The 360-Degree Feedback Process De-Brief
Study Guide

By Marcie Levine

Introduction

Your staff has just been through a 360-degree feedback process, and you have been tasked with distributing the results to each individual. You have the report in-hand, but how can you

- **approach this conversation?**
- **assure that the leader (the person being rated) is open to the scores and comments of his/her raters**
- **work with each leader to understand the messages within the scores?**
- **work with each leader to help determine and recommend changes?**

One generally stated outcome of a 360-degree feedback process is to improve the behavior of a leader within selected competencies in order to move both the leader and the organization towards success. To do so, support in the report de-briefing process is key.

A leader who reviews a report without the support of a coach may:

- be overwhelmed by the sheer numbers in the report,
- try to determine "who said what" and compromise the anonymity of the feedback,
- focus only on the weaknesses brought out in the report, and
- not understand how to prioritize the issues when developing an action plan.

While coaches and many internal HR/OD/Training staff members may have experience in this de-briefing process, many managers are not equipped with this type of training. While a feedback report may look simple and seem easy to understand, communicating the output of the report in a balanced and thorough method can be complex.

No matter the objective of the 360, the number of topics/competencies and questions, the type of response scale used, or the labels of the different types of relationships (i.e. Manager, Direct Reports, Peers, etc.), there are many similarities that apply to most 360 feedback processes. In this article, various reports will be shown and explained. While reports may look different depending on the software used, there are usually similarities in much of the output, and this is where our discussion will focus.

Notes to the de-briefer

- When reviewing a leader's report, look for balanced feedback. Balance is imperative; it is just as important to identify the things one does well as it is to point out areas for improvement. In some cases, leaders and de-briefers focus on the lower scores, but this might not in the participant's best interest. For example, there may an individual who is rated low on the "teamwork" category. If this person is not part of any teams, these low ratings may be of little concern to this person. Therefore, this person may want to concentrate on other competencies.
- Assume that raters take their role very seriously. Raters will generally share more constructive feedback if the output of the 360 process is not linked directly to compensation or succession planning.
- If possible, it is best to send the report out to the leader about 24 hours prior to the session. Distributing the report too far ahead of the de-brief meeting often gives the leader too much time to dwell on the report without being able to gain a more thorough understanding of the information. Conversely, the leader should not receive the report at the start of the de-briefing as the meeting will be more efficient if the leader has had a chance to review the report prior to the meeting. An interactive discussion is best.
- Sometimes a leader may say something like: "Somebody was really upset with me that day and I know they gave me bad scores." Since the scores are anonymous, neither you nor the leader knows this to be true. Your response to this type of comment is to look at the relativity of the scores. Look at the four to six highest scoring questions and ask the leader, "Do you believe this is where you excel?" Then look at the four to six lowest

scoring questions, and ask the leader if these scores make sense. If the leader agrees or buys-in to the relativity of the scores, the conversation will go more smoothly, and the prioritization for action planning will be easier.

The Report Introduction

The report introduction (Fig. 1) should be read before the leader starts reviewing their scores. This report sets the stage so that the leader should:

- avoid trying to figure out who said what
- look for trends
- look for balanced feedback, both on the high-scoring and low-scoring ends, and
- use the information to determine what the next steps will be (after the de-briefing)

Introduction

As you read your reports, please keep the following guidelines in mind:

• Be open to the feedback you are receiving.
• Look at the high scores – understand what raters said you do well.
• Look at the low scores – what group of raters does this information come from? Are low scores for an entire topic area or just for individual questions?
• Look for the gaps, both between your scores and the raters' scores, as well as gaps between different types of raters and try to understand why there might be different perceptions.
• Look closely at the narrative feedback. Sometimes, that feedback sheds considerable light upon the numerical feedback.
• Are there any surprises? Try to understand the results for any surprises.

Your manager will sit down with you to discuss your feedback. After that, we'll have a meeting with all the feedback recipients to discuss common themes and provide some valuable coaching to one another. You might want to discuss your feedback with your colleagues or others who know you well.

Fig. 1

Overview Report

Mean Scores
by Competency by Relationship

This report shows you the variation in scores by relationship. It also shows how many raters from each type of relationship completed the assessment (e.g., N2). There is a graph under the chart to reflect these same scores.

Key:	NR no responses	LR limited responses

Scale:	Strongly Disagree 1	Disagree 2	Neither Agree Nor Disagree 3	Agree 4	Strongly Agree 5

Competency	Self N=1	Supervisor N=1	Direct Reports N=7	Colleagues / peers N=4	Others N=1	Total N=13
Change	4.33	4.33	4.57	4.09	5.00	4.45
Communication	4.40	4.00	4.31	3.90	4.60	4.18
Efficiency / Productivity	3.75	4.00	3.82	3.69	4.75	3.87
Employee Development	3.50	4.00	3.93	3.93	5.00	4.02
Integrity	4.25	5.00	4.64	4.19	4.75	4.54
Leadership	4.00	4.00	4.37	4.35	4.80	4.37
Management	4.00	4.00	4.37	4.00	4.57	4.24
Problem Solving /	3.75	4.25	4.58	4.06	4.50	4.38

Fig. 2

This report (Fig. 2) provides an overview of the feedback, organized by competencies (sometimes called topics). These scores are rollup averages of the individual question scores within each competency (e.g., if there are 3 questions in "Communication," the competency score is a roll-up average of those questions within the "Communication" competency). Understanding this report will allow for a foundation on which to base the rest of the de-briefing session. Remember that the report you are reviewing might look different than our example, but the overview data is generally very similar in most report outputs.

- In the illustration there is a 5 point response scale; in this case a higher score is a better score.
- This report includes an overview of the Self scores, as well as the Manager, Direct Report and Peer scores.
- The Total column is the average of all rater scores (the Self scores are not factored into this average). On a 5-point scale, generally, scores of 3.9 – 4.2 are good scores, scores of 4.3 – 4.5 are very good scores, and scores of 4.6 and above are outstanding scores. However, this is just a generalization. Once a 360 process has been completed, it will be easier to see if this generalization applies to your organization.
- Review how many people there are in each category; if there are only one or two people in one of the relationship categories, be sure to keep that in mind when weighing their scores in your discussion.
- In going through this report, determine three of four areas to highlight; ask the leader for their feedback on what they want to highlight as well.
- When reviewing the Overview Report, look at the Self scores and how they compare to other relationships scores (e.g. Manager, Direct Reports etc.). This can provide insight into perception issues between raters and the leader; the larger the gap, the greater the perception issue.
- In the example report, this leader's (we'll call him David) Self-Scores averaged 3.75 – 4.40 on the 5-point response scale. David's Manager gave him average score of 4.00 to 5.00; the Direct Reports gave him a few scores under 4 and a few scores over 4, generally hovering around a 4.00; Peers gave scores slightly lower than 4. The Others category has only 1 rater, so the scores are high, but only represent about 8% of the total raters. These scores indicate that David's Direct Reports think more highly of his overall competency skills than his Peers. The Integrity scores are all high, which is great news – high Integrity scores show a higher amount of respect and trust, and give the leader time and good will to work on other areas. The Total Column, which represents overall roll-ups, shows strong scores in all areas except Efficiency/Productivity, so David will need to look at that area closely later in the report.

Unfavorable – Neutral – Favorable Report by Topics

This graph (Fig. 3) shows the roll-up scores by competencies. On a 5-point response scale, the percentage of raters who selected the bottom two scale options for the questions in the competency (in this case "Strongly Disagree" and "Disagree") are in red, or Unfavorable. The percentage of raters who selected the middle scale option (in this case "Neither Agree Nor Disagree") are in yellow, or Neutral, and the percentage of raters who selected the top two scale options for the questions in the competency (in this case "Agree" and "Strongly Agree") are in green, or Favorable. Essentially red is bad, green is good. No self-scores are included in this graph.

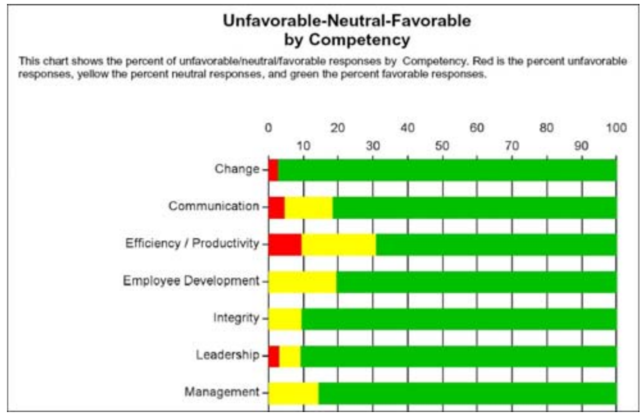

Fig. 3

This graph is important is for several reasons:

- Mean scores, as seen in the Overview Report, are a good first indicator of performance. If someone gets a 4.8 (on a 5-point scale; 5 = high) it indicates very high scores, and if they receive a 2.1 (on a 5-point scale; 5 = high) it indicates very low scores. However, if a leader has a mean score of 3, without more information it is impossible to decipher if most raters gave the leader a score around 3, OR if about half of raters gave the leader a 1 and about half gave the leader a 5. In both scenarios the mean score would be 3 (approximately), but the message would be very different. This report provides some range information; if most raters gave the leader 3.0s then the yellow line will be larger, if they gave him/her mostly 1.0s and 5.0s then the red and green lines will be larger and the yellow line will be smaller.
- In prioritizing issues, look for percent Favorables (greens) that are 80% and above and then look for percent Unfavorables (reds) that are 10% and above.
- This graph is effective for visual learners. Instead of charts with a potentially overwhelming number of scores, this graph assembles the data into an easily understandable format.
- As you and David are thinking forward to the action-planning phase, there is a strategy in determining what to do about the scores. Does David want to move his yellow scores up to green or does he want to move his red scores up to yellow? In other words, does he want to create an action plan that helps build on clearly defined strengths, or does he want to work on improving his weaknesses? There is no right answer, and scores must be assessed as they relate to the individual leader. The action plan the leader creates may combine some of both of these strategies.
- In this report, David has great Change, Integrity, Leadership and Management scores. Once again we see that Efficiency/Productivity is an area that needs more understanding and attention.

Questions by Competencies by Relationship

Problem Solving / Decision Making

Question Text	Self	Supervisor	Direct Reports	Colleagues / peers	Others	Total
40) Considers a broad range of issues or factors in making decisions.	4.00	4.00	4.71	4.00	4.00	4.38
41) Generates solutions to problems that do not depend on business as usual experience and thinking.	4.00	4.00	4.50	4.25	5.00	4.42
42) Makes decisions under uncertain conditions.	3.00	4.00	4.50	3.75	4.00	4.17
43) Seeks input and information from others when appropriate.	4.00	5.00	4.57	4.25	5.00	4.54

Efficiency / Productivity

Question Text	Self	Supervisor	Direct Reports	Colleagues / peers	Others	Total
11) Adjusts to changing work requirements.	4.00	4.00	4.71	4.00	5.00	4.46
12) Identifies and implements opportunities to save time, effort and money.	4.00	4.00	3.71	4.25	5.00	4.00
13) Manages multiple projects without a decrease in productivity or quality.	3.00	4.00	3.00	3.25	4.00	3.23
14) Shows resilience in the face of constraints and frustrations.	4.00	4.00	3.86	3.25	5.00	3.77

Fig. 4

This report (Fig. 4) breaks down each competency/topic by its questions.

- A de-briefer should approach this report with more emphasis on specific areas of each competency. Is the leader over or under-rating themselves? Is there consistency between the different rater groups? Are there any outliers that need attention?
- This report is particularly useful in identifying specific questions which may have raised or lowered scores within a given competency.
- In the first example, David has consistent high scores for all four of the Problem-Solving / Decision-Making questions. His Direct Reports have given him the best scores in this category, and David and his Supervisor seem to have consistent perceptions of his skills in this area.
- In the second example, David has varying scores, with a high score on "adjusting to changing work requirements", and a low score regarding "managing multiple projects

effectively”. Questions 13 and 14 are some of David’s lowest scores within the assessment and need attention.

Gap Report

Gap Reports (Fig. 5) measure the difference between the self scores and the combined rater scores. This Gap Report is sorted by the size of the gap (total raters’ scores (Others Mean) subtracted from the Self Scores).

- In looking at the gap column, a positive gap reveals that the person under-valued themselves, while a negative gap reveals where they over-rated themselves.
- It is important to look for gaps of more than 1.0 (either positive or negative), and discuss why there might be a perception difference.
- In the section of the Gap Report shown, David has undervalued himself in about 5 questions – in all these cases David Self-scored at a 3.0 (Neither Agree Nor Disagree). As a de-briefer, you may ask David about why he scored himself low on these questions – does he really see his behavior so differently than his raters?

Gap Report by Question
in Order of Gap Value

This report shows each Question text with the associated Competency, the Self Score, the roll-up of everyone else's score, and the difference between the self and the others scores (Gap). The larger the gap, the more inconsistent the view of a behavior between you and the other raters. If scores are mostly high or low, look for relative highs and lows.

Key:	NR no responses	NA cannot assess	LR limited responses

Scale:	Strongly Disagree 1	Disagree 2	Neither Agree Nor Disagree 3	Agree 4	Strongly Agree 5

Question Text	Competency	Self Score	Other Mean	Gap
36) Helps individuals to solve their own problems rather than solving problems for them.	Management	3.00	4.62	1.62
17) Provides recognition.	Employee Development	3.00	4.31	1.31
42) Makes decisions under uncertain conditions.	Problem Solving / Decision Making	3.00	4.17	1.17
30) Has a sense of urgency, which is communicated to and influences others.	Leadership	3.00	4.15	1.15
18) Provides challenging assignments and opportunities for development.	Employee Development	3.00	4.00	1.00
23) Shows consistency in principles, values and behavior.	Integrity	4.00	4.62	0.62
52) Seeks and solicits ideas from others.	Teamwork	4.00	4.62	0.62
9) Listens well in a group.	Communication	4.00	4.54	0.54
43) Seeks input and information from others when appropriate.	Problem Solving / Decision Making	4.00	4.54	0.54

Fig. 5

Comments

Although this section (Fig. 6) appears at the end of the report, do not feel like you must wait until the end of the discussion to review these comments. Some de-briefers prefer reading them first with the leader so that they have some kind of information on which to base the rest of the scores. At any point in this de-briefing process, if the leader looks at a score and says “I have no idea what people are talking about; this makes no sense to me," look at the Comments to see if there is any qualitative support for the quantitative scores. Open ended comments are helpful in understanding why the scores are what they are. Review the open ends wherever you think it will be most useful in your conversation.

15) Comments: Efficiency / Productivity
Other
Good multitasking skills
Kevin has a hard time delegating tasks to his staff and utilizing their support. This causes tasks to build up and productivity to decrease. Kevin also has a difficult time prioritizing tasks and has a tendency to procrastinate.
Kevin has had the best interest of the school in sight as he has been in his current role.
Has to learn to handle paperwork better, like so many other people. Can do it, just does not like it. Also, he hesitates to delegate due to the workloads carried by those under him, now. However, he does do so when the demand requires it.
Kevin frequently waits until the last minute and completes his work after the deadline.
44) Comments: Problem Solving and Decision Making
Other
Kevin always discusses topics with his team when making changes or decisions. It is apparent he desires input.
Kevin is always open to hear the suggestions of others. He takes these different ideas into consideration when making decisions.
Kevin has demonstrated time and again that his problem solving skills are fair and just.
Kevin always thinks 'outside the box' utilizing his prior business experience to help in his current position. He is also not afraid to ask questions when necessary.
In most cases, he is an independent thinker, using his skills and background, character and integrity, in making decisions. However, he tends to carry too much of the responsibility alone. He does not always seek advice from all those that work for him, but from select ones. Occasionally, this can be disconcerting.

Fig. 6

- We have included two sets of comments to review.
- The first set of comments is for the Problem-Solving and Decision-Making competency. Here David sees good examples of why he received high scores – he gets input from others, is open to suggestions, is fair, and can think "outside the box".
- The second set of comments is for the Efficiency / Productivity competency. Once again, there are examples of why David’s scores were not high in this area -- difficulty in prioritizing and delegating as well as some procrastination issues are discussed.

Next Steps

Following a de-brief meeting, a leader typically thinks through the meaning of the feedback, prioritizes their thoughts, and assembles an Action Plan. The leader may use a formal Action Planning Template or simply write down notes. An Action Plan usually includes three to five areas on which to focus over the coming months. Some leaders wish to take a strength and make it stronger while some want to take issues that are perceived as problem areas and improve on one or two of them. Ongoing discussions (e.g., monthly, quarterly) help keep the Action Plan are relevant and on track. Additional follow-up 360s can help measure progress against Action Planning goals.

Overall, David has solid scores, with one clear area of concern. In his Action Plan, he might want to consider the following ideas:

- Work with his manager on his prioritization and delegation skills.
- Work with his staff on providing more timely feedback in a more formalized process.
- Continue to treat others fairly and effectively, asking for input when appropriate.
- Take on more cross-department or team leadership opportunities.

About the Author

Marcie Levine

Marcie Levine is CEO of SurveyConnect, the provider of intuitive assessment applications, survey software and survey services to companies and organizations to support achievement of their missions and goals. Prior to starting SurveyConnect, Marcie had more than fifteen-years experience in human resources, both as a consultant and in several corporate positions.

Marcie received her degree in Human Resources from the University of Kansas, and her MBA from the University of Colorado at Denver. She has published several articles about the survey process in trade magazines including *Selling Power, Quirk's Marketing Research Review* and *The International Society of Performance Improvement Journal.*

Contact Information:

Marcie Levine
SurveyConnect, Inc.
2960 Diagonal Highway
Suite 202
Boulder, CO 80301

mlevine@surveyconnect.com
800.945.0040 ext.223