360 SURVEYS

BEST PRACTICES FOR ADMINISTRATORS

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Administrators can take steps throughout the 360 project to make the project more successful. The ThinkWise team recommends these best practices for 360 projects.

CREATE A COMMUNICATION PLAN

It is important that the organization communicate their expectations for the 360 project before, during and after the 360 survey. This will help clarify expectations and help increase the response rate of your survey. The recommended communication plan is shown below:

When	Message	To Whom
4 weeks before project launch	Organizational Announcement	All in organization who may receive invitations to participate.
3 weeks before project launch – due date one week	Request for Roster	All who will be evaluated during the 360 survey – the participants
1 week before project launch	Respondent Notification from Participants (optional)	Sent by participants to all those they have included as respondents on their roster
On Launch Date (Monday launch preferable)	Survey Invitation	To all participants and respondents, sent by ThinkWise system as part of project launch
Thursday of launch week	1st Reminder	All participants who have not yet completed their survey.
Tuesday following launch week	2nd Reminder	All participants who have not yet completed their survey.
Due Date of Survey	Final Reminder	All participants who have not yet completed their survey
After survey results are distributed to participants	Participant Follow-up	All participants

SET A LAUNCH SCHEDULE

Work with your ThinkWise team to create a launch schedule. The launch schedule should include dates for the following:

- All items in the communication plan, as noted in the above section.
- Conduct new Project Administrator training (if applicable).
- Finalize survey items, scales and custom categories and send to ThinkWise for upload to the system.
- Audit individual rosters, combine and build master roster.
- Setup TEST 360 and conduct final review/approval of items, roster and system email.
- Start and end of survey completion window.
- Generate reports and conduct feedback.

AVOID TOO MANY SURVEY ITEMS

Items are the behavioral statements related to each competency in the ThinkWise system. These are the statements against which the respondent ranks the participants.

- For a 360 survey, we recommend that the number of items not exceed 70; the ideal number is around 45 items. This reduces rater fatigue and increases the number of respondents who provide feedback.

- All items related to a competency do not be selected in order to measure a competency. Competencies can be effectively measured in as few as 3 items.
- You can also include open-ended questions in your survey. We recommend no more than five in a 360 survey. (For list of default open-ended questions, see Appendix B.)

NARROW DOWN THE RESPONDENT GROUPS

- Those that provide feedback to the 360 participants are referred to as respondents. Survey results are grouped by respondent. For example, if the participant has team members and direct reports in their respondent group, survey results will be shown by each of those separately. To preserve confidentiality, there must be three or more responses from a respondent group in order to show those results separately.
- Decide which respondent groups you are going to use in your organization. Narrowing down the respondent groups will increase the number of raters within each group and help ensure that the three or more response minimum is met. It will also make it easier to compare across surveys if the respondent groups are consistent.
- List of all respondent/rater relationships available in the ThinkWise system:
    - Self
    - Team Member
    - Manager
    - Manager 3
    - Customer
    - Board Member
    - Peer
    - Direct Report
    - Manager 2
    - Other
    - External Respondent
    - Colleague

CHOOSE THE RATING SCALE

- The scale types built into the ThinkWise system are agreement, satisfaction and importance. Of these, administrators can choose a scale range from 3 points to 10 points.
- All scales can include an "n/a" option.
- Shown below are the most commonly used scales. The deciding factor for most people is if they want to give respondents the option of 'Neutral' or not.

4pt Agreement scale with N/A

N/A	1 Strongly Disagree	2 Disagree	3 Agree	4 Strongly Agree

5pt Agreement scale with N/A

N/A	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree

If you have any further questions regarding 360 Survey best practices or common issues – please contact a ThinkWise representative at: thinksupport@thinkwiseinc.com

APPENDIX A - SAMPLE COMMUNICATIONS

Use these words as a starting point and make them your own. At a minimum, change the words in *italics* to make them applicable to your organization.

Organizational Announcement

Note: this is sent to all participants and respondents across the organization.

As you know, the leadership team has been recently been taking a number of steps to *increase our organizational ability to achieve our vision and strategies.* We have created an organizational competency model, and *established organizational goals toward which we are all working.* The next step in this process is to launch a new process by which leaders can gather feedback on their behaviors and competencies.

This new process is called a 360 Survey. A 360 Survey is a questionnaire-based process where a person conducts a self-rating and has others (e.g., supervisor, peers, and direct reports) rate behaviors related to performance. The feedback provides a 'full-circle' (thus the term 360) comprehensive view of performance and comparison of self-ratings to the ratings of others.

There are a number of benefits to this process:

- It gathers feedback from individuals (such as direct reports and customers) who otherwise might not have the opportunity to provide feedback
- It provides a consistent and structured source of feedback for leaders, increasing awareness of how the organization would like them to perform.
- It provides leaders with a comprehensive understanding of their strengths and developmental opportunities aligned around the competencies needed to achieve the organization's strategy.

Over the coming weeks, we will be holding information sessions for those who will be a part of this process. The meeting will provide more details on timing and how it will work.

As we move forward, many of you will receive an email asking you to provide feedback on someone else in the organization. Our 360 Survey uses the ThinkWise system, which collects your feedback in a secure, external environment and combines it with other respondents to provide collective, anonymous feedback. I encourage you to take the time to thoughtfully provide your feedback as you complete the online survey. Your feedback is valued and will be important to our leaders and their development.

Thank you for your time and support with this effort. If you have any questions, feel free to contact me for further information.

(PROJECT SPONSOR NAME)

Request for Roster

Attach the Participant 360 Roster Template to this email. Edit this email so that it reflects the respondent types you are using in your organization. Participants are typically given one week to complete and return their roster.

Dear*(PARTICIPANT)*,

As you know, you will soon be participating in a 360 Survey. Each participant in the survey needs to identify persons from whom they wish to receive feedback. The attached spreadsheet should be used to provide this information.

For each respondent (i.e. person rating you), you will need to provide their first name, last name, email address and relationship to you. Participants can request feedback from several different types of respondents. The respondent types are:

- *Self*
- *Peer*
- *Team Member*
- *Direct Report*
- *Manager*
- *Manager 2*
- *Manager 3*
- *Other*
- *Customer*
- *External Respondent*
- *Board Member*
- *Colleague*

We recommend a minimum of 4 - 5 people per group. You do not have to use all rater groups. Rater groups with < 3 responses will not display on the report results. Manager groups are the exception to that rule.

An example roster is included in the first tab of the attached spreadsheet. If you have any questions, please contact *(PROJECT ADMIN'S NAME).* Please return the completed rosters to *(PROJECT ADMIN'S EMAIL)* by (ROSTER DUE DATE).

Thank you for your cooperation.

(PROJECT ADMIN'S SIGNOFF)

Respondent Notification from Participants

This is typically sent from the participant to the respondents they have selected for their survey. Alternatively, this email could be edited and sent from HR.

Hi everyone –

I am very excited to be starting a new leadership coaching program here at (*COMPANY NAME)*. In order to achieve my goals for *being an effective leader and producing better results throughout the organization*, I need your help in completing an online 360-degree Survey.

There are no right or wrong answers to this survey. Also, your responses will be kept completely anonymous and will be pooled together so that no one individual can be identified. The results of this survey will be used to create an individual feedback report for me. My coach will then share this report with me so that I can develop a personal action plan that addresses any areas of concern or areas that can be improved.

Please be sure to "white list" the email address ThinkWiseAdmin@thinkwiseinc.com. You will receive an email from this address sometime over the next few days to complete the survey. It will only take about *(COMPLETION TIME)* to complete, and I very much appreciate your cooperation and support in completing the survey.

To access the survey, simply follow the instructions you receive in the email from ThinkWise. If you have any questions, please feel free to contact me, or you can contact (PROJECT ADMIN'S NAME*). (HE/SHE)* is supporting me with this effort and can be reached at *(PROJECT ADMIN EMAIL OR PHONE)*.

Very truly yours,

(*PARTICIPANT'S SIGNOFF*)

Survey Invitation

This is the default survey invitation sent from the ThinkWise system when your project is set up. You may leave this as-is or modify it to suit your organization. This email can be modified as part of project setup.

The items in **bold**, below, are automatically generated by the ThinkWise system.

Respondent Name,

You have been selected to provide feedback in the test for one or more team members listed below:

- **Participant Name(s)**

Please take this opportunity to provide constructive feedback to the participant(s) listed above by **DueDate** using the link included below.

Your feedback is confidential and the results will be aggregated into a development feedback report prepared especially for each participant being rated. If you are not the Manager of the participant, your responses will be grouped with at least two other individuals to ensure a level of anonymity. Manager responses will be reported individually and are not anonymous.

Please contact **Survey Administrator** with any questions you might have regarding this survey process. For problems or questions regarding responding to the online survey, please contact ThinkWise technical support by emailing ThinkWise Support. To begin completing your online survey, click on the link below:

Link to access survey: **Respond to Survey items**

Email address to login with: **email_login**

A 360 Survey is a process where you and others, as well as the person being assessed, are asked to rate job performance behaviors. The feedback obtained from the survey provides the person being assessed with insights into areas of strength and areas needing development. The questions you will be asked to answer may include both numerical ratings and open-ended questions. Please answer all questions as openly and honestly as possible. Without candor, the feedback received will be limited. To encourage this candor, we have taken several steps to ensure your answers remain anonymous. For example, your name will not be associated with any answer and your individual responses are not viewable by anyone.

To begin providing feedback, please click on the link above. You do not have to complete all of the questions at one time. Instead, you can click Save and then Logout – to answer the remaining questions at a later time, simply click on the same link from this email message.

Thank you for your participation in this valuable process.

1st Reminder

Items which appear like **$this$** are automatically generated by the ThinkWise system. Leave them as-is to have that information automatically populated in your email. These reminder emails are sent from the 360 Project Page.

Subject Line: Reminder: *(PROJECT OR PROGRAM NAME)* – Due *(DUE DATE)*

> **$FirstName$,**
>
> Good morning! Your task for the *(PROJECT OR PROGRAM NAME)* survey is currently listed as incomplete. If you feel you have received this reminder in error, please reach out to the ThinkWise support team (THINKSUPPORT@thinkwiseinc.com).
>
> You may use the information below to access the survey and complete at the next available opportunity. The survey should take approximately *(COMMUNICATED TIME)* to complete.
>
> You have been selected to provide feedback for:
> **$Participant$**
> Link to access survey: **$SurveyLink$**
> Email address to login with: **$Email$**
> Thank you,
> *(PROJECT ADMIN'S SIGNOFF)*

2nd Reminder

Subject Line: 2nd Reminder: *(PROJECT OR PROGRAM NAME)* – Due *(due date)*

> **$FirstName$,**
>
> Your task for the *(PROJECT OR PROGRAM NAME)* survey is currently listed as incomplete. If you feel you have received this reminder in error, please reach out to the ThinkWise support team (THINKSUPPORT@thinkwiseinc.com).
>
> You may use the information below to access the survey and complete at the next available opportunity. The survey should take approximately *(COMMUNICATED TIME)* to complete. All survey feedback must be received by **$DueDate$**.
>
> You have been selected to provide feedback for
> **$Participant$**
> Link to access survey: **$SurveyLink$**
> Email address to login with: **$Email$**
> Thank you,
> *(PROJECT ADMIN'S SIGNOFF)*

Final Reminder

Subject Line: Reminder: *(PROJECT OR PROGRAM NAME*) – DUE TODAY

> **$FirstName$,**
>
> Good morning! The *(PROJECT OR PROGRAM NAME)* survey is scheduled to close today. Your task is currently listed as incomplete. If you feel you have received this reminder in error, please reach out to the ThinkWise support team (THINKSUPPORT@thinkwiseinc.com).
>
> You may use the information below to access the survey and complete at the next available opportunity. The survey should take approximately *(COMMUNICATED TIME)* to complete.
>
> You have been selected to provide feedback for
> **$Participant$**
> Link to access survey: **$SurveyLink$**
> Email address to login with: **$Email$**
> Thank you,
> *(PROJECT ADMIN'S SIGNOFF)*

Reminder for Surveys with a Very Low Response Rate

This reminder language is designed for surveys in which there is a very low response rate. This typically occurs when the feedback is tougher to give. This message can be used for respondents other than the participant's manager; manager feedback is not anonymous.

> **$FirstName$,**
>
> Good afternoon! I trust you are doing well today! The 360 feedback survey for *(PARTICIPANT NAME)* is scheduled to close tomorrow. You were asked to provide feedback as a *(RELATIONSHIP).* Currently, your task to complete the survey is listed as incomplete. Your feedback will be completely anonymous. Your name is not included in the feedback report they will receive and your responses are averaged together with at least 3 other people in your respondent group. The survey should take approximately *(COMPLETION TIME)* to complete. Please provide your input at the next available opportunity.
>
> Link to access survey: **$SurveyLink$**
>
> Email address to login with: **$Email$**
>
> If you have any questions or need anything further from me, please don't hesitate to reach out!
>
> *(PROJECT ADMIN'S SIGNOFF)*

Reminder for Surveys when Deadline is Extended

At times, it will be necessary to extend the deadline of a 360 project in order to ensure that crucial feedback is included. The text changes depending on the participant's relationship to the respondent. See the examples below.

Manager Version

Subject: Reminder: *(PROJECT NAME)* – deadline extended

> Good morning! Your task for $ProjectName$ is currently listed as incomplete. If you feel you have received this reminder in error, please let me know!
>
> You were asked to provide feedback as (*PARTICIPANT'S NAME*)'s manager. We have extended the deadline of the survey because your input is a crucial component in their 360 process. The survey should take less than (*COMPLETION TIME*) to complete. Please provide your feedback at your soonest opportunity.
>
> > Link to access survey: **$SurveyLink$**
> >
> > Email address to login with: **$Email$**
>
> If you have any questions or concerns, don't hesitate to reach out to me or the ThinkWise team. You can email me directly at (*PROJECT ADMIN'S EMAIL*) or the ThinkWise team at ThinkSupport@thinkwiseinc.com.
>
> *(PROJECT ADMIN'S SIGNOFF)*

Participant Version

Subject: Reminder: *(PROJECT NAME)* – deadline extended

> Good morning! Your task for $ProjectName$ is currently listed as incomplete. If you feel you have received this reminder in error, please let me know!
>
> You were asked to complete a self-evaluation. We have extended the deadline of the survey because your self-evaluation is a crucial component in the 360 process. The survey should take less than (*COMPLETION TIME*) to complete. Please provide your feedback at your soonest opportunity.
>
> > Link to access survey: **$SurveyLink$**
> >
> > Email address to login with: **$Email$**
>
> If you have any questions or concerns, don't hesitate to reach out to me or the ThinkWise team. You can email me directly at (*PROJECT ADMIN'S EMAIL*) or the ThinkWise team at ThinkSupport@thinkwiseinc.com.
>
> *(PROJECT ADMIN'S SIGNOFF*

Respondent Version

Subject: Reminder: *(PROJECT NAME)* – deadline extended

Good morning! Your task for $ProjectName$ is currently listed as incomplete. If you feel you have received this reminder in error, please let me know!

You were asked to complete a 360 survey as a (RELATIONSHIP) to (PARTICIPANT NAME). We have extended the deadline of the survey because your input is a crucial component to their 360. The survey should take less than (*COMPLETION TIME*) to complete. Please provide your feedback at your soonest opportunity.

Link to access survey: **$SurveyLink$**

Email address to login with: **$Email$**

If you have any questions or concerns, don't hesitate to reach out to me or the ThinkWise team. You can email me directly at (*PROJECT ADMIN'S EMAIL*) or the ThinkWise team at ThinkSupport@thinkwiseinc.com.

(PROJECT ADMIN'S SIGNOFF

Sponsor Follow-up Email

This email is sent to participants after the survey results have been distributed. It is sent through the organization's email system, not through the ThinkWise system. Typically, this is sent from the person championing the project within the organization, aka the project sponsor. Organizations can also use this email to direct participants to internal learning resources or, if subscribed, within ThinkBox.

As you know, we have recently concluded the 360 Survey process. If you haven't already reviewed it, I encourage you to spend some time looking over your personal feedback report.

After you review your report, the next step is up to you. Consider your areas for improvement and identify at least two development objectives based on the feedback provided in your report. Meet with your manager, mentor, or a trusted colleague to review your goals and identify strategies to achieve them. *(DIRECT PARTICIPANTS TO INTERNAL RESOURCES OR TO THINKBOX HERE.)*

You may want to email the people you asked to respond to the survey and thank them for their input. Share the 2-3 high points that you gleaned from the survey results – both strengths and areas for improvement. Also, communicate what you will be focusing on in the next several months.

Finally, consider sharing your development objectives with your peers and direct reports. Let them know you'll be soliciting periodic feedback from them. This is important, not only in determining your developmental actions, but also in assessing your progress. Your improvement will be reflected in subsequent 360 surveys.

Thank you for participating in the 360 survey process. I hope you found it to be an insightful and worthwhile experience. If you have any questions, feel free to contact me for further information.

(SPONSOR NAME)

APPENDIX B -- STANDARD OPEN-ENDED QUESTIONS

Organizations can create their own open-ended questions for their 360 survey. In addition, there are some generic questions which are included as part of the setup. Feel free to use them.

- What should this individual START doing? Please be specific – so they have a crystal clear picture of what behavior to start (e.g., not "Start driving results harder" as this is not clear enough – but instead "Start having your direct reports make specific goal commitments to you which you review with your manager.")
- What should this individual STOP doing? Please be specific about behaviors – so they have a crystal clear picture of what behavior to stop (e.g., "Stop ignoring customer needs" is not clear enough – but instead "Stop interrupting customers and don't discuss our products until you thoroughly understand their problems.")
- What should this individual CONTINUE doing? Please be specific – so they have a clear picture of what behaviors should be continued (e.g., "Continue the really nice warm-ups you do with customers – talking about our region, sports, ect. – you create a great connection with almost everyone at the beginning.")
- What additional comments or concerns are relevant for the participant to know?
- What is the participant's greatest asset?
- Where does the participant need to improve?