

Handbook of Strategic 360 Feedback

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**Allan H. Church
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APPLICATION OF 360 FEEDBACK FOR LEADERSHIP DEVELOPMENT

CYNTHIA MCCAULEY AND STÉPHANE BRUTUS

The practice of 360 Feedback is strongly rooted in efforts to develop leadership in organizations. Although feedback as a mechanism for improving employee performance has a long history, the practice of systematically collecting evaluations of a focal leader's behaviors and skills from the perspective of that leader's manager, peers, and direct reports is a more recent development. An effort in the 1970s to identify assessment tools for providing feedback to leaders from coworkers yielded only 24 instruments; however, most of these either were designed for upward feedback only or were research questionnaires, included because they had the potential for providing feedback (Morrison, McCall, & DeVries, 1978).

Four decades later, there are hundreds of 360 Feedback instruments available in the marketplace, and many organizations have created their own customized instruments. It is now common for leadership development programs and coaching engagements with leaders to include a 360 Feedback tool early in the process. And, organizations are increasingly making use of 360 Feedback as a regular talent process, much like annual performance evaluations or employee engagement surveys. Although organizations today use 360 Feedback for multiple talent management purposes, leader development is an element of nearly all 360 processes (3D Group, 2016).

Technology that made the collection and compilation of data faster and easier is certainly a major factor in the growth of 360 Feedback. But, we would argue that the

growth is also due to the gap it fills: Leadership is a social process, and the manager often has a limited view of the variety of interactions that make up that process. Peers and direct reports also have useful views, but the power dynamics of hierarchical organizations often deters them from sharing those views. The rater anonymity built into the 360 Feedback process creates a safer route for receiving honest input from the broader social system.

For leadership development, 360 Feedback is increasingly used at all levels in the organization, makes use of tools that are customized to reflect an organization's leader competency framework, and is viewed as a core talent process for leadership development. As a result, 360 Feedback is becoming more strategic: It focuses on competencies valued by the organization, is designed to create change in leaders across the organization, supports the development of a feedback culture, and informs broader talent management processes (Chapter 2). In its application to leadership development, 360 Feedback must influence the development of individual leaders; yet, to have a strategic role in an organization, it also needs to enhance the leadership capacity in the organization for meeting its strategic agenda.

In this chapter, we highlight well-established practices for using 360 Feedback for individual leader development and emerging practices for its use in the collective development of leadership capacity. But first, we address the debate about whether 360 data for leadership development should be used only for development purposes.

360 DATA FOR "DEVELOPMENT ONLY" VERSUS "DEVELOPMENT PLUS"

Complexity in the design of a 360 Feedback process for leadership development is the trade-off between using the data for development purposes only versus using the results for both development *and* making decisions about the leader (e.g., performance evaluations, selection into high-potential pools). Some organizations opt for complete data confidentiality, leaving any decisions about sharing the feedback report in the hands of the focal leader and arguing that confidentiality creates more honest feedback from raters and more openness to that feedback by leaders. Other organizations use the same 360 process for leadership development and for organizational decision-making, careful to be transparent and consistent about how the data will be used and who has access to what level of detail. They argue that the 360 data have value beyond development, and the organization would be remiss in not using these data to make better decisions. They also point to the enhanced motivation to improve when individuals know that how others rate them will be used in decision-making. Some organizations work to avoid the debate by using different 360 processes for developmental feedback and for organizational

decision-making about leaders; however, this can become cumbersome and potentially confusing to raters.

Of course, there are a range of options in between the two extremes of complete data confidentiality and data being available for any type of personnel decision. Data may be shared beyond the leader but remain in the realm of leadership development. For example, elements of the data can be shared with the boss for use in formal development planning, with an internal coach working with the leader, or with human resource professionals who combine data across individuals to identify the developmental needs of leaders across the organization.

There is limited research on how the purpose of 360 Feedback impacts raters. There is some evidence that employees have a more positive view of 360 Feedback when it is used for developmental purposes than when it is used for decision-making (Bettenhausen & Fedor, 1997; 3D Group, 2016). When asked, slightly over a third of raters say that they would change their ratings if the data were used for evaluative rather than purely developmental purposes (London, Wohlers, & Gallagher, 1990). One can point to a more extensive body of research on performance appraisals that show higher ratings on average when evaluations are obtained for administrative purposes compared to those obtained for research or development purposes (Jawhar & Williams, 1997).

Designers of 360 Feedback for leadership development need to carefully consider these options. An organization's culture (e.g., openness of communication, deference to hierarchy) and its history with 360 Feedback are important considerations in deciding whether the data will be used for purposes beyond leadership development. As an organization matures in its use of 360 Feedback, it may decide to move from a development-only purpose to development plus decision-making; however, such a transition needs to be deliberate, transparent, and supported by necessary changes in the system and tools to better fit with a broader purpose. The "development-only" versus "development-plus" debate has existed as long as 360 Feedback has existed and, in our view, can only be resolved locally.

360 FEEDBACK PRACTICES FOR INDIVIDUAL DEVELOPMENT

The success of 360 Feedback for leadership development rests with its ability to stimulate desired changes in focal leaders. The good news is that there is an extensive body of 360 Feedback research (see Atwater, Brett, & Charles, 2007; Bracken & Rose, 2011; Nowack & Mashih, 2012) as well as broad experience using these tools in organizations (see Bracken, Rose, & Church, 2016; Efron & Ort, 2010; Fleenor, Taylor, & Chappelow, 2008; Leslie, 2013), all of which point to useful practices in designing and implementing

360 Feedback for individual leader development. Many of these practices are aimed at providing clarity to leaders about changes they can make for enhanced effectiveness in their organization and motivating leaders to pursue these changes. Equally important are postfeedback development opportunities that are as thoughtfully crafted as the feedback process itself. To maximize its developmental impact, 360 Feedback should be utilized as a tool within a broader leadership development system.

Feedback That Provides Clarity About Needed Changes

Clarity about needed changes is enhanced when the focal leader receives feedback messages that are specific, relevant, and credible. Many design features of the 360 Feedback process impact the quality of feedback, including the instrument itself, the raters, and the delivery of feedback (Chapter 15).

Items on the instrument should describe precise, observable behaviors and skills. Items that ask about traits (e.g., friendly, creative); outcomes (e.g., makes me feel valued, impresses customers); or broad capabilities (e.g., a strategic thinker, talented at dealing with people) are not as helpful for the leader seeking guidance about needed changes. Items should also be relevant to the leader's context, focusing on leader competencies that the organization has identified as important and behaviors particularly germane to the leader's organizational level. Accumulating and sharing evidence that scores on the instrument's leadership dimensions actually do predict leader effectiveness in the organization will bolster perceptions of the relevance of the instrument's content (Chapter 14).

There has been considerable discussion about the best rating scales for items on 360 instruments. The vast majority of instruments use a five-point Likert scale, asking raters to indicate either the frequency of the described behavior or the degree to which the leader exhibits a specific capability. Use of these types of scales have been criticized for yielding a lack of variability in responses across leaders and for low usefulness when it comes to identifying the most important changes the leader should make, prompting exploration of alternative approaches. A promising option is social comparison scales that ask about the leader's skill relative to others (e.g., among the best, about average, among the worst). There are also compelling arguments for asking raters more directly about what the leader needs to change, for example, asking whether the leader needs to do more, not change, or do less of each behavior or asking which skills are the leader's top strengths and developmental needs.

Raters themselves—who they are, their willingness to give honest feedback, their understanding of the process—play a major role in the relevance and credibility of the feedback. Feedback should be invited from all coworkers who have an opportunity to

regularly observe the leader in action. Focal leaders typically generate a list of raters that their managers review and may augment. Raters need to be oriented to the 360 process: how they were selected, how their ratings will be used, and what the outcomes of the process are. To encourage honest responses, rater anonymity should be guaranteed. Rater training is an important but underutilized practice for improving the quality of feedback. Such training can reduce common rating errors, such as recency effects and halo, thus increasing the accuracy of ratings. Educating raters about the leader competencies being evaluated, reviewing the items with them, and creating a shared understanding of the rating scale increases consistency in how raters complete the instrument.

It would seem to go without saying that the feedback data need to be delivered in ways that help the focal leader discern key messages in the feedback. Before receiving their own feedback reports, focal leaders should be adequately prepared to receive and understand their individual feedback reports, ideally in a live group session where questions can be addressed. This is a time to remind participants of the purpose and goals of the feedback process, encourage them to be open to the feedback (e.g., others have invested their time to provide this feedback) and spend an adequate amount of time with their data (e.g., do not make the common mistakes of accepting or rejecting the feedback too quickly), and explain how to read and interpret the report.

The most useful reports are comprehensive yet lead individuals through the data in a step-by-step process, highlighting the results that they should pay most attention to and offering interpretation and suggestions along the way. The visual presentation of the feedback information is important: It is currently one of the weaknesses of most feedback reports. The developers of 360 Feedback instruments often overemphasize assessment quality at the expense of the feedback report design. The field of data visualization should be tapped into more regularly in designing feedback reports that translate large amounts of data into simple yet meaningful visuals.

The most potent way to support focal leaders as they make sense of their feedback and begin to formulate action steps is through a private consultation with a feedback facilitator who is experienced with the instrument being used. These one-on-one sessions should take place after the focal leader has had some time to digest and reflect on his or her feedback. A facilitator encourages sense-making in the face of what can be an overwhelming amount of data by asking questions about what the focal leader sees in the data and about his or her reactions to the feedback (e.g., what is most surprising, most disturbing) and by helping the leader identify themes in the data and seek to understand why different rater groups may have different perceptions of the leader's capabilities. The facilitator also encourages the focal leader to move from sense-making to action planning,

including identifying any puzzles in the data that are best addressed by going back to coworkers for more information.

Feedback Processes That Motivate Change

A feedback process also needs to spur commitment to change and to establish mechanisms that will help maintain that commitment over time. Growth and change takes sustained effort. Given the competing demands on a leader's time and energy, these efforts will wane without strong motivation. Motivating change starts with setting an organizational expectation that 360 Feedback will be used for development. Setting goals based on the feedback then generates motivation for specific changes for each leader. Accountability mechanisms and tracking progress encourage leaders to work toward their goals and realize those changes.

When initiating a 360 Feedback process for leadership development, the message to focal leaders and their raters needs to be clear: We are investing in this process because feedback is key for focusing individual development efforts in directions that matter for our collective success; we expect to see positive changes in each leader who participates. That message is reinforced when the feedback focuses on leadership competencies that the organization has identified as critical and that are already used in the organization (e.g., in performance appraisals and in leadership training programs). Having senior executives who participate in the feedback process and whose subsequent change efforts are visible also strongly reinforces the expectation. Yet, the message of "we expect you to change" is necessary but not sufficient. There is an equally important element to be communicated: "and we know you can change." By encouraging a sense of self-efficacy, organizations are reinforcing a growth mindset (Dweck, 2006), that is, a belief that skills can be developed, which in turn leads to a desire to learn and master challenges.

A 360 Feedback process will have minimal impact if it does not generate development goals and action plans for achieving those goals. The research is clear: Specific improvement goals drive behavior change. Resources for development planning, including a plan template, should be shared with leaders when they receive their feedback reports. Access to feedback facilitators helps ensure that leaders will move from drawing insights from their data to identifying potential goal areas. These initial goal areas should be vetted with the leader's manager. Input from peers and direct reports is also valuable. The final plan should focus on a few challenging goals that, if realized, will benefit the organization, increase the likelihood of tangible rewards for the leader, and generate personal satisfaction. The plan should also articulate how the focal leader will use multiple learning strategies (e.g., practice, ongoing feedback, training programs, developmental relationships, or

challenging assignments) to reach the goals. Sharing the plan with the manager and getting his or her approval increases the likelihood that needed resources and support in implementing the plan are available.

Sharing feedback results with others and involving them in postfeedback action planning also creates a greater sense of accountability on the part of the focal leader to follow through on efforts to change. A three-way session between the focal leader, his or her manager, and a coach is a particularly effective strategy for motivating action in response to the feedback. Ideally, the session is driven by the focal leader, having been coached on how to make the most of the session. The first part of the session is an authentic conversation with the manager not only about the feedback itself but also about the manager's expectations of the focal leader. The aim of the second part of the session is to agree on the most important development goals and how the manager will support work on those goals. Follow-up sessions with the coach and regular check-ins with the manager on goal progress create two accountability partners for the focal leader.

Postfeedback coaching may seem like a luxury reserved for senior leaders and those designated as high potential. However, organizations that invest in 360 Feedback for leaders at all levels of the organization are increasingly leveraging that investment with lower cost approaches to postfeedback coaching. For example, individuals who serve as feedback facilitators may continue supporting change efforts through three 1-hour coaching sessions conducted over the phone and spaced over 6 months. One organization has a cadre of managers trained in coaching skills that they use to provide targeted, short-term coaching to focal leaders (who are not their direct reports) following feedback.

Finally, tracking progress toward goals also motivates focal leaders to continue exerting effort to improve. For example, at the Center for Creative Leadership (CCL) we offer participants the opportunity to get a second round of 360 Feedback to check on their goal progress. This second round is more focused, asking raters about the behaviors and skills the focal leader is working on, and asks raters directly about the amount of change they have observed and the impact of those changes. Some organizations are also experimenting with user-driven feedback tools that allow focal leaders to ask for anonymous feedback from coworkers in real time, for example, immediately after a meeting or at the completion of a major task (Chapter 5).

360 Feedback Embedded in a Broader Leadership Development System

The impact of 360 Feedback is enhanced when the feedback is part of a broader leadership development system. Such systems offer feedback from multiple assessments, opportunities to practice new behaviors and skills and to learn from others, as well

as ongoing support and accountability for development. 360 Feedback is typically embedded in a development system via feedback-intensive development programs, formal leadership development initiatives that extend over time, executive coaching, and the organization's development-planning and succession-planning processes.

In feedback-intensive development programs, 360 Feedback is a central tool. These programs use multiple sources of data to deepen self-awareness and inform development goals. Personality measures provide insights into why certain behaviors come more naturally to the focal leader. Assessments of interpersonal preferences can explain why the leader's typical ways of interacting with others do not always meet their expectations. Examining how personality and preferences shape behavior helps focal leaders see how their internal sense-making may need to shift to change certain behaviors or how particular skills may be more difficult to develop because they require leaders to "go against their grain" in some way. Feedback-intensive programs also use observations of behaviors in simulations and role plays and feedback from fellow program participants to provide additional sources of feedback that can validate and inform insights gained from 360 Feedback. Feedback facilitators work one on one with the focal leaders to integrate data from multiple assessments and identify development goals.

Also, 360 Feedback is used in the front end of development initiatives that extend over time. These programs focus on the dimensions assessed by the 360 instrument, providing opportunities to gain knowledge relevant to each dimension and to practice new behaviors and skills in the safe environment of a classroom. Focal leaders then identify behaviors to experiment with or skills to apply back in the workplace. Follow-up sessions allow leaders to share their successes and challenges, obtain feedback and advice from fellow participants, and gain further coaching from program staff. A second round of 360 Feedback at the end of the program provides a measure of progress and insights for a new round of goal-setting. This structured process helps focal leaders maintain focus and motivation throughout the journey from self-awareness to mastery of new behaviors and skills.

360 Feedback tied to executive coaching allows for a highly customized form of leadership development. As with feedback-intensive development programs, executive coaching may use multiple assessments to deepen the focal leader's self-awareness and to provide the coach with a more nuanced understanding of the leader's strengths and weaknesses. Coaching engagements also are typically charged with identifying development goals aligned with a particular organizational need (e.g., preparing the focal leader for higher level positions, enhancing performance in an arena critical to the leader's current job). Once these goals are identified, the coach works with the leader over time to monitor and reflect on progress toward goals, as well as to discuss issues that arise and

strategies for dealing with those issues. The coach and focal leader may include other stakeholders in the coaching process in ways that facilitate the leader's development efforts.

When 360 Feedback is designed as a "development plus" process, data may also be used in an organization's development-planning and succession-planning processes, again to inform the identification of development goals that will enable the focal leader to better contribute to the success of the organization. Plans for reaching these goals include identifying situations where the focal leader will practice behaviors and obtain ongoing feedback, new assignments that will stretch the focal leader's current skillset, and access to a mentor or experienced peer who can serve as a role model and advisor as the focal leader works on the targeted skills. The implementation of these plans and monitoring of progress need to be jointly owned by the focal leader, the manager, and the process owners.

360 FEEDBACK PRACTICES FOR COLLECTIVE DEVELOPMENT

The deployment of 360 Feedback can be designed to affect leadership in an organization beyond its impact on the focal leader. Used as a broad organizational intervention, it can influence the overall leadership capacity of an organization and, as a result, contribute to the organization's ability to meet its strategic agenda.

Feedback Processes That Educate Raters

The fact that 360 Feedback processes rely on the collective effort of multiple raters is an opportunity to extend its influence far beyond the focal leader. From its deployment to its conclusion, a 360 Feedback process needs not only to engage raters in meaningful ways but also to educate them about what effective leadership looks like in the organization and how their feedback plays a critical role in producing this leadership.

The education of raters begins with the solicitation to participate in the process. This is not an *invitation* to participate, it is an *expectation* to invest in creating the kind of leadership the organization needs for success. A well-designed communication campaign begins with a clear message from the chief executive officer or head of human resources about why the 360 is being deployed, the raters' critical role for its success, and the mechanics of the process (e.g., anonymity of ratings).

Rater training should provide an opportunity to reflect and think, in a structured manner, about the organization's leadership competency model. The act of rating a coworker on items that reflect these competencies provides a unique opportunity to

promote and reinforce them throughout the organization. This reinforcement is further enhanced when employees evaluate multiple focal leaders; distinctions between leaders expose employees to variance in behaviors, furthering the refinement of their comprehension of the model.

Asking focal leaders to share with raters insights from the feedback, as well as their development plans, reinforces the importance of the rater's role in leadership development. These coworkers then have a front row seat as the focal leader works to change and grow and should have opportunities to provide ongoing feedback that helps the leader track progress and make adjustments. As noted, 360 Feedback is the beginning of a development process that unfolds over time. As active participants in the process, raters can themselves learn, albeit vicariously, from the development successes and challenges of the focal leader.

360 Feedback at All Levels

To use 360 Feedback as a tool for developing collective leadership capacity, organizations must ensure that leaders at all levels receive feedback. This goal of inclusiveness can be achieved in multiple ways. Organizations might opt to make 360 Feedback a regular element of each job move a leader makes, administering a 360 instrument 6 to 12 months into the assignment. Another option is to include 360 Feedback in mandatory leadership development programs for leaders moving to new levels of responsibility in the organization. When the data will be used in other talent management processes, organizations often deploy 360 Feedback as an organization-wide assessment that is repeated at regular intervals. Some organizations use a cascading approach, starting with top leadership and then moving through each subsequent management level. This not only reinforces the importance of the process in the organization but also gives managers a first-hand experience before they are called on to support the process with their direct reports.

Implementing 360 Feedback across levels in a single administration has its challenges. Most notable is the load on raters who are completing assessments of their boss, multiple peers, and multiple direct reports. Instruments with fewer items can lighten this rating load. Another option is to spread the rating load across time by administering 360 Feedback to a portion of the organization's leaders on a rotating basis (e.g., providing feedback to a quarter of the leader population every 3 months). Single administration can also overtax feedback facilitation and coaching resources, leading some organizations to opt out of using these impactful practices. On the other hand, single administration may be necessary to supply needed data to other talent management processes in a timely

way, and rating multiple people at once may help raters better discern competency-level differences across various colleagues.

Deploying 360 Feedback across all levels also generates data that help organizations diagnose leadership issues and opportunities in their population of leaders. If leaders across the organization, at particular levels, or in certain regions are rated lower on particular competencies, then extra developmental attention can be given to those competencies. If leaders in certain regions or functions are rated noticeably higher on particular competencies, then leaders in these groups could be a useful source for mentors, or rotational assignments into these groups could provide access to knowledge and role models for developing these competencies. Having 360 data from all leaders (and across time) is also valuable from a talent analytics perspective, for example, to discern competency patterns related to employee engagement or to identify recruiting sources for leaders who are rated highly on skills essential to the organization.

360 Feedback as the Cornerstone of a Feedback Culture

A strong feedback culture is one where individuals continuously receive, solicit, and use formal and informal feedback to improve their job performance (London & Smither, 2002). A 360 Feedback process that incorporates many of the practices we have already noted—rater education, broad participation, sharing feedback results, and integration with a leadership development system—can serve as a cornerstone for developing such a culture. These practices emphasize the value of feedback for the individual and the organization, provide a structure for giving and receiving high-quality feedback, make leaders' efforts to change and grow in response to feedback more visible, and encourage more informal feedback in support of that development. With these practices in place, a 360 Feedback process can provide a training ground for feedback conversations and can enhance comfort with feedback and with conversations about performance at work.

The limited research in this arena is promising. Participation in a 360 process appears to promote open communication and interactions between employees (Druskat & Wolff, 1999). And, organizations that use 360 Feedback have higher levels of knowledge sharing among employees and increased productivity compared those that do not (Kim, Atwater, Patel, & Smither, 2016).

The role of 360 Feedback in developing a feedback culture is strengthened when senior leaders demonstrate that feedback is essential for their own self-awareness and continued development. They send a powerful signal to organizational members when they launch a 360 process with their own participation. For example, we know of a newly appointed leader of a healthcare organization who, in the first few months of his

tenure, asked all 400 employees to evaluate him. Although it may have been preferable to conduct the assessment after his employees had more opportunity to observe his behavior, the main point of the exercise was to send a very direct message that feedback mattered. Senior leaders also send a powerful message when organizational members are aware of how their leaders are making use of their feedback. For example, in one organization we have worked with, it is well known that executive team members meet to share their feedback with one another and use this discussion to set individual and shared goals.

CONCLUSION

The use of 360 Feedback in contemporary leadership development has become ubiquitous. Be it as the cornerstone of wide-scope leadership development programs aimed at middle managers, as part of individualized programs designed for higher level executives, or as input to annual development-planning processes, 360 Feedback provides a level of clarity that is unique and essential to guide leadership development efforts. In addition, 360 Feedback possesses the distinct capacity to trigger and stimulate desired changes in leaders. However potent these processes may be, 360 Feedback processes can be complex to manage; thus, careful design and implementation considerations are needed to achieve maximum impact.

As a practice, 360 Feedback has long been viewed as a process for individual development. However, this perspective limits the value of 360 Feedback for organizations. Increasingly, investments in 360 are embedded in broader interventions aimed at impacting organizational leadership capacity. With this broader perspective, 360 Feedback can contribute to an organization's strategic intent by operating as a lever for collective leadership improvement and organizational change.

Key insights for using 360 Feedback for leadership development include

- The choice between using 360 Feedback for development or development plus is significant. In making this choice, an organization has to consider the context within which the 360 will be used. Once a purpose has been established, expectations of all users have to be managed carefully (e.g., confidentiality, ownership of the data).
- The most effective 360 processes are meticulously designed. From the selection of participants and the initial communications to target leaders and evaluators to feedback report design and postfeedback support, every step of the process

requires attention to design details to ensure high impact and alignment with purpose.

- Postfeedback development opportunities need to be as thoughtfully crafted as the feedback process itself. Feedback increases self-awareness and motivates change. Without targeted opportunities to practice new behaviors, learn from skilled others, and receive ongoing real-time feedback and support, the insights gained from 360 Feedback may not lead to actual development.
- A feedback culture in which informal feedback is valued and encouraged also enhances the value of a 360 Feedback process. At the same time, the introduction of strategic approaches to 360 Feedback can advance a feedback culture by signaling its importance for organizational success.
- Organizations can expand the impact of 360 Feedback by using it not only to develop focal leaders but also to develop raters. A 360 process that educates raters about important leadership competencies, asks them to be mindful about what they are evaluating, and involves them in postfeedback support of the focal leader can have positive effects on their own leadership capacity.

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