360 Reviews

Most employees are familiar with the typical annual or semi-annual reviews that their supervisors routinely conduct. These reviews only involve the employee receiving feedback from a single perspective: their manager's.

While those reviews are vital, they rarely provide feedback that leads to the professional development of the employee. Typically, a standard job review focuses on the employee's level of success (or failure) in performing their current job duties and not much more.

360 reviews help people develop business and interpersonal skills. In particular, they focus on three key pieces of feedback:

1. Identifying a starting point for the development of new skills.

2. Measuring progress as the subject works on skills over time.

3. Identifying the personal blind spots of behavior and the impact that everyone has but never notices.

They are a professional feedback tool designed to help anyone from a CEO to a store clerk develop and hone their professional skills. While a standard review is about the employee's job performance, a 360 review evaluates the employee themselves. That makes it very personal and very powerful; that's why we built a tool to easily conduct a 360 review using SurveyGizmo!

Want to learn more about 360 Assessments? Check out our Guide to 360 Reviews.

Step 1: Create a Spreadsheet of all Employees

The first and the most complex step of creating a 360 Review Project in SurveyGizmo is creating a spreadsheet for all of the employees in your organization. There are two spreadsheet formats that will be discussed below:

- **Payroll Format -** determines relationship by team and supervisors
- **Review Format -** relationships are defined in file

It's important to ensure that all of your email addresses are valid before you add them to your spreadsheet. Even one invalid email address can cause issues with your 360 Review.

Ensure that the spreadsheet does not include trailing spaces *(extra spaces)* **before or after what exists in each cell. Trailing spaces can cause issues with accessibility to data.**

You can check email address validity by first uploading your email addresses to a SurveyGizmo Email Campaign. Any invalid email addresses will be included in the Import Log. Visit the Send Your Survey via Email documentation for instructions.

There are also a number of third party tools where you can verify the validity of email addresses, including NeverBounce and Verifalia.

⊕ **Payroll Format Instructions**

⊕ **Review Format Instructions**

## Step 2: Create a 360 Review Project in SurveyGizmo

360 Reviews utilize a wizard-like process to create your project. While several customization options are available while creating your project, once you have elected to click the **Finish > Create the Project** option, you will no longer have an option to customize the survey content.

Please review your project at each step of the way to ensure that you are ready to proceed.

Now that you've got your spreadsheet ready to go, you're ready to jump into SurveyGizmo to create your 360 Review Project.

The 360 Review Project is a *Forward Only* *survey by default.*

1. Click the arrow to the right of **Create a Survey** and select **Create 360 Review Form**.
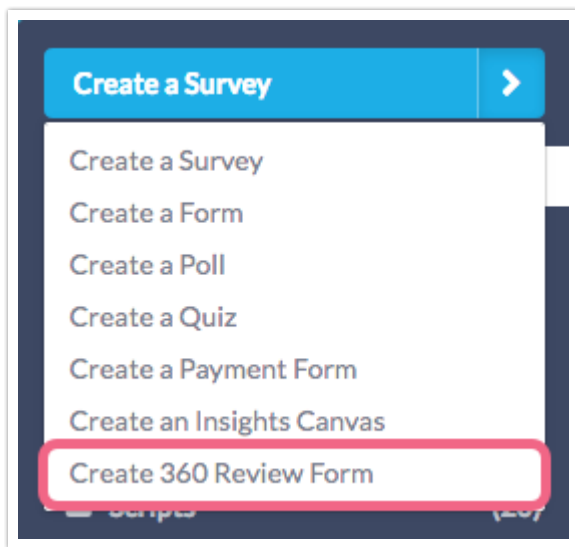
2. Customize your **Project Name**; this will display at the top of the review form. You can change this later if you need to.

3. Select the **File Type** (Payroll Format or Review Format) and upload your employee spreadsheet in **CSV** format.

   - If using the **Review Format**, skip to **#8**.

4. **(Payroll Format)** There are two options for **Type of Review**: **360 Degree** or **180 Degree**.

   A true 360 Review includes subordinate reviews of their supervisors. If you do not wish to conduct subordinate reviews of supervisors select the 180 Degree review option.

5. **(Payroll Format) Self-Assessments** will be included by default. If you do not

wish to have employees complete a self-assessment, uncheck the Self-Assessment option.

6. **(Payroll Format)** Select the **Definition of "Peer"** option you wish to use:

   - Anyone on the same **Team** (from spreadsheet, 'team' field)
   - Anyone with the same **Supervisor** (from spreadsheet, 'supervisor email' field)
   - Anyone with the same **Supervisor** and **Team** (from spreadsheet)

7. **(Payroll Format)** Finally, customize the **Language Used** in the survey and invites for the words **Supervisor**, **Peer**, **Employee**, and **Customer**.

8. (Optional) Change the **Logo URL** for your finalized reports. The SurveyGizmo logo will be included by default.

9. Click **Next Step: Preview Relationships**.

Step 3: Confirm Relationships

On the next page, you can confirm the relationships that were inferred based on your uploaded spreadsheet. Scroll through each **Ratee** and make sure that all relationships are accurate as this determines who reviews whom.

Click on the **Details** option to view specifics related to each **Ratee**. Once you have reviewed and confirmed all relationships, click **Next Step: Measurement Attributes**.

SurveyGizmo Employee Toolkit

360 Review Project > Confirm Relationships

Before proceeding, please confirm the relationships to that will be surveyed. If there is an error, please correct your upload file, return to the previous page and resubmit.

Ratee	Ratee's Email	Reviews	
Helen, Helen	helen@software.com	**7 Total:** 1 Self, 1 Supervisors, 2 Subordinates, 3 Peers	Details
George, George	george@software.com	**7 Total:** 1 Self, 1 Supervisors, 2 Subordinates, 3 Peers	Details
Carol, Carol	carol@software.com	**6 Total:** 1 Self, 1 Supervisors, 4 Peers	Details
Edward, Edward	edward@software.com	**6 Total:** 1 Self, 1 Supervisors, 4 Peers	Details
Ronald, Ronald	ronald@software.com	**6 Total:** 1 Self, 1 Supervisors, 4 Peers	Details
Michelle, Michelle	michelle@software.com	**6 Total:** 1 Self, 1 Supervisors, 4 Peers	Details

Step 4: Select Your Question Bank

SurveyGizmo currently offers two options for adding questions to your 360 Review Project:

1. **Custom Question Bank**

   This option allows you to define and use your own competencies and ratings for your employees. While quite customizable, your questions are unique to your organization and thus the generated reports will not be compared to a normative database.

2. **Copy from Past Custom 360 Survey**

   If you have previously created a 360 Survey using the **Custom Question Bank**, you can select this survey here.

Once you have chosen your question bank option, click **Next Step**.

- ⊕ **Step 4a: Create Competency Label and Measurement Statements**
- ⊕ **Step 4b: Define Scale Labels**
- ⊕ **Step 4c: Open Text Questions**

After having customized your labels or settled on the defaults, click **Last Step: Set Email Content**.

Step 5: Customize Your Email Content

Now you're ready to customize the **Email Subject**, **From Address**, and **Invitation Content** for the Email Invitations that will go out to all reviewers.

You can customize to your heart's content but be sure to leave the **[invite("survey link")]** merge code as is, as this will automatically populate with the link to the survey!

Additionally, the **[invite("custom 1")]** merge code pulls in a comma-separated list of individuals that will be reviewed by the recipient of the email.

When you are finished customizing your email invitations, click the **Finish > Create the Project** button. Then click **Go to Project**.

> Once you elect to click the **Finish > Create the Project** button, your project will be created and the content within it will no longer be available for customization. Make sure you are ready to proceed before creating the project.
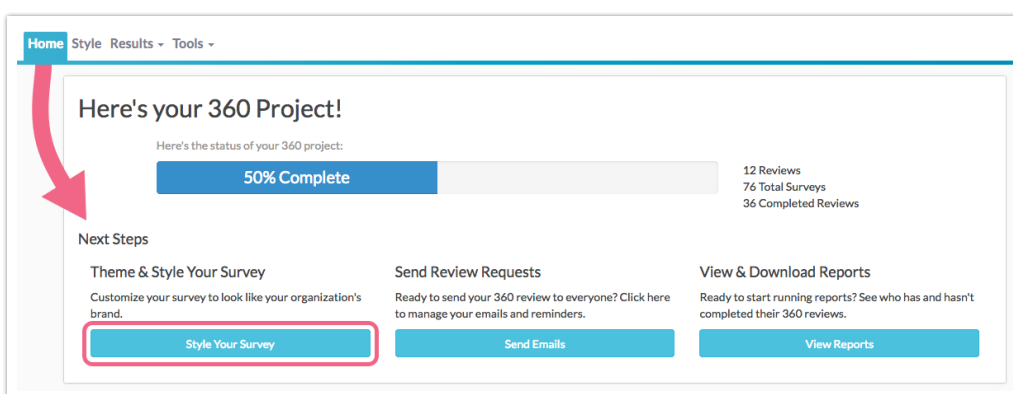
Step 6 (Optional): Style Your 360 Survey

When you click the **Go to Project** button you will be taken to the 360 Project **Home** tab. Here, you can:

- Track the status/progress of your 360 Project
- Style your survey
- Send the initial invitation emails to your reviewers
- View your compiled reports.

The **Style** tab allows you to preview what your 360 Survey will look like for reviewers. If you would like to customize the look and feel of your 360 Survey, check out our Style Your Survey Tutorial to learn how!

Step 7: Send Your 360 Survey Invitations

Now that you've customized and styled your 360 Survey, it's time to send it out! To do so, on the 360 **Home** page, click the **Send Emails** button. Here, you will have another option to customize your email content via the **Campaign Designer** step.

When ready to send, navigate to the **Send Campaign** step and click **Send Now**.
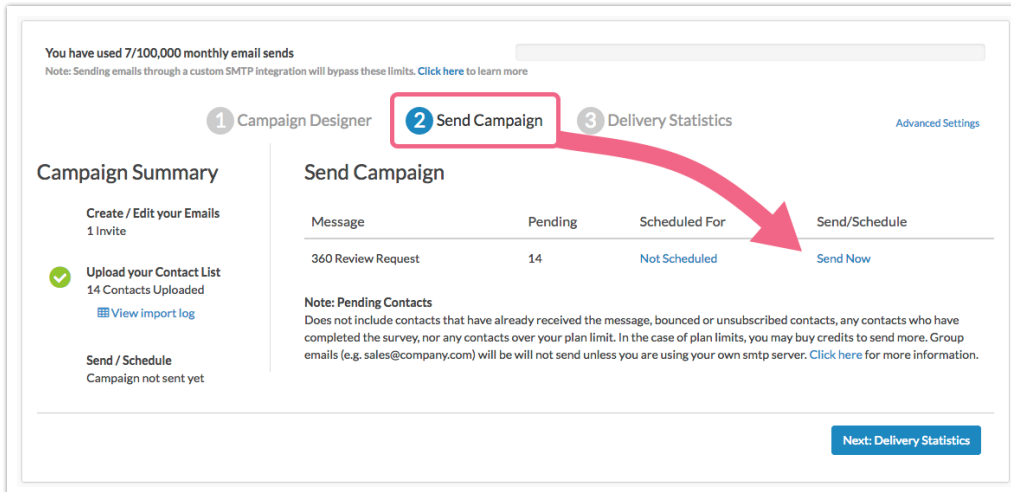
If you prefer to send your links via an email system outside of SurveyGizmo, you can **Export Contacts with Send Status** from the **Delivery Statistics** page. This will provide you with a file that contains the unique links that will need to be sent to each reviewer.

Step 8: Review and Share Results

Once the 360 Review data starts coming in, reports will be automatically compiled for each employee. Each report will only display data for that employee.

> The reports that are automatically generated for your 360 Project are not customizable. The content included in each report is explained below.

Reports for each employee can be accessed from the 360 **Home** page via the **View Reports** link or via **Results > 360 Reports** .

You can also access **Advanced Reports** where you will find reports like the Standard Report, Crosstab, Comparision Report, and the Raw Data Export.
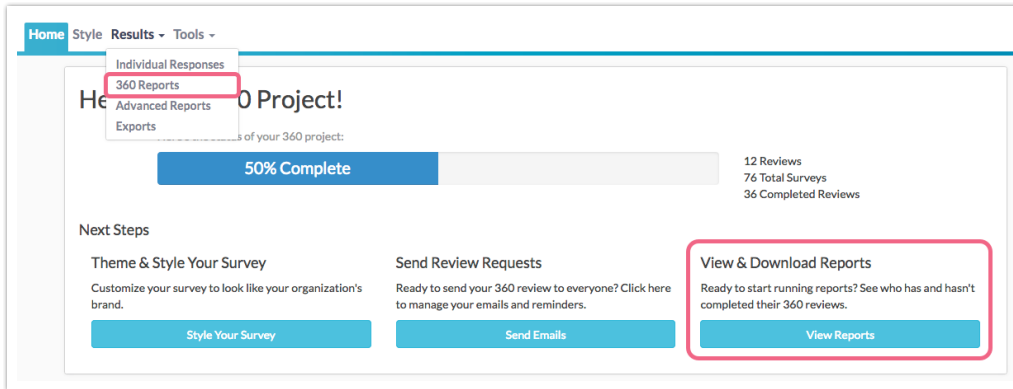
Once on the Reporting page, you can access each employee's individual report via the **View Report** button.
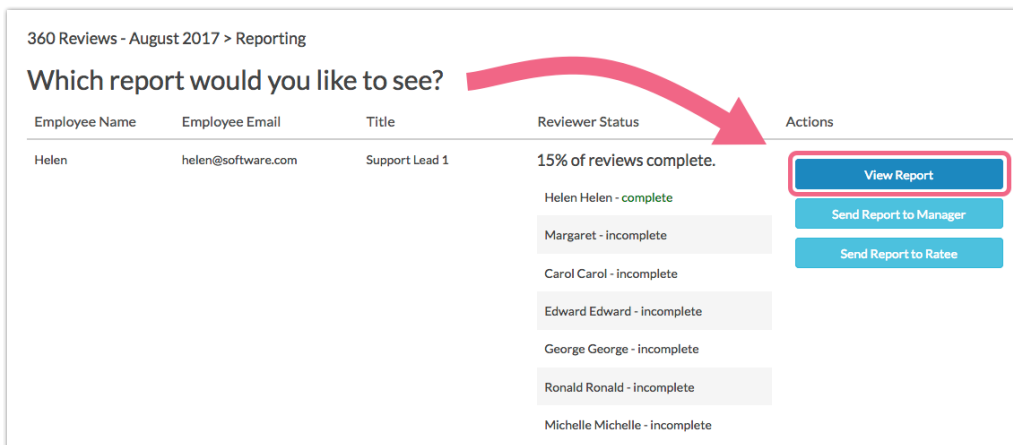
The main reporting page will display the **Employee Name**, **Employee Email**, and job **Title** (sourced from your original uploaded spreadsheet). You will also see the **Reviewer Status** (who has and has not reviewed the employee).

Here, you also have the options to send report to (email addresses sourced from your original spreadsheet):

- **Send Report to Manager**
- **Send Report to Ratee**

Clicking either of the **Send** options will trigger the email immediately.

Finally, the **Download All Reports** button (bottom of page) will output a .zip file containing all reports.

360 Reports

The report that is generated for each employee is comprised of several sections.

See a sample 360 Report.

The report will contain a cover page followed by information that will help you understand the data that is presented on the following pages.

Competency Profile

The first part of the report is the employee Competency Profile (presented as a Spider Chart) - an overview that shows how the **employee** rated themselves across all competencies, versus how they were rated by their **peers** and **everyone** (including supervisors).

Your Overall Competency Profile

Below is a chart showing your competancies as you see them, to your competancies as others see them.
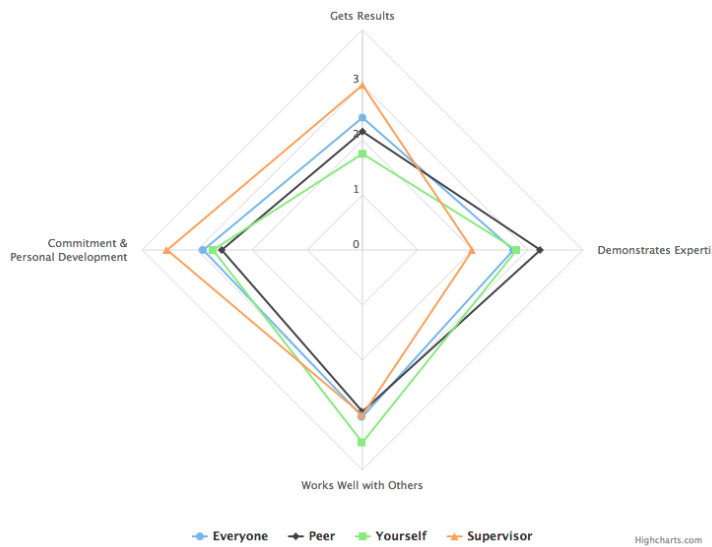
Two Factor Leadership Profile

This is a statistically derived overview of the employee's leadership style based on two primary factors of leadership: **Focus on Execution** and **Focus on People**. This chart also provides comparisons for how the employee rated themselves versus how they were rated by peers and everyone.
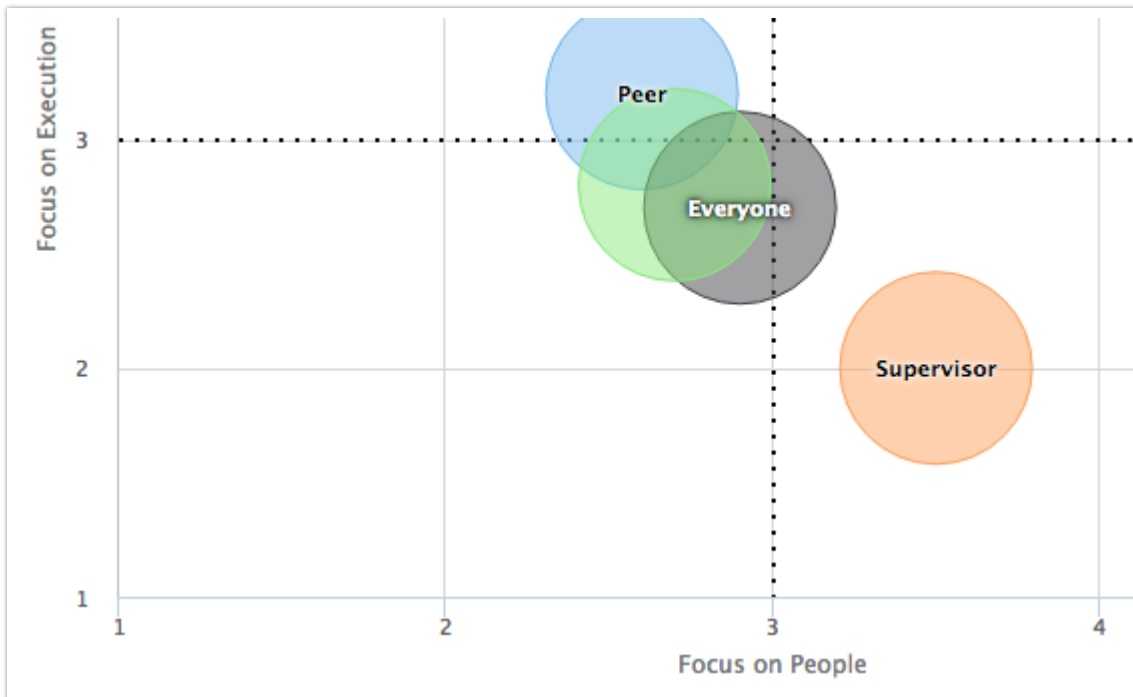
Category Scores

For each competency, the employee will be provided with the **Score** (average rating) for each category of raters (Self, Peers, Everyone, etc.). Items are rated on a 1-5 scale (Disagree to Agree).

The employee will also see **Gap** values for each category of raters (aside from Self). The gap value represents the difference between the score that the employee received from their self-assessment and the score they received from one of the rater categories.

A positive **Gap** value means that a category of raters provided a more positive assessment than what the employee provided in their self-assessment. A negative value means the employee rated themselves more favorably than they were rated by their peers, for example.

Category Scores

Leadership		Score	Gap
Everyone		3.7	3.7
Peers		3.8	3.8
Manager		3.5	3.5

Competency Scores

The Category Scores are followed by detailed scores for each **Measurement Statement** (grouped by Competency).

Leadership

Overall Average	Gap Score
3.6	3.6
	Hidden Strength

Rewards High Performing Team Members		Score	Gap
Everyone		4.0	4.0
Peers		3.5	3.5
Manager		5.0	5.0

Leads By Example		Score	Gap
Everyone		3.3	3.3
Peers		4.0	4.0
Manager		2.0	2.0

Highest and Lowest Items

The employee report highlights those **Measurement Statements** with the highest and lowest scores. The employee will be presented with up to 5 highest and 5 lowest scoring statements.

Highest and Lowest Items

Highest		Score
Rewards high performing team members		4.0
Leads by example		3.3
Participates in team-building activities		3.3

Lowest		Score
Leads by example		3.3
Participates in team-building activities		3.3
Rewards high performing team members		4.0

Written Comments

Finally, the employee will see the written comments that have been provided by their peers and superiors. Supervisor comments will be **bolded**.

Updating or Replacing Reviewers

If the original file that you used to create your 360 Project contained errors, or if you need to update any information prior to sending your invitations, you will need to create a new 360 Project to do so. As such, **it is critical to review your file for errors prior to uploading**.

FAQ

➕ **How do I copy an existing 360 Review to start a new project?**

➕ **Can I edit the content of my 360 survey?**

➕ **Can I change/edit the content of the reports that are generated for me?**

➕ **Will my 360 reviews be anonymous?**

➕ **How do I send a link to an employee that did not receive an email?**

➕ **Can I add an employee to a 360 survey after sending it out?**

➕ **Can an employee have multiple supervisors?**

➕ **Can respondents edit their entries after having submitted their surveys?**

⊕ Can I remove or customize the *Unable to Answer* column from my questions?

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