



Fearless

360° Reviews

Smart Strategies for Today's Multi-generational
Leaders, HR and OD Professionals

BY: **Cathy Light**



assessment
LEADERS

DISCOVER THE HUMAN POTENTIAL™

Acknowledgment

Thanks to all of our clients who have provided the experiences that have led us to create this simple, yet meaningful and much-needed, book to become a more effective leader. It's amazing how behaviors can improve when one is open to feedback and making a positive difference, both in the workplace and beyond.

A special thanks to my dear colleague and friend, Deborah Morton-Padilla, HR Executive at Anritsu Company, who was my very first 360° client back in 2005. We met at a luncheon where I was the speaker on Priceless Leadership™. She called me the next day and said, "would you be available to train 150 of our manager's over the next six months and this includes your 360° tool?" I'll never forget that day as I just launched my second company, Assessment Leaders.com. The "wow" factor was running throughout my body and I was telling myself "you can do this... you can do this.... breathe." And, I did! It was evident to me six-months into the initial engagement, that I did in fact master the art of listening, providing unbiased feedback and coaching, and debriefing both a great and not so great, 360° for maximum outcomes.

My passion to grow businesses by growing leaders will never waiver.

Cheers to Fearless 360s....

A handwritten signature in black ink that reads "Cathy Light". The signature is written in a cursive, flowing style.

Forward

Living in Colorado, I am amazed at the challenge of the pioneers to move west through the Rocky Mountains. We have mining towns, rail tunnels, and highways that cut right through majestic peaks. When I think about the feat of creating those holes in the mountains, I am reminded of the unique tools the early settlers used and their ability to be both resourceful and intuitive. Their choices dramatically accelerated their ability to make progress into and through (literally) the Rocky Mountains. They lived in a dangerous time- where one wrong move could hurt their future and erase the hard work they've done.

You may be starting to wonder what Colorado's early settlers have to do with 360° evaluations. Here is the connection: 360° evaluations are a game-changing resource in organizational leadership and development. When used properly, they can tremendously accelerate organizational learning and health. They are a strategic accelerator of business success. Conversely, when 360° evaluations are implemented improperly, they have the power to destroy careers, teams, and organizations. That may sound dramatic, but it is no less true.

Having said that, you may wonder why every organization does not use 360° evaluations? The short answer is because it is not easy to implement a 360 well. There are very specific requirements for its use and a systematic process is key to successful adoption. Deviating from the best practices can have devastating consequences. And once a 360° evaluation is implemented poorly, it likely cannot be used again within that organization for many years to come.

When organizations use 360° evaluations effectively, employees feel empowered, heard, cared for, and motivated to maintain and improve their performance. Managers and supervisors lead more effectively because they have a quality tool for providing regular feedback and direction, as well as a means of gathering important insight from employees about their own and their colleagues' performance. The evaluations become an important component of the trust-building and continuous learning cultural dynamics present in high-performance organizations. With the emergence now of five generations in the workforce and significant generational differences, leaders need quality tools for collecting and providing actionable feedback. 360-degree evaluations have the potential to deliver those results.

This e-book was written to provide detailed best practices for implementing 360° evaluations effectively, to ensure you get the maximum benefit from them without hurting the future of your organization. I encourage you to heed the advice in these pages. 360's are too important of a resource to ignore; the risks are manageable; and the results can be a positive game changer in organizational well-being!



Happy Reading,

Mark Tuggle, PhD., Organizational Learning SME



Fearless

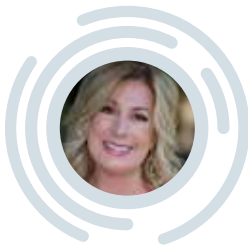
A constant evolution- that's exactly how I described the new **World of Work** to a client the other day. While the constant change to some might be considered stressful or problematic, the truth is... I find it refreshing!

Growth brings innovation, which stems from something I think plagues companies more than they are willing to admit: policies and procedures. While not innovative in word, I believe having the right practices in place allow innovation and progress to flourish.


We help companies be better companies based on our collective corporate backgrounds and experiences that solutions were much easier than most believed to elevate leaders within a company and provide direct, bottom-line revenue through employee satisfaction - happy and engaged employees provide a connectedness throughout the organization.

We still believe, one of the best ways to identify gaps, encourage and uplift is to provide relevant, timely and helpful feedback. I hope you enjoy this 360° guide as much as we enjoyed creating it for you. If you have any questions, please reach out, we want to be of help to you, your business, and growing your leadership teams.

With gratitude,

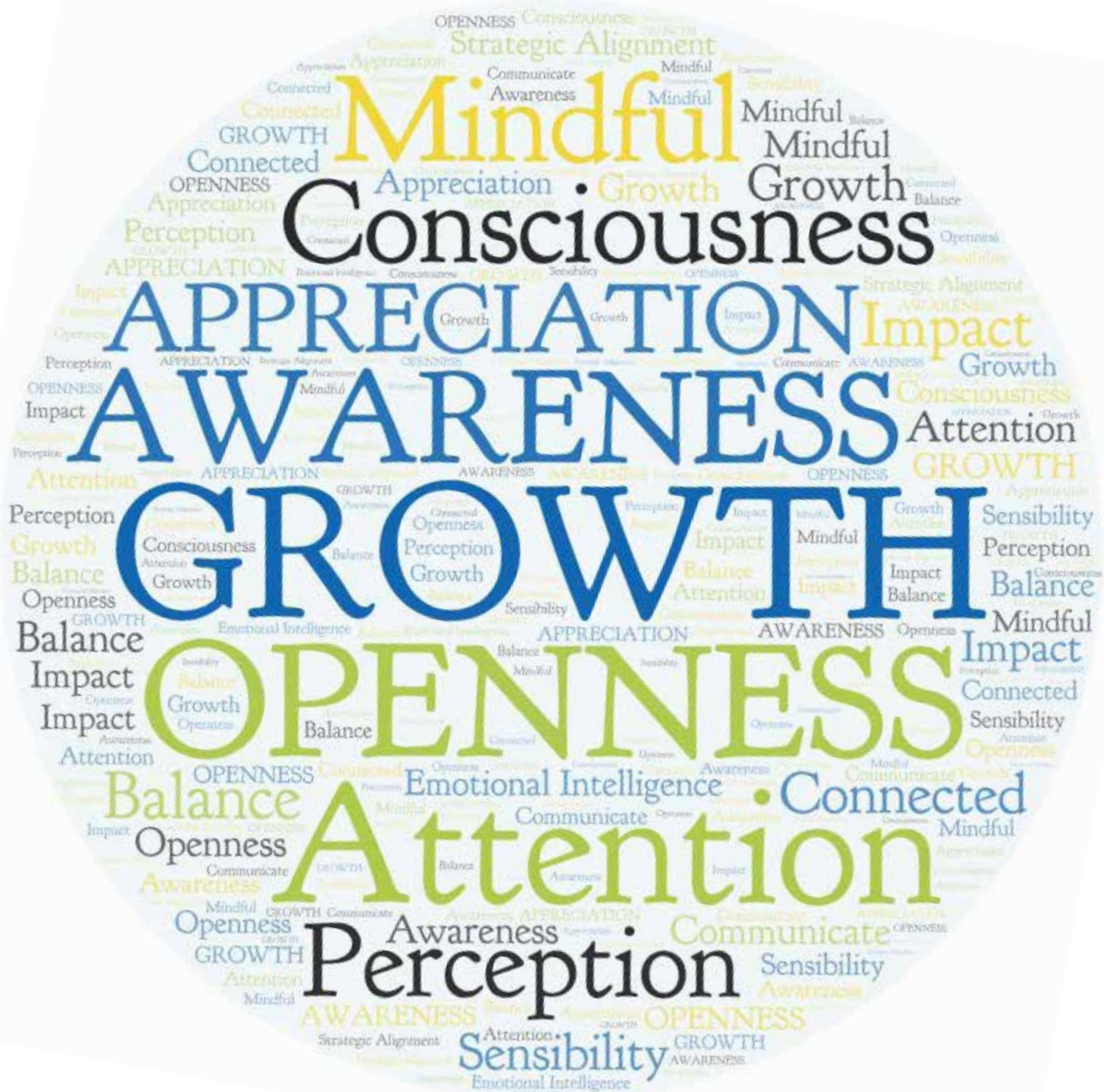


Cathy Light, CEO
Linderanca Group, Inc.



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"I have worked with Cathy Light year-over-year coaching my leadership teams on Managing Up, 360° Business Alignment, Creating and Cascading a Strategic Department Plan, Soft Skills and (EI) Improvement, Executive Presence, and Building Team Relationships. Each manager received a 360°-feedback report identifying their strengths and development areas for focused improvement. Cathy's gift to deliver an unbiased debrief, along with the post 360°, 3-Step Action Plan, made all the difference in my leader's being open to growth and recognizing their own vulnerability."

- Gus Salem | Group President, IDEX Corporation and Former VP/GM of Agilent Life Sciences



“When we make progress and get better at something, it is inherently motivating. For people to make progress, they have to get feedback and information on how they’re doing.”

- Daniel Pink

The feedback dilemma: Why are so many organizations failing at feedback?

Let’s assume you’re afraid of needles, just as many individuals are fearful of feedback. Your doctor (let’s call him Doc A), without warning or explanation, injects a needle to draw blood. He runs the blood work through the lab, then emails the results with no additional commentary.

As a result, you feel frustrated by the experience, dismiss the results, and make no changes, even though the lab results suggest that dramatic lifestyle changes are needed to improve your health. The entire process is wasted.

Alternatively, suppose you visit a new doctor (Doc B), who thoroughly explains the benefits of running bloodwork before beginning. After gaining your buy-in, he proceeds. A follow-up appointment is scheduled to walk you through the lab results and Doc B partners with you to develop a plan for appropriate lifestyle changes. Then, he schedules a six-month follow-up appointment to rerun lab-work, validate progress, and adjust plans as needed. So much more effective, right? You understand the purpose, accurately interpret the results, commit to making necessary changes, and eagerly engage in ongoing conversations as you strive for improvement.

Did you know that just as there's a science to good medicine, there's a science to giving and receiving good feedback? According to Sheila Heen and Douglas Stone, authors of the book, "Thanks for the Feedback: The Science and Art of Receiving Feedback Well," feedback can be life-changing to give and receive. A paragraph in the book states,

"Before you tell me how to do it better before you lay out your big plans for changing, fixing, and improving me, before you teach me how to pick myself up and dust myself off so that I can be shiny and successful—know this: I've heard it before. I've been graded, rated, and ranked. Coached, screened, and scored. I've been picked first, picked last, and not picked at all. And that was just kindergarten."

In fact, throughout childhood, we were taught: "If you don't have anything nice to say, don't say anything at all." This advice is imprinted on us and, as a result, many of us avoid giving and receiving feedback—much to the detriment of our leadership or professional careers. This is especially true for a multi-generational workforce who all looks to communicate in different ways—it's no wonder each generation and individual prefers feedback personalized as well.

In this guide, you will learn to become the Doc B of 360° assessments as we teach you how to prepare, administer, and debrief each member of your organization effectively. A 360° delivered well is a powerful tool that yields impactful results: Influential leaders, engaged employees, healthy teams, and hunger for continuous improvement.

Right now is the perfect time to ignite this transformation and create a culture of feedback. The workplace is primed for it. Today's employees don't want annual reviews; they want ongoing conversations; they don't want a boss, they want a coach; they care more about purpose than pay, and they want to be challenged and developed.

Finally, there's one more reason that right now is the perfect time to create a culture of feedback... Simply put, *we desperately need it*. For the first time, we are encountering a workplace in which employees across five generations are working together. The diversity of experiences, expectations, needs, and desires is massive, making it impossible for a leader to innately know the best way to serve and engage with each individual. The only way to know how is to ask. We must ask for feedback, carefully listen, clarify for understanding, adjust accordingly...and then start the process again. Through candid, but caring feedback and a willingness to listen and learn, five diverse generations can and will thrive together in today's modern workplace.

By 2020, Millennials will comprise over half of the workforce, and Generation Z is estimated to make up over 20% of it. Both generations grew up in an environment in which they received constant feedback through social media. They thrive on it and, as a result, they expect and desire this timely and frequent feedback to continue in the workplace.

According to Gallup, Millennials are the least engaged generation at work today – 29% are engaged, 55% are not engaged, and 16% are actively disengaged. As a result, 60% of millennials in the US workforce say they are looking for a new job opportunity. The impact of this potential turnover for companies is significant. The good news is that levels of engagement increase when frequent and consistent feedback is provided. They are craving feedback and development, so let's give it to them!



Understanding feedback preferences for each generation

According to [TinyPulse](#), who recently polled over 1,000 professionals across the generational spectrums around their views on the review process:

- 37% of respondents said the performance review process is outdated
- 42% of respondents felt that something important was left out of their performance review due to bias
- 41% told us they do NOT receive a pay increase after a positive review
- 64% said they wanted their review tied to compensation
- Millennials fear performance reviews the most, while baby boomers are more comfortable with them
- Millennial respondents were significantly more stressed by the review process than Gen X or baby boomers

While the generations agreed in how reviews were preferred, there were clear differences in generational preferences as well. Throughout many recent other studies, a few truths remain as evident as for how different the four generations in the workplace are. See below for some of our findings:



TRADITIONALISTS:

- Traditionalists, (or those before the Baby Boomer generation) are expected to drop to under 1% of the workforce by 2020. However, that doesn't mean their roles and preferences should be discounted. Typically liking order and balance, Traditionalists look to brief communication that is given with the ability to prepare, usually on a schedule. Traditionalists have been in the workforce the longest and hold deep respect for the companies they work for. Their value should not be forgotten, as Traditionalists have an important set of eyes and an importance voice.



BABY BOOMERS:

- Prefer more traditional feedback methods, with written feedback given alongside goals. While most may sit in upper management, many Boomers realize they have a few more years left of work than they've expected and they aren't, "tuned-out" quite yet



GENERATION X'ERS:

- Look for balanced feedback that is direct, honest and personalized to their goals. More active in life-long learning, X'ers look for opportunities to improve and educate themselves more than ever before.



MILLENNIALS:

- Not shy to give feedback in return, Millennials often initiate conversations around compensation and feedback. Quick "touch base" discussions are preferred over formal processes and Millennials value discussions much more often than their older peers.



GENERATION Z:

- New to the workforce, this generation is cutting their teeth on all they've read between the often-contentious (and overplayed) relationship between Baby Boomers and Millennials. Processes help train Generation Z to know what to expect and to lead into the future.

To craft feedback that works for all, innovative solutions come to mind—none better than the 360° performance review. One of the easiest and most profound methods to ignite this type of cultural transformation is through 360° feedback assessments. These are formal assessments used to gather confidential, anonymous performance feedback about an individual's performance from a broad range of co-workers and stakeholders. The results compare the individual's self-perception with others' perceptions, helping him/her gain awareness of alignment and gaps in perception, as well as strengths and opportunities for improvement. Rather than pure downward or upward feedback, reviews on performance are given from all angles (hence the name '360°') so that the individual can understand his/her effectiveness as a leader, employee, and coworker.

While the quantitative and qualitative feedback provided in a 360° assessment is both comprehensive and compelling, the power comes in how it is delivered and reviewed. If administered poorly, it can do more damage than good.





Debunking failed feedback processes

Even our organizational systems seem to be afraid of feedback, requiring it to be given only once, maybe twice, per year through a formal performance management process. We anxiously wait to hear how well we have performed over the past year during a one-hour review that will dictate our pay and expectations for the following year. The truth is, that's far too little feedback to create lasting innovation or relationships.

Harvard Business Review wrote in 2014 that they believe feedback, "should be an ongoing process woven into the fabric of everyday work." Years later, it's still as true as it is when it was first written, and they aren't alone. Even the United States Office of Personnel Management cites "effective and timely feedback is a critical component of a successful performance management program and should be used in conjunction with setting performance goals."



Why are so many organizations giving feedback only once or twice yearly?



Organizations have old structures in place that were trusted in the past, however- the world of work has changed dramatically. It's been proven that employees perform best when feedback (and recognition) is given often and in ways that enable employees to listen, act and modify their activity to reflect the feedback.

The truth is, the style of reviews that many organizations participate in can hurt the bottom line. Just like a poor Yelp review can hurt a business, a mismanaged structure of feedback can be detrimental to employee performance, leading to a direct correlation to bottom-line revenue numbers.

Let's look at the flaws of a typical feedback system:

Firstly, the feedback comes from one perspective, our manager. What about the perspectives of other stakeholders – peers, direct reports, customers, and suppliers? Shouldn't their opinions count as well?

Secondly, the feedback is often delayed. Waiting weeks or months to provide both positive and negative feedback changes the impact of what's being said. Often, positive comments lose their power, and negative comments become discouraging instead of coming across as helpful.

When feedback hurts:

"A few years ago, we administered 360° assessments for a group of recent college graduates who were participating in a highly-selective leadership development program. Contrary to our recommendations, the organization wanted to keep the process very simple – anonymous feedback collected and results provided directly to each individual. Post-assessment coaching was entirely optional and, while not discouraged, it wasn't necessarily encouraged either. Unfortunately, this direct delivery stifled the opportunity for open dialogue. Participants received both positive and negative feedback but had little direction on how to digest and apply the information. Without appropriate delivery and guided next steps, participants grew more insecure in their weaknesses, overlooked their strengths, and missed the opportunity to develop through the 360° review experience. More damage was done."



How can we make the feedback process less stressful for all parties involved?



Organizations have old structures in place that were trusted in the past, however- the world of work has changed dramatically. It's been proven that employees perform best when feedback (and recognition) is given often and in ways that enable employees to listen, act and modify their activity to reflect the feedback.



Reframing the feedback process

These five items, when put together, help feedback come across as its best:

1. **Proactive**
2. **Timely**
3. **Specific**
4. **Honest**
5. **Multi-Faceted**

Employees need proactive, timely, specific, and honest feedback that is multi-faceted, (from multiple sources) to identify strengths and unveil blind spots.

Only when each of these five is present, then can organizations create proactive plans to further grow their strengths and improve weaknesses. Not only does this type of feedback develop more effective leaders, but it generates a positive ripple effect throughout the entire organization, driving cultural transformation.

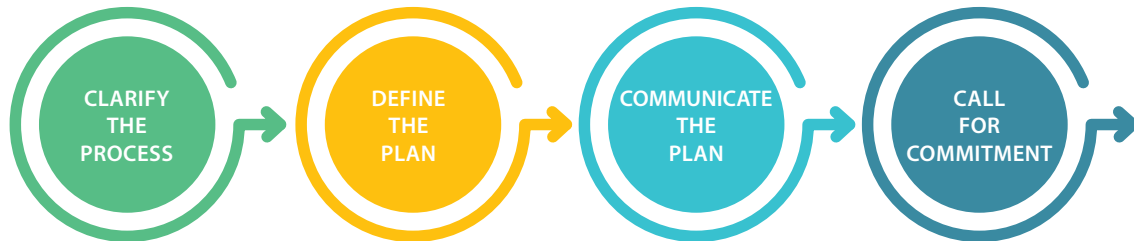
How does a good feedback process begin?

- (1) It starts with a leader asking for and genuinely listening to feedback from the team.
- (2) After digesting the information, the leader makes behavioral changes accordingly. Respect is gained; trust is built.
- (3) The team feels empowered to have open dialogue and inspired to pursue continuous improvement themselves.
- (4) Soliciting feedback becomes the norm with positive and constructive criticism frequently given.
- (5) The culture shifts dramatically and feedback gains a new reputation – it's viewed as a gift, loses its intimidating edge, and becomes a powerful, everyday tool. A thriving culture of trust and open dialogue emerges which inspires innovation and profit gains.

Keep reading to find out the next steps to a successful 360° feedback process...

Part I:

Preparation is key



STEP ONE: Clarify the purpose

The first step in preparing for 360° assessments is to ensure all parties involved understand the purpose. This is your foundation for success. It's like baking cookies...you carefully measure and mix ingredients, roll the dough, and put in the oven; but, you missed the first step and never preheated the oven. The dough does not transform into delicious cookies, despite great effort. What a disappointment! It's the same story here - if you do all the work to process the 360° assessments but forget to 'preheat the oven' by clearly conveying the purpose, don't expect great results. Missing this step makes it challenging to gain full commitment and participation.

So, what is the purpose? 360° feedback provides an honest and clear assessment of an individual's strengths and opportunities. As human beings, we struggle to offer this same level of honesty and clarity when providing feedback in conversation, leaving the recipient either confused or still in the dark. Alternatively, a 360° allows coworkers to thoughtfully and anonymously provide straightforward feedback. From there, a report is created that extensively dissects the reviews, making it easy to identify strengths and opportunities based on key competencies. Until you have clarity on what is working and what isn't, you can't take productive steps to develop and improve. This clarity is critical and is reached quickly and effectively through a 360°.

Another key component of the 360°'s purpose is to receive feedback from multiple sources, which increases its validity. Let's face it; even the best managers are not perfect and, due to human nature, are subject to personal bias when evaluating employees. We are inclined to like people who are

similar to us, so may inadvertently give more favorable reviews to those with a similar working style, personality, or background. We are also subject to the halo effect, which is a tendency to allow an impression created in one area to influence opinion in another area. For example, if an employee is a gifted presenter and delivers an exceptional sales pitch, we may unintentionally assume that they can exhibit similar performance across all skills, even unrelated skills like data analytics. Receiving feedback from a broad range of individuals with whom you interact regularly reduces the risk of bias and provides a holistic perspective.

It is important to communicate that the purpose of the assessments is to support development, not to rate or rank employees. Strengths identified in the feedback will be celebrated, and opportunities to better utilize those strengths will be pursued. Weaknesses identified in the feedback will be discussed, and opportunities for training, development, and coaching in these areas will be provided. 360° assessments create a unique, vulnerable, and accountable culture in which teams can fully support and encourage one another's development.

Once you've clarified the purpose, the next steps may seem logical and simple, but please don't discount their importance.



STEP TWO: Define the plan

First, you need to define the plan. The wise author Alan Lakein said, "Failing to plan is planning to fail." Don't do this. Take time to outline a detailed plan. Partner with the assessment provider as they likely have examples or templates readily available. The plan should include the purpose, goals, a timeline, roles and responsibilities, and expectations for post-assessment steps. Defining this plan will ensure you maximize the value of the assessment process.

STEP THREE: Communicate the plan and call for commitment

Next, share that plan with everyone involved in the process. Remember how we discussed the fact that most people view feedback as negative and, therefore, avoid it? Your teams may be fearful of participating in these 360° processes – both those being assessed and those providing feedback likely have concerns. This is your opportunity to reinforce the purpose, communicate the value, and clearly outline expectations. Chances of engagement multiply when people know the ‘why’ and ‘how’ behind an initiative. While sharing the plan, don’t forget to call for a commitment from each individual. Soliciting this commitment forces unanswered questions or concerns to the surface, giving you the opportunity to address them.

STEP FOUR: Trust the process

Now that you’ve clarified the purpose, defined and communicated the plan, and secured a commitment from the team to participate, you’re ready to roll. Hopefully, they’re excited to dive in, but don’t be discouraged if they remain hesitant. This hesitancy is likely rooted in fear and may not subside until they complete the entire process.

In Seth Godin’s book, “Linchpin: Are You Indispensable?” he discusses the “lizard brain.” This refers to the most primitive area of our brain, where the instincts that warn us of danger reside. This old part of the brain allows us to react to a threat in an immediate and automatic way (fight or flight), without processing the decision through the rest of the brain, thus gaining split-second responses in support of survival. Although we don’t face the same life-or-death threats and predators in today’s world, this survival instinct remains strong. Unfortunately, it often hurts us, rather than helps us, causing us to resist new and different things.

We must resist this urge to fight or run and, instead, engage and combat the fear of action. If your team is still hesitant to participate in the 360° assessments, know that this may not go away until they actually step into the process and engage. Fear loses its foothold when we engage and take action. So press-on...

Part II:

Delivery and debrief

Administer the assessment

When distributing the assessment, be sure to reiterate the purpose, participation expectation, and a identified deadline to complete the survey. Be prepared to send multiple reminders as the deadline approaches. Striving for 100% participation maximizes value.

Debriefing the results + establish a plan

As mentioned on page 7, the goal is to act like Doc B in this process. To achieve this, effective interpretation and debriefing of the results is critical.

When left to interpret the results alone, individuals often focus on the negative feedback and feel unsure of how to respond. Engaging a third party in the debrief makes all the difference. Using an external partner tends to reduce bias and produce more transparent dialogue. The coach will help the individual digest the feedback in bite-sized portions, celebrate strengths, understand opportunities, and identify areas in which the employee's self-perception did not match the raters' perceptions.

From there, the coach will help the individual articulate an action plan. Without this, the transformation is unlikely, but with it, progress seems feasible, and the individual approaches next steps with optimism and excitement. The plan should include the following:

1. Ways to further exercise and utilize strengths
2. Plans to address opportunity areas
3. A strategy to dive deeper into gaps between self-perception and rater perception



4. A communication plan, which the leader can communicate to his/her team that they:
 - a. Listened and are grateful for the feedback
 - b. Are committed to making adjustments in response
 - c. Desire to have an ongoing open dialogue

A continuous coaching partnership throughout action plan implementation is highly recommended (or, at a minimum, intermittent check-ins). With often overwhelming business demands, the coach will help the leader stay focused, celebrate progress, navigate roadblocks, and experience true transformation.

Evaluate current leadership, make adjustments, and drive engagement

While we don't recommend using 360's to influence performance ratings, we do recommend using the consolidated information to evaluate the strength and effectiveness of your current leadership team. More sophisticated 360° tools will provide a team report with a consolidated view, highlighting strengths and challenge areas. Use this information to strategize ways to improve leadership team behaviors. Be transparent about the new awareness of your workforce and the efforts you're making to respond. This step alone will improve employee engagement.



Part III:

Maintain momentum

Don't fall into the “one and done” trap

In an increasingly fast-paced world, the capacity for patience is decreasing, and we often fall for quick-fix solutions. It's tempting to deliver one 360° and hope that it can provide all the feedback needed to support a lifetime of positive transformation, but it just doesn't work that way.



First, as humans, we are constantly evolving, developing new strengths and encountering new challenges. Furthermore, the business and job responsibilities are far from static. Therefore, we have evolving leaders in ever-changing businesses with constantly shifting responsibilities. As a result, fresh feedback and updated development goals are an ongoing necessity. 360° evaluations are not a “one and done” process, rather they deliver the most value when revisited on a recurring basis. If a leader is facing highly challenging results in a 360°, we recommend repeating the survey six-months later to track progress and make adjustments. If results are mostly favorable, repeating the process on an annual basis is recommended. Committing to a recurring schedule communicates to the workforce that you are committed to ongoing feedback and improvement.

Part IV:

Get started

Developing a culture of trust and feedback does not happen overnight, but it is feasible. Implementing a 360° program is an easy and highly effective first step to trigger the cultural transformation. But remember, thoughtful implementation is critical to success. Partner with a third party, follow these steps, and you'll be well on your way.

1. Clarify the purpose
2. Define the plan
3. Communicate the plan
4. Call for commitment
5. Administer the assessment (push for 100% participation)
6. Partner with a coach to debrief the results
7. Establish a plan
8. Support action plan implementation + track progress
9. Evaluate combined leadership effectiveness
10. Commit to recurring 360° reviews



“Employees who report receiving recognition and praise within the last seven days show increased productivity, get higher scores from customers, and have better safety records. They’re just more engaged at work.”

– Tom Rath



Sound decisions require insight and intelligence

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Cathy Light, CEO | Linderanca Group, Inc.

Cathy Light's dynamic energy and passion for helping organizations and individuals reach their highest potential have led her to establish Leadership Balance® and three other growing enterprises: Assessment Leaders, Business Builders and Be Well Perform Well. In recognition of her extraordinary work, Smart Business nominated Cathy Light for the "Ernst & Young Entrepreneur of the Year" award in both 2009 and 2010.

Before venturing out as an entrepreneur, Cathy worked in the corporate world in a variety of leadership roles, including Vice President and General Manager of Sunrise Technologies, Inc. and Senior Sales and Marketing Executive at Fuji Optical Systems, Ltd. She began her trailblazing career at a start-up company known as Apple Computer.

Cathy is a globally recognized speaker known for engaging and inspiring her audiences. Her commitment to helping others extends to active leadership within the community. She currently serves on the Advisory Board for the Business and Economic School at Boise State University and mentors MBA students when time permits.



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