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A Guide to Storytelling with 360 Degree Review Reports

What are 360 Degree Reviews?

360 degree reviews, often called multi-rater assessments, gather feedback about an individual from multiple sources (employees, managers, coworkers, staff members, customers, etc.) within an organization. The underlying assumption of a 360 degree review is that collective feedback from a diverse group of peers the employee directly interacts with provides the most comprehensive assessment of their proficiency within the competencies being assessed.

360 degree reviews are typically part of a broader Human Resource (HR) or Learning and Development (L&D) initiative. They are used for a variety of reasons; the four most common 360 degree use cases are:

While working with hundreds of organizations as they plan, develop, and implement their 360 degree reviews, Explorance has had an up-close view of what works and what doesn't. We've learned over the years that every 360 degree project possesses its own narrative, and 360 degree reports can be set up in numerous ways to convey an organization's desired narrative effectively.

In this guide, we will look at some best practices that will help you enhance your 360 degree reports to inform, inspire, and ultimately become a mechanism that drives meaningful change. We will also cover real-world examples of reporting structures for individual 360 assessments.

1. Leadership development
2. Workforce readiness planning
3. Training impact demonstration
4. Performance management

Begin with the End in Mind

To provide the correct data in your reports to stakeholders, your 360 degree review must be configured with the end goals in mind. You need to know in advance what type of data your stakeholders want to receive from the assessment. It will be much more challenging to determine what your reports should look like and what story you want them to tell if you haven't defined the end goal of the 360 degree review upfront.

Ask yourself the following questions:

- What are the objectives of the 360 degree review?
- Are your 360's a standalone process, or are they integrated into another initiative, such as a leadership development training program?
- What audience is being assessed, and who is rating who – and why?
- Have you considered the effort to return the data in an expected manner (e.g., technology vs. manual efforts, scalability or distribution)?

Consider the Story

Once you have the information that clearly defines the end goal, you can start to think about the story you want your 360 degree reports to tell. You can tell a story around:

Individual performance:
How did the training program improve individuals' performances, if at all? How does the data guide and inform employees' progress?

Different departments:
How does one department's strengths/opportunities compare to the organizational average?

Individual managers:
Who are your top performers, and what skill sets/competencies do they demonstrate vs. others? What is unique to your top performers? What is the year over-year-story – who are your stayers, leavers, and joiners?

Initial Report Considerations

Now that you understand the reasons for your 360 degree reviews and the objectives, there are some important considerations to keep in mind for the reports.

Confidentiality:

Ensuring confidentiality will allow your employees to give honest feedback without fear of retaliation or judgment. When considering your 360 degree reports, you need to keep the following in mind.

- How much details can you provide in your reports to distinguish between different raters without breaching confidentiality?
- Are you including raters' names or other identifying information?
- Are you grouping different individuals together?
- Do you have a broad enough spectrum of raters to ensure confidentiality?

Response Rates:

Response rates on 360 degree reviews are very important because with low response rates, there is the risk of obtaining biased and unreliable results. Ask yourself the following questions when planning your 360 degree response rates:

- What is your target response rate, and what actions will you take if that target isn't met? Are you going to extend the collection period and give people more time to complete the 360 reviews? Will you send out reports anyway, even if they have incomplete data?
- Do you want to pre-define response thresholds (e.g., require at least two responses/group)? If those thresholds aren't met, what are the actions or consequences? Are you not going to distribute reports, or do you have certain stakeholders that must participate in the 360 degree for a report to be distributed?
- If you have pre-defined thresholds for responses that aren't met, what is the consequence or action?

Branding & Fonts:

With an appealing design, your reports can be more impactful and help drum up enthusiasm for your 360 degree feedback process. Here are some things to consider about branding your reports.

- What look and feel do you want for your report(s), and how can that contribute to the story the report will tell? In other words, when people open the report, what will they see, and how does that start the story?
- Do you have unique branding or logos related to the purpose/objectives of the 360 reviews (e.g., competencies descriptions, departmental logos, company goals, mission statements)?

Informational Text:

This can be a powerful tool for 360 degree review reports. Information text can help provide a consistent and reinforced message about the purpose of the assessment and any expectations around competency management moving forward because of the evaluation. Consider adding informational text to guide report interpretation and usage.

- What do I need to know from this report?
- What should I do next?
- Explanation of scale and rater network + calculations
- Hyperlinks to additional resources (performance management system, guidance on goal setting, etc.)

File Format & Delivery:

When addressing file format and delivery, it's crucial to establish the distribution process and timing. This may involve prioritizing report access for managers before employees and designating a reviewer responsible for handling data-related concerns, including feedback requiring HR intervention. Additionally, consider stakeholders' preferences for accessing and viewing the reports.

- Will stakeholders want to print or view online/mobile format, etc.?
- What type of effort will be involved in distributing the reports?
- Do results need to be reviewed by specific stakeholders before mass distribution?

With Explorance Blue 360 degree feedback, the report delivery process is automated and driven by the organization's business rules.

360 Report Examples

Many organizations grapple with the challenge of seamlessly integrating various 360 degree reports into a cohesive narrative. By harnessing the capabilities of a robust 360 degree software like Explorance Blue, you gain access to an advanced reporting engine. This engine offers preformatted yet customizable data representations, empowering you to craft a more engaging and personalized presentation of your data. The result is a more immersive and impactful narrative.

This section will explore real-world 360 degree report use cases that can significantly enhance your ability to convey meaningful insights. To illustrate these concepts, we will leverage Explorance Blue's 360 degree reports.

Individual Reports - What is the Story?

Most organizations performing 360 degree reviews do not use larger strategic reports. They are creating individual reports so that each employee can see their results. These reports help tell an interesting story and should answer the following questions.

- How has this individual been assessed overall?
- How has this individual been assessed in individual competencies?
- What are this individual's strengths and opportunities?
- How does this individual compare to their peers?
- Does this individual have any hidden strengths or blind spots?

Overall Rating

To kick off your individual 360 degree report effectively, consider consolidating all the evaluation questions and comparing the results to the average scores from various rater groups, including self-assessment, managerial input, direct reports, and feedback from peers within the project.

The advantage of an overall rating lies in its ability to distill the essence of the report, providing a clear grade that cuts through the abundance of information. It's crucial to understand the needs and priorities of your audience – in this case, the individuals being evaluated – so you can deliver insights that are most valuable to them.

Competency Summary

A competency summary offers a comprehensive view of assessment results, neatly organized in a table-like format. This approach is grounded in the principles of strengths-based 360 degree feedback, which means it assesses how a rater and their network collectively rate various competencies.

To effectively utilize a competency summary, providing context within the report is essential. Typically, this context involves explanatory text that emphasizes the strengths-based nature of the interpretation. In this approach, employees are not pressured to excel in every competency. This philosophy aligns perfectly with the strengths-based approach, alleviating employees' anxiety about lower scores in certain areas. Instead, they can focus on the competencies that truly resonate with their strengths and identity.

Planning ahead is the key to making the most of a competency summary. It's crucial to design the 360 degree questionnaire with the end goal in mind, ensuring it can be translated into this table format later. One effective method is to employ a single selection table as an overarching question. For example, you could ask raters to evaluate a manager on specific competencies, with suba-competencies listed within the table. In a strengths-based report, your questionnaire might feature table questions where the overarching question is the competency itself (e.g., adaptable, agile, flexible), and the table contains sub-questions that delve into that competency (e.g., collaborative). This structured approach ensures a seamless transition to the competency summary format.

Competency Details - Summary

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

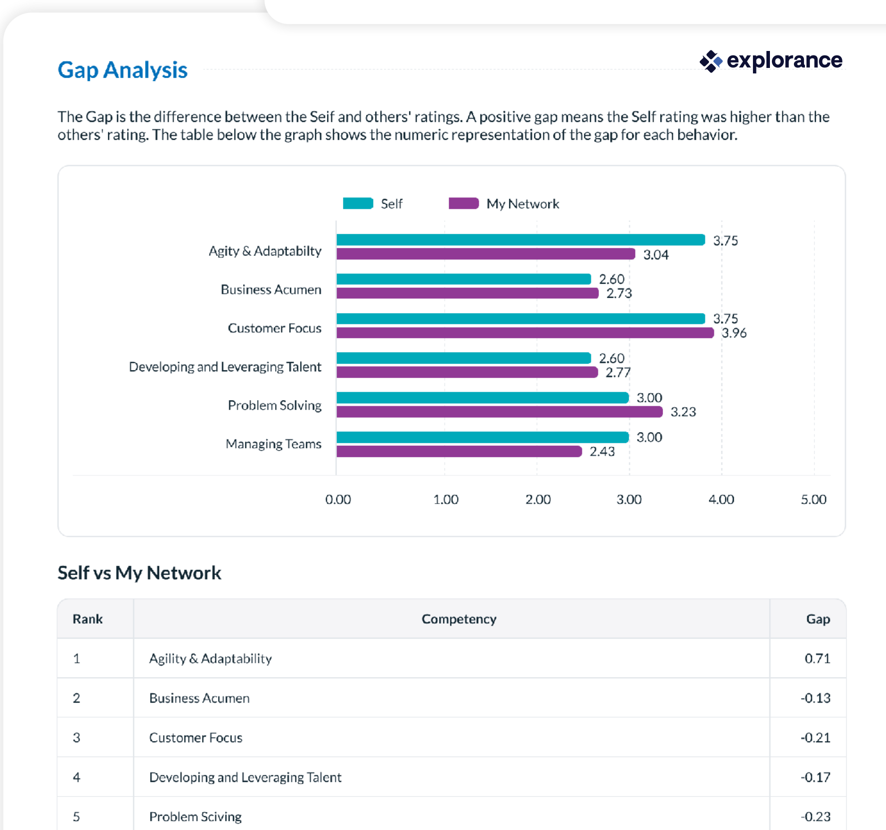
Overall and Breakdown

The competency summary has a minor drawback when it comes to numerical data. Individuals can miss subtle differences between numbers, making it necessary to provide a more visual representation of competencies. That's where the overall and breakdown individual report comes in, offering both an overarching score and a detailed breakdown of individual questions or competencies for each rater.

This report type weaves together important insights, addressing questions such as:

- Which competencies contribute to the overall score?
- What are the individual's areas of strength and areas for improvement?
- Do variations exist in how different rater groups, or the individual's self-assessment compared to others, have rated this individual, either overall or in specific competencies?

In essence, the overall and breakdown individual report provides a comprehensive narrative that helps stakeholders grasp the nuances of an individual's performance assessment more effectively.



Gap Analysis

The gap analysis provides a statistical perspective on specific questionnaire areas. It not only visually illustrates the gap but also calculates it statistically. This analysis helps pinpoint disparities between the self-assessment and assessments from the individual's network of raters. It's a tool to determine if the individual has rated themselves significantly higher or lower in certain competencies and identify areas where alignment might be lacking.

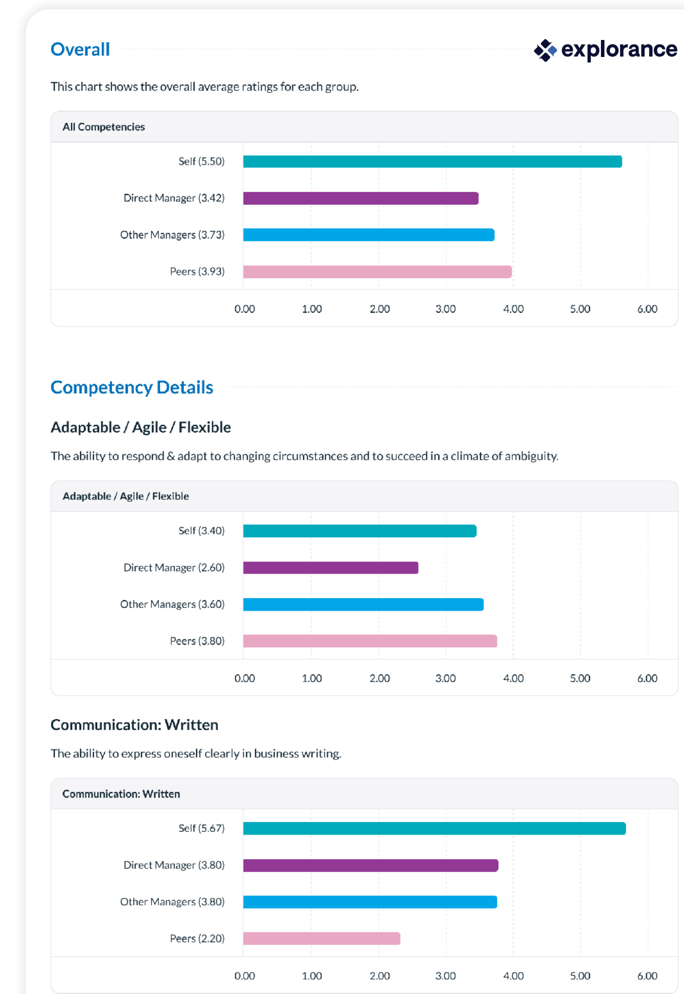
Effective explanatory text is crucial in this context to ensure employees can interpret the numerical data accurately and understand its implications.

Strengths & Opportunities

Strengths and opportunities provide a valuable framework for making quick and meaningful comparisons, especially for individuals who may not easily grasp numerical data. This framework includes descriptive labels, such as "aligned strengths," "aligned growth opportunities," "blind growth opportunities," and "blind spots." These labels facilitate comparisons between an individual's self-assessment and assessments from others.

To break it down further, when something is "aligned," the assessments from the individual and their peers match. "Hidden growth opportunities" occur when peers rate the individual lower than their self-assessment, indicating areas for improvement that may not be immediately apparent to the individual. On the other hand, "blind" refers to instances where peers rate the individual higher than their self-assessment, highlighting areas where the individual may have underestimated their strengths.

These types of comparisons unveil the individual's strengths and opportunities for growth, shedding light on areas of alignment within their rater network and areas that may be hidden or underestimated. If you are familiar with the Johari window, you might recognize that Explorance Blue uses its concept in the breakdown of strengths and opportunities.



Comments

Comments, often overlooked in 360 degree reporting, possess significant potential when strategically integrated into the process. They serve to substantiate your data effectively. Consider this: if you plan to discuss gap analysis, it's advisable to incorporate comment sections within the questionnaire. This enables raters to provide subjective qualitative insights that complement the quantitative data derived from the assessment questions. In essence, comments offer anecdotal and detailed information that unveils the "why" behind competency scores.

Comments can help answer questions like:
- What factors contributed to an individual's high, low, or average ratings in various competencies?
- Are there constructive suggestions for improvement?
- What specific examples support the assessment?

Furthermore, you can guide raters to provide the specific data type you seek in the comments. For instance, you can prompt them to share anecdotes about examples where the individual demonstrated leadership.

Explorance Blue allows viewing comments as an aggregated block, where all comments are presented together without identifying information or by group. However, when opting for the latter, it's essential to consider confidentiality, as language patterns within smaller peer groups may be similar, potentially allowing the ratee to discern the source of a comment.

Additional 360 Report Scenarios

Let's get into some of the other aggregate reports you can build in Explorance Blue 360 degree software to tell more interesting stories.

Aggregate Results by Demographics

You can use your demographics. To ensure you can generate aggregate reports effectively, plan and ensure that the data you need is correctly integrated into your data source before initiating the project – begin with the end in mind.

Aggregate reports offer a broader perspective, allowing you to examine assessment results at an aggregated level, such as by department, location, or manager. These reports can help you address questions like:
- Do variations exist in competencies across different demographic groups?
- Are specific managers excelling in fostering employee development?
- Do certain employee groups perform above or below the average?

By strategically utilizing demographics and aggregating data, you gain valuable insights into your organization's performance and development dynamics.

Gather Supplemental Data

This serves as both an aggregate report and a valuable strategy within a 360 degree assessment context. It enables you to collect additional data and feedback from your pool of raters through the 360 degree process. For instance, you can gather insights related to organizational values, such as retirement plans, and better understand where employees stand on these matters.

Moreover, this approach allows you to obtain data that can be utilized to create more detailed and strategic reports. For instance, you can gather information on whether employees have engaged in development conversations with their managers over the past year. This data can then be incorporated into the manager's report, providing context and insights within the scope of that specific question.

Key Takeaways

This comprehensive guide on storytelling with 360 degree review reports delves into the essential elements of effectively conveying insights and narratives through assessments. Below are the key takeaways. When combined with Explorance Blue's features, these strategies enable you to create impactful narratives that drive positive change within your organization.

1. Begin with a clear vision by defining assessment objectives and understanding stakeholder expectations.
2. Craft a compelling narrative by determining the story you want your reports to tell and align it with specific objectives.
3. Consider initial report considerations, addressing confidentiality, response rates, branding, and informational text to enhance report quality.
4. Explore various report types, including individual, overall and breakdown, gap analysis, strengths and opportunities, and comments, each providing unique insights.
5. Additionally, consider additional 360 report scenarios like Training Impact Assessment, Aggregate Results by Demographics, and Gathering Supplemental Data to enrich your reporting capabilities.

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