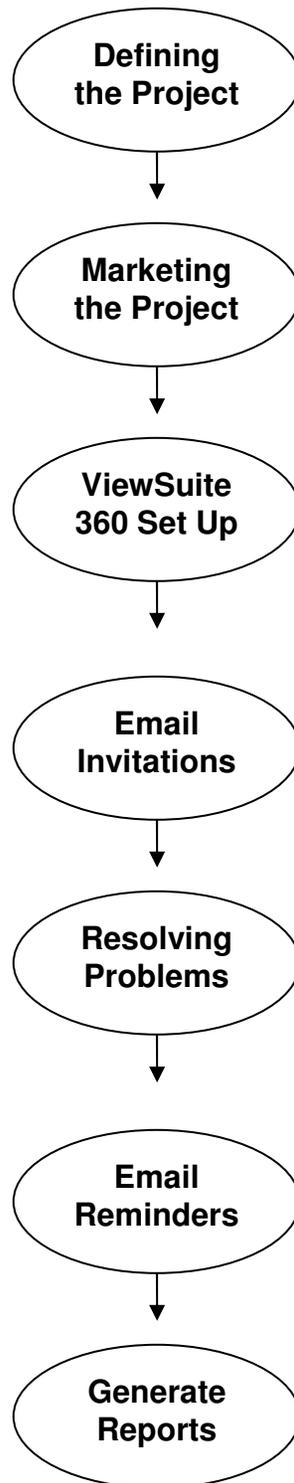# Envisia Learning
360 Feedback Online
Project Flow Process

Step 1: **Defining the 360 Feedback Project**
This step includes first defining the purpose of the 360 feedback intervention with your client and answering the following questions together with them:

1. Who is the target audience (executives, managers, teams, professionals, etc.) and how many will be participating?
2. What competencies are going to be measured?
3. Which ViewSuite 360 assessment is most appropriate (off the shelf or customized)?
4. What do they want to say in email instructions that go out to participants? To raters?
5. What is the deadline date for completing the online questionnaire?
6. What date do the feedback reports need to be received to support the coaching or training intervention? Where are they to be sent?
7. How will raters be selected (participant decides, management decides, or joint decision)?
8. How many raters will be invited to provide feedback?
9. Which type raters will be invited to provide feedback (direct reports, customers, peers, team members, manager, etc.)?
10. How long a period of time should a rater work with a participant to be invited to participate in the feedback process?
11. Who will receive the feedback reports?
12. Are feedback reports to be printed/shipped or emailed?
13. Should the graphs in the reports use Envisia Learning norms, company specific norms or average scores?
14. Should the open-ended questions in the feedback report be broken down by rater group or collapsed?
15. Is the company using any spam or email filters that would prevent automated emails being sent from support@envisialearning.com to be received by participants and raters?
16. Who will be given permission to track and monitor online progress of the 360 feedback process?
17. Who will be given permission to access the ViewSuite administration website to send out emails, add new raters and handle any email problems?

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ENVISIA LEARNING 360 PROCESS FLOW

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        ┌─────────────┐
        │  Defining   │
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        ┌─────────────┐
        │  Marketing  │
        │ the Project │
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        │  ViewSuite  │
        │ 360 Set Up  │
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Step 2: **Marketing the 360 Feedback Project**
This step includes communicating the purpose and administrative process of the 360 feedback intervention to both program participants and raters <u>before</u> getting started and rolling the program out. This communication can be either in a group setting or via email to all participants and raters involved. This communication should clarify the purpose of the 360 process, assure confidentiality, stress that the participation is voluntary, explain who will actually receive feedback reports and how the results will be used.

Step 3: **ViewSuite 360 Project Set Up**
This step includes setting up a 360 feedback project using the ViewSuite administration system. It is typically done by Envisia Learning staff but can also be done by a consultant or project administrator identified within the client organization with a quick orientation to how to access and use the system.

Once the specific ViewSuite 360 tool is selected for the project, our Envisia Learning staff will send the consultant or client our email template to go out to the participants and his/her selected raters. This text is typically edited and sent back to Envisia Learning along with a company or consultant logo for use in our administrative system. This text includes important information such as the purpose of the 360 process, deadline date for completion, how to select raters, assurances of confidentiality and steps for completing the online 360 questionnaire and selecting raters. The ViewSuite 360 project set up requires the following information from the consultant and/or client company which is entered into our administrative system:

1. The full names and email addresses of the participants and company.

2. Company and/or consultant logo for our online administration and report covers.

3. Deadline dates for completion and Reminder dates for emails.

4. Edited text that will go to program participants and selected raters.

5. Labels to be used for the rater types participating in the 360 process (e.g., standard rater labels are self, manager, direct report, team member, and peer).

6. What to say in the email "Subject Header" for the text going out to participants and raters.

7. Preference of the text to identify where the emails from Envisia Learning are coming from (the View Suite 360 administration system can specify where the emails come from so it will appear in participant/rater email as coming from the consultant or company to minimize confusing these instructions as spam).

SPAM Prevention and Email Testing
Before any emails are sent out to participants, it is highly recommended that a pilot test be done to ensure that the client company does not have spam or email filters to prevent the Envisia Learning View Suite 360 administration system from working properly. It is typically done by Envisia Learning staff but can also be done by a consultant or project administrator identified within the client organization with a quick orientation to how to access and use the system.

It is recommended that a contact person be identified within the company to receive a test email from our system. If they do, it is likely that no further email problems due to spam or email filters will be the cause of receiving email instructions (since participants select his/her raters online, it is possible that the wrong email address is typed).

IMPORTANT: Even if they do receive the email, some messages may be blocked by company specific spam or email filters at a later date. Whenever possible, it is important to contact the internal IT department up front, explain the situation and ask that all emails from support@consultintoolsusa.com will be allowed through.

It is not uncommon for raters to delete emails received from or system thinking it is SPAM. For this reason, Envisia Learning recommends again that the project is clearly communicated ahead of time to all participants to let them know that the 360 administration is being handled by an outside consulting company. Additionally, the ViewSuite 360 administration system can also specify the name of the consultant or company as to where the email is coming "from" to minimize it being immediately deleted as SPAM.

Step 4: **ViewSuite 360 Email Instructions**
This step includes sending out email instructions to the participants from the ViewSuite 360 administration system. It is typically done by Envisia Learning staff but can also be done by a consultant or project administrator identified within the client organization with a quick orientation to how to access and use the system.

Once the participant receives the email instructions from Envisia Learning (the text of which has been edited and supplied by the consultant and/or client company), they are asked to do two things:

1. Complete his/her own questionnaire online by clicking on the embedded link in the email or "cutting and pasting" the URL provided into their browser

2. Selecting his/her own raters by completing a very brief form online (see screen shot below).
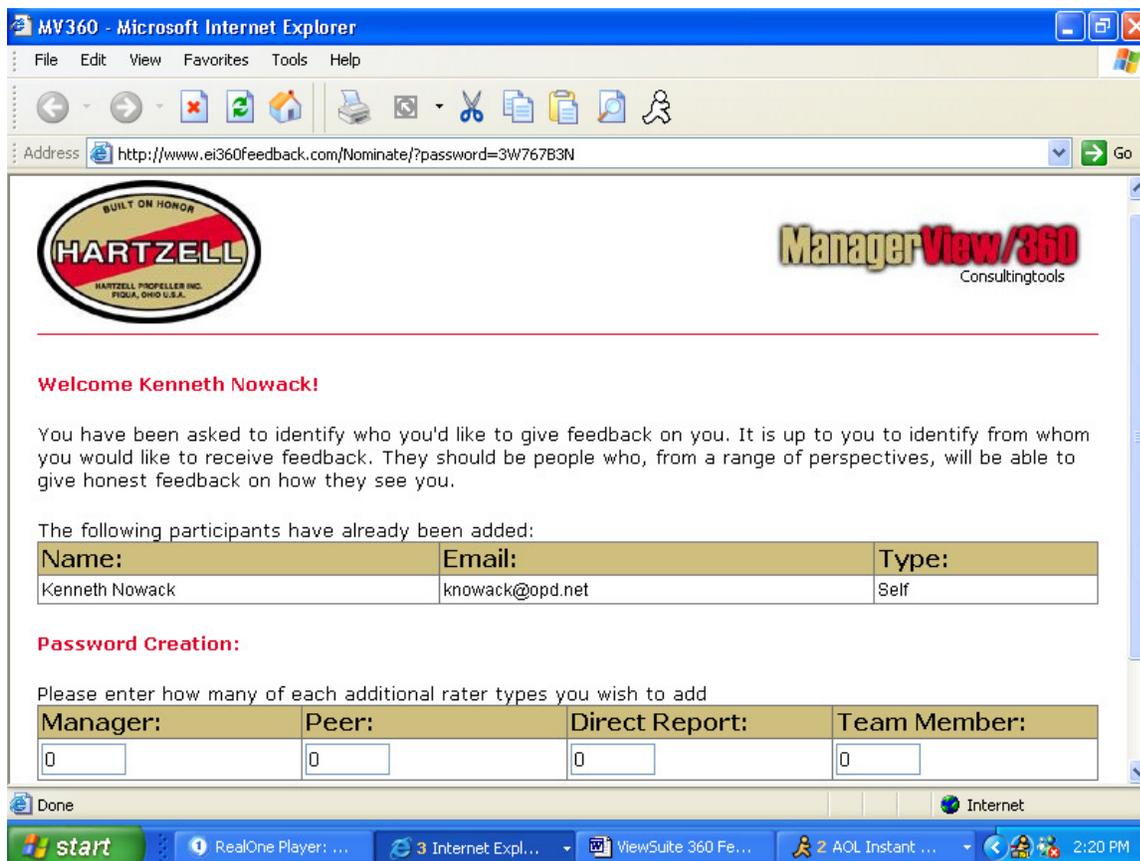
Once the participant types in how many raters in each of the rater groups above, the page will then open to a form to type in the names of the raters and their email addresses. Once this form is completed, the participant is asked to "submit" this list by clicking on a button at the bottom of the page. Once this is done, email instructions to the raters are sent out automatically (again with text edited by the consultant and/or client) asking them to complete the 360 questionnaire online.

Step 5: **ViewSuite 360 Email Problems**
The View Suite 360 administrative system works very effectively but sometimes email problems and errors can occur as discussed earlier. The typical email problems and solutions are summarized below:

1. Emails Are Not Received Because Of Filers or SPAM Blockers: A pilot test is a good way to ensure that the company is not blocking emails. If they are being block, asking the IT department to allow emails coming from support@envisialearning.com will take care of this problem.

2. Emails are Not Received Because the Addresses are Typed Incorrectly: The View Suite 360 administration system allows for updating email addresses and sending out new emails. Bounced emails can be sent to either Envisia Learning or the consultant and/or program administrator.

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3. Participants/Raters Click on the Embedded Link and it doesn't take them to the Questionnaire: Some rarely used browsers such as Safari, very old versions of Netscape Navigator or attempts to use Lotus Notes have sometimes caused such errors. Participants and raters asked to use an alternate browser such as Internet Explorer (IE) typically have no trouble accessing the questionnaire.

4. Participants/Raters are Unable to Answer the Questionnaire after the Deadline Date: The View Suite 360 administration system allows for the specification and changing of a deadline date. If a participant or rater attempts to complete the questionnaire after this date, they will receive an error message that the questionnaire is unavailable.

5. Participants/Raters click on the Embedded Link to Take the Questionnaire Online and It Does Not Seem to Work: This is very rare and due to some temporary problem with service provided by the internet service provider of the participant or rater. Attempting to complete the questionnaire again at a later date seems to remedy this problem in most cases.

Step 6: **ViewSuite 360 Email Reminders**

Each client and/or administrators have the ability to track and monitor progress for each participant and rater using the ViewSuite 360 system. Sometimes, it is important to send out reminder emails to either participants or his/her selected raters to ensure timely completion of the online questionnaires.

The View Suite 360 administrative system allows for either scheduled email reminders or ones that can be sent out manually. It is typically done by Envisia Learning staff but can also be done by a consultant or project administrator identified within the client organization with a quick orientation to how to access and use the ViewSuite system.

The text for the email reminders can also be customized along with the initial email instructions to participants and selected raters.

Step 7: **Generate ViewSuite 360 Reports**

All of our ViewSuite 360 reports can be either printed and shipped or emailed in Adobe PDF format. Raters can be reclassified or deleted if necessary (e.g., the participant initially classified a "Direct Report" as a "Peer") before a report is generated. It is important to note that the View Suite administration system also utilizes a feature called Anonymity Protection (AP) to ensure confidentiality of reporting when less than a specific number of raters have completed the online questionnaires (the default is set at "2" except for the "manager" rater category). However, Envisia Learning staff or the ViewSuite administrator can modify this AP number at any time.

GROUP REPORTS AND TIME SERIES REPORTS

1. Group Reports: All of our ViewSuite 360 products allow for both individual and group reports. The ViewSuite group reports provide for a summary of all raters within a project providing a snapshot of group/team strengths and development areas. The group reports do <u>not</u> include any open-ended questions.

2. Time Series Reports: All of our Viewsuite 360 products allow for time series reporting at the individual level (i.e., report summarizing an individual's results over two administrations—Example: Before and after a coaching intervention). This report feature is very useful for coaches, consultants and trainers who are looking for a way to evaluate improvement and behavior change. Each report will contain the open-ended questions gathered at the second time period.

Each ViewSuite 360 product has several options in the reporting that can be selected (e.g., use of normative scores or average scores in the graphs, classification of rater groups in the open-ended questions, inclusion of line graphs or bar graphs for the ViewSuite tools using the software, etc.). Additional information is available from the Envisia Learning staff about what report options exist for each specific 360 tool.

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INSTRUCTIONS TO PARTICIPANTS AND RATERS: SAMPLE TEXT

PARTICIPANT EMAIL TEMPLATE

Header: View Suite 360 Questionnaire Online Instructions

Hello %participantName

As part of your executive coaching process, you have been asked to complete the following multi-rater feedback assessment instrument, (name of ViewSuite 360 product). The final deadline for you and all your raters to complete the survey is DECEMBER 30, 2007.

The following categories of raters can be asked to complete your (name of the ViewSuite 360 questionnaire): 1) Your Manager or managers (those to whom you currently or most recently reported to); 2) Direct reports (those who have reported to you at least 4 months); 3) Peers (other raters in your organization at the same job level); or 4) Team Members (those that you work with on project teams or special projects who could provide you with useful feedback inside or outside your organization). The feedback they will provide, except for your own manager, is completely anonymous and the instructions on how to complete the survey are contained in this e-mail.

To begin your 360 process, select the raters you wish to participate by clicking on the first link provided below. You will be shown a screen asking you to select the number and type of raters who will be participating in your feedback process. You will then be asked to type in their full names and email addresses. Once you have completed this step, your raters will automatically receive instructions for completing the 360 questionnaire online.

You will also need to complete your own self-assessment. You can do this now or at a later date by clicking on the second link provided below. You may complete the questionnaire all at once or start and come back to it at a later date (your completed responses will be saved). If you are unable to answer any specific question on the (name of the ViewSuite 360 questionnaire) because you have not had an opportunity to observe me in that situation, use the response choice of "Not Applicable" or "Not Observable."

If you have any questions about this online process, please feel free to contact Envisia Learning at 310-452-5130 or by email to support@envisialearning.com

To select your RATERS, please click on your name below or "cut and paste" the website address provided into your browser (e.g., Internet Explorer)
%nominationURL

To complete your own Emotional Intelligence View 360 questionnaire now or at a later date, your name below or "cut and paste" the website address provided into your browser (e.g., Internet Explorer)
%passwords

Thank You!

RATER EMAIL TEMPLATE

Header: Request to Complete a 360 Feedback Questionnaire

Hello %raterName

As part of an executive development program in which I am participating, I would like you to complete a brief online questionnaire, (name of the View Suite 360 questionnaire), online by DECEMBER 30, 2007.

Your individual responses to the online administration of (name of the ViewSuite 360 questionnaire) will be computer scored and combined with results from others who have also completed the questionnaire. Your individual ratings and comments are sent to a third-party, outside consulting firm and remain anonymous. The feedback from all raters will be summarized in a comprehensive feedback report to me. If you are the person to whom I report, your ratings will be shown separately from all other raters—however, no one will be identified by any written comments that are provided regarding my perceived strengths or developmental needs, as they will be presented anonymously as group data.

Completion of the (name of the ViewSuite 360 questionnaire) should take you no more than 15-20 minutes to complete. At the end of the questionnaire you will have an opportunity to provide responses to two open-ended questions regarding my strengths and opportunities for development. These comments will be very helpful to me in interpreting the quantitative data.

You may complete the questionnaire all at once or start and come back to it at a later date (your completed responses will be saved). If you are unable to answer any specific question on the 360 questionnaire because you have not had an opportunity to observe me in that situation, use the response choice of "Not Applicable" or "Not Observable."

If you have any questions about this online process, please feel free to contact Envisia Learning at 310-452-5130 or by email to support@envisialearning.com

Thank you for your cooperation! I look forward to working with the results.

To complete the (name of the View Suite 360 questionnaire), please click on your colleague's name below or "cut and paste" the website address provided into your browser (e.g., Internet Explorer)

%passwords

REMINDER EMAIL TEMPLATE

Header: Reminder to Complete a 360 Feedback Questionnaire

Hello %raterName,

If you have not already completed the (name of the View Suite 360 questionnaire) for your colleague below, the final deadline is DECEMBER 30, 2007.

Thank you very much for your assistance and cooperation!

%passwords