

A handbook on 360-degree survey templates



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Introduction

The revolutionary nuances of the [360-degree survey](#) at work are relevant and more necessary than ever before. As companies experiment with a flexible work environment in the COVID-19 era, the holistic approach of 360-degree templates can strengthen teams, leadership and performance management processes across industries and organizations. This handbook offers objective insights into these templates and how you can employ them for the most in-demand job roles this year.



What is a 360-degree survey?

A 360 survey is the process of eliciting effective feedback on employee performance from various sources, such as managerial opinion, peer reviews, performance reports, etc. 360-degree surveys are likely more useful in creating future-focused development plans than in developing metrics for a unidirectional performance review.

“

What we know from our years of research correlating leaders' 360 ratings to important organizational outcomes is that they are very predictive.

”

Jack Zenger and Joseph Folkman
Harvard Business Review



Unlike the biases and limitations that exist in conventional employee reviews and annual appraisals, a 360 feedback survey:

- Offers holistic insights into individual performance and behavior
- It helps set realistic goals and expectations
- It ensures an unbiased plan for employee appraisals, learning and development

How to conduct a 360 feedback survey

Using a relevant and comprehensive 360 feedback template is ideal for upgrading employee assessment and appraisal processes. Organizations must set clear instructions, timelines and follow-up reminders to complete a 360 feedback survey. Additionally, confidentiality should be considered because the survey is usually more effective in identifying blind spots without straining professional relationships – when undertaken anonymously. You may also need subject matter experts' intervention to smoothen the process by aligning your vision and goals with the survey's objectives.

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When implemented efficiently, the survey adds immense value to your people decisions:

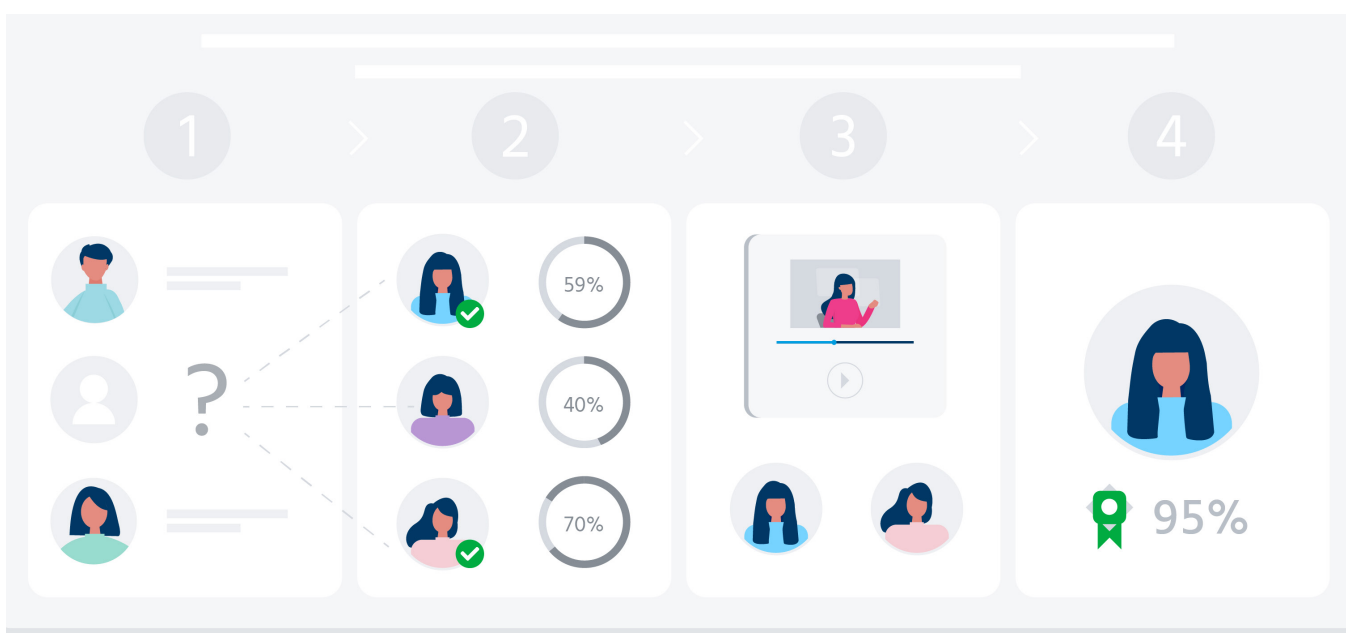
- It can significantly improve employee engagement and professional development.
- It makes individuals more self-aware about their strengths and weaknesses.
- It can help organizations identify gaps in training needs.
- It improves productivity and work relationships.
- You gain better insights into individual employees' work and progress.
- It allows an organization to be fairer and more transparent.

You can incorporate the following best practices into your feedback implementation checklist to simplify things when rolling out a 360 survey in your organization:

- The survey should be short and easy to comprehend to provide constructive feedback.
- It should be easy to setup and fill.
- You should focus on discovering strengths and tailor the results to each individual and their position.
- You should focus on data that can help create personal development plans. Besides, the data should be easy to absorb. Hence, graphical formats are usually recommended.
- The employees and relevant stakeholders must be involved from the beginning of the process for better traction once the survey is launched.

What should be included in 360-degree feedback?

While there cannot be a 'one-size-fits-all' formula for 360 feedback, organizations can use an existing framework with pre-defined competencies/values as a starting point. You must have an unambiguous understanding of what you wish to achieve through a 360 survey. Key skills, behaviors and traits you wish to measure for appraisals or other HR initiatives should form the base for the type of questions you would ask in the survey. The following chapter outlines some commonly used 360-degree review templates that you can customize for your requirements.



360 evaluation templates and competencies

Most 360 surveys utilize varying combinations of the same competencies that employers seek in professionals across industries. This chapter covers an overview of such combinations relevant to various job roles when measuring employees through an efficient 360-degree survey.

List of competencies to create 360-degree survey questions

These competencies include employee skills, behaviors and attributes necessary for employees' success in an organization. Basing your 360 feedback template on a set of well-defined competencies is crucial for its success. We have listed and elaborated on some key competencies that you will find useful when formulating a 360 survey.



Accountability

It refers to an employee's ability to take responsibility for his/her actions and decisions. It also includes following through on the commitments without passing on the blame to others in case of failures.



Collaboration

This competency is characterized by effective team coordination to accomplish common goals, being inclusive and helpful to others.



Customer focus

Probing and gaining insights into the customers' obvious and unstated needs to provide them with the most optimal solution, timely and efficiently, is essential to an array of job roles. A competent professional who understands customer needs can ensure customer delight and further opportunities to grow the relationship.



Developing others

This competency is about improving performance, supporting and encouraging individuals and teams to ensure they give their best. Behavioral indicators of this competency include motivating teams, offering opportunities and mentorship, building efficient workgroups, promoting inter-team collaborations, etc.



(Active) Problem-solving

It is about taking initiatives to resolve issues, being persistent in overcoming challenges and accomplishing goals by utilizing available resources.



Communication

It encompasses a professional's ability to receive, comprehend and convey untampered information in a timely, brief and clear manner. Behavioral indicators of this competency include accurate communication of organizational level decisions and active management of communication processes by ensuring that information is successfully delivered, received and understood.



Creativity and innovation

Devising new ideas and different methods when faced with challenging situations is another significant professional skill. It also includes the ability to apply novel means or repurposing established means to solve complex problems.



Driving excellence

One must challenge oneself and others to surpass set standards and achieve exemplary results. It also includes excellent observational skills, ensuring quality and consistency in work and attention to detail.



Leading and empowering others

It is mostly required for senior levels and leadership roles. The ability to develop organizational vision, set the strategy, and foster self-sufficiency in employees is crucial for ensuring a positive and engaged workforce focused on shared goals.



Integrity

It is also essential to gauge whether employees behave honestly, fairly and ethically. They should consistently align their actions with words while maintaining high ethical ground, fairness and transparency.



Learning agility

It involves the ability and urge to continuously learn new skills and apply them to new and changing contexts to achieve the desired results.



Negotiation and influence

Convincing others of one's viewpoint and effectively arriving at a common ground to accomplish goals and objectives is a critical competency in high-performing individuals.



Vision and strategy

It is the ability to build an explicit plan, delineating both long and short-term goals clearly. Creating an effective and efficient plan of action to achieve the goals and a supportive environment to accomplish them is a vital behavioral indicator of this competency.



Networking

It refers to building, maintaining and leveraging professional networks and personal relationships within and outside the organization to gather information and resources to ensure individual and organizational success.



People orientation

Measuring this competency allows you to gauge a candidate's cultural sensitivity, empathy and willingness to help others.



Planning and organizing

The ability to prioritize tasks and shuffle between various roles to maximize efficiency is another core competency to measure using a 360 survey. Behavioral indicators of this competency include employees' ability to allocate optimum resources at work, detailing the steps required to accomplish their objectives and effective contingency planning.



360-degree survey templates for popular job roles

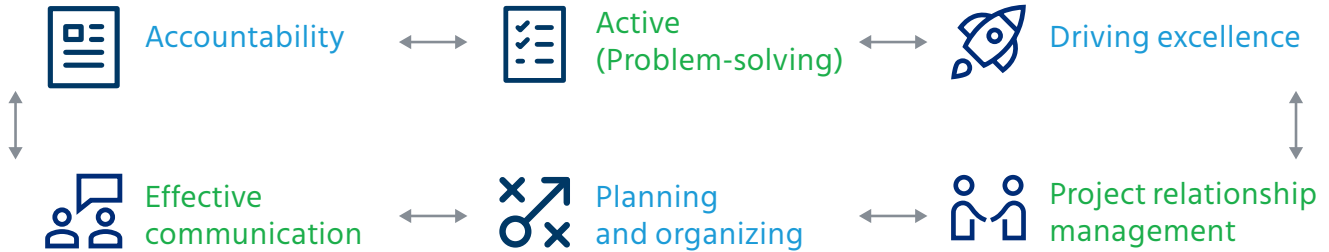
The evaluation parameters for employees at different levels will significantly overlap in some areas but vary considerably in others. Below are a few examples of 360 feedback survey templates detailing how the measured competencies vary according to the job role, level and industry.

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360-degree survey template for project managers

Project managers are responsible for delivering a project successfully and acting as leaders who plan, organize and lead the team to achieve desired results. Hence a 360 survey template for project managers should include an assessment of competencies that indicate dependability, maturity, dedication and domain expertise.

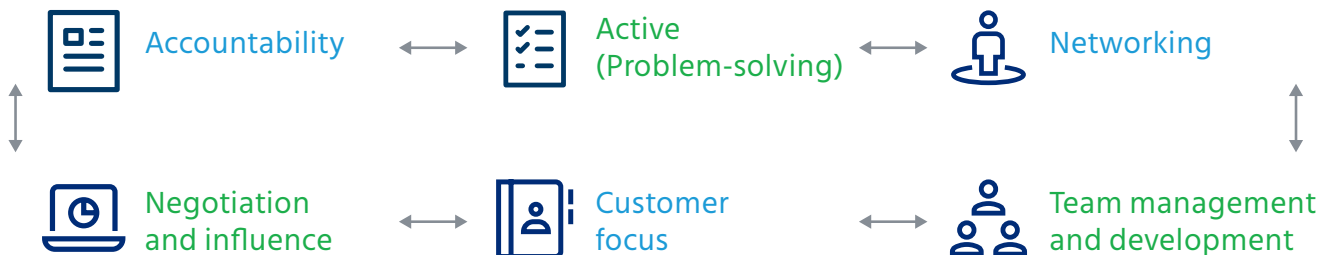
Competency framework for project managers



360-degree survey template for sales managers

Sales managers deal with retailers and distributors, run day-to-day operations for the sales team, generate revenue and maintain customer relationships in respective geographical areas. Therefore, they need to be business-savvy, effective communicators, emotionally intelligent and intensely customer-focused.

Competency framework for sales managers



360-degree survey template for senior managers

Senior managers plan, direct, coordinate and monitor the team’s progress. They maximize efficiency, productivity and performance by ensuring all operations run smoothly. Besides possessing strong leadership qualities, they also need to be creative and innovative.

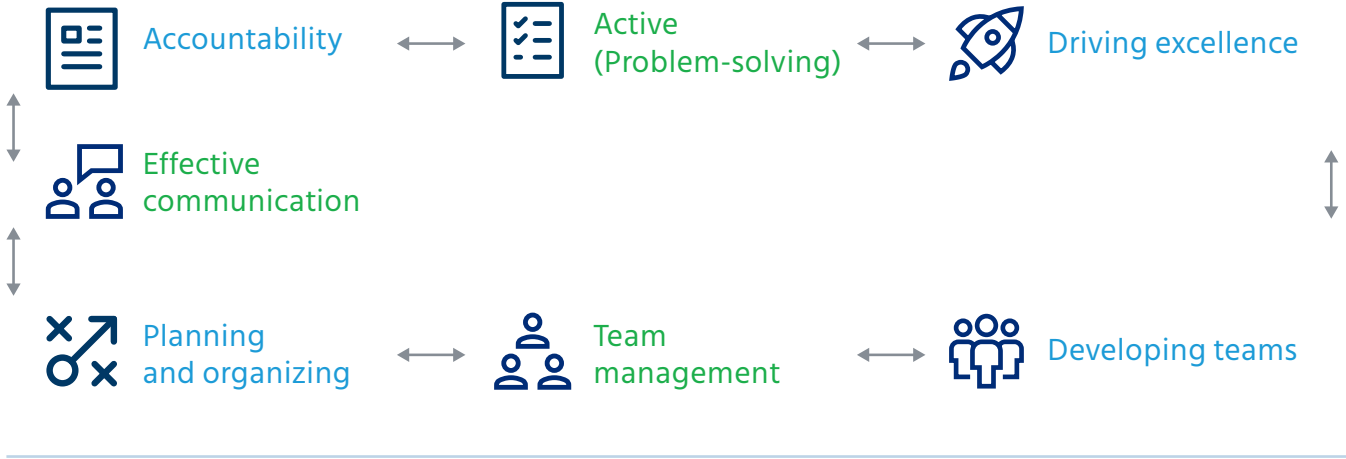
Competency framework for senior managers



360-degree survey template for IT team leads

IT team leads plan, execute and steer a project from start to finish as per respective business standards, methodologies and controls. They must encourage and lead team innovation and prepare training modules for subordinates and client interaction to deliver high-quality results.

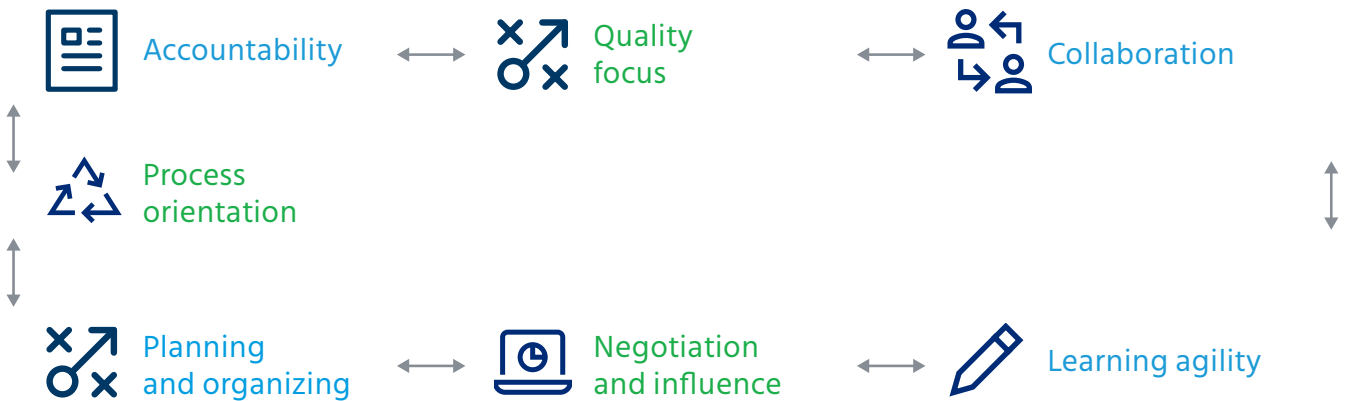
Competency framework for IT team leads



360-degree survey template for IT individual contributors

Individual IT contributors oversee technical operations, work with top executives to develop strategic plans for future improvements to ensure security and help maintain their organization's competitiveness. They must be masters of domain skills and keep up with the continually evolving IT space.

Competency framework for IT individual contributors

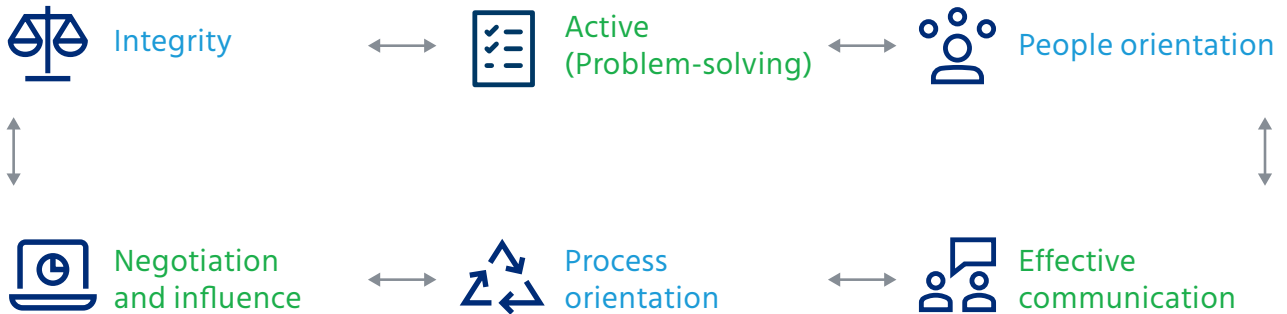


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360-degree survey template for HR managers

HR managers manage the HR department, design and implement HR policies, evaluate employee relations and serve as a link between management and staff. Their assessment should focus on their ability to manage people, handle complex situations effectively and resolve conflicts smoothly.

Competency framework for HR managers



360-degree survey template for leadership roles

Leaders set a clear vision, build morale and constantly lend support to the workforce. They analyze future trends when making decisions to solve immediate problems while also preparing for the future.

Competency framework for leadership roles



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360-degree survey template for sales individual contributors

Individual sales contributors assist existing accounts, reach out to new customers and resolve issues. Their primary goal is to achieve the designated sales target within the delegated time. Hence, the questionnaire for their 360 feedback should focus on the following competencies.

Competency framework for sales individual contributors



How Mercer | Mettl can help: Applications of 360-degree templates

Mercer | Mettl has a one-stop solution for all your 360-degree evaluation needs. Our custom surveys and in-depth reports enable you to:

- Understand differences in how individuals are perceived by the people with whom they work
- Empower employees with actionable insights from their ratings
- Create personalized development plans across all job levels

You can use our 360-degree feedback templates for crucial people decisions on appraisals, high-potential identification, training needs identification and succession planning.

Performance appraisals

Before undertaking an appraisal exercise, a 360-degree appraisal template offers you a holistic perspective on employee strengths and development areas.

- **A seamless platform:** It helps eliminate operational hassles from the 360-degree evaluation and the appraisal process by ensuring quick setup, effortless administration and automated reminders.
- **Intuitive reports:** Detailed reports and dashboards with well laid-out and actionable information add to the survey's appeal. It consists of comprehensive feedback data, group analyses and easy-to-understand charts.
- **Customizable survey:** Mercer | Mettl helps you build custom questionnaires, an exhaustive competency library and multiple question types.

Training needs identification

The assessment tool helps identify gaps in an employee's skills and personality traits as perceived by other stakeholders. You can use the survey findings to answer three pertinent questions:

- **Why train**
- **Who to train**
- **What to train on**

The goal is to design a customized training plan based on individual skill gaps and training needs.



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Aside, Mercer | Mettl helps you to curate the right training program for your organization. It covers the core areas listed below:

- **Skills:** It helps identify the unique skill sets required to succeed in every job role.
- **Behavior:** It identifies behavioral gaps that need improvement because behavioral traits can be the dominant predictor for most professional roles.
- **Future-proofing:** It augments the organization's learning agility by identifying upcoming skills that can help build a future-ready workforce.

HiPo identification and succession planning

This tool understands the dynamics observed on the job and helps improve the high-potential identification and succession planning process at every step.

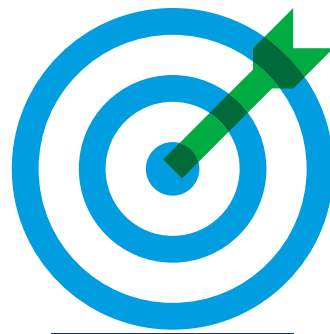
- **Identification:** It defines key competencies required to succeed in critical roles and helps nominate candidates.
- **Assessment:** Valid and reliable tools such as psychometric assessment, aptitude tests, assessment and development centers, etc., are used to gauge candidate readiness on vital competencies.
- **Planning:** Customized reports are used to shortlist suitable candidates for succession.
- **Action:** It helps facilitate the growth of selected candidates.



Conclusion

Implementing a 360-degree feedback system in organizations is a smart investment and futuristic business decision as it promotes self-awareness among employees and creates transparency in communication. The feedback tool brings clarity toward expected behaviors and goals.

A well-crafted 360-degree review template and process can boost overall team performance.



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About us

At Mercer | Mettl, our mission is to enable organizations to make better people decisions across two key areas: acquisition and development. Since our inception in 2010, we have partnered with more than 4,000 corporates, 31 sector skills councils/government departments and 15+ educational institutions across more than 90 countries.

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