360 Feedback – A Field Guide for Managers

At TMC, we’re seeing renewed interest from clients on 360 feedback. Our coaches and trainers have been fielding questions ranging from “should we start doing this?” to “what questions should we ask?”

360 feedback is like pudding or pavlova, one of those retro desserts that are making a comeback—people are curious about them, but aren’t confident that they can pull them off, and are worried about the mess they will leave in the kitchen if they don’t do it right.

Done right, 360 feedback is a helpful tool for developing employees. Done badly, it could negatively impact staff morale, erode trust, and consume tremendous amounts of organizational energy. We’re here to help you get it right and avoid some common traps.

This article is organized into a set of questions and decisions that organizations need to wrestle with as they embark on the 360 feedback process.

1. What is 360 feedback? What are the different types of 360 feedback?

   - A 360 review is a process of getting feedback on an individual’s performance and/or potential from their manager and others who interact with them regularly, ie., peers, direct reports, manager’s manager, etc... A 360 review has several different names—360 evaluation, multi-directional feedback, peer feedback etc. In this document, we will use “360 reviews” ("360s" for short) as our term of choice.
   
   - There are two types of 360 feedback—

     A) Episodic 360s for senior staff done as part of a leadership development program (e.g. Rockwood’s 360 assessment) or done for all senior staff administered by HR in-house. These are typically pretty in-depth and involve getting feedback from dozens of people internal and external to the organization, and usually requires a coach or an assessment expert to interpret the results for the participant.

     B) Regular or Periodic 360s for all staff conducted once a year, coinciding with the performance evaluation process. At TMC, we are focused more on (B)—the periodic 360 reviews that are tied to the annual performance review.

2. What is the purpose of a 360 review?

360 reviews, at their core, are about informing the manager's evaluation of staff member with multiple perspectives. 360s are a key input into a staff member's performance and development.

To be clear, a 360 review is NOT a substitute for a manager’s judgment about an employee’s performance. Neither is it a substitute for systems to share feedback more directly throughout the year (such as during 1-1s). It serves two purposes—it provides additional perspectives to
help the manager write a well-rounded review and it serves as a coaching and development tool.

3. **What are the benefits of doing 360 reviews?**

- A 360 review brings multiple perspectives about an employee’s performance and/or potential. Especially in cross-functional or matrixed teams, peers may have views about the strengths and development areas of a staff member that the manager may not have.
- If the manager and staff member are in different locations and the manager doesn't get to observe the staff member’s behavior on a day-to-day basis, 360s can help bridge the gap.
- 360s are great for promoting equity in the organization. They can help offset manager bias by bringing broader perspectives. They also help the manager spot patterns or inconsistencies across lines of difference—for instance, is a white person getting rave reviews from other white people on staff but concerning feedback from colleagues of color?
- Last but not least, they are a great tool to improve employee self-awareness and instill confidence.

4. **Ok, I understand the benefits of doing 360 reviews. How do I know if my organization is ready?**

- Here are some questions to ask yourself to decide: a) if incorporating 360 reviews is right for your organization and/or b) when would be a good time to start.

<table>
<thead>
<tr>
<th>Question</th>
<th>Details</th>
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<tr>
<td>☐ Are we large enough (~30+ staff) for a formal 360 review system? (In a smaller organization, instead of a formal 360 process, a manager can quickly check in with a couple of others to get input on a staff member)</td>
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<td>☐ Do we operate in multiple locations or have a large number of remote staff? Are staff members managed by managers in different locations? (360s can provide managers a window into staff behaviors that they don't/can't observe on a day-to-day basis)</td>
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<td>☐ Do we have cross-functional or matrixed teams that come together for projects (where the staff member’s manager may not be involved directly in the project)?</td>
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<td>☐ Do we have a habit of doing performance reviews? (We wouldn’t recommend doing 360 reviews now if you haven’t been doing annual performance reviews for a year or two.)</td>
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<td>☐ Are staff used to receiving feedback from managers? (360s would be too heavy a lift if staff are not used to giving/receiving feedback, and don't see feedback as a positive in general)</td>
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- If you answer ‘yes’ to at least three of the above questions, now (AKA the next performance review cycle) is probably a good time to introduce 360 reviews.
- If not, we recommend starting with incorporating feedback into 1-1 check-ins first, followed by introducing the regular (at least annual) performance reviews, and 360s as a distant third.

5. **I know of this organization that started doing 360s and it backfired horribly. How can I prevent the same thing from happening at my organization?**
Well, we’ve created a handy chart listing the typical mistakes organizations make (and “critical success factors”) while deploying a 360 process.

<table>
<thead>
<tr>
<th>Typical Mistake #1</th>
<th>Critical Action</th>
<th>Recommended Process</th>
<th>Supporting Tools</th>
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</table>
| Failing to explain the purpose of the 360 process, both to staff and to managers—leading to confusion and suspicion about the intent of the process | Invest the time **upfront** to articulate the “why” and “what” of the 360 process to both staff and to managers | • Send an all-staff email explaining the addition of the 360 review to the performance evaluation process.  
• Schedule an all-staff meeting (or add to an existing all-staff meeting agenda) where people can ask questions and raise concerns  
• Knowing that employees may not be forthcoming with their concerns in an open forum, a) request questions ahead of time that will be read out anonymously and/or b) offer up “office hours” or 1-1 time with HR (or the person spearheading the process) to raise concerns privately. | Email announcing 360 feedback process to managers  
Email announcing 360 feedback process to all staff  
A sample agenda for team call |

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<tr>
<th>Typical Mistake #2</th>
<th>Critical Action</th>
<th>Recommended Process</th>
<th>Supporting Tools</th>
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| The 360 process is onerous for managers and respondents, with everyone providing feedback on everyone else, bringing down response rates and response quality | Get the optimal response quality with the least number of participants by carefully selecting people who get to provide input. | • In our experience, the best practice is to **co-create the list with the staff member and manager** sitting together. First, the manager proposes a list based on what they know about the staff member—projects they worked on and staff they regularly interact with. Then, the staff member reviews the list and provides additions/suggestions.  
• Be selective—not everyone who might have an opinion gets to be a respondent. We recommend 4-6 respondents per staff member. Look for a balance of respondents across organizational hierarchy and lines of difference, always asking the question “can this person provide a perspective I might not have?”  
• The exception to this rule is for managers that manage a large number of staff. You should seek feedback from every direct report for a manager.  
• In an ideal world, you would keep track of who you sought feedback from in a given year. The following year, you’d swap out some of the folks on the list to invite fresh perspectives while providing some continuity. | Checklist for selecting respondents |

<table>
<thead>
<tr>
<th>Typical Mistake #3</th>
<th>Critical Action</th>
<th>Recommended Process</th>
<th>Supporting Tools</th>
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<tr>
<td>Each 360 review takes so long to complete that respondents resort to generic answers</td>
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### Critical Action
Make it easy for respondents to provide specific and honest feedback

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<td>● Conventional wisdom is that a 360 survey should ask the respondent to rate the staff member on a given set of competencies followed by free-form questions on “strengths” “development areas” and “any other comments.”</td>
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<td>● We recommend a simple four-question model for soliciting feedback—two quantitative (to get patterns) and two qualitative (to get context/specifics).</td>
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<td>● You can use our provided questions as-is or tweak them to fit your context—but we urge you to mind the sweet spot! Fewer than four questions won’t get you enough perspective and more than eight will lower your response rate. Also, aim for a 50-50 split between quantitative and qualitative questions. It shouldn’t take a respondent more than 20 minutes to provide a thoughtful 360 review.</td>
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| Supporting Tools | Sample 360 feedback form – Staff member version (Simple)  
Sample 360 feedback form – Manager version (Simple) |

| Typical Mistake #4 | Feedback from 360 reviews don’t translate to effective development plan for employees |

| Critical Action | Coach managers to incorporate 360 feedback into performance reviews AND ensure that managers still use their judgment in interpreting the 360 feedback. |

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<td>To get into the habit of incorporating 360 feedback into reviews, add a “Highlights from 360 reviews” section in the performance review form with two sub-sections—Strengths and Areas for Development. The manager should summarize the 360 feedback into a few sentences in that section. This will 1) encourage managers to see and articulate patterns from the 360s, 2) show staff that 360s are a key input (but just one input) in the overall evaluation, and 3) discourage managers from using 360s as a substitute for their own judgment.</td>
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| Supporting Tools | Coaching guide for managers  
Examples of review language with 360 feedback incorporated into it  
Performance evaluation form template  
Annotated example of a well-written 360 feedback |

6. **How should we administer the 360s? Any tips for logistics?**

**Assign an owner.** This person (typically in HR/Talent) will be the point person for the 360 and performance review process. They will own the communications (even if the actual emails might come from the CEO/ED or the Chief Talent Officer) and will the go-to person for questions.

- **Use a survey platform to collect the 360 feedback.** If your organization uses a performance review software, it probably has a customizable “360 feature.” If not, use any commercially-available, user-friendly survey platform.
- **Set and send reminders.** Aim for an 80% response rate with 20% active declines (i.e. everyone who doesn’t respond should share why they can’t respond—no ghosting!)
- **Give the process ample time.** If your drop-dead date for delivering all staff reviews is the end of January, kick off the process as early as November 1.
• Align performance evaluations and 360 reviews to your annual goal-setting cycle. Avoid the temptation to conduct your evaluations on a rolling basis, such as on work anniversaries! This is a surefire way to break the “don’t make it administratively onerous” rule.

7. We want to do this, but we don’t want to go all in. Is there a way to pilot this or dip our toes in the water?

Well, yes. There are a couple of options to test and build trust in the process before launching it organization-wide. 1) Start by requesting input on managers from their direct reports. This is sometimes called a “180 degree review.” 2) Solicit 360 feedback just for the leadership team, not for all staff. 3) Use any skip-level meetings you may have to elicit performance feedback.
360 TOOLS FOR MANAGERS

Email announcing 360 feedback process to managers
Email announcing 360 feedback process to all staff
Sample 360 feedback form – Staff member version (Simple)
Sample 360 feedback form – Manager version (Simple)
Performance evaluation form template
Checklist for selecting respondents
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TOOL 1: EMAIL ANNOUNCING 360 FEEDBACK PROCESS TO MANAGERS

Key Points
The communications to managers should cover the following points:

- The purpose of 360s—it is an employee development tool, not a punitive one. The feedback received will be just one input into the overall review; it won’t supplant or replace the manager’s review.
- It’s the manager’s job to find patterns and communicate them to the staff member in the context of the overall review. Strongly discourage “cutting and pasting” peer feedback into the review document in lieu of a summary.
- Don’t use 360 feedback as an indirect way to send difficult messages to staff members. Managers should have those conversations directly. For instance, if an employee is struggling with time management, the review should say “Time management is a development area for you. I’ve noticed that you frequently turn in your assignments 1-2 weeks late. Others have pointed out this issue in their 360 feedback as well.” Instead of “Your colleagues believe that you need to improve your time management capabilities.” To reiterate, managers should own their feedback—positive AND constructive—instead of letting semi-anonymous 360 respondents speak for them, especially on development areas.
- When going through the 360 review, if something seems off, the manager should speak with the reviewer to get additional context before assuming anything or passing it off to the staff member.
- The manager ultimately owns writing the review and they should exercise judgment in how and what they choose to highlight.

Sample Email

From: ED
To: All Managers

Hi everyone,

You’ve all heard me say that our biggest asset as an organization is our talented staff. I’m excited to announce a new talent development initiative for the entire organization. We are going to roll out a 360 degree feedback process for all staff this November as part of our annual performance review cycle. I will be sending out a note to all staff about this later this week.
Put simply, a 360 review is a process of getting feedback on an individual’s performance and/or potential from their manager and others who interact with them regularly, i.e., peers, direct reports, manager’s manager, etc.

We are launching this for a couple of reasons:

1) As more and more of our work is done in cross-functional or matrixed teams, peers may have views about the strengths and development areas of a staff member that the manager may not have.

2) It furthers our commitment to equitable management practices by layering in additional perspectives to inform the manager’s review, and

3) Thanks to all of you, we have become pretty good at giving/receiving feedback on a day-to-day basis here at <<organization>>, which sets us up for success in a formal 360 process.

How will it work?
You’ll sit down with your staff member to co-create a list of respondents—folks you believe should be part of their 360 process. You (via HR) will send a short survey <<hyperlink>> to the respondents and request them to provide their perspectives.

Most importantly, you will incorporate the feedback received into your regular performance review. We’ve updated our performance review form to incorporate 360 feedback as well—you can see the form here <<hyperlink>>.

I wanted to share my thoughts on what we should be doing to make it a success at <<org>>.

● First and foremost, I want to emphasize that the 360s are not replacing our traditional performance reviews—we are simply adding one more input into them. The job of writing a clear and actionable review for your staff is still on you.

● Please don’t use the 360 feedback verbatim in your review—your job is to look for patterns in the feedback, and use your judgment in interpreting the feedback. Are there inconsistencies in the feedback across lines of difference? Are reviewers reasonably aligned on the staff member’s strengths and development areas?

● If something doesn’t sound right, speak with the person that provided that feedback. Getting additional clarification almost always helps you put the feedback in context for your staff member.

● A 360 review is not a substitute for a direct uncomfortable conversation with a staff member about their under-performance. Resist the temptation to couch the tough feedback you want to offer your staff member in the voice of a 360 reviewer.

We’ve made it as easy as possible for you by taking care of most of the logistics centrally. <<Person responsible for HR>> is going to drive the process. HR will nudge you to send them lists of respondents for each of your direct reports. Respondents will get links to the 360 review and reminders to complete the reviews.

Since this is the first time we are going to be rolling out this process organization-wide, we will have an all-staff meeting on Monday where << Person responsible for HR >> and I will take everyone’s questions and share more FAQs.
We will also conduct a couple of office hours—<<Wednesday from x to y>>, and <<Friday from y to z>>. It will be staffed by <<Person responsible for HR>> and you can come by or call with any lingering questions or questions specific to your situation.

We will check-in with all of you a couple of weeks before the process kicks off—likely in early November as well.

I hope you’re all as excited as I am to further push on our talent development efforts. Please don’t hesitate to ping me with questions or thoughts.

Cheers,
ED

TOOL 2: ANNOUNCING 360 FEEDBACK PROCESS TO STAFF MEMBERS

Key Points
When communicating to employees, emphasize the following:

- The advantages of 360 feedback and how it will serve as a development tool for staff members
- The employee and manager should co-create the list of folks to seek feedback from.
- Questions will be standardized across the board and will be shared with everyone. (Side note: if possible, involve staff members in the question selection process. We have provided a few sample questions to include in your 360 reviews <<here>>—use them as a starting point to tweak them for your organization)
- Samples of a well-written 360 review. <<include hyperlink>>
- What managers are expected to do with the feedback.
- The timeline for the overall process and how it’ll work.
- There will be confidentiality throughout the process—the feedback received will not be directly attributed to reviewers.

Sample Email
From: ED
To: All staff

Hi everyone,

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Put simply, a 360 review is a process of getting feedback on an individual’s performance and/or potential from their manager and others who interact with them regularly, such as peers, direct reports, manager’s manager, etc.

We are launching this now for a couple of reasons:

1. As more and more of our work is done in cross-functional or matrixed teams, peers may have views about the strengths and development areas of a staff member that the manager may not have.
2. It furthers our commitment to equitable management practices by layering in additional perspectives to inform the manager’s review.

How will it work?

For the staff member: You’ll sit down with your manager to co-create a list of respondents—folks you believe should be part of the 360 process. Your manager (via HR) will send a short survey to the respondents and request them to provide their perspectives. Your manager will incorporate the feedback received into your regular performance review. We’ve updated our performance review form to incorporate 360 feedback as well—you can see the form here.

For the respondents: First and foremost, any feedback you provide is not anonymous, but is completely confidential. The manager will know who the feedback is from and may choose to paraphrase your feedback or choose select quotes, but they won’t cite you as the source. Needless to say, they will not quote you if the quote is easily attributable to you. Each 360 request will likely take 20 minutes of your time. Please be specific in your feedback.

<<Our Person Responsible for HR>> is going to drive the process centrally. Since this is the first time we’re rolling out this process organization-wide, we’ll have a few sessions to answer any questions folks may have. We’ll have an all-staff meeting on Monday where <<Person Responsible for HR>> and I will take your questions and share more FAQs. If you don’t want to ask your question out loud during the all-staff session, or want to do it anonymously, feel free to email it to <<Person Responsible for HR>>.

We will also conduct a couple of office hours—<<Wednesday from x to y>>, and <<Friday from y to z>>. It will be staffed by <<Head of HR>> and you can come by or call with any lingering questions or questions specific to your situation.

We will check in with all of you a couple of weeks before the process kicks off—likely in early November as well.

I hope you’re all as excited as I am to further push on our talent development efforts. Please don’t hesitate to ping me with questions or thoughts.

Cheers

CEO

Sample agenda for team call

1. What are 360s? – ED (5 minutes)
2. Why are we introducing this, and why now? – ED (5 minutes)
3. How will the process work? – <<person responsible for HR>> (15 minutes)
4. Demonstration of survey tool – (10 minutes)
5. Q&A – 25 minutes

TOOL 3: STAFF MEMBER 360 – SAMPLE QUESTIONS

Please answer the following questions on a 1-7 scale, where 1 = highly disagree 4 = neither agree nor disagree and 7 = highly agree
1. <<staff member>> made our work better
2. <<staff member>> exemplifies our core values
3. What are 1-2 areas that the staff member excels at? (Provide examples where possible)
4. What are 1-2 areas that the staff member needs to improve on? (Provide examples where possible)

TOOL 4: MANAGER 360 – SAMPLE QUESTIONS FOR DIRECT REPORTS*
1. On a scale of 0-10, where 0 = not at all and 10 = extremely, how likely are you to say “I want to continue working for my manager as long as possible”?
2. On a scale of 0-10, where 0= not at all and 10 = extremely, how effective is <<manager>> at getting results?
3. What are 1-2 areas that the <<manager>> excels at? (Provide examples where possible)
4. What are 1-2 areas that the <<manager>> needs to improve on? (Provide examples where possible)

*Note that for a manager’s peers, you would simply use the staff member version

TOOL 5: PERFORMANCE EVALUATION FORM TEMPLATE
Check out our performance evaluation form template in its entirety, or add this brief section to your current evaluation form:

Highlights from 360 feedback  *(REMINDER: The manager should summarize the themes and not just cut and paste the feedback verbatim)*

1. What are two or three notable areas of strength?

2. What are two or three areas of growth or improvement?

TOOL 6: CHECKLIST FOR SELECTING RESPONDENTS
The key to getting reliable 360 feedback is ensuring that the list is balanced. In general, look for the following:

✓ Is there a mix of people up, down and sideways on the org structure providing input?
✓ Have we made sure the list is diverse across racial and gender lines and/or other elements of identity?
✓ Have we included colleagues that the staff member has had good working relationships with, as well as some they may not get along with?

TOOL 7: COACHING GUIDE FOR MANAGERS
Questions to ask managers during your check-ins with them:

● Have you looked at the 360 feedback for <<staff member>>?
● What are some patterns you noticed?
Was there any feedback that you were concerned about or confused by?
  o In those cases, did you go speak to the person that provided the feedback to better understand why?

What did the 360 feedback tell you about <<staff member>> that you didn’t already know?

What did the 360 feedback validate for you?

Is there any part of the review (360 or otherwise) that you are uncomfortable about?

Would you like to role play the review conversation with me?

TOOL 8: EXAMPLES OF REVIEW LANGUAGE WITH 360 FEEDBACK INCORPORATED INTO IT

Sample phrases to use:

● Peers appreciate that you provide insightful feedback on project plans (“he always identifies a step I hadn’t considered and should include!”)

● Almost everyone that provided 360 feedback for you noted your creativity as one of your strengths. I’ve included a couple of quotes as examples
  o “she always comes up with out-of-the-box solutions for problems”
  o “when we were stuck on <<project>>, she came up with a way to resolve it that was both simple yet creative”

● I truly appreciate your willingness to jump in with both feet and volunteer for “risky” projects and your peers mention it as well. This ranges from taking on a new service area for us, to volunteering to test the new email system.
  o “when no one was willing to give the new email system a try, they were not only happy to give it a go, but gave me thoughtful feedback after testing it for three days.”

● Your ability to turn out high-quality deliverables is a strength. However, sometimes the drive for quality results in missed deadlines. Your peers appreciate your commitment to quality, but recommend you do so with an eye towards deadlines. Communicate frequently so that others that depend on your output know where you stand and what they can expect and when.
  o “when the brief came back, it was stellar...I could find no fault in it, but it came almost a week late”
  o “I wish he would keep us apprised of where he is at with deliverables—sometimes, I’m happy to take a ‘good enough’ product today and work with it than wait for the perfect deliverable.”
  o “Getting a better understanding of the requestor’s context and deadlines would help her adjust her work quality and pace to match our needs. Sometimes we just need a doodle, not a work of art”

● I haven’t observed this myself but several of your peers have commented that your feedback to junior staff members can be very direct and blunt. While we encourage giving direct feedback, I would urge you to moderate your tone to make sure the recipient focuses on the content of your feedback and is not put off by the tone.
  o “they told the operations associate that her work was ‘shoddy’—while I don’t disagree with the feedback (the work was bad), they could have used that as a teachable moment to explain why it was unacceptable and use better language to express the same sentiment.”

● As we have discussed before in our check-ins, one key area of development for you is improving your fundraising acumen. While the numbers look good to-date, I hope
you realize that a lot of that is attributable to others jumping in to fill the void. I have observed this and your peers agree as well that it is not a skill issue but a will issue. You are primarily responsible for our fundraising efforts and I want to see you leading the charge here. We should focus on this over the next six weeks on this to see how I can help you make progress.

TOOL 9: ANNOTATED EXAMPLE OF A WELL-WRITTEN 360 FEEDBACK
Hermione Granger has provided this feedback for Luna Lovegood, with whom she worked on a recent project.

1. **What are 1-2 areas that the staff member excels at? (Provide examples where possible)**

   **Timeliness and Responsiveness:** I really appreciate how responsive Luna is. She proactively checks in with me to see if we need to get together quickly for any short turnaround assignments. She is always ready on time and is not fazed by seemingly impossible odds against us. For instance, during the recent project, Luna was one of the first to sign up and she helped recruit others to come out so we could hit our turnout goals.

   **Creativity:** Luna excels at coming up with out-of-the-box solutions to difficult problems. I’m amazed at how she is able to put on her thinking cap in the middle of difficult situations. For example, when a donor pulled out at the last minute, she worked out a deal with our ad agency to accept different payment terms while we worked on an alternate fundraising plan.

2. **What are 1-2 areas that the staff member needs to improve on? (Provide examples where possible)**

   **Communications:** Luna’s comments can occasionally come off as tone-deaf or insensitive. While what she says is indeed true, it could end up hurting people’s sensibilities. For instance, during a recent project meeting, she described our campaign as “insipid”—while the description was certainly accurate, she should have known that the campaigns team was already in their fourth iteration and struggling with the message. Her criticism was just not constructive. Just stepping back for a few seconds and putting herself in the other person’s shoes will help her modulate her tone and communication style to better appeal to everyone.