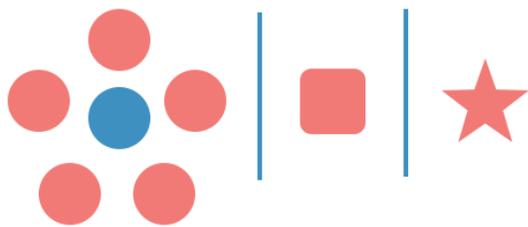


 PerformYard

360 Review

Process Template



This 360 review process template includes a timeline, quick feedback guide for employees, peer review questions and process suggestions. Please use the template as a jumping off point and make changes to suit the needs of your organization.

Timeline



The suggested timeline spans five weeks. It uses a staged approach that allows managers to read and analyze peer and self reviews before creating their own summary review.

This approach spreads the review cycle over a longer period of time, allowing employees to make a case for themselves in their self review ahead of the manager's review. Also, peer reviews can be screened and summarized by the manager to help create a clearer narrative.

In the following sections, we break down each stage and provide process suggestions.

Before Your Cycle: Feedback Training

Quality feedback is essential to the success of a 360 review. You should take time to train employees on how to write constructive feedback that helps, rather than hinders employee development. We suggest you share these guidelines when you launch your performance review cycle.

Keep positive feedback meaningful: Reserve recognition for great performance. Don't try and sugarcoat a review by including irrelevant or overblown praise. This can create a confusing message, distorting other feedback.

We're not suggesting that you go negative! Simply focus on the extraordinary in actions big and small.

Support positive feedback with details: Focus on what went right and why. Digging into all the gritty details focuses feedback on actions rather than just results. Positive feedback feels good, but it should also help us learn from our success.

For negative feedback, be a coach: It can be easy to call out all the things you think went wrong, but it's much harder to show someone the path to what's right. Highlight potential solutions rather than dwell on the examples of failure.

Focus on work, not character: No one wants to be judged on their character. It isn't productive, makes people defensive, and doesn't provide solutions.

Frame your feedback around the work itself. For example, don't say, "you're unorganized." Say, "you're forgetting to call people back, and that's a problem because..."

Provide examples: Concrete examples help employees understand the feedback, and they provide a better foundation for conversation. For example, rather than saying, "you're missing too many deadlines," say, "you missed the deadline for these five projects..."

Stage 1: Nominate Reviewers

The key to a good nomination process is clear criteria. Decide ahead of time who should be reviewing whom. For project-based organizations, team leads will often be chosen to provide 360 feedback. For employees working onsite, clients can be chosen. Managers can receive feedback from their direct reports. Employees can receive peer feedback from their immediate team, or from other departments their team interacts with frequently. No matter which criteria you choose, stick to it.

Next, ask employees or their managers to choose 3-5 reviewers based on the criteria. This can also be done by HR if they have the data necessary.

Following the nominations, have managers or HR review the choices. 360 reviews are about uncovering new and diverse feedback, so reviewers should not always come from the same small circle of close colleagues.

Stage 2: Peer Reviews

With peer reviews, we're looking for more and diverse feedback, not a final answer on performance. Stick with high level questions that draw out details you won't get from a manager review. A simple rating or yes/no question on overall performance is also useful. Keep the forms short; employees need to fill out multiple peer review forms and should be able to complete them efficiently.

Here are a few questions that we've found to be very effective.

Share examples of when this employee contributed at a very high level.

Share examples of when this employee could have done better.

*Would you always want to have this employee on your immediate team?
(Yes/No)*

Stage 3: Sign-Off on Peer Reviews

Managers should sign off on peer reviews. This ensures the feedback is constructive and gives managers time to follow up with reviewers if anything needs clarification. If you are very concerned about problematic feedback, or you need more time to train managers on effective feedback, HR can also sign-off at this stage and use it as a training opportunity.

Stage 4: Manager Reviews

In a 360 review, the manager review can serve to create a throughline or cohesive narrative that helps the employee interpret peer feedback and decide how to act upon it.

A common complaint against 360s is that employees get lots of feedback dumped on them and then feel overwhelmed, hurt, alone, and unsure what to do next. A good manager review addresses this issue. Managers can also provide more context on what feedback deserves the highest priority.

Here are three prompts we've used to focus manager reviews:

From the peer feedback on positive contributions, find up to three themes and sort them from highest to lowest impact. Support the themes with examples from peers or your own experience.

From the peer feedback on opportunities for improvement, find up to three themes and sort them from highest to lowest priority. Support the themes with examples from peers or your own experience.

Share additional context you think is important for any specific pieces of peer feedback.

Stage 5: Sign-Off on Manager Reviews

HR and/or leadership should sign off on manager reviews. The sign-offs can seem like unnecessary steps, but they create valuable checkpoints in the review process that HR can use to make sure everyone is completing their reviews. They also are an opportunity for training, improving the process during the current cycle. Having HR and leadership read these manager reviews will also give the company a better understanding of how teams are functioning.

Put those reviews to work for good!

Stage 6: Performance Review Meeting

Send your employee their completed 360 review ahead of their in-person review meeting. We find the sweet spot to be a few hours to one day ahead of the meeting. This way, your employee has the opportunity to review and digest the feedback. Providing feedback in advance can take the stress out of review meetings, as employees know what is on the table ahead of time. However, don't send the package too early, as you don't want people stewing on things for days before they have the opportunity to get the full context.

If you're training employees well enough on providing quality feedback, and fixing any poorly presented feedback in the sign-off steps, then we'd suggest presenting the employee all the feedback attributed to the people who provided it. That said, you may want to run a cycle or two with anonymous feedback until employees are comfortable receiving peer critiques.

When it comes to the in-person meeting, set aside plenty of time for the manager and employee to have a thorough discussion of the feedback. This meeting is what everything has been building towards. The result of a 360 review is not a bunch of filled out forms; it's an informed and productive discussion of past and future performance.

We suggest starting the meeting with a review of employee goals. It may be counterintuitive, but starting with a discussion of the employee's and company goals helps align the rest of the conversation around a purpose. For example, instead of saying, "I'd like you to be better at X," you can say, "Improving at X will help us achieve Y."

Then move on to a discussion of what's going well, giving the employee plenty of time to advocate for themselves.

Finally, discuss areas of improvement. It's important to let the employee kick off this section of the review, as it leads to productive and less defensive conversations. If you're already in agreement on certain points, then there is no need to harp on understood shortcomings. Instead, engage around solutions.

Remember: this is an opportunity for growth and development. Focusing on a solution, rather than failure, will provide the employee with a path forward.



Performance Management that's Easy for Everyone

PerformYard streamlines the 360 review process by automating time consuming tasks like organizing nominations, distributing forms, managing sign-off workflows, controlling anonymity and visibility of feedback and much more.

To learn how PerformYard can streamline and formalize your organization's performance management process.

- visit performyard.com/demo
- or call (888) 745-0761