



**EQ 360<sup>®</sup>**  
assess. predict. perform.



# Top Tips for Using a 360 Assessment in Performance Appraisals



- Project delivery; a case study
- Performance appraisals; best practice
- Research results; ratee gender differences

# What is a Performance Appraisal?

Formal process for employees and those concerned in their development to discuss individual performance over the last 12 months and the development opportunities to take forward in to the coming year

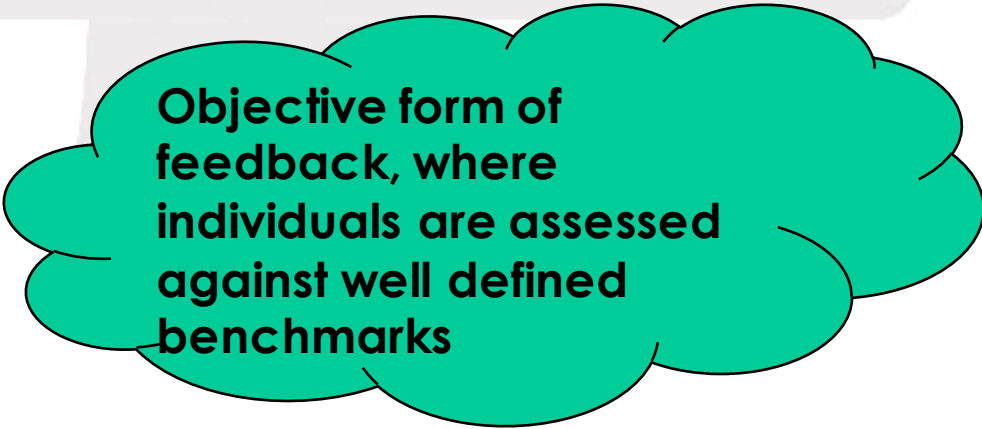
Objective?

- identify employee training and development needs
- help identify the support they need in order to achieve this
- effect promotions based on competency and performance
- improve communication between employees and managers
- determine whether selection, training and development programmes are being effective?

# Difference between...

## Performance Management and Performance Appraisals?

- Performance Management
  - Continuous and ongoing
  - Formal and/or informal
- Performance Appraisals
  - Periodic (usually annual)
  - Formal review

A green, cloud-like graphic with a black outline, containing text. In the background, there is a large, light gray speech bubble and two faint silhouettes of people walking.

**Objective form of feedback, where individuals are assessed against well defined benchmarks**



# Methods of appraising performance?

## Traditional methods:

- Forced Distribution Method
- Graphic Rating scale
- Narrative Method
- Critical Incident Technique

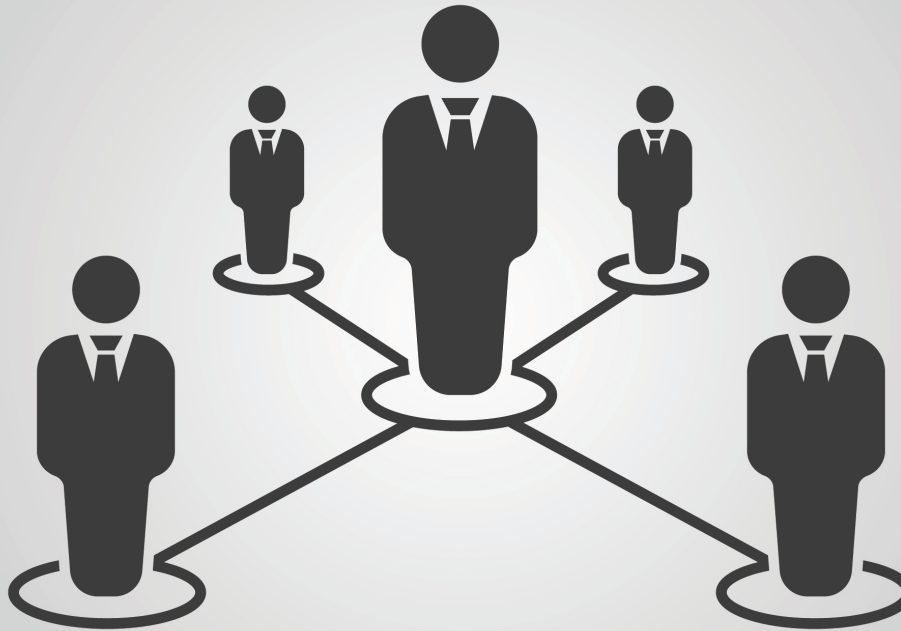
## New methods:

- Behaviour Anchor Rating scale
- Online web based performance appraisal
- 360 assessment
- Assessment centres

# The challenge?

- Biased: halo/horn effect
- Competencies not clearly defined e.g. results focused –  
what does this mean?
- Difficult to develop and expensive
- Ratings scales are not standardised
  - What does a rating of 6 mean?

# What is 360 assessment?

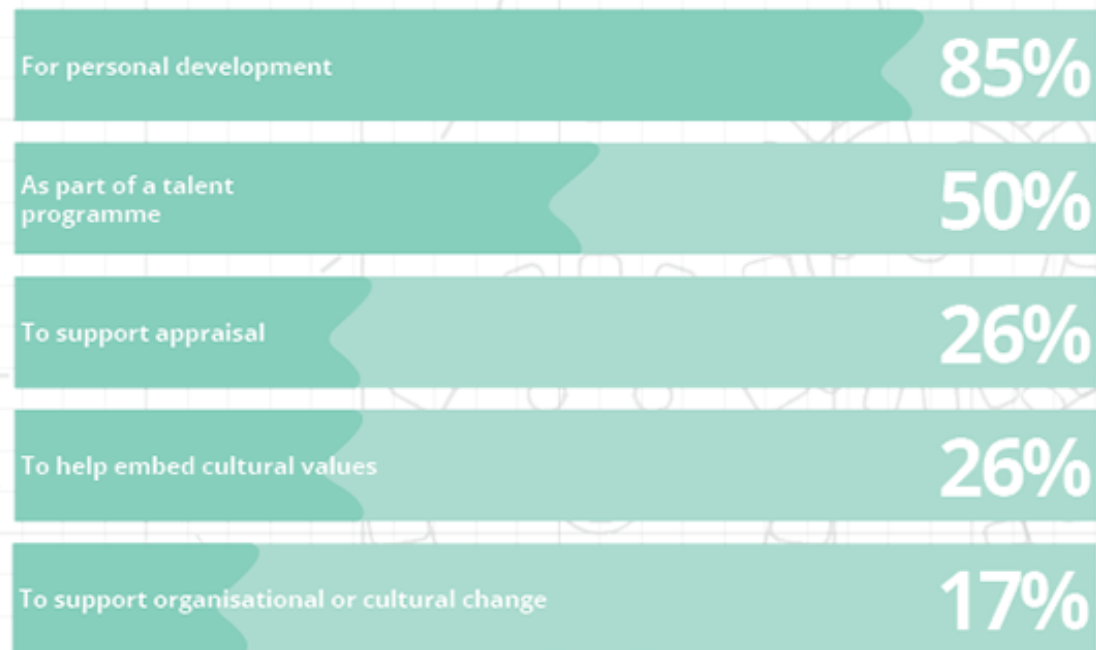




## 1. What's 360 degree feedback being used for?

Once upon a time, 360 degree feedback was used almost exclusively as a development tool for senior leaders. This is no longer the case. This report's findings reinforce a trend seen in our 2010 report and show that organisations are increasingly using 360 to support various business objectives.

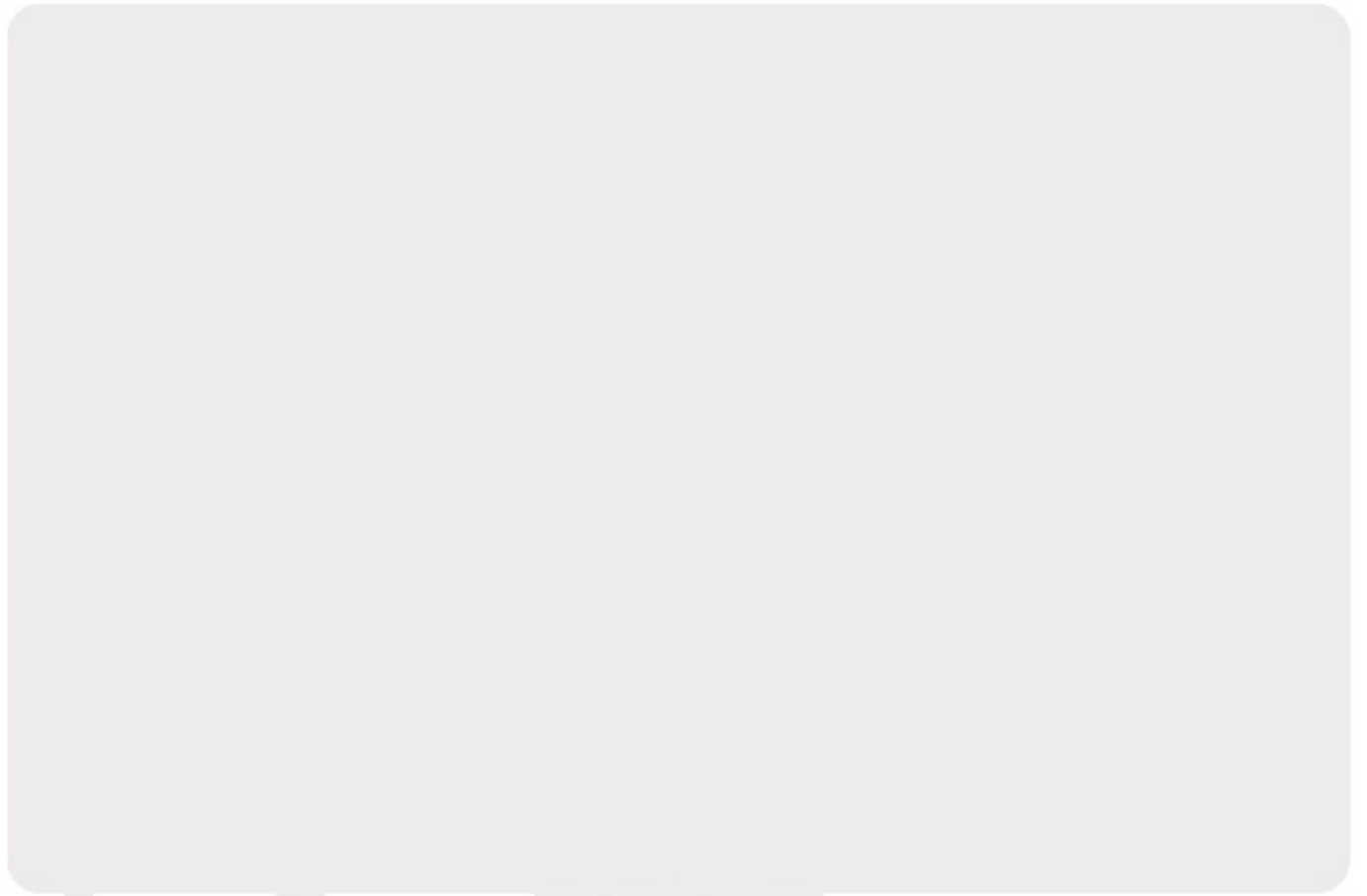
### For what reasons are organisations using 360?\*



\*Respondents were asked to indicate all purposes that apply

Project delivery

# A CASE STUDY





3 levels - *some overlapping*  
behaviours identified

## Customer Focus

Partners	Client Manager	Ass Client Manager
Customer Focus	Customer Focus	Customer Focus
Strategic Awareness	Results Orientation	Attention to Detail
Persuasive Communication	Communication Skills	Communication Skills
Creative	Project Management	Information Management
Leadership Po	People Management	Team Orientation
Decision Mak	Planning and Organising	Planning and Organising
Developing Others	Developing Others	Developing Others
Results Orientation	Problem Solving	Analytical
Delegating	Delegating	
Motivation	Motivation	Motivation

## Developing others

## Motivation



3 levels - some *different behaviours relating to that role*

Attention to detail

Creative

Problem Solving

Persuasive Communication		
Creative		
Leadership Potential		
Decision Making		
Developing Others		
Results Orientation	Problem Solving	Analytical
Delegating	Delegating	
Motivation	Motivation	Motivation



# Competency: identifying behaviour(s)

**Decision Making** - *'has the vision to make strategic decisions'*  
*'ensures that all decisions are well informed'*

**Developing Others** – *'able to support and mentor others in the workplace'*

**People Management** = *'doesn't do things simply to remain popular'*

Ratings: Strongly agree, agree, somewhat agree.....strongly disagree



# Competency rating

Exceeds competency consistently	10
Meets competency	9--8
Partially meets competency however still needs to focus on development of some areas	7--4
Requires development to meet competency	3--2
Needs to develop competency	1



# Leadership potential

## Positive Indicators

- Takes an independent view of issues
- Welcomes the views of others, but subjects them to rigorous evaluation
- Communicates a motivating vision to back their proposals
- In touch with industry developments and is strategic about company direction.
- Maintains positive team relationships while preserving managerial authority.

## Negative Indicators

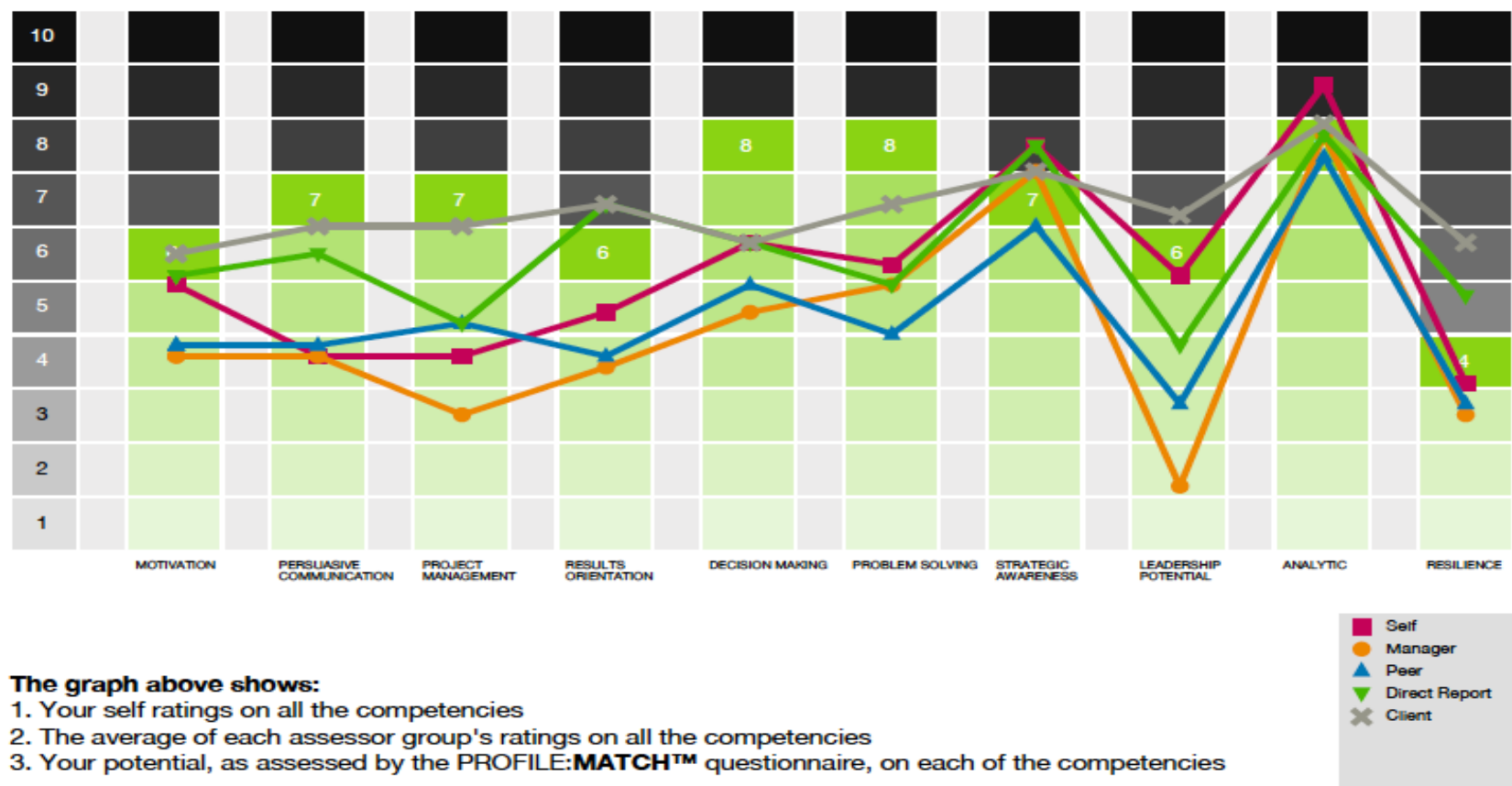
- Easily swayed by group pressure
- Decisions are influenced by a desire for personal popularity
- Finds it difficult to create a vision and gain 'buy-in' from others
- Has a narrow perspective and ignores the bigger picture
- Seems unaware of the feelings and concerns of team members

# Customer Focus

- Can challenge clients when appropriate
- Has a positive and optimistic approach when dealing with clients
- Understands the critical importance of strong client relationships to business success at X
- Takes the company values around client care and strategies on board and acts by them
- Attentive and displays active listening skills**

- Has difficulty understanding client challenges
- Quick to show irritation and impatient when dealing with clients
- Does not understand the importance of strong client relations to business performance
- Acts individualistically and is unconcerned about company values around client care
- Slow to act. Does not follow through on commitments or on resolving issues

## Overall profile - the big picture



# Benefits of a 360 approach?

- Increases self awareness and recognition of development needs
- Provides an objective form of feedback
- Minimises halo/horn effect
- Facilitates open communication ethos
- Increases employee motivation and confidence

Performance Appraisals

# Best practice

# Appraising past performance ....with the future in mind..



Profile: **Match2**

Sam Sample

PROFILE 1: Sam Sample's personality profile  
*Your temperament*

	SCALE	T SCORE	LOW MEANING	STEMS										HIGH MEANING
				1	2	3	4	5	6	7	8	9	10	
ADJUSTMENT	SELF-ESTEEM	35	Apprehensive Self-doubting Self-conscious Self-critical Worrying Anxious			3								Confident Self-assured Unfazed Trusting Optimistic Bold
	COMPOSURE	41	Intense Irritable Moody Passionate Emotional Turbulent			4								Composed Calm Stress-tolerant Steady Unemotional Imperturbable
EXTROVERSION	SOCIABILITY	50	Inhibited Reserved Reluctant Solitary Socially anxious Uncommunicative					6						Demonstrative Outgoing Talkative Ongregarious Socially confident Seeks the limelight
	ASSERTIVENESS	50	Reserved Lethargic Uncompetitive Not goal focused Reserved about status Unassuming					6						Determined Driven Eager to take charge Keen to impress Energetic Ambitious
AGREEABILITY	SENSITIVITY	33	Exact Aloof Task focused Tough minded Unsympathetic Critical		2									Caring Convinced People focused Sympathetic Warm Friendly
	ACCOMMODATION	56	Independent Self-sufficient Fortnight Uncompromising Impartial Individualistic						7					Communal Needy Averse to conflict Eager to fit in Unorthodox Inter-dependent
CONSCIENTIOUSNESS	COMPLIANCE	73	Unpredictable Challenging Inquisitive Capricious Spontaneous Risk taking										10	Conforming Rule abiding Obedient Tactful Cooperative Risk-averse
	PERFECTIONISM	57	Casual Unsystematic Impatient with detail Flexible Proportionate Undisciplined						7					Systematic Organised Detail conscious Inflexible Pussy Compulsive
OPENNESS	IMAGINATION	51	Realistic Practical Unquestioning Down-to-earth Not easily bored Pragmatic					6						Conceptual Curious Innovative Big picture orientated Analytical Destructive
	STUDIOUSNESS	73	Spontaneous Resists being taught Learns by doing Apathetic Learns the necessities Faith in experience										10	Factual Learning for pleasure Knowledgeable Wiley informed Well prepared Faith in information

Validity of these results  
Sam Sample endorsed 10 items on the PROFILEMATCH™ Consistency scale. This score indicates that the profile is valid and interpretable.



Profile: Match2<sup>®</sup>

Rater Comments

### Responses to extra questions

The individual assessor responses to the extra questions are given below. These may give valuable additional information about how the assessee is perceived at work and how others rate their contribution.

**Is there one particular characteristic that contributes most to the candidate's success in their present role?**

**Answer 1:** Sam's willingness to get stuck in and attention to detail

**Answer 2:** Highly committed with strong work ethic

**Answer 3:** Technical ability

**Answer 4:** Very approachable

**Answer 5:** No comments made.

**Answer 6:** Composed under pressure, maintains good sense of humour

**Answer 7:** Very hard working and has a great attention to detail. Takes time to review his work and also to help others. Patient at explaining things to colleagues.

**Answer 8:** Sam is approachable and easy to work with, he quickly builds rapport with his colleagues and has strong working relationships with my longer serving members of staff.

**Answer 9:** Sam is very 'can do' in his approach

**Answer 10:** Takes ownership of all projects in hands and achieves the results in the most efficient way.

**What single improvement would make the greatest difference to the candidate's performance in their present role?**

**Answer 1:** Sam should believe in himself more!

**Answer 2:** Less defensive and irritable at times of high pressure

**Answer 3:** Trying to be more relaxed when things go wrong

**Answer 4:** No comments made.

**Answer 5:** No comments made.

**Answer 6:** Be more prepared to question or change established processes

**Answer 7:** No comments made.

**Answer 8:** There is no single improvement I feel would make a significant difference to Sam's performance. I am unable to offer any constructive criticism as in my dealings with Sam I have found him to be knowledgeable, dependable and easy to work with.

**Answer 9:** I cannot say I noted any development issues in my dealings with Sam

**Answer 10:** No comments made.

**Is there any other point that you wish to make about the candidate's work performance?**

**Answer 1:** I have absolute trust in what Sam does

Open ended questions  
allow for an open  
conversation about  
strengths

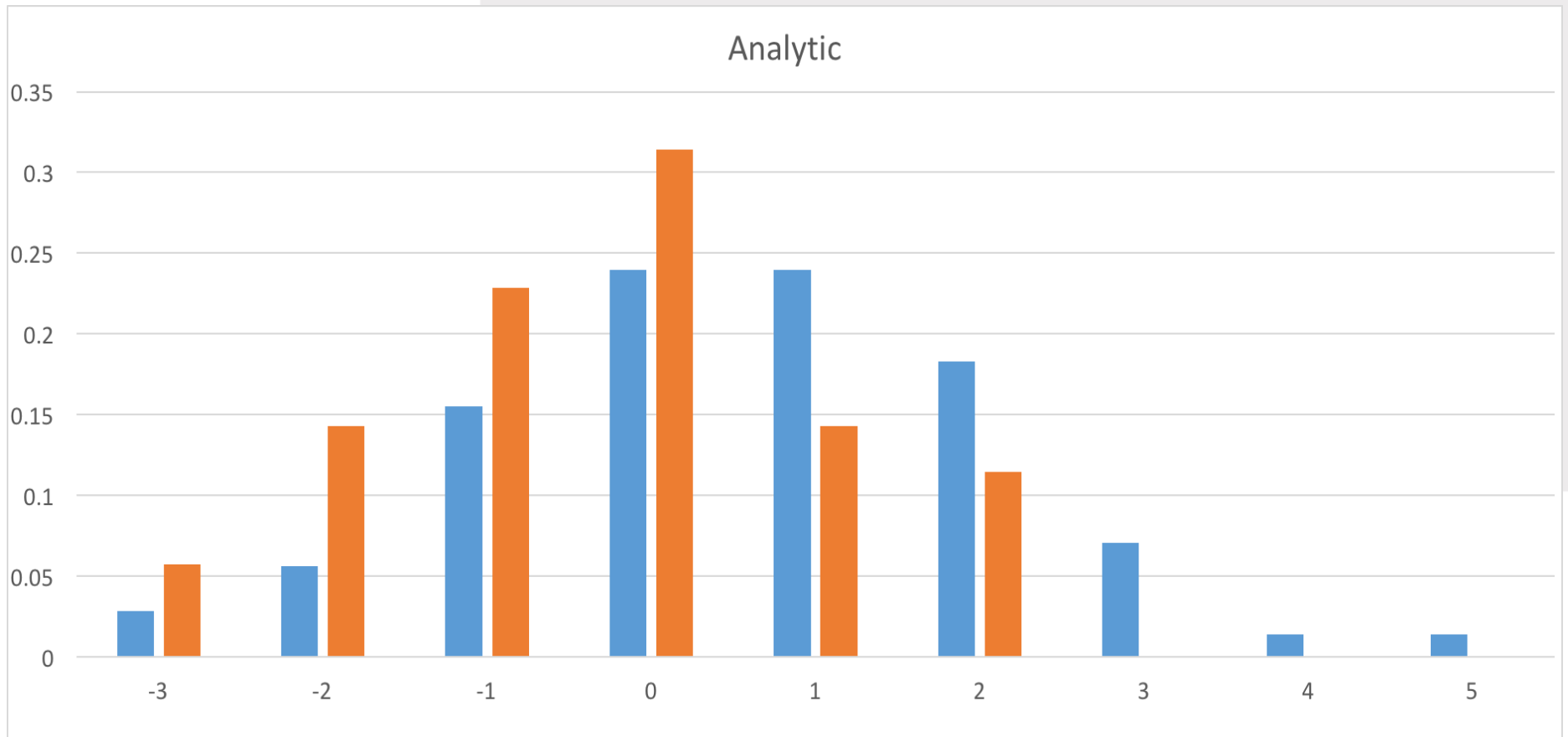
Are they being utilised and  
fully realised or are there  
opportunities in the  
business to use them  
elsewhere or within a  
different job role?

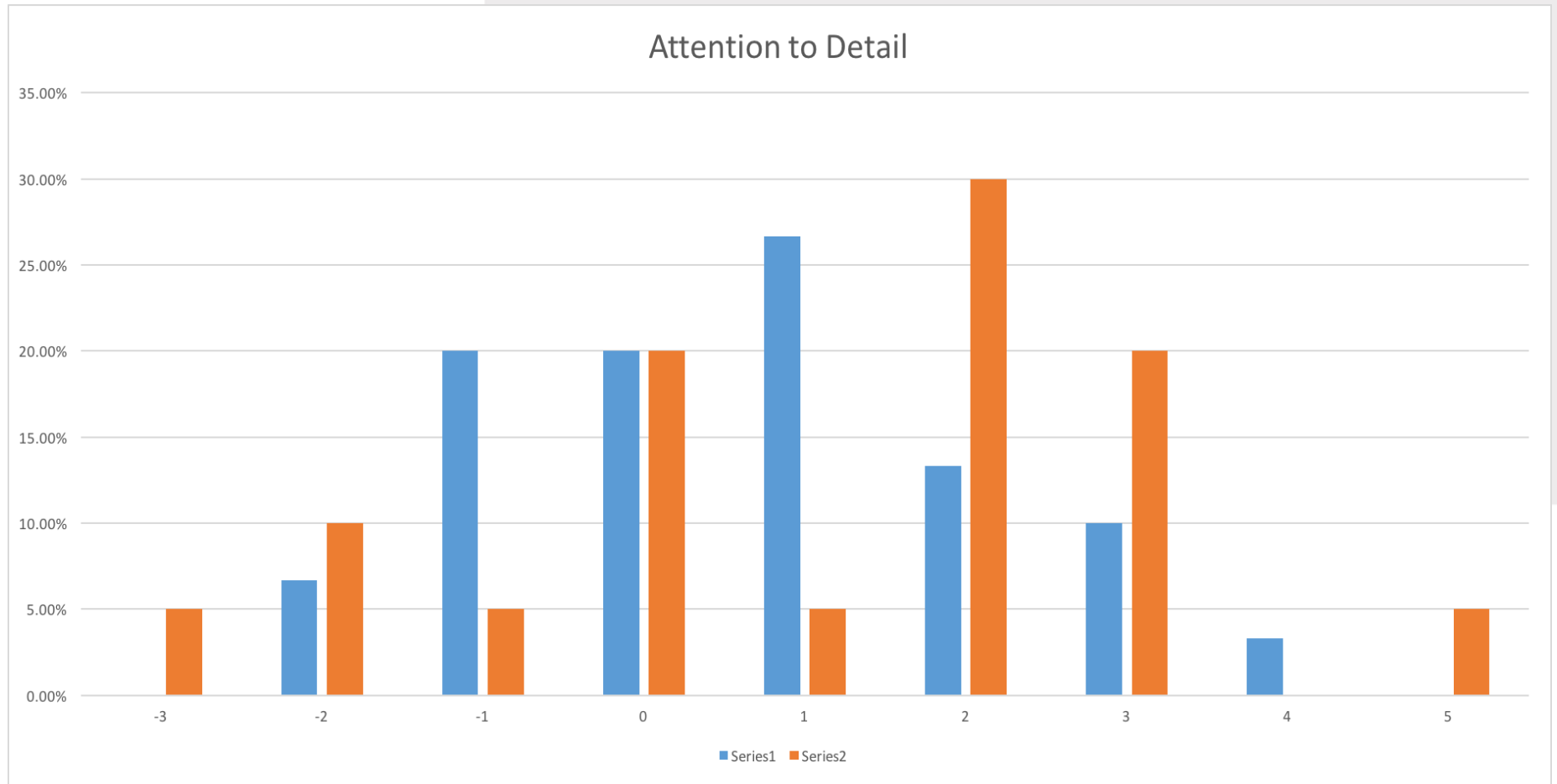


- The world of work today...
  - Flexibility
  - Transferable skills
  - Transitioning across different departments
  - Career change opportunities
  
- So can be prepared for:
  - Business development and growth
  - Future business innovation and change
  - Succession planning
  - High potential

Research results

# **RATEE GENDER DIFFERENCES**





## Benefits of 360's in Performance Appraisals?

A larger proportion size of women under rated themselves in comparison to men

21 out of the 24 competencies for women in comparison to only  
4 out of 24 competencies for men

**Gives a full 360 perspective – objective, unbiased so you can identify an employee's full potential**



# Any Questions?

Attendee discount offer of **25%**  
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Quote reference PCL360

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\* EQ-i2.0 is part of the EQ360 certification process

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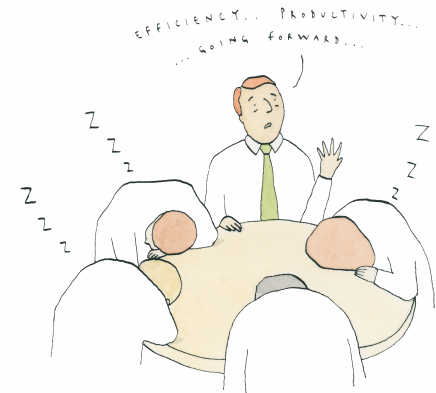


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# Benefits of 360° Assessment

- Increases self awareness and recognition of development needs
- Provides an objective form of feedback
- Minimises halo/horn effect
- Increases employee motivation and confidence
- Facilitates open communication ethos





# Pitfalls of 360° Assessment

- Time consuming and difficult to manage
- Contributions becomes personal and unconstructive
- Can be de-motivating for ratee
- Process becomes the ONLY platform for employee feedback
- No follow through or action plans taken forward

