during a facilitated 1:1 feedback session with [insert department name or coach]. You are not part of this session – and will not see the report. At the end of this conversation, the individual development plan will be developed and then implemented over the coming months.

## Questions

If you have any questions please contact [*insert name*] on [*insert telephone number*] or e-mail at [*insert e-mail address*]

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## Next steps

If you would like to know more about practical ways to use 360 degree feedback, please get in touch.

## About Head Light

Head Light helps organisations understand the strengths, risks and readiness of their workforce. Working primarily with public sector and regulated organisations where workforce capability is critical to operational performance, our workforce intelligence platform transforms workforce signals into actionable intelligence.

Head Light has attained the ISO27001 standard for Information Security. Certificate No 217613.

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