People Skills 360® FEEDBACK
FACILITATION CHECKLIST

QUESTIONS TO ANSWER BEFORE CONDUCTING THE FEEDBACK SESSION

- ❑ Why is this being done? What is the goal for the learner, team, and organization? What is the purpose?
- ❑ What type of buy in does the organization have from executives?
- ❑ Who is eligible for 360° feedback?
- ❑ Who is sponsoring this effort?
- ❑ Who gets to see the report?
- ❑ What is the role of the learner's boss?
- ❑ What is the role of HR?
- ❑ Who will facilitate the feedback session?
- ❑ Will there be a group report? If yes, who will get to see it?
- ❑ What is the learner's experience with 360?
- ❑ Who picks the raters?
- ❑ How many raters?
- ❑ What is the rater experience? Will there be rater orientation or debrief?
- ❑ What competencies will be included? Will the importance questions be included?
- ❑ What sections of the report will be included?
- ❑ What support is in place from the organization?
- ❑ How much time is set aside for the initial feedback session? Is follow-up included?
- ❑ Is this a follow-up to group feedback?
- ❑ Is it expected that an IDP will be created? If so, is it public or private?
- ❑ Will development tracker be used?
- ❑ How will the learner get their report?

PREPARE FOR THE FEEDBACK SESSION

- ❑ Determine your role as a facilitator

- ❑ Understand the expectations of the session and communicate it to the learner

- ❑ Review the report and understand the "story"

- ❑ Prepare a feedback strategy

- ❑ Gather materials: Report, PSH, "Placemats," highlighters, pens, tissues, etc.

- ❑ Pick a neutral setting where there won't be any interruptions – sit side by side

- ❑ Order feedback report so there is a logical flow to the process (broad perspective to greater level of detail)
  Suggested order:
  - o Skill Rating Overview
  - o Importance Rating Overview
  - o Blind Spots
  - o Hidden Strengths
  - o EQ Report
  - o Narrative Report
  - o Scoring Distribution Summary
  - o Group Summary On Skill Ratings
  - o Group Summary On Importance Ratings
  - o Skill Importance Matrix
  - o Comments By Raters

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DURING THE FEEDBACK SESSION

❑ Getting started
- o Introductions and your background
- o Answer any questions on the 360° process
- o Review confidentiality, who gets a copy of the report, expected follow up, etc.
- o Review expectations for the session
- o Overview of competencies (if necessary)
- o Review of the raters (who and why they were chosen)

❑ Review relevant background information/context for the session
- o Experience with 360° feedback (prior reports to look at?)
- o Work history
- o Current role, current boss
- o Current issues to call out
- o Current business objectives
- o Career objectives
- o Anything to call out that may be relevant in interpreting the results?
- o Is this the first time seeing the results?

❑ Goal setting
- o Determine the learner's objectives in the feedback session
- o Determine the learner's long term objectives
- o Determine the learner's expectation of you as a facilitator
- o Link objectives to business goals (if applicable)
- o Self assessment of strengths and opportunities – how does the learner currently view themselves – highlight the cluster sheet

❑ Understanding the perspective of others – review the feedback report
- o Provide a high level overview of the report
- o Explain that there is a lot of information and encourage the individual to set aside additional time to review the reports after the session
- o Walk through each report and briefly describe what is contained in each report
- o As you review the report ask questions to engage the learner:
  - What do you notice/what stands out to you?
  - What are your reactions?
  - How consistent is the feedback with how you see yourself?
  - What specific events were you thinking about when you answered the questions?
  - Any surprises? What was confirmed?
  - What have you taken away from this feedback so far?
  - What troubles you the most?
  - What would you like to do next with the feedback?
- o Point out what you see in the report
  - Overall pattern of results
  - Agreement between self and other
  - Differences in the rater groups
  - If derailers are used – ask "what might stall your career?"
  - Build on the individual's comments and solicit additional reactions:
    - ▪ "One observation I had is -------------- what do you think of that?"
- o Summarize
  - What is the story or overall pattern you see here?
  - What themes do you see (both strengths and opportunities)?
  - What do you see as your primary strengths?
  - What do you see as your key development needs?
  - What are your 2-3 insights? How would you summarize what we talked about today?

DURING THE FEEDBACK SESSION (ct'd)

❑ Closing and Next Steps
  - o Encourage the individual to set aside time to review the feedback
  - o Discuss how to solicit additional feedback from raters if clarification is needed
  - o Highlight the development plan and reinforce to 70-20-10 guide to development
  - o Brainstorm development opportunities
  - o Discuss how the learner will follow up with manager and raters
    - Encourage learner to share what they'll be working on and be open to additional feedback

ADDITIONAL

❑ Facilitating closure with raters (suggested script):
  "*I have completed my 360° feedback session and it was very beneficial and informative. Thank you for supporting my development by taking time to rate me. I have learned that _____ are some of my best developmental opportunities. I would welcome and appreciate your continued informal feedback on my growth and development of these competencies/areas.*"

❑ Asking for additional feedback:
  "*I am committed to my development and was hoping you could provide me with some additional suggestions that will help me build my development plan.*"

  "*I would like some additional feedback on _____. Can you provide me with some specific examples of where you have seen me _____. What would you suggest I do differently to be more effective?*"

  Ask open ended questions to draw out the other person's perspectives:
  "*What is your perspective?*"
  "*How do you think I could have been more effective?*"

  Paraphrase the other person's perspective to convey that you have heard and understood the speaker's points:
  "*So, you think I can improve by doing _____.*"

  Summarize what you plan to do and express appreciation for the feedback:
  "*I really appreciate you taking the time to give me some feedback. The next time _____ comes up I'm going to try and do _____.*"