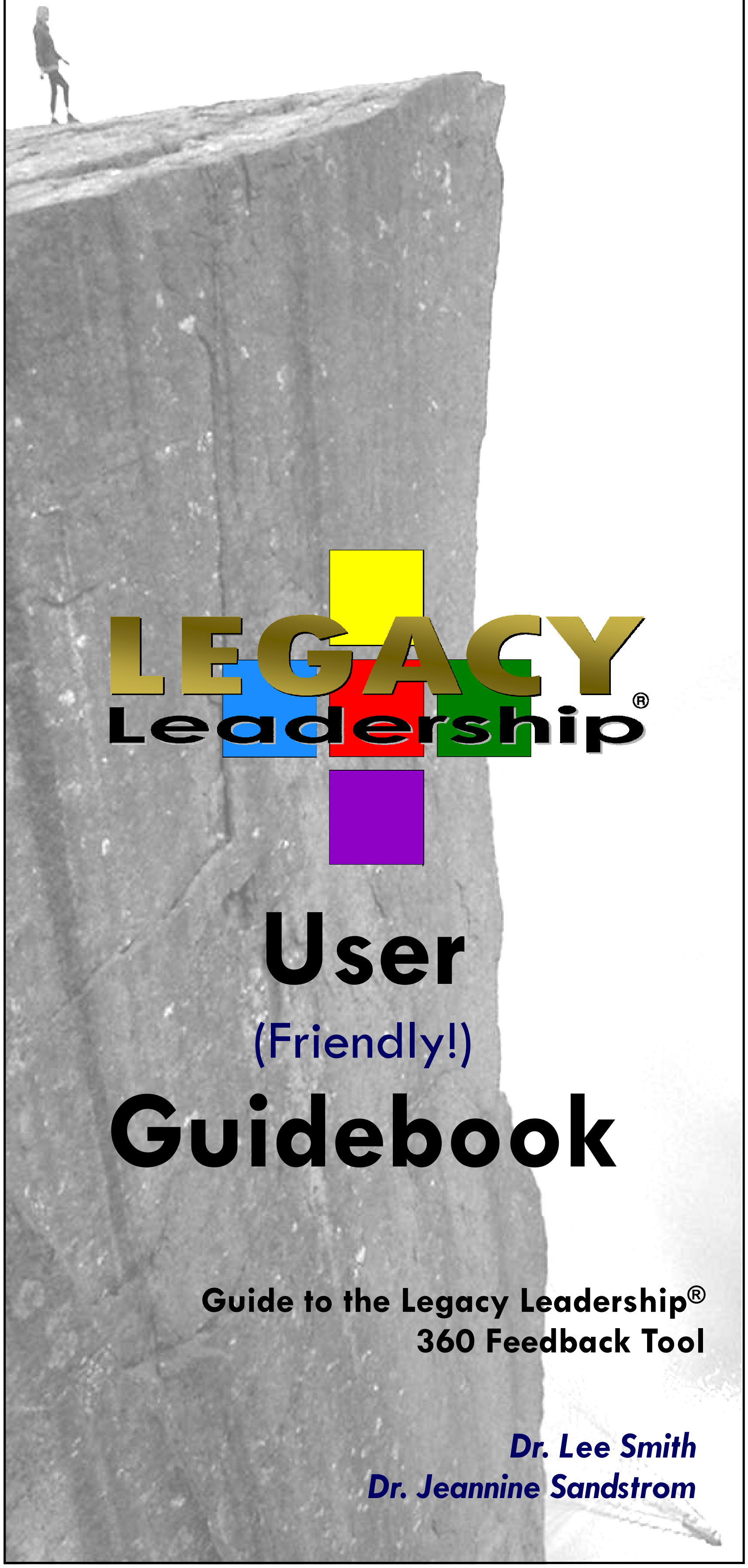
360 Feedback



LEGACY Leadership®

User

(Friendly!)

Guidebook

Guide to the Legacy Leadership® 360 Feedback Tool

Dr. Lee Smith
Dr. Jeannine Sandstrom

CoachWorks® International
The LEGACY Leader Company®

ISBN #

THE LEGACY LEADERSHIP 360 FEEDBACK TOOL: USER (FRIENDLY!) GUIDE.

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The Principals, Authors of Legacy Leadership®

Dr. Jeannine Sandstrom
Dr. Sandstrom has been a business owner and international leader coach since 1979. She has focused her leader development coaching in the practical arena of behavioral contracting, outcome clarification, and strategies to sustain performance excellence. In her 25 years of individual and organizational consulting, Jeannine coached numerous executive leaders and their teams in the high tech, communications, financial and energy industries. Sandstrom has co-authored coaching materials used extensively throughout the executive coaching industry. She has been featured on PBS specials, in The Wall street Journal and Fortune Magazine. Sandstrom holds certifications as Master Coach and Corporate Business Coach. Her doctorate is in Human Resource Development, and she holds masters degrees in Business Administration and Adult Learning.

Dr. Lee Smith
Dr. Smith is an Executive Leader Coach who has authored numerous leader coaching programs and established standards and ethics for the executive coaching profession. Smith is highly skilled in identifying key relational patterns and hidden systems that prevent groups of people from being the best they can be. As barriers are removed, she coaches and guides leaders to reorganize around successful business strategies and to establish new patterns and systems that sustain progress. Dr. Smith regularly presents at national and international professional conferences and has been featured in Newsweek, PBS Specials, and other media. Smith is one of the first internationally credentialed Master Coaches. Her Ph.D. is in Organizational Behavior and Psychology.

CoachWorks® International Corporation
Dallas, Texas
Seattle, Washington USA

214.585.8254
www.CoachWorks.com
www.LegacyLeadership.com
info@coachworks.com

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Welcome

Welcome to the User (Friendly!) Guidebook for the Legacy Leadership® 360 Feedback Tool. This booklet is intended as an introduction to 360 feedback—the history, process and delivery of results, and specifically the Legacy Leadership® 360 Feedbook tool (online assessment version). It was originally intended as a text to accompany the 360 Feedback TeleClass taught by CoachWorks® International, Inc. executive coaches. Whether or not you are taking this class, we believe you will find this information useful.

As always, we are happy to receive your comments and suggestions regarding this and other CoachWorks®' materials. Please let us know how we can continue to improve the resources available from CoachWorks®. Thanks!

Background

"Followers don't know anything about leadership." These words came from a high-ranking U.S. Navy officer. He held the view that bosses know best about leadership and are in the best position to judge whether a subordinate is a good leader. This wisdom prevailed in the late 1970s.

In 1973, Dr. Clark Wilson developed the first survey instrument for 360 degree feedback for leadership/management development, which he called the Survey of Management Practices™ (SMP). The *Survey of Management Practices* was developed as a teaching tool for Dr. Wilson's management class at the University of Bridgeport (Connecticut) Graduate School of Business. Management students completed the SMP on themselves or their supervisors. As more people were exposed to the SMP, it made its way into industry. The DuPont Company was the first corporation to adopt the SMP in 1973. What the company found most effective was that the SMP focused on specific, observable behaviors as opposed to broad unquantifiable statements. By the mid-1970s more companies, including Dow Chemical, Pitney Bowes and several utilities were using the instrument and its growth continues.

Today, it is estimated that nearly all Fortune 1000 companies have either already implemented a 360 process, or plan to shortly. The increasing affordability of 360 has allowed many small to mid-size companies to undertake 360 for individuals and groups within their organizations. In fact, 360 has become so well established that often individuals in companies without a formal process in place will seek outside means to run 360 on themselves. Companies that once used 360 only for training elite managers are starting to apply it throughout their organizations.

Managers and academics alike have come a long way in the past 15 years in their thinking about who should best evaluate leadership and, in fact, have begun to recognize that followers, peers, and customers, as well as superiors, know quite a bit about leadership. 360 feedback assessments are powerful tools for helping individuals improve, grow, and develop their leadership skills.

360 degree feedback can have a very positive bottom line impact when used for leader development. A study by J. Folkman indicated that effective leaders have lower turnover of employees under them. Another study showed that performance-based assessments and development can yield a return on investment as high as 700%.

J. Folkman, "360 Surveys That Make a Difference, Measuring & Maximizing 360 Feedback" International Quality and Productivity Center Conference" May, 2001.

What is 360-degree feedback?

Three hundred sixty three degree feedback is the process in which a leader evaluates him or herself on a set of criteria, and also receives feedback from managers and bosses, peers, direct reports and customers. Its name is derived from the "full circle" of people around the participant.

> "The (360 degree) feedback process...involves collecting perceptions about a person's behavior and the impact of that behavior from the person's boss or bosses, direct reports, colleagues, fellow members of

project teams, internal and external customers, and suppliers. Other names for 360 degree feedback are multi-rater feedback, multi-source feedback, full-circle appraisal, and group performance review." (*Lepsinger, Richard and Anntoinette D. Lucia. The Art and Science of 360 Degree Feedback. Pfeiffer/ Jossey-Bass Inc., San Francisco, 1997.*)

The 360 consists of a series of questions that relate to leadership behaviors, competencies, attitudes and skills that are directly observable by others. It is uniquely different from personality assessments or styles inventories and relates specifically to measurable behaviors. The ratings data is collected and organized electronically in a way that ensures confidentiality to the persons providing feedback. (Be sure to see the exception to this, the single rater boss category, discussed later.) Once all data is collected, a comprehensive personalized report is generated which includes the quantitative and qualitative feedback on all 50 of the inventory questions, and will feature strengths and challenges. An additional report highlights hidden strengths and blind spots (a challenge the participant does not know he or she has). These reports are designed for the leader's developmental purposes, to ultimately support the organization's vision and strategic goals. 360 reports are best delivered by experienced coaches, and should be utilized in a long term, ongoing leader development program to include regular coaching and follow-up assessment.

Most traditional performance evaluations are very subjective and one-sided, and ineffective in providing honest objective feedback. Self assessments offer only a limited perspective of the leader's true behavior and leadership competencies. Regardless of the position a leader holds in a company, it is vital for him or her to understand how others (boss, team/direct reports, peers and customers) perceive the person's effectiveness as a leader—including strengths and potential challenges. 360-Degree input from supervisors, co-workers, clients and subordinates is valuable in improving organizational and individual performance.

When leaders determine strategic direction, make decisions or create new innovative methods, they rarely seek information from just one source. Leaders gather data and indicators from many contributors, analyze it thoroughly, sometimes look for more information, and then carefully weigh it all to come to a conclusion for decisions or future direction. Leaders can't afford to make multi-million dollar decisions any other way. In the same way, leaders should make decisions about performance development only after gathering ample data that will help them maximize their people development dollars.

Coaches also need as much input, feedback and data to focus coaching around the appropriate development areas. In many cases, however, they only receive the personal perspective of the person being coached. Gathering information from one source will only take the coaching and development a short distance and will most likely hinder achieving the desired outcomes. This can be very costly, both in time and dollar investment, for all parties concerned. In order to get a more complete picture of current status of behavior, coaches and leaders must become proficient at gathering information from many contributors who are knowledgeable about a person's actions and levels of performance on specific critical success skills, both in and out of stress situations. Coaches must also be proficient at giving feedback gathered from the data. To maximize the feedback, coaches use a standard 360 degree tool and feedback process. If there are multiple coaches, all must be familiar with the process to ensure standard delivery.

Benefits of 360 Degree Feedback

> **"Incorporating customer feedback in the evaluation process emphasizes the importance of client expectations in determining company focus."**
> *Robert Hoffman*
> *"The reasons you should be using 360-degree feedback"*
> *HR Magazine*
> *April 1995*

- **Better, more rounded and honest feedback**
- **Helps team members learn to work more effectively together.** (Teams know more about how team members are performing than their bosses.) Multi-rater feedback enables team members to become more accountable to each other. A well-planned 360 process can improve communication, team development and trust, but if done improperly, can create long range and long term problems, including eroding trust.
- **Professional and Organizational Performance Development:** 360 degree feedback is one of the best methods for understanding personal and organizational developmental needs. It provides quantifiable data and what is sometimes considered "soft skills." Companies using the 360 process indicate that it increases productivity by giving employees a more accurate awareness of their personal strengths and areas of challenge.
- **Improved working relationship with Boss:** The 360 feedback adds depth to standard performance review systems.
- **Individual Responsibility for Career Development:** 360 feedback can provide excellent information to an individual about what he or she needs to do to enhance his/her career. The 360 information is useful for both career and personal development.
- **Better Customer Service:** Feedback processes that involve the internal or external customer should enable the leader to improve the quality, reliability, promptness, and comprehensiveness of customer service.
- **Reinforced and strengthened corporate culture:** IF the 360 questions are linked to organizational leadership competencies and company values.
- **Training Needs Assessment:** Multi-rater feedback can provide information about organizational training needs and allows planning for relevant classes and training events, cross-functional responsibilities, and cross-training.

Cautions and Advisories

- 360 degree feedback is not the same as a performance management system. It is merely a part of the feedback and development that such a system offers within an organization. Make sure the 360 feedback is integrated into a complete performance management system.
- Just as an organization implements any planned change, the implementation of 360 feedback should follow effective change management guidelines.
- For a 360 feedback process to work, it must be connected with the overall strategic aims of the organization. If the organization has identified competencies or has comprehensive job descriptions, participants need feedback on their performance of the expected competencies and job duties. The Legacy Leadership® Competency Inventory 360 Feedback Tool can be

linked especially well with established organizational competency expectations, and Legacy Leadership® is an excellent all-around foundational leadership model which can be utilized in the absence of an existing organizational leadership model. The 360 process will not succeed if it is just "tacked on" rather than a firm support of the organization's basic vision and strategic goals. It must function as a measure of accomplishment of the organization's vision.

- Employees who will participate in a 360 process need training and information about the process. Failure to provide the appropriate amount of training and information can sink a process quickly. (potential problems: lower morale, decreased motivation, lack of trust, employee "revenge" etc.)

- Supervisors, HR staff, bosses, managers and others must be trained to assist people to understand their feedback, and help people develop realistic action plans based upon the feedback. Supervisory people need to be trained to be coaches as well as bosses to ensure successful development of participants.

- 360 feedback may be inappropriate in cases where the person receiving feedback is too new to the group or organization, where there aren't enough raters who truly know and have experience with the individual being rated, during a time of major change (such as mergers and acquisitions), or in an environment where trust is fragile or not evident. However, raters can also come from a previously held position.

Preparing for 360 Feedback: Readiness Factors

The Organization

If an organization has determined that the 360 feedback tool would be helpful and meaningful to achieving the organization's strategic vision, there are a number of issues that should be addressed PRIOR to beginning the process. Organizations need to determine how ready they are for the 360 process. The 360 is a powerful diagnostic/assessment process, and it can be used in many areas of human resource development and personnel management. It should also raise questions about how the process/system will be used and how it will affect people in the organization. The success and effectiveness of the feedback is dependent on the integrity of the entire process, the level of commitment, the clarity of purpose and intent, and all development plans and follow-up. Planning for organizational 360 feedback processes must start at the top levels to ensure complete buy-in. Be sure to directly address, openly and up front, any issues that might create resistance. Determine and focus on the benefits both to the individual, to teams, and to the organization as a whole. If possible, an outside (external coach/ consultant) can help eliminate any fears of confidentiality breakdowns and misuse of information.

The following is a short list of questions that should be considered fully by top leadership. These are offered here only as thought generators, not as a complete list or "how to" instructions. These issues should be fully investigated and the answers to all questions should be answered before engaging in any organization sponsored 360 process. Internal and external coaches can help the organization explore these issues and find appropriate answers.

1. Do we need this 360 degree feedback to improve our corporate strategy and accomplish the organizational vision? How will it help do this? (in other words, WHY do we want to do this?)

2. What problems might the process create? How will we either eliminate these problems, or deal effectively with them? (What is the feedback "climate" here? Is it possible to get honest results?)

3. What is top leadership/management/HR roles in this process? Are they specifically delineated and understood?

4. What will we do, organizationally, with the results? How will we generate employee development plans utilizing the feedback, and how will we encourage that development? (Specifically, how will these development plans be used to align behaviors and expectations desired to successfully implement the organizational strategy and identified goals?)

"Another factor in 360 readiness is whether those who will be rated see the process as constructive, not attacking--that is, is the organization using the 360 process to help people improve (or, in some cases, choose to play a different role in the organization) or is it using the process to justify removing people or otherwise making punitive actions?"

Judy Cox
Performance Management Listserve
March 19, 1999

5. Are there sufficient financial resources available, and designated, to insure a solid, successful and high integrity process, including coaching for leadership development follow-through?

6. What about after the feedback process? Have we identified, outlined and budgeted for follow-up activities such as employee/leader training and development, ongoing coaching/ consulting, follow-up assessment processes?

7. How will we prepare employees and customers (internal and external people) for this process?

8. Is any additional training required for bosses, management, teams and others to ensure the success of this process? (For example, is there a leadership model in place, does it fit with the 360 process? If not, should an organization-wide leadership model be introduced and incorporated? How will people help others achieve their development goals? Do we need a corporate development plan?)

9. Exactly how will we use this data? (Leadership development only, or performance evaluation, or other?)

10. Are we prepared emotionally, financially and technically to undertake such a project?

Communication is critical to the success of the 360 degree feedback process. Bosses and participants need to be educated and involved from the beginning regarding the purpose and goals of the process. From the beginning, the 360 degree feedback team should make communication a key element in planning the 360 degree feedback process.

It should also be noted that there is a great deal of front end work involved for the external or internal person (sponsor) leading this effort. If this person or group is external, consideration must be given by both the organization (and the external sponsor) regarding how these efforts will be funded. External sponsors must determine how these hours are billed in overall invoicing process.

(NOTE: CoachWorks® can also provide a Group Summary Report that averages all the ratings for all the participants showing areas where the organization may wish to consider organizational development plans)

The Individual

A single individual can benefit greatly from a 360 feedback process. This might happen if that person has engaged a coach and the coach determines the 360 is appropriate, or if the person's boss believes a 360 would be beneficial for the employee. A 360 degree feedback should not be used as a method to fire or remove someone from a position. It should be viewed for constructive, developmental potential to the individual. In simple terms, a 360 is NOT for discipline. It's for development.

The individual should be briefed on the basic 360 feedback process, and helped to understand the motives and intent behind the assessment. The idea of 360 feedback can be a little intimidating to some, both for the participant and for the raters. Everyone involved should be given ample instruction and information before beginning, and assurances of confidentiality (see the section on The Boss).

Have the individual (in association with his or her boss, if possible) determine who will provide the feedback. It is best if these raters have at least six months' experience with the participant, and a working understanding of the individual's performance and expectations for performance. Those with limited experience may be included (and can actually provide some good "first impression" insights), but only if there are enough others in the particular category to provide ample sampling.

> **"For 360 degree feedback to be effective as a stimulus for change, people need to understand its broader purpose."**
>
> *Richard Lepsinger and Anntoinette D. Lucia*
> *The Art and Science of 360 Degree Feedback. Pfeiffer/ Jossey-Bass Inc., San Francisco, 1997*

The Boss

(Please also see the section "The Process" and the note entitled "An Important Note About the Boss Category" for issues regarding confidentiality)

Generally, the person being coached determines whether to share the full 360 feedback report with the boss, or just provides a verbal overview or summary page. However, if possible, CoachWorks® usually recommends that the results of 360 feedback for any employee be shared with the boss. It is recommended that the boss, the participant, and the coach be involved in a face-to-face meeting for this purpose, and all parties are aware of this in advance. There are a number of considerations regarding sharing individual information with the boss of any individual. While sharing the 360 data does increase accountability and allows the boss to track progress, there are some issues that should be addressed first, or the following may result:

> **"People need clarification about what is expected of them after they receive the feedback, as well as ongoing support, if what they have learned is going to lead to action or change."**
>
> *Richard Lepsinger and Anntoinette D. Lucia*

- The entire process is feared, effectively skewing results and limiting real development

- Feedback comments will not be as constructive or honest
- Scores may be higher, as people try to "please" rather than honestly evaluate
- Data can become a weapon, not a development tool
- Bosses may lack the ability to interpret the data appropriately and constructively (the coach can enable the boss to understand feedback and how to use it effectively)
- The boss may reprimand the employee for not doing well, and use the results as discipline

> **"Despite their growing popularity, many multi-rater efforts are falling woefully short of their potential. Most companies view the multi-rater process as a special event, using it one time only as part of a training or coaching session. As a result, they don't take the process beyond the initial goal of providing feedback to individual employees."**
> *Susan H. Gebelein*
> *"Employee Development: Multi-rater Feedback Goes Strategic," HR Focus, January, 1996*

All parties must focus on goals and development, not numeric results. In this way, bosses can act as ongoing coaches, guiding the individual to higher performance levels, rather than judges, focusing on specific scores and comments and using them as a weapon during performance reviews. Note that 360 feedback results should be directly related with performance review systems in place.

The Sponsor

CoachWorks® highly recommends that a trained and experienced executive coach, an internal or external sponsor, be involved in the planning, the administration, the reporting and the leader development stages of the 360 process, whether for organizations or individuals. The coach can help anticipate hurdles, problems and obstacles and pave the way for real results. Here's a partial list of how the sponsor can enable a smooth process with meaningful results:

- Determine and enable readiness
- Communicate instructions and procedures
- Generate enthusiasm among leaders and participants
- Proactively anticipate objections
- Demonstrate the link between 360-degree feedback and specific business objectives
- Clarify costs and benefits to individuals and the organization
- Communicate clearly and frequently about purpose, process and progress
- Address and communicate confidentiality
- Develop coaching skills for bosses so that they can support the process
- Assist subjects with the skills needed to accept feedback and effectively manage their own performance
- Interpret the results with positive planning
- Assist in developing individual/team goals, leader development and action plans
- Provide organizational information, evaluate trends and patterns among participants at various levels or in specific areas of the organization
- Drive training and other organizational interventions with group summary data
- Provide coaching, training around 360 results and subsequent development plans (ongoing support)

- Quantify progress in development
- Develop next-level goals and objectives for participants
- Provide follow-up measurement (re-assessment at appropriate times, for example, a 6-month or 1-year follow-up to determine progress)

The 360 as Part of Accelerated Coaching

(The following is excerpted from the article "Formula 7: The Chemistry of Accelerated Learning in Executive Coaching" by Drs. Smith and Sandstrom of CoachWorks® International, Inc.)

Measurement

In order to launch the coaching process quickly and move into an accelerated learning environment, the coach and the leader must first learn what they don't know. A 360 feedback tool can provide this kind of vital information prior to developing a plan of action. There are many excellent feedback programs. CoachWorks® has developed one of their own entitled The Legacy Leadership Competency Inventory™ (LLCI), based on the leadership model also developed by CoachWorks®. The 50 assessment questions on this feedback tool are based on the 10 Critical Success Skills of each of the 5 Best Practices that comprise Legacy Leadership®, a comprehensive framework for great leadership. An online service works well for 360 feedback, providing detailed graphs and observations on the leader's behavior and competencies, seen by the leader AND those around him or her.

A 360 is only one form of measurement needed in this accelerated environment, however. In order to acquire the most information in the least amount of time, the coach should develop "interview" questions designed to measure the real performance of this leader by those closest to him or her. The person being coached provides the coach with a list of the people closest in the leadership structure, those who truly know this leader well. These people may also have provided 360 assessments, but the questions asked of these people are separate from performance ratings. These questions have more to do with communication, trust, visionary ability, executive teams and inner workings not generally covered in a standard 360. The coach personally interviews these people, asking the questions and carefully noting responses.

When the results of the 360 feedback are combined with these personal interviews, a comprehensive level of understanding about the person being coached is obtained quickly. The coach now knows what he or she didn't know before, and quite often, the same applies to the leader. These results can sometimes be surprising to the client.

The alternative to these measurement elements is to merely talk to the person, asking the same kinds of questions found on a 360 assessment, or in the personal interviews. However, you must keep in mind that you will gain information from only ONE perspective, and it may or may not be accurate. Some time ago a client told us that his people really loved him and they would do anything for him. This man was in marketing and had achieved very high production sales, well above expectations. However, it didn't take long to determine that "his people" had lost respect for him, and in fact, his turnover rate was excessive. His great sales levels were a result of external abilities, but he could not follow-through after the sales with his staff because his internal behaviors kept him from being an effective leader. His perception was faulty. Interviewing only the leader about the leader will slow, not accelerate, the learning as you begin with an incomplete picture and one that is often based in assumptions, not reality.

The Legacy Leadership® Competency Inventory™

The Legacy Leadership® Competency Inventory (LLCI)™, an online 360 feedback tool, is a highly preferred method to gather data for both the level of performance and expectations of performance (a dual-factor instrument). The LLCI process easily facilitates input of up to 48 raters in four categories (Boss, Peer, Direct Report, and Customer, as well as self-assessment), designated by the person requesting feedback. A completely confidential and extremely thorough evaluative report (considered and sometimes corrected for rater bias) gives the Coach and the subject person (the participant) the information needed to create a coaching plan for leadership development. It measures 50 critical success skills in five categories of the Five Best Practices of Legacy Leadership®. Some of the leaders receiving such feedback have been humbled to learn that they are appreciated while also gaining insights about what can be improved. Also, when tough feedback is given by the Coach or leader, it is done in such a manner to be understood, accepted, then utilized to improve performance more quickly. The LLCI has had at least a 95% rate of successful feedback ("successful" is defined as received and accepted by the evaluated person) because it shows not only levels of performance and expectations, but also hidden strengths and blind spots in the areas of leadership that are so very critical. The LLCI measures critical success skills that overlap with whatever leadership factors or model happens to be in place in an organization, and raises the level of leadership competencies as well. Even with the highest scores received, there is still room to raise the level of performance against such critical skills and competencies. This is a DUAL factor inventory, which means that the raters are asked to rank the person for both PERFORMANCE and EXPECTATIONS of performance.

Successful coaches and leaders prefer gathering data for a complete picture of performance so that developing a leader toward higher levels of performance can occur quickly. Without it, the picture is incomplete and development lumbers along slowly. In our rapid-pace world, leaders need to be as meticulous about gathering performance data as they are about financial indicators and decision data. The LLCI 360 Feedback tool gathers complete data and provides a means for rapid and thorough development.

The LLCI Online Process

Generally the 360 assessment process has been determined by either a boss for an employee, or by a coach for his or her client. Whoever is sponsoring the 360 should explain to the participant what is required, and how the process works. CoachWorks® will need a list of participant and rater information, as well as pertinent dates, etc. Here's how it works and what to tell your 360 participant:

1. **<u>Determine the FINAL date for receiving all responses, and a final report</u>**. This should be about three weeks away from when you begin the process. This gives the participant time to gather rater information, for CoachWorks to send instructions, and for respondents to complete the online 360.

2. **<u>Request the participant to generate a list of raters in four categories</u>**: BOSS, PEER, DIRECT REPORT and CUSTOMER. The "Customer" category can be internal or external, or may even consist of people not considered customers, but some other designated group. The online system can handle an unlimited number of raters in each of the four categories. It is recommended that you request the 360 participant to have at least 5-7 or more raters in each category if possible. On occasion, some people requested to provide feedback do not follow through, for a variety of reasons (schedules, intimidation, etc.). CoachWorks® will NOT generate a report with less than 3 responses in each category. For example, if a participant only has feedback from 2 people in the DIRECT REPORT category, that category will NOT be shown on the report. If this happens in more than one category, NO report will be generated. Providing at least 5-7 names in each category should ensure a reliable average. The only category where this is not true, is BOSS. Most times there will be only one boss, but more are acceptable. (PLEASE NOTE THE COMMENTS REGARDING CONFIDENTIALITY OF BOSS RATINGS.) Once the participant has selected <u>and notified</u> his or her raters, have them make a list with the complete names of each individual, their relationship to him or her, and their email addresses:

PARTICIPANT'S NAME: William Leader (include participant's email address also)

PARTICIPANT	RELATIONSHIP to Participant	Rater's Email Address
Joe Smith	Boss	jsmith@anywhere.com
Jane Doe	Peer	jdoe@commons.com
Peter Buck	Peer	petersbuck@corporate.org
Nancy Neighbor	Peer	nancy_neighbor@corporate.org
Ron Sampleton	Peer	ron_sampleton@corporate.org
Linda Worker	Peer	lworker@anywhere.com
Jim Best	Peer	123bestj@abc.com
Robert Runner	Direct Report	r_runner1@345.com
Ashley Sprinter	Direct Report	ashleysp@123.com
Ned Alert	Direct Report	ned.alert@corporate.org
Tom Carpenter	Direct Report	Tom.carpenter@corporate.org
Sue Sweeper	Direct Report	sue_sweeper@corporate.org
Maria Marigold	Direct Report	marigold_123@345.com
Daniel Consumer	Customer	dconsumer@anywhere.org
Ralph User	Customer	r_user@123.com
Wilma Conditions	Customer	w_conditions@123.com
Sandy Utopia	Customer	s.utopia@corporate.org
Lester Learning	Customer	l_learning@university.org
Lincoln Presidential	Customer	lincolnp@abc.com
Goldie Feedback	Customer	g.feedback@corporate.org
Stanton Steadyhand	Customer	stantons@456.com
Rosita Monitor	Customer	r.monitor@laptop.org

As participants select those who will provide feedback on their performance, remind them that it is best for raters to have at least one to several years experience with the participant in order to provide competent feedback. However, raters can offer some interesting insights based on a "first impression" basis as well, if they have limited exposure or experience with the participant. **BE SURE TO HAVE PARTICIPANT CHECK ALL NAMES AND ESPECIALLY EMAIL ADDRESSES FOR ACCURACY**. This is very important.

3. **Ask the participant to alert raters that they will receive an instructional email** with all the directions and passwords for completing the online assessment. The instructions will be received from the CoachWorks 360 Administrator. The subject line will read either "[participant name] 360 Feedback Instructions" (for all raters) or "[participant name] 360 Self Assessment Instructions" (for the participant).

   The following is the standard set of instructions sent to raters (except BOSS category; see notes below). This notice is for DIRECT REPORTS, but is essentially the same sent to all categories:

SUBJECT: 360 FEEDBACK FOR PARTICIPANT NAME

PARTICIPANT NAME is participating in our online 360 Feedback Leadership Assessment Tool. You have been requested to provide feedback for **PARTICIPANT NAME** as one of his/her raters. **PLEASE READ ALL OF THE FOLLOWING INSTRUCTIONS CAREFULLY**. **You can prevent errors and problems if you take a few minutes to read through these instructions first.**

This process requires obtaining feedback from bosses, peers, direct reports (or other employees) and customers (or other persons) regarding **PARTICIPANT NAME 's** leadership and on-the-job performance and expectations. This survey is done online and only takes about 15-20 minutes to complete. All feedback is confidential. Although we require your name to track the responses in the master system (this merely allows the webmaster to determine if all raters have responded), **ALL INFORMATION IS ANONYMOUS** when reported. No one has access to the database except our webmaster, and the person being rated NEVER sees who filed what responses. Your confidentiality is always protected.

PLEASE NOTE: WE NEED YOUR FEEDBACK COMPLETED NO LATER THAN (TARGET DATE).

NAME OF PERSON YOU ARE PROVIDING INFORMATION FOR: PARTICIPANT NAME

YOUR Relationship: BOSS/PEER/DIRECT REPORT/CUSTOMER (THIS is the button you will click on)

Please follow these instructions:

1. Go to web address http://legacyleadership.com/LL_360.html

2. Please **read the instructions FIRST** by clicking on the words "ASSESSMENT INSTRUCTIONS" directly below the small blue login box on the left sidebar. (This is a **dual rating inventory** - performance and expectation - so you will need information on how to properly complete your feedback.)

3. After reading the instructions, click the blue "LOG IN" button.

4. Enter the following: **User ID: xxxxxx** **Password: xxxxxx** (neither is case sensitive)

5. **IMPORTANT!** Click the **SECOND button** "Click Here for Peer, Boss, Direct Report or Customer Assessment" **and then LOGIN**. (Note, if you inadvertently click on the first button for self assessment, you will not be allowed into

the system. Go back and click on the SECOND button to enter.)

6. Select the name of the person (**PARTICIPANT NAME**) you are rating from the drop-down menu list.

7. Please provide YOUR name in the box above the drop-down menu list. You can provide either initials or your whole name, but **we do need a way to track** to see if all raters have provided information. THIS INFORMATION IS **COMPLETELY CONFIDENTIAL AND ANONYMOUS** WHEN REPORTED. Again, only the webmaster can view the names of raters. ***(We will remind you of your need to provide feedback if the system notes that you have not done so prior to the date indicated above.)***

8. Click the appropriate button that shows **YOUR RELATIONSHIP** to the participant you are rating. **In this case, you will click on [CATEGORY]**. (This is very important, so please be sure to click the appropriate button before completing the assessment. Do NOT arbitrarily change your assigned "relationship" designation.) Again, it is YOUR relationship to the person being rated, NOT their relationship to you. ***(i.e., if this person is YOUR boss, this means you are a DIRECT REPORT, and you click on Direct Report, unless specifically directed to do otherwise.)***

9. Complete the assessment (50 questions, DUAL responses for each question) (**PLEASE NOTE**: There are 50 assessment areas for you to rate the participant. **ALL 50 MUST BE COMPLETED WITH A RATING**. If any are left blank, the system will NOT accept the assessment.

9a. **"NO RATING" OPTION:** We realize you may have some areas which are difficult to rate, depending on your experience with the participant. You may not have had enough experience to accurately rate this person in certain areas, therefore we have allowed the system to accept a NO RATING response if necessary. We encourage you to try your best to provide as much solid feedback and as many rated responses as you can, but in those cases where you do not feel comfortable providing these ratings, please select the NO RATING button, for either performance or expectation columns, or both. It is possible that you have experience in the performance for this individual in a certain area, but you do not have any knowledge of the expectation for that person. A NO RATING response under the expectation column is acceptable here. Or, you may not have any experience in performance OR expectation, and if so, you should mark the NO RATING button for each of the two columns. The system will consider these responses null and will not include them in averages. Again, **please do not use this option extensively**, unless that is a true reflection of your experience with this person in certain areas. If you wish to make comments about these NO RATING responses, you may do so at the end of the assessment in the provided space.

10. **PLEASE PROVIDE COMMENTS IN THE BOX AT THE END OF THE ASSESSMENT**. This is a very important part of the assessment, and we value your comments. Follow the instructions there. Again, all information is completely confidential. PLEASE BE COMPLETELY HONEST AND CANDID WITH YOUR COMMENTS AND INCLUDE ANY INFORMATION YOU FEEL IS IMPORTANT.

11. **SUBMIT YOUR ASSESSMENT:** When you have completed this section, click on SUBMIT to send your assessment. (If you log out before clicking on SUBMIT, you will lose all your data and will have to re-do the assessment.) **PLEASE NOTE WHAT THE SCREEN SAYS WHEN YOU CLICK ON THE SUBMIT BUTTON!** It will either thank you for your assessments (meaning it has been successfully submitted) or it will tell you that something has not been completed. If you see this second note, please go back and check your responses to be sure you have clicked on all the questions, both performance and expectation buttons, then resubmit.

Once again, PLEASE COMPLETE THIS ASSESSMENT **NO LATER THAN** **TARGET DATE.**

If you have any questions/concerns about this assessment, or if you need to report a problem or any other comments, please contact me at email address.

On behalf of **PARTICIPANT NAME**, thank you for your assistance with this 360 Feedback.

Legacy Leadership 360 Administrator
CoachWorks International, Inc.
Seattle, Washington and Dallas, Texas USA
214.585.8254

AN IMPORTANT NOTE ABOUT THE BOSS CATEGORY

In most cases, the person participating will have only one boss. Occasionally more than one boss will provide feedback, if specified by the participant. This, and all other categories, can handle unlimited raters. However, since there will most likely be only one boss rating the participant, this brings up the subject of confidentiality for a single set of responses, when the final report is shared with the participant. The participant will see the single rater's responses. In all other categories, the ratings are combined for averages, and are not identified by rater, and are thus confidential and rater identity protected. This is not the case for the boss. For this reason it is important to prepare the boss PRIOR to receiving instructions, to understand that his or her ratings for the participant are not considered confidential, and will be seen by the participant. It is helpful if the sponsor (coach, or other person, internal or external) alerts the boss to this situation. In another area of this document we will address the issue of sharing participant results with the boss and participant present, after final report is received. In both cases, be sure the boss understands that his or her ratings will be known by the participant, if the boss is a single rater in this category. To help alert the boss, the following (next page) is the set of instructions which CoachWorks® will send to the Boss, similar to those above, but with a disclaimer notice regarding confidentiality.

> Dear [rater's name],
>
> **[Participant's name]** is participating in our online 360 Feedback Leadership Assessment Tool. You have been requested to provide feedback for **[participant's name]** as one of his raters.
>
> PLEASE NOTE: As BOSS in this assessment feedback process, your responses may be the only set of feedback ratings in this category. Other categories (PEER, DIRECT REPORT, CUSTOMER if applicable) will have multiple ratings. We do not run a report in any other category unless it has a minimum of 3 sets of responses to insure anonymity. In the BOSS category, however, a single set of ratings is allowed and the report will show only one respondent. For this reason, it is likely that your responses will indeed be known by the person being rated. It is critical to obtain the BOSS's feedback, and most of the time a person has only one person in this category. We wanted you to be aware that your feedback, as a single rater in this category, will be known by the person being rated once the report is generated and shared with the participant. If you have concerns about this, please contact the person sponsoring this report. In this case, you would respond directly to [sponsor's name] at [sponsor's email address])
>
> **PLEASE NOTE: WE NEED YOUR FEEDBACK COMPLETED ON OR BEFORE [date]**
> **NAME OF PERSON YOU ARE PROVIDING INFORMATION FOR: [participant name]**
> **YOUR Relationship: BOSS**
>
> **Please follow these instructions:** *(see previous page for remainder of email instructions)*

ABOUT SELF ASSESSMENTS

The person being rated is asked to complete a self assessment which is used as a comparison to other ratings. The SELF assessment does NOT include the ability to make comments. This is reserved for the other raters.

4. **Forward the completed rater list to the CoachWorks® 360 Administrator** AT LEAST 2 WEEKS PRIOR (preferably 3 weeks) to the date you have selected for final report. It is best to give raters a small window of time (no less than one week, and no longer than 10 days) to complete feedback, and it will require a few days to get the account(s) set up by the webmaster. The list can be in any format including a spreadsheet, table, or simple list in an email. Once the list is received by CoachWorks®, the instructional emails will be sent. Please be sure raters have been alerted to receive this email PRIOR to forwarding the list to CoachWorks®. Also, since the age of spam filters and tightening IT controls, the sponsor may need to prepare others to receive the instructional emails. This sometimes means alerting the IT department in an organization, or sending a preliminary email to raters to alert them to look for these instructions and not allow them to end up in spam filters. When this happens, CoachWorks has no way of knowing if the rater received the instructions or not. CoachWorks® will provide user assistance and troubleshooting, if necessary, for the raters.

5. If the coach/sponsor wishes, the **CoachWorks® 360 Administrator is available to work with directly**. On occasion, personalized emails and attention to specific needs is helpful. Send an email to info@coachworks.com with your requests.

6. **CoachWorks® will monitor the feedback** site to determine progress of assessment receipts. Reminders will be sent (by CoachWorks®), if necessary, a few days prior to target completion date if a rater has not completed feedback. On occasion, and with communication with the sponsor, the deadline for responses may be extended, and raters notified.

7. Once all feedback has been received, **CoachWorks® will run the final report**, which consists of 15 introductory pages for interpreting the results, followed by approximately 16-17 pages of actual results in graphic form. This is captured in full color graphs in a PDF file, which is then forwarded to the participant's sponsor. CoachWorks® does not generally forward 360 reports directly to the participant, unless specifically requested to do so. All PDF 360 reports are locked, and password protected. CoachWorks® also does not print reports. This is the responsibility of the sponsor, or the person to whom the reports are sent.

8. If the sponsor is unfamiliar with interpretation of 360 reports, one of the CoachWorks executive coaches may be available for **assistance in interpretation** prior to the sponsor's debrief with his/her client. This expertise/assistance is available at an EXTRA cost. If the sponsor is interested in this service, contact the administrator directly to make these arrangements.

CUSTOMIZATION OPTION

The comments portion of the assessment is available for customization. You may wish to have additional ratings areas, or request answers to specific targeted questions, in addition to the general comments area. CoachWorks can customize your 360 in a great number of ways, allowing for even richer, more accurate assessment results. This customization is available at an EXTRA cost. Contact the administrator well in advance of your deadlines so this service can be discussed and built into the database for your project.

TAKING THE ASSESSMENT

These instructions are provided so you have an understanding of the online process, should your clients need further instructions or assistance. The Coachworks International 360 Administrator is usually available via email for questions and concerns, but we felt each sponsor should have materials available to assist if needed.

The participant can access the page above (log in page) either by going to the homepage for CoachWorks International, Inc. (www.coachworks.com or www.legacyleadership.com) or using the URL sent to them in their instructions (http://coachworks.com/LL_360.html). If they go to the homepage, they will need to click on the "360 Online Service" tab on the far right of the upper menu bar. That action will take them to the page above. There is a login box located at the far left of this page. All users (self and 360 raters) will click on the blue box that says LOG IN. Encourage everyone to read the assessment instructions FIRST before going any further. These will appear in a pop-up box when the "ASSESSMENT INSTRUCTIONS" button is clicked. For your information, here are the instructions contained at the site:

Completing the Online Legacy Leadership Competency Inventory (LLCI)™
For Self, or 360 Feedback for Others

1. Read these instructions completely before beginning.

2. After reading the instructions, click on the words "Log In" in the right column.

3. This will bring up a screen where you will be asked for your User ID and Password. If you are one of the registered program participants, you will have been issued a unique User ID and Password. Enter those here and select if you are doing a Self Assessment (first button) or a 360 assessment for someone else (second button). Other respondents (not one of the registered participants) will have been issued a corporate ID and corporate password. *(The unregistered participants will only be able to complete the 360 Feedback, not the Self Assessment portion.)*

You will automatically be taken to the 50 questions worded for either self or 360 assessment. **Please answer ALL 50 questions,** using the following instructions:

DUAL COLUMN RATING INSTRUCTIONS

1. There are a total of 50 questions. There are two columns or sets of response numbers, one column for **PERFORMANCE** and one for **EXPECTATIONS**. Each column has 5 buttons for your ratings, numbered 5 (highest rating) to 1 (lowest rating). You are asked to provide a rating for EACH of the two columns, for EACH question. You would therefore be entering a total of 100 responses.

2. When you consider your rating, ask these questions for each column:
   PERFORMANCE:
   How often **do I exhibit** this stated behavior/attitude? *(SELF)* ***OR*** How often **does this person exhibit** this stated behavior/attitude? *(360 Feedback)*
   EXPECTATIONS:
   How important is this stated behavior/attitude to my position? *(SELF)* **OR** How important is this stated behavior/attitude to the position this person holds? *(360)*

3. Read each statement carefully, and honestly rate yourself/other person on a scale of 5 (highest) to 1 (lowest) as follows:
   This statement describes my/their behavior/attitude (PERFORMANCE COLUMN):
   5-Consistently
   4-Frequently
   3-On Average
   2-Occasionally
   1-Not At All
   The statement describes how important this behavior/attitude is for the position (EXPECTATIONS):
   5-Consistently
   4-Frequently
   3-On Average
   2-Occasionally
   1-Not At All

   Rate yourself (or your boss, peer or direct report) for BOTH Performance AND Expectations using this scale. **Answer all 50 questions, two responses (ratings) each question (one for Performance and one for Expectations).**

4. **IMPORTANT NEW MODIFICATION IN RATING RESPONSE OPTIONS** (as of November 2006): **ADDITION OF "NO RATING" RESPONSES** We realize you may have some areas which are difficult to rate, depending on your experience with the participant. You may not have had enough experience to accurately rate this person (or yourself) in certain areas, therefore we have modified the system to accept a NO RATING response if necessary. We encourage you to try your best to provide as much solid feedback and as many rated responses as you can, but in those cases where you do not feel comfortable providing these ratings, please select the NO RATING button, for either performance or expectation columns, or both. It is possible that you have experience in the performance for this individual in a certain area, but you do not have any knowledge of the expectation for that person. A NO RATING response under the expectation column is acceptable here. Or, you may not have any experience in performance OR expectation, and if so, you should mark the NO RATING button for each of the two columns. The system will consider these responses null and will not include them in averages. Again, please do not use this option extensively, unless that is a true reflection of your experience with this person in certain areas. If you wish to make comments about these NO RATING responses, you may do so at the end of the assessment in provided space.

5. After you have answered ALL 50 QUESTIONS, please answer any questions stated at the end, and make comments as desired in the provided comments boxes, then click on 'Submit' to send your report. The system will then ask you if you want to continue with another assessment, or log off.

NOTE: If you make mistakes during your rating, you can correct the error simply by selecting the correct button. The system only allows you one entry per set of numbers, so you can correct an incorrect response. You must do this BEFORE clicking on the SUBMIT button, however. If you realize that you have made errors after clicking on the SUBMIT button, please contact the site administrator with an explanation of the situation. The administrator will contact you with instructions if necessary. Thanks!

CoachWorks International
The LEGACY Leader Company

Legacy Leadership® 360 Feedback Online Assessment

ASSESSMENT INSTRUCTIONS
(click here to read instructions)

Self-Assessment Questions

Participant Name

Organization Name

	PERFORMANCE						EXPECTATIONS					
	Consistently	Frequently	On Average	Occasionally	Not At All	No Rating	Consistently	Frequently	On Average	Occasionally	Not At All	No Rating
	5	4	3	2	1	•	5	4	3	2	1	•
1. I am very adept at developing and maintaining relationships.												
2. I require peak performance and support everyone with appropriate resources.												
3. I personally create possibilities that are both innovative and sound for our organization.												
4. I insist on having teams of individuals with diverse approaches and capabilities.												
5. I have a well-defined strategic plan for accomplishing the goals of the vision.												
6. I have clearly defined accountabilities for myself and my organization.												
7. I constantly acknowledge and recognize the attributes and contributions of others.												
8. I ensure the organizational values are integrated into how we do business.												
9. I have a clearly developed action plan with benchmarks and milestones, and provisions for making adjustments along the way.												
10. I constantly raise the visibility of individuals by mentoring and developing them.												

	PERFORMANCE						EXPECTATIONS					
	Consistently	Frequently	On Average	Occasionally	Not At All	No Rating	Consistently	Frequently	On Average	Occasionally	Not At All	No Rating
	5	4	3	2	1	•	5	4	3	2	1	•
11. I set the tone for thinking beyond where we are presently in order to innovate now for the future.												
12. I intentionally delegate for the development of others.												
13. I have my "finger on the pulse" of my organization and know our milestone status.												
14. I have clearly identified my personal values and "walk my talk" in everything I do.												
15. I am a masterful facilitator of conversations such that everyone contributes their best thinking toward the task/issue at hand.												
16. I look for cross-functional opportunities where unique talent can be developed.												
17. I effectively communicate and sustain processes and systems to achieve the organizational vision and values throughout my business area.												

This is the page that the individual participant will see when he/she logs on. The questions are randomized, and contain the same language as that found in the paper version of the LLCI.

CoachWorks International®
The LEGACY Leader® Company

Legacy Leadership® 360 Feedback Online Assessment

ASSESSMENT INSTRUCTIONS (click here to read instructions)

Assessment Questions

Reviewer: RATER'S NAME
Assessment provided for: Select Name of Person

Boss ◉ Peer ○ Direct Report ○ Customer ○

ORGANIZATION NAME

#	Question	PERFORMANCE: Consistently 5	Frequently 4	On Average 3	Occasionally 2	Not At All 1	No Rating •	EXPECTATIONS: Consistently 5	Frequently 4	On Average 3	Occasionally 2	Not At All 1	No Rating •
1.	This person is very adept at developing and maintaining relationships.	○	○	○	○	○	○	○	○	○	○	○	○
2.	This person requires peak performance and supports everyone with appropriate resources.	○	○	○	○	○	○	○	○	○	○	○	○
3.	This person creates possibilities that are both innovative and sound for the organization.	○	○	○	○	○	○	○	○	○	○	○	○
4.	This person insists on having teams of individuals with diverse approaches and capabilities.	○	○	○	○	○	○	○	○	○	○	○	○
5.	This person has a well-defined strategic plan for accomplishing the goals of the vision.	○	○	○	○	○	○	○	○	○	○	○	○
6.	This person has clearly defined accountabilities for themself and the organization.	○	○	○	○	○	○	○	○	○	○	○	○
7.	This person constantly acknowledges and recognizes the attributes and contributions of others.	○	○	○	○	○	○	○	○	○	○	○	○
8.	This person ensures the organizational values are integrated into how we do business.	○	○	○	○	○	○	○	○	○	○	○	○
9.	This person has a clearly developed action plan with benchmarks and milestones, and provisions for making adjustments along the way.	○	○	○	○	○	○	○	○	○	○	○	○
10.	This person constantly raises the visibility of individuals by mentoring and developing them.	○	○	○	○	○	○	○	○	○	○	○	○
11.	This person sets the tone for thinking beyond where we are presently in order to innovate now for the future.	○	○	○	○	○	○	○	○	○	○	○	○
12.	This person intentionally delegates for the development of others.	○	○	○	○	○	○	○	○	○	○	○	○
13.	This person has his or her "finger on the pulse" of the organization and knows the milestone status.	○	○	○	○	○	○	○	○	○	○	○	○
14.	This person has clearly identified his or her personal values and "walks the talk" in everything they do.	○	○	○	○	○	○	○	○	○	○	○	○
15.	This person is a masterful facilitator of conversations such that everyone contributes their best thinking toward the task/issue at hand.	○	○	○	○	○	○	○	○	○	○	○	○
16.	This person looks for cross-functional opportunities where unique talent can be developed.	○	○	○	○	○	○	○	○	○	○	○	○
17.	This person effectively communicates and sustains processes and systems to achieve the organizational vision and values throughout his or her business area.	○	○	○	○	○	○	○	○	○	○	○	○
18.	This person is a masterful listener for both what is said and what is not said.	○	○	○	○	○	○	○	○	○	○	○	○

This is the page that 360 raters will see when they log on. The questions are randomized, but follow the same language as that for the self-assessment, except for wording that makes that applicable to another person.

45. This person draws out differing perspectives and believes that disagreement is a learning opportunity.

46. This person brings out the best in people.

47. This person establishes measurable milestones and benchmarks congruent with the vision.

48. This person has ongoing dialogue and involvement with internal and external communities.

49. This person is alert to trends that potentially affect results and re-calibrates action plans where necessary.

50. This person keeps in mind the bigger picture which helps him or her to ask timely, tough questions.

COMMENTS: Please provide any additional information you feel is important for this person's leadership development, or other information that is pertinent to this 360 process. ***Please do not use your name.*** These comments are provided in a report where ALL respondents are grouped together, not differentiated by category, and not identified by name. Thank you for your participation in this 360 assessment.

Submit Clear Exit

CoachWorks International
The LEGACY Leader Company

Offices in Dallas, Texas and
Seattle, Washington USA
CORPORATE OFFICES
7370 Hawk Road
Flower Mound, TX 75022 USA
214.585.8254
eMail: info@CoachWorks.com
PRIVACY POLICY/LEGAL INFORMATION

This is the page that 360 raters will see when they come to the end of the assessment (not for self assessments). If this portion is NOT customized, it will appear as a single comments box. This portion may be customized with additional questions, etc.

The 360 LLCI Feedback Report

Once the 360 feedback assessments are received from all respondents, CoachWorks® will generate a complete 30+ page report. *A SAMPLE test case report is included in this guide.* The report is in four basic sections.

Part 1: Introduction and General information

The first section is 15 pages, and contains information about Legacy Leadership (very brief introduction) and instructions on how the data is presented, and how to interpret it using the report. This is a standardized section which is included in all reports.

Part 2: 360 Feedback Results

The next section (pages 16 through 27) contains the actual feedback results, presented in color bar graphs representing each category responding (self, boss, peers, direct reports, customers). Graphs and averages are presented for each of the 50 questions on the questionnaire (representing the 50 critical success skills of the 5 Best Practices, for both PERFORMANCE and EXPECTATION. Each Best Practice requires two pages of the report, for a total of 10 pages. Following this is a one page summary, presenting averages for all the questions for each Best Practice, also in bar graph format.

Part 3: Blind Spots and Hidden Strengths Report

Beginning on page 28, a 3-page report is included showing the participant's Blind Spots and Hidden Strengths. This is in tabular format, listing all 50 of the critical success skills, sorted by Best Practice, with columns presenting both the performance and expectations feedback scores for the two categories of SELF and ALL OTHERS (combined averages). Another column calculates the difference between the two listings and presents the result as either a — # (blind spot) or a + # (hidden strength). Differences of 1.0 (+ or —) are significant.

Part 4: Comments

If respondents included comments during their assessments, these are presented in simple, straightforward (not categorized, not identified by rater) listing. These comments begin on page 31, and continuing, if necessary.

If the participant is part of an organizational group also participating in 360 reviews, CoachWorks can generate a **Group Summary Report**, which will show the average responses for all participants for each Best Practice. This report can show trends and be extremely helpful for organizational planning.

The Feedback Delivery

It's all about PREPARATION. The meeting you will have with the participant to deliver his or her feedback results is extremely important, and requires your careful preparation. Here are a few guidelines to follow during your preparation and initial delivery discussions. *Please see the following section on "Feedback Insights" for more information.*

- It is assumed here that you, as coach and/or sponsor for this 360 feedback, will have **trained the participant in the 5 Best Practices of Legacy Leadership®**, especially as they are presented in the language of the 50 critical success skills PRIOR to administering the 360, and delivering feedback results. It is essential that the participant have a basic understanding of Legacy Leadership® in order to understand feedback results.

- **Ask your client to review carefully the 30+-page report** generated by CoachWorks® in PDF format, and sent to you for distribution. (Send this report to the client at least 1 week, if possible, before your meeting to discuss the results, so he or she has ample time to review it. Be sure to include the password needed to open the file.) If you are meeting your client in person, ask them to print out the report, preferably in color, and bring it with them to your pre-arranged meeting. A "cold" meeting (where the client is unprepared) is not recommended. Be sure to discuss the logistics of printing, reviewing the report in advance, and other issues prior to your meeting. Ask your client to make a list of questions for you, to indicate what stands out to them on the report, and what surprised them, if anything.

- If you have not had much contact with the participant, it is important to take some time to **get to know the client**, and to know ABOUT him or her. It is helpful for the coach to have some information about the participant that allows you to attach feedback around. For example, you might want to consider having the client think about and answer three questions (BEFORE your 360 debriefing), such as:

    1. What are your business and personal challenges? *(What is keeping you awake at night?)*
    2. What are your career goals? *(What do you aspire to, what do you want to do better in your present position?)*
    3. What is the focus that you would like to have in your coaching?

- **Begin your 360 feedback results session with some front-end coaching**. Don't just lead off with the feedback. Get a sense of presence and how this person interacts with others, and how they might respond to the feedback. Have them answer the three questions above, and spend some time discussing their answers. We know the participant will be anxious about the results, but this initial coaching will be very important to establish some foundation on which to deliver the results. In many instances, this delivery call will be your first contact with the client, and for this reason, the front-end coaching is even more important. The first contact upon delivery of 360 results is not preferable, but it does happen. Ideally, the coach will have already spent some interview and coaching time with the participant prior to this delivery meeting. (Be sure to allow ample time for this delivery call. It is possible that such a call will require 90-120 minutes for successful delivery of the feedback results, and all subsequent responses and conversation.)

- **Be sure that YOU are prepared for the call.** Print the report in color (it is more difficult to read the graphs in black and white), read it carefully SEVERAL times, and know the results well. Spend time highlighting the key issues for this participant, making notes and preparing for delivery. Pages 14 and 15 of the report are provided for you to make brief notes about each of the 50 critical success skills represented in the feedback results. Do not attempt to print and read the report 15 minutes before your call. Your client deserves more thoughtful preparation.

- **Be prepared for such things as questions** about how the results are tabulated and calculated (be able to provide generic answers to these questions), and the possibility that your client might be somewhat contentious, shocked, awed, overwhelmed, embarrassed or even angry. People who have not participated in full 360 feedback assessments before can have some very strong feelings about the process, and the results. It can be viewed as in "invasion of privacy" or even a "conspiracy." Others may find the whole process very stimulating and exciting because of the growth potential. Be prepared to handle all these issues.

- **Begin your call by setting the stage**, establishing an agenda for the call, and preliminary goals. Always attempt to have a sound beginning of front-end coaching, delivery of the results and subsequent discussion, and a wrap up that includes next steps and accountability. A good model for this is CoachWork®'s "Collaborative Conversation™" model seen here.

Focus and Out-comes	Discovery	Action Plan	Remove Barriers	Review
▪ What do you want from the meeting? ▪ What shall we address that is most important to you? (specific) ▪ What I need most from the conversation is ____. ▪ I need your help with ____.	▪ Where are you now with this? ▪ What's been tried? ▪ Where would you like to be? ▪ If you do that, what is likely to occur? ▪ What are other options? ▪ What you're saying is ____.	▪ How will you accomplish it? ▪ What resources do you need? ▪ What are you willing to do? ▪ What is the timeline? ▪ Is there anything else that needs to be done? ▪ How will you communicate this to others?	▪ What would prevent your being successful with this? ▪ What is missing? ▪ What have you not considered? ▪ What additional information might you need? ▪ How can I help?	▪ Are you committed to this? ▪ What will you accomplish before we meet again? ▪ When shall we have our next meeting? ▪ Let's calendar this now while we're together.
1	2	3	4	5

- Ask your client to have the **printed color report** in front of them (if this is not possible, they can view it onscreen). A paper copy of the LLCI is also very helpful (for both coach and participant) for reference purposes, but not necessary.

- Begin delivery by taking the client **step-by-step through the first 15 pages of the report**. This section contains the basic information about the 360 feedback tool, and how to read the report. This will provide some helpful information in the participant's interpretation of the results.

- Beginning on page 16 of the report, take your client through the **graphed and averaged results**. Ask them what caught their attention, or if they have any questions about anything reported there. You can highlight the areas where this participant did well before discussing the areas of challenge. The 50 critical success skills (50 questions) are presented in order of the 5 Best Practices. They are summarized and averaged for an overview of all 5 Best Practices on page 27.

- Next, refer the participant to the **Blind Spots and Hidden Strengths Report** which begins on page 28 of the report. The first section of the report gives a brief explanation of how these are to be interpreted. Highlight both the strengths and challenges of this participant.

- The Legacy Leadership® 360 Feedback Tool Report now contains **comments made by respondents** during the assessment. This is generally a one-page (longer if more comments) simple listing of the actual comments made. These are not sorted by category, and no names are provided. After delivery of other results, take the client to this last page(s) in the report and read through and discuss the comments. Do they offer any insights to other feedback scores? Explore how the participant views these comments. Any surprises? What can be gained from them?

- Continue with the discussion of results until the delivery is complete. **Be sure your client understands the results** through strategic questioning and inquiry. Discuss a leader development plan to address the results of the feedback and potential growth path. The development plan may be the subject of another call. This is at your and your client's discretion.

DO NOT ATTEMPT FEEDBACK DELIVERY WITHOUT READING AND UNDERSTANDING THE FOLLOWING SECTION ON "FEEDBACK INSIGHTS."

Feedback Insights

The following "insights" are intended as reminders and helps both in interpreting and delivering 360 feedback results. They are not considered the sum total of learning and understanding in this area. Please refer to the Resource section for references to additional materials on this subject.

- Be sure you have allowed ample time to **explain the sample graphs** in the report on page 9, and that the participant is trained to fully understand the ratings scores and expectations.

- It is generally rare, but on some occasions, the **client will own up to their results** and be able to see gaps and strengths on their own, even in cases of great challenge. Give the participant the opportunity to do this first. This is obviously the preferred situation. In many cases, however, the client will have difficulty accepting areas of challenge. Help them explore what these might mean, and especially how they can be improved. There is a school of thought out there that says we shouldn't bother to improve our weaknesses, but rather concentrate only on the strengths. This can become an excuse for bad behavior, and may allow working situations to deteriorate rapidly. If the 360 feedback shows vital areas of challenge, these must be addressed and explored fully, and the client enabled to strengthen these areas, or make changes in position to highlight his or her strengths more fully.

- In some cases, **people will be so disturbed by some feedback** that they might indicate a need for "revenge" or the desire to hunt down the people who provided the low scores. Obviously, this is avoidance, and can create a very distasteful, and perhaps even dangerous, situation. They may attempt to determine who it was that "did this" to them. Diffuse these situations immediately. Do everything you can to view all results (high and low scores) in a positive light, so the client sees these as good things. Some people have even remarked that the 360 feedback process is a great reality check for them. Try to help your clients understand that these results are for their good, and are intended to develop them into better leaders, regardless of what they see in the results.

- Design your delivery process so that **results are delivered and discussed with no repercussions**, but genuine discussion of growth potential. Weigh the scores carefully and thoughtfully – together. Ask questions of the participant regarding low and high scores. What is their "take" on these scores? How do they explain them? Remember, anything that comes out of this delivery session is subject for further coaching. Take notes!

- Most often it is desirable to have the **range of feedback scores between 4.00 and 5.00**, especially for high performing leaders. This is the goal, but not always the reality of such feedback. A 3.5 average is "OK," but most leaders are not in a position to be content with OK. This is definitely an area open for improvement. Any scores below 3.5 require a careful look at the situation, the client's time in his or her position, the working environment, conditions, and any other issues that might influence these scores. If any area is obviously not a strength, perhaps this is something the client should not be doing, or is not capable of doing. Should they move, or will intentional work around this challenge be effective? Quite often at the beginning of coaching, scores will even dip below this. These are the areas that present the greatest challenges to the participant, and will become the subjects of further development and coaching. Scores of 2.0 and below can be problem areas. You may need to explore these scores to determine their real accuracy. On occasion, especially in environments of missing trust, or disgruntled employees, some scores may reflect unhappy employees with “an ax to grind.” Don’t allow the participant to use this excuse to dismiss the results. Explore what it might mean.

- **Look carefully at the spread of results**. Where do the lowest scores originate? Where do the highest scores originate? Boss, peers, direct reports or customers? Each group will rate the participant differently, depending on their experience with this person. For example, often bosses will score an employee higher than direct reports or peers. This usually indicates that the boss really doesn’t have the experience with the participant to know how they are behaving with others. This is especially true if the participant is scored consistently lower in all categories by peers and direct reports. It may also reflect that this person is behaving differently in different groups. If the scores are consistent (regardless of high or low), this generally indicates they are behaving seamlessly across all categories – a good sign.

- The natural response of most people to 360 scores is the **tendency to “grab onto” the higher scores** and claim those as “truth.” They will usually tend to discount the lower scores as some sort of anomaly, or someone trying to sabotage the results—the “ax to grind” syndrome. Look for gaps in the rating scores between groups and explore what these might mean.

- **Even a tenth of a point can be significant**, especially across a spread of responses. If you are conducting post coaching 360 feedback, these differences become more significant. A difference between a pre and post feedback can be only 1/10 of a point. Kevin Fitzgerald, the former head of Oracle’s OGEH division said that the boiling point of water is 210 degrees F, and it doesn’t boil at one degree below boiling point. So 1/10 of a degree (point) is large.

- When discussing weaknesses, or challenges as we prefer to label them, listen for conversation by the participant that might **seek to dismiss low results, or excuse them**. One of the most common areas where people tend to score lower than they expect is Best Practice 3, Influencer of Inspiration and Leadership™. This often comes as a surprise to people who have assumed they are in fact an inspirational leader. It surprises people if they are not seen that way by others. In all areas of challenge be sure the client understands the results, accepts ownership, and is not attempting to compensate or dismiss them.

- **Look for gaps between performance and expectation.** This is a dual rating inventory and the responses in both areas are critical to overall understanding. How do respondents view the expectations of this person? Are they consistently higher or lower than what the participant scored for him or herself? Is the performance consistently lower or higher than the expectation? These gaps can reveal some interesting mindsets and uncover other areas of improvement needed in overall leadership qualities.

- **Does this person seem to have more blind spots than normal?** Is he or she really unaware of the perception they create as leaders? How about strengths? Do they consistently score themselves lower than others? Do the direct reports score this person higher or lower than others? Do bosses have a consistently higher expectation for this person than the person scored for him or herself? These are **themes in scoring** that need to be discovered by the coach in the preparation stage, BEFORE feedback begins. Look at the results carefully and search for the themes. These will become important coaching areas.

- In your preparation and preliminary review of the report, go through and rank the feedback responses choosing **the top 3 and lowest 3 in each of the 5 Best Practices**. Compare scores to those obtained in the other best practices. Which come easier to this participant? Which are more difficult? This will quickly point out the person's strengths and challenges in each of the 5 Best Practices, and will help you determine a plan for discussion, and a plan for development.

- Watch your client to see how they pace their comments, and **how quickly they discover truths on their own**. The coach may want the client to discover something, rather than simply telling it. The coach may have to wait for the participant to do this, through guided discussion and inquiry. Self discovery is always preferred and has the greatest impact, enabling ownership of results and faster growth. Keep asking, and checking in with, your client to be sure they are understanding the results, and the feedback as you are delivering it. Stop periodically for questions.

- Sometimes it may be necessary to ask **which of these sets of responses (feedback scores) are most important to the participant**. For example, is the boss merely a "lame duck" and not really involved? Are the direct report scores of more interest? How about the customer? Which is most relevant, or most useful for this person's development plan? (Be sure your language around these areas is charge "neutral!"). Relevance can often be found on the expectation scores.

- We believe that the best feedback delivery is done in person, in face-to-face meetings. However, most of the time this is not plausible or possible. **When delivering telephonically**, pay close attention to the client's comments, to pauses, to voice tone, to learning styles and other indicators of reaction to the results. Some people may need two sessions, one for an overview, and the other for details. The coach needs to assess this need fairly soon in the delivery session. Keep clients on task, balanced and moving through the delivery.

- Watch to see if the person **gets too wrapped up in or distracted by responses in one particular area**, perhaps an over reaction to feedback, etc. If you can't move your client past a certain set of feedback responses, this is obviously an area of coaching for the future. Use standard coaching questions like "give me an example of what this means to you?" "What is this like in a team?" "Do you really know what your personal values are?" Use standard coaching questions to help them answer their own questions. Sometimes we have to give outright feedback of what we have discerned from their behavior during the feedback session that might be relevant to their coaching.

- When debriefing the **blind spots and hidden strengths report**, tie the results back to the overall ratings. A gap (difference) in scores between self and others greater than 1.0 (either + or -) is significant. Things will start to fall out and take shape and a development plan can be formulated. Alert the client in the beginning to be thinking about a **development plan** throughout delivery and discussion of the feedback.

- A 360 feedback delivery session can be exhausting, both for the coach and the participant. The coach must sense when the client has had enough and it's time to pull all the discussion together into a plan, or even to break up the session. A lot of exploration and discussion has happened. The coach can begin the **development planning** portion (or this may even need to be a different session) with questions such as:

  What are your initial reactions?
  Were there any surprises?
  What did you learn?
  What is the first thing that comes to mind for your development plan?
  What would you like to do next?
  What help will you need in these coming steps?

  Follow where this discussion leads. If desired, the coach can assign a "homework" session for the client to complete his or her own development plan, based on the actual feedback results. There is a one-page plan in the back of the paper copy of the LLCI for brief summary plans. There is a more detailed plan in the Field Guide, which is similar to one presented in this guidebook on the next pages.

SCORE INDICATORS

The following are observations, by category, we have made of trends in 360 feedback scores. These are generalizations, and will not always be the case, but may be important for overall understanding of results, and should be explored.

BOSS

Higher than average scores:
This is not unusual. It can mean that the boss does not have daily "hands on" information or relationship with the participant, or that the participant only shows the boss his or her "best side" in limited exposure. It also indicates that the peers, direct reports and customers most likely have more real experience with the client, and know his or her behavior better. This can also indicate that the boss has a blind spot.

Lower than average scores:
May indicate that the boss is not getting the results he or she wants, and has more direct experience with the participant than others. The participant is apparently not performing according to the boss's expectations and standards. Be sure to thoroughly investigate the scores marked for expectation AND performance.

PEERS

Higher than average scores:
Peers are pleased with the participant's performance, for the most part. Can also mean that the participant does better in a team environment than with individuals one-on-one.

Lower than average scores:
These may indicate a problem within a team, where peers are desiring something different in performance than what has been observed in the participant. Compare expectations to performance scores carefully. Sometimes lower scores here can mean that peers have "written off" the individual and scores indicate gross generalizations.

DIRECT REPORTS

Higher than average scores:

Higher scores here indicate that the participant is doing well with his or her direct reports. He or she may not, however, be meeting boss expectations. This person might be able to manage and lead well down, but not across and up. May likely see a high self rating here.

Lower than average scores:

This person may be giving "lip service" to his or her boss or peers, but the employees are taking a beating. Can show lack of respect for the participant, and lack of leadership with direct reports. Perhaps there is no clear direction, or even inspiration and encouragement. This needs further exploration as it can signal a major problem.

CUSTOMERS (Internal or External)

Higher than average scores:

Customers are pleased with the participant's performance; they feel well cared for. This is why this person is there. Customers, however, may not have enough information, enough day-to-day exposure, to rate this person accurately.

Lower than average scores:

This is a red flag. This person is not doing the job for which he or she was hired.

SELF

Higher than average scores:

The participant is not aware how others perceive him or her. Multiple blind spots, and unrealistic opinion of personal leadership.

Lower than average scores:

This person is probably too critical of self, may be humble. However, on occasion lower than average self scores can be an effort to manipulate the results so he or she appears humble, is seeking higher scores from others.

PERFORMANCE VS. EXPECTATION

If performance scores are consistently lower than expectation, this person is not doing his or her job. There may be factors such as new or "old" on the job, training, resources, or other situations that need to be investigated.

If performance scores are consistently higher than expectation, this person may be an overachiever, or not interpreting expectations correctly. In either case, explore the conditions and circumstances of the position that may have contributed to these consistent gaps.

Other Assessments

If the client or participant is interested in complete feedback, using resources beyond the 360 process, quite often 360 feedback will be combined with other assessments, such as personality and styles inventories. These are generally determined prior to entering into the 360 process, and often the organization will either specify or provide such instructions and/or instruments. If not, the coach can make recommendations (some coaches have specific training and certification in personality profiles and styles inventories). The 360 degree feedback is well complemented by a thorough personality profile, or styles inventory. When results from the 360 are viewed together with those from a personality or style assessment, a more well-rounded profile of the individual is obtained, and a more complete development plan and executive coaching plan result. There are many such tools available from the very simple to the very complex, with associated price tags. CoachWorks® International recommends the Winslow Research Institute's Personality Profile (www.winslowreports.com) as an excellent complement to the 360 results.

A simple, yet highly effective and inexpensive, tool is the Personal Coaching Styles Inventory (PCSI)© which was originally written by Drs. Smith and Sandstrom, and is now used by and available through CCUI (Corporate Coach University Inc.). This is a great and quickly administered resource that can have profound effect, especially within teams. *(The PCSI is also available at the CoachWorks® web store.)*

Another measurement tool which is very helpful at this phase is the Emotional Intelligence (EI) map, which correlates beautifully with common sense, an amazingly scarce yet critical element in excellent leadership.

The Development Plan

The plan on the following pages may be used by the coach and the participant as a preliminary development plan based on the results of the 360 feedback scores. This plan may need to be refined in the future. This is only a sample. Other plans may be used which might be considered more suitable for the client. The coach will assist the participant in this decision. Use the space below to make your own notes about this participant's plan, according to your perceptions.

Development Notes for:

Development Plan: PART 1

BEST PRACTICE	Top 3 Strengths in this Best Practice	Top 3 Challenges in this Best Practice (*development opportunities*)	Specific skills in this Best Practice I want to develop	My goals for development of this Best Practice
1 Holder of Vision and Values™	1. 2. 3.	1. 2. 3.		
2 Creator of Collaboration and Innovation™	1. 2. 3.	1. 2. 3.		
3 Influencer of Inspiration and Leadership™	1. 2. 3.	1. 2. 3.		
4 Advocator of Differences and Community™	1. 2. 3.	1. 2. 3.		
5 Calibrator of Responsibility and Accountability™	1. 2. 3.	1. 2. 3.		

CIRCLE THE TOP 5 AREAS YOU WISH TO DEVELOP NOW

Continued next page…

Development Plan: PART 2—Mapping the Plan for Professional Development

1 Use this template to formulate a simple development plan for change, based on your answers to Part 1 of the Development Plan

2 LEADER SHIFTS		3 Observable and Measurable DIFFERENCES (What will you see)
FROM	TO	
List the top 5 areas you want to work on now in the FROM column in language that states your current behavior. List these behaviors again in the TO column to show the shift you will make. These are goal statements.		When you reach the desired state, what changes will you (and others) be able to observe and measure in these 5 areas?

ACTION ITEMS (Making it happen)	7 RESULTS (Impact on you and others)
4 How will you bring about the desired shift and growth?	What do you see as the impact of making these changes? On yourself? On others? On your business? On your organization?
5 What resources do you need for this plan to succeed?	
6 When do you expect to achieve your goals?	

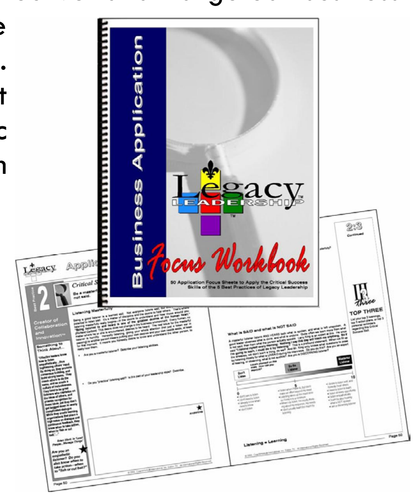
The Follow-Up

This section includes tips for both follow-up coaching and follow-up measurement of development progress in the post-coaching 360 process.

- In all cases it is advised that the coach and client establish an ongoing regular coaching schedule following the delivery of 360 feedback results. If coaching is not present after feedback, the client's growth and development can be severely retarded and even halted, and the efforts of the 360 process wasted. Determine a schedule and goals together to assist the participant in achieving his or her stated desires for development.

- All coaches will have their own styles, methodologies and perspectives regarding how to coach the client around achieving the targeted development areas. We will not attempt to outline those here. Be sure to include resources for your client, such as recommended books, articles, or other materials that may help with development in specific areas. The Legacy Leadership® Field Guide contains an excellent resource for recommended reading for each of the 5 Best Practices.

  CoachWorks® International offers a tool specifically designed to work on individual issues (critical success skills), one at a time, as they apply to the business environment. This focused application is available in the print format Focus Workbook, for paper journaling. *Available at the CoachWorks® online store*. Intended to "drill down" the 5 Best Practices of Legacy Leadership®. Includes current relevant business quotes, insightful questions and brief explanations of each Critical Success Skill. Excellent way to facilitate direct application of Legacy Leadership into the business environment, and to reinforce the concepts of Legacy Leadership on a regular basis. Has been used in year-long coaching and roll-out programs to reinforce learning and keep concepts fresh. May be used by complete corporate groups, or individuals. This workbook makes it easy to embrace a powerful leadership system throughout an organization by providing the learning and the tools for individuals to sustain that culture. Legacy Leadership was designed for leadership development—at all levels both professionally and organizationally. Every employee is a potential leader. Every employee is capable of completing the exercises contained in this workbook, and of becoming true Legacy Leaders®. The perfect tool for effective and targeted business application of Legacy Leadership®. by leaders and for use by coaches for individual and organizational/team clients. Excellent tool for coaching and leadership development following 360 feedback which will have targeted specific areas of challenge. Also contains an introductory section on the basics of Legacy Leadership.



- Look for places and ways in which your client can **utilize the learning from the 360 process**, and put into action developing skills. Ask him or her about special projects, and areas where this might be possible. Development requires practice, not just theory. Discuss specific meetings, or projects where behaviors can be practiced, and observed. Question the client about progress in these areas.

- **Action Learning Projects** (ALPs) are the perfect place to practice skills either individually, or by whole teams. What clients learn through coaching or reading can rapidly vanish if it isn't immediately made relevant to organization and professional leadership challenges. Action Learning Projects can be the real-work laboratory where leadership skills are practiced and clients master what they have learned through individual coaching and team collaboration. ALPs can also give groups an opportunity as a leadership team to work together on a unifying outcome that draws from the use of their best creative talent and helps them to build and align relationships for the betterment of the team. It is intended that the outcome will provide direct return on investment of time, affecting the bottom line in ways that can and will be measured. Discuss this possibility with your client.

- **Follow-up measurement** to determine client growth and status of development is highly recommended. The 360 process should be repeated, using the same respondents, anywhere from 6 months to one year following the initial 360. Some organizations conduct a 360 feedback process annually.

Recommended Reading

There are a great many books and articles available for information about 360 feedback. Try doing your own search online for some excellent resources through business magazine articles and books. We recommend these for quick reading and solid reference.

- Collins, Michelle LeDuff Collins, Ph.D. (2000). The Thin Book of 360 Feedback, A Manager's Guide. Thin Book Publishing Co.: Plano, Texas.

- Lepsinger, R. and A. Lucia. (1997). The Art & Science of 360° Feedback. Jossey-Bass Pfeiffer: San Francisco, California.

- Waldman, David A. Ph.D. and Atwater, Leanne E. Ph.D. (1998) The Power of 360° Feedback. Gulf Publishing: Houston, Texas.

360 Feedback Tool

CONFIDENTIAL

Assessment Report

Organization Name

Prepared for: CASE STUDY Participant

Report Date:

CoachWorks® International, Inc.
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I N S P I R I N G L E G A C Y L E A D E R S H I P®

THIS 360 FEEDBACK TOOL ASSESSMENT REPORT HAS BEEN SPECIALLY PREPARED FOR THE INDIVIDUAL NAMED ON THE FRONT OF THIS REPORT. **This report is CONFIDENTIAL.** Permission is given to the individual named, and to the person's assigned executive coach (CoachWorks® or Internal) to make copies of this report for the exclusive use of coaching this individual. No other duplication is authorized.

What This Report Contains

1. **Bar graph charts** depicting averages of all scores for each of the 50 questions, grouped by Best Practice, for both Performance and Expectations.
2. **Overall average information** (based on actual computation of all data, not average of averages) for each question (located just below the bar graph)
3. **A summary report** showing overall averages of the 10 Critical Success Skills for each Best Practice.
4. **Blind Spots and Hidden Strengths Report** which is a compilation of values representing:
    a. Self only
    b. All others (average of all other respondents including bosses, peers, direct reports and customers)
    c. Difference (the Self score less the "all others" score, for both Performance and Expectation for all 50 questions, including an overall BP average)

What Is Legacy Leadership®?

We hear stories every day about the lack of strong leadership talent. Legacy Leadership® is a comprehensive model for developing such talented leaders. It includes competencies and practices with immediate applicability to most every possibility and challenge the leader today faces. These practices embrace both vision and accountability for results, as well as methods for creating an environment for team success, strong and dependable relationships, and maximizing the talents of diverse perspectives and strengths.

Many organizations have a set of competencies with which to measure their leader performance, others do not. In either case, Legacy Leadership provides a sound structure for such competencies to reside. With the structural map of the 5 Best Practices, you have a full and complete picture of the destination your leader development program will go, for you personally, and for those you lead. The basic focus of Legacy Leadership® is on OTHERS, rather than on the leader, in order to develop leaders who then develop other leaders. The outcome is fully developed leaders, both current and emerging, and a greatly enhanced leadership potential within the organization.

Legacy, in this model, is not about building things, but building people. It is about investing in individual leaders who then share what they have learned with others. Legacy is seen in this perpetuating cycle of leadership development that enables your personal and organizational plan to come alive and thrive. Your best self is offered to others to develop their best selves and so on, leaving a multi-generational imprint—a living legacy.

Leadership Competencies and Critical Success Skills— The 5 Best Practices of Legacy Leadership®

Given that leadership is so complex, CoachWorks® has distinguished five core competency platforms and associated critical success skills for successful leadership. These platforms represent a complete set of observable and measurable behaviors. These behaviors, when used in total, are leverage points for success. Those practices of leadership that are essential for every leader are included, regardless of their industry or level within the organization.

These 5 Best Practice platforms are the context of the Legacy Leadership model, and are presented on the following page for summary purposes. For each of the 5 Best Practices (competencies) there are 10 critical success skills. The Legacy Leadership® Competency Inventory (LLCI)™ is based upon these Critical Success Skills, which comprise the 50 questions of the assessment.

The 5 Best Practices

DEFINITIONS | **EXPLANATION**

1 Holder of Vision and Values™

HOLDER	VISION	VALUES	EXPLANATION
One who "keeps" in hand those things that are important, by embracing and encouraging their remembrance.	A clear view and understanding of realizable goals, plans and intentions.	Those things considered right, worthwhile and desirable—the basis of guiding principles and standards.	This Best Practice is about direction and commitment. The term "holder" indicates that the leader lives the vision and values while measuring every action against both. The leader then provides consistent focus and direction. The critical success skills include: integration of vision/values into all responsibilities, having a well-defined strategic plan, team translation of vision and values, establishing milestones and benchmarks, modeling the practice, developing the potential of others to pull out the best in them, and effectively communicating and sustaining organizational vision/values.

2 Creator of Collaboration and Innovation™

CREATOR	COLLABORATION	INNOVATION	EXPLANATION
One who causes something to "come into being" through original or inventive means.	The process of working together to achieve common goals instead of personal agenda.	The introduction of something new and different to the process of achieving goals	This Best Practice is about creating a positive environment for working relationships. The term "creator" indicates the leader's ability to create a learning trusting environment where collaboration and innovation can occur. The critical success skills include abilities to: unleash innovation, listen masterfully, learn from others, be aware of the bigger picture, discern when change needs to occur, and being a masterful facilitator.

3 Influencer of Inspiration and Leadership™

INFLUENCER	INSPIRATION	LEADERSHIP	EXPLANATION
One who brings about a desired effect in others, by direct or indirect means.	The process of animating, motivating or encouraging others to reach new levels of achievement.	The process of guiding and directing others to shared success.	This Best Practice is about making connections with individuals—the heart of relationships as well as leadership. The term "influencer" indicates the leader's ability to influence and inspire for positive relationships. The critical success skills include abilities to: influence positively, demonstrate high levels of emotional intelligence, bring out the best in people by developing them fully, focus on others rather than self, make tough decisions with minimal people impact, and be humble while holding resolve to accomplish stated goals.

4 Advocator of Differences and Community™

ADVOCATOR	DIFFERENCES	COMMUNITY	EXPLANATION
One who stands in support of a cause, a practice or a person on its or their behalf.	Those qualities that distinguish people or things from other people or things.	A group of people with shared interest working together to achieve shared success.	This Best Practice is about distinguishing individual strengths and inclusion of differing perspectives. The term "advocator" indicates the leader's ability to support and stand for strengths-based talent. The critical success skills include abilities to: be an advocator of individuals, be a connoisseur of talent, insist on teams with diverse perspectives and abilities, stand for cross-functional development and collaboration, recognize community impact, and promote an inclusive environment united toward a common focus.

5 Calibrator of Responsibility and Accountability™

CALIBRATOR	RESPONSIBILITY	ACCOUNTABILITY	EXPLANATION
One who "sets the mark" for the quantitative measurement of success/acceptance.	The ability to respond correctly to—and meet—stated expectations.	The obligation to justify conduct, conditions or circumstances.	This Best Practice is about execution and performance measured against vision and values. The term "calibrator" indicates constant vigilance, with possible adjustments, of progress toward accomplishing responsibilities and accountabilities. The critical success skills include abilities to: execute successfully, maintain a "finger on the pulse" for status measurement, require peak performance, provide feedback and coaching, have clearly defined action plans, model a sense of urgency in getting things done and respond to change, be alert to trends, and gain commitment to follow-through.

1 BP#1 – Holder of Vision and Values

1. Consistently reinforces organization's vision and values.
2. Intentionally models the guiding principles in everything he or she does with all stakeholders.
3. Personally integrates the organization's vision in all responsibilities.
4. Has a well-defined strategic plan for accomplishing the goals of the vision.
5. Person's team has translated and aligned its daily responsibilities with the goals of the organization.
6. Establishes measurable milestones and benchmarks congruent with the vision.
7. Ensures the organizational values are integrated in how we do business.
8. Has clearly identified personal values and "walks the talk" in everything he or she does.
9. It is very important to this person that he or she develops the potential of others in the organization.
10. Effectively communicates and sustains processes and systems to achieve the organizational vision and values throughout his or her business area.

2 BP #2 – Creator of Collaboration and Innovation

1. Personally creates possibilities that are both innovative and sound for the organization.
2. Fosters a learning, trusting environment where true collaboration and innovation is unleashed.
3. Is a masterful listener for both what is said and what is not said.
4. Is comfortable not knowing "the answers" and learning from individual perspectives.
5. Draws out differing perspectives and believes that disagreement is a learning opportunity.
6. Keeps in mind the bigger picture which helps him or her ask timely, tough questions.
7. Sets the tone for thinking beyond where we are presently in order to innovate now for the future.
8. Can project how ideas may play out in the organization and marketplace.
9. Can discern, and assist others to understand, when change needs to occur and when it does not.
10. Is a masterful facilitator of conversations such that everyone contributes their best thinking toward the task/issue at hand.

3 BP#3 – Influencer of Leadership and Inspiration

1. Is very adept at developing and maintaining relationships.
2. Uses his or her emotional intelligence and positive energy to influence others.
3. Chooses to model the positive perspective in all situations.
4. Brings out the best in people.
5. Constantly acknowledges and recognizes the attributes and contributions of others.
6. Intentionally delegates for the development of others.
7. Leads with a constant focus on showcasing others rather than self.
8. Has the ability and courage to take risks and inspire others to follow.
9. Is able to make tough decisions that have minimal negative impact.
10. Leads with humility and fierce resolve to accomplish the goals of the organization through others.

4 BP#4 – Advocator of Differences and Community

1. Is able to take a stand for a person, practice, or cause.
2. Constantly raises the visibility of individuals by mentoring and developing them.
3. Is an advocate for a strengths-based culture where everyone works from their strengths.
4. Is a connoisseur of talent, recognizing, valuing and utilizing the best each person has to offer.
5. Insists on having teams of individuals with diverse approaches and capabilities.
6. Looks for cross-functional opportunities where unique talent can be developed.
7. Promotes inter-departmental collaboration rather than "silo" orientation.
8. Considers the impact of actions on the greater community beyond organizational boundaries.
9. Has ongoing dialogue and involvement with internal and external communities.
10. Promotes an inclusive environment that unites towards a common focus.

5 BP #5 – Calibrator of Responsibility and Accountabilities

1. Executes the organization's strategic plan and uses appropriate checks and balances to reach the goals.
2. Has his or her "finger on the pulse" of the organization and knows milestone status.
3. Individuals in this person's team are clear about position responsibilities and how they fit in the organization's direction and deliverables.
4. Requires peak performance and supports everyone with appropriate resources.
5. Provides regular feedback and coaching, and takes action when performance does not meet stated expectations.
6. Has clearly defined accountabilities for self and the organization.
7. Has a clearly developed action plan with benchmarks and milestones, and provisions for making adjustments along the way.
8. Models a sense of urgency both in getting things done and responding to change.
9. Is alert to trends that potentially affect results and re-calibrates action plans where necessary.
10. Has gained commitment from everyone in his or her areas of responsibility, and has established accountabilities with appropriate consequences and rewards.

PURPOSE

The purpose of the LLCI assessment for 360 feedback is always to discover and confirm strengths, to determine and plan for strengthening needs and assist in preparing a comprehensive Leadership Development Plan for the individual assessed. The focus of the assessment is to strengthen the leader, provide sound development plans and further equip him or her for current and future leadership opportunities. These reports are never used to belittle or tear down anyone, but instead to build them up and provide them tools for powerful change. Any use other than this is not in keeping with CoachWorks® International, Inc. standards.

METHODOLOGY

Each participant in the assessment and/or leadership initiative program is asked to provide a self-assessment, and to obtain feedback from a representative sampling of bosses, peers, direct reports and customers (if applicable). These feedback providers take a 50-question online assessment, where they rate the person on a scale of 1 to 5, with 1 being the lowest and 5 being the highest possible score for any of the 50 questions. The online questions are in random order, with no indication as to which Best Practice they are intended to represent. This is a DUAL factor inventory, which means that the raters are asked to rank the person for both PERFORMANCE and EXPECTATIONS of performance. After all assessments are completed, reports are generated for review. **The following are the online instructions for raters:**

Completing the Online Legacy Leadership® Competency Inventory (LLCI)™
For Self, or 360 Feedback for Others

1. Read these instructions completely before beginning.
2. After reading the instructions, click on the words "Log In" in the right column.
3. This will bring up a screen where you will be asked for your User ID and Password. If you are one of the registered program participants, you will have been issued a unique User ID and Password. Enter those here and select if you are doing a Self Assessment (first button) or a 360 assessment for someone else (second button). Other respondents (not one of the registered participants) will have been issued a corporate ID and corporate password. *(The unregistered participants will only be able to complete the 360 Feedback, not the Self Assessment portion.)*
4. You will automatically be taken to the 50 questions worded for either self or 360 assessment. **Please answer ALL 50 questions**, using the following instructions:

DUAL FACTOR RATING INSTRUCTIONS

1. There are a total of 50 questions. There are two columns or sets of response numbers, one column for **PERFORMANCE** and one for **EXPECTATIONS**. Each column has 5 buttons for your ratings, numbered 5 (highest rating) to 1 (lowest rating). You are asked to provide a rating for EACH of the two columns, for EACH question. You would therefore be entering a total of 100 responses.

2. When you consider your rating, ask these questions for each column:

   PERFORMANCE: How often **do I exhibit** this stated behavior/attitude? *(SELF)* ***OR*** How often **does this person exhibit** this stated behavior/attitude? *(360 Feedback)*

   EXPECTATIONS: How important is this stated behavior/attitude to my position? *(SELF)* **OR** How important is this stated behavior/attitude to the position this person holds? *(360)*

(continued…)

3. Read each statement carefully, and honestly rate yourself/other person on a scale of 5 (highest) to 1 (lowest) as follows:

   This statement describes my/his or her behavior/attitude (PERFORMANCE COLUMN):
   5-Consistently
   4-Frequently
   3-On Average
   2-Occasionally
   1-Not At All

   The statement describes how important this behavior/attitude is for the position (EXPECTATIONS):
   5-Consistently
   4-Frequently
   3-On Average
   2-Occasionally
   1-Not At All

4. Rate yourself (or your boss, peer or direct report) for BOTH Performance AND Expectations using this scale. **Answer all 50 questions, two responses (ratings) for each question (one for Performance and one for Expectations).**

5. After you have answered ALL 50 QUESTIONS, make any comments you wish, then click on 'Submit' to send your report. The system will then ask you if you want to continue with another assessment, or log off.

NOTE: If you make mistakes during your rating, you can correct the error simply by selecting the correct button. The system only allows you one entry per set of numbers, so you can correct an incorrect response. You must do this BEFORE clicking on the SUBMIT button, however. If you realize that you have made errors after clicking on the SUBMIT button, please contact the site administrator with an explanation of the situation. The administrator will contact you with instructions if necessary. Thanks!

NOTE: The webmaster/site administrator has worked with an appointed internal representative of the organization in order to determine that all assessments have been completed, and are labeled with correct designation (self, boss, peer, direct report, customer, etc.) prior to the generation of these reports.

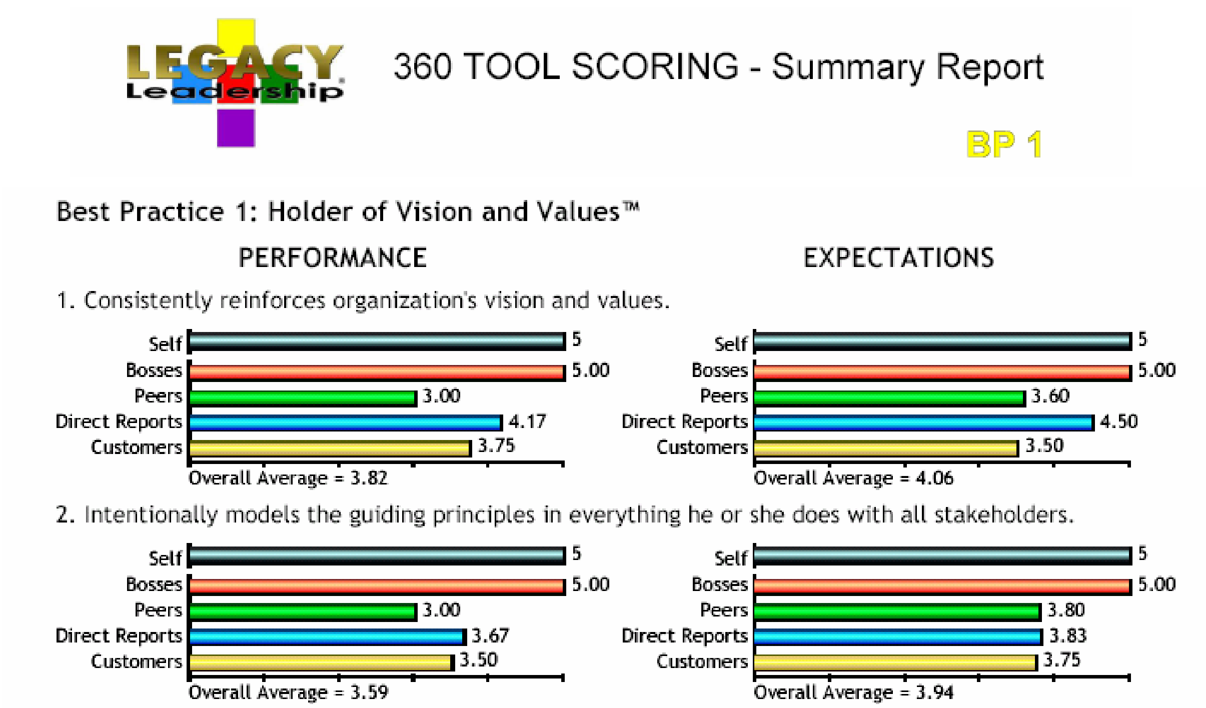
HOW TO USE THIS REPORT
These assessment summary reports are to be used by the assigned executive coach and his or her participating leader to be coached and their bosses. No other copies of this report are authorized, and no other disclosure is allowed. These files (assessment reports) are CONFIDENTIAL and are password protected for opening and printing, and cannot be manipulated or changed in any way.

The coach is to review this report in order to:
1. Determine the leader's strengths and challenges
2. Determine greatest strengths and most pressing challenges
3. Determine overall rankings
4. Look for differences among raters
5. Discover blind spots and hidden strengths
6. Work with the leader to compile a sound Leadership Development Plan
7. Coach the leader around the discovered strengths and challenges

HOW TO USE THIS REPORT *(continued)*

Carefully read through every page of the report, taking notes as necessary on your observations. For your convenience, we have included a one-page comments sheet in this file which you can print and use for a condensed summary of your comments.

MAIN SUMMARY REPORT
The following is a sample of what you will see in the main portion of the summary report. Every one of the 50 questions on the assessment will be presented in logical order under the Best Practice it represents. Each question, seen in a statement format, is printed before the two graphs which represent the responses, one set for PERFORMANCE and one set for EXPECTATIONS. Your leader's assessment responses appear on the top bar of the graph labeled SELF. The next bar down are bosses, next peers, then direct reports and customers. All bars on the graph are labeled. The number which appears immediately to the right of the bar is the AVERAGE of the responses for that category. For example, if 5 direct reports gave feedback, all 5 of their responses are averaged. Directly below the graph is the overall average for this question. This is a computation of all responses and is not just an average of the averages. (*The graphic below is only a representative sample. Only two questions for BP1 are shown here. The actual report shows all 10 questions for each of the 5 BPs.)*

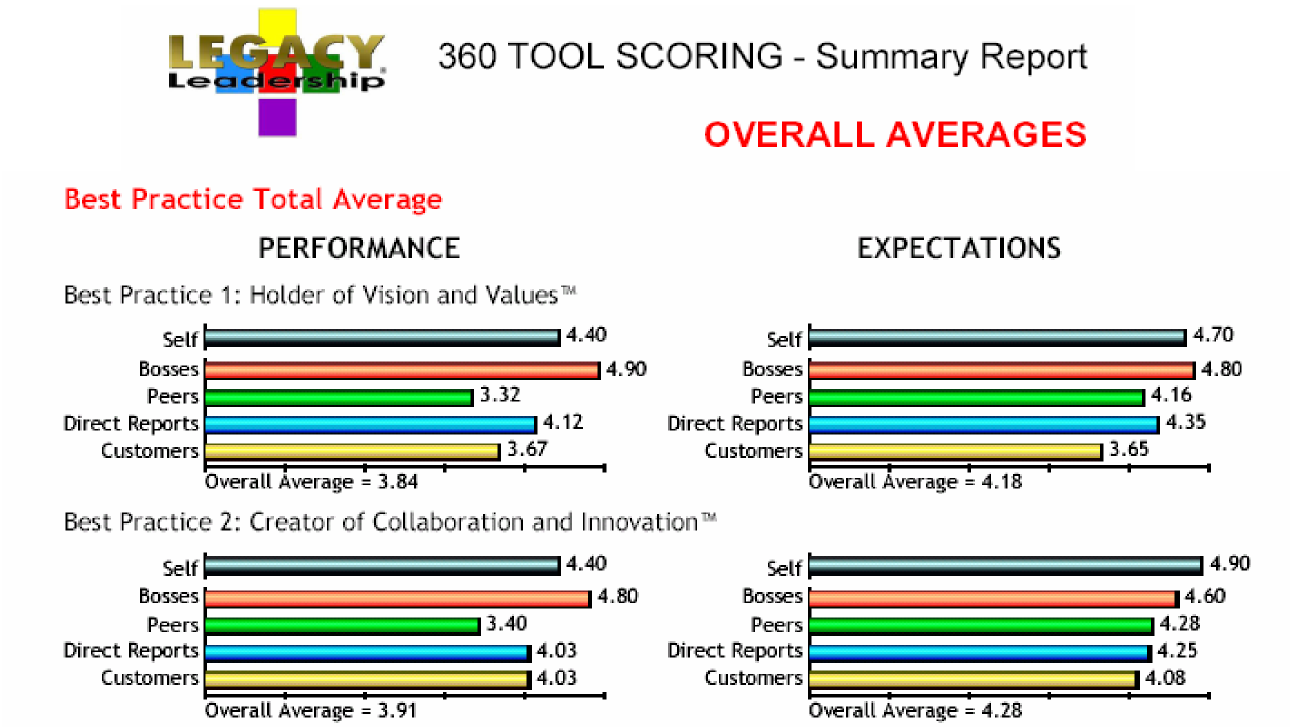


On the above sample, for question 1—Performance, the person being rated scored self a 5, the maximum or highest rating ("consistently"). The bosses scored the same, but peers, direct reports and customers scored this person significantly lower. However, when noting the same scorers for the Expectations column, the lower raters also scored this as a lower expectation. There is a great deal of information that can be gained from these responses. The coach will use his or her own expertise and discretion when evaluating the responses. **It is intended that the coach will carefully review this report with the leader** so that each item noted as "of interest" can be discussed.

HOW TO USE THIS REPORT *(continued)*

BEST PRACTICE TOTAL AVERAGE REPORT

In addition to the print out showing graphs for each of the 50 questions, there is also a one-page report that follows, showing the overall averages for responses to all 10 questions under each BP. Each Best Practice is listed, following by a graph of averages for both Performance and Expectations. All of these results are true averages, and not averages of averages. The overall average includes ALL responses for this Best Practice, including SELF. Quite often differences will occur between self and all others, which will not be reflected in these overall averages. It is usually in these differences that the most telling information is gained. These differences are highlighted in the “Blind Spots and Hidden Strengths Report” which is discussed later. The following graphic is a representation of the first two BPs and what you will see on this report.



If desired, the coach can use the “Master Scoring Grid” (page 15) included in this file to visually chart the overall averages for each BP, for both Performance and Expectations (Best Practice Total Average report page 27). Print the page, then color in the appropriate shape for the average for each BP. This can make a useful visual for both you and the client for seeing results at a glance.

HOW TO USE THIS REPORT *(continued)*

BLIND SPOTS AND HIDDEN STRENGTHS REPORT
The most revealing information to be gained from this assessment report is most likely found on the "Blind Spots and Hidden Strengths Report." This report includes a column for SELF responses, and a column for ALL OTHERS. The "All Others" figure is an average (true average, not average of averages) of all other respondents, other than self. The report then subtracts the "All Others" number from the "Self" score, to yield a "Difference" number. This "Difference" reported is either a positive or negative number. This computation is provided for both the Performance and Expectations ratings for each of the 10 Critical Success Skills, for each of the 5 Best Practices. The actual Critical Success Skill listed on this report (the basis for the assessment question) is condensed into a few word title instead of the entire question (in the interest of space only).

A negative number in the "Difference" column indicates that the leader scored him or herself HIGHER than all others, and may signify a blind spot. A positive number in the "Difference" column indicates that the leader scored him or herself LOWER than all others, and may signify a hidden strength. **A difference of 1.0 or greater, either negative or positive, is considered significant.**

The following graphic shows the detail generated on this report for Best Practice 1 only. Overall averages are also provided. Be careful to also compare Performance and Expectations ratings to one another.

Blind Spots and Hidden Strengths Report for (Leader's Name)

	CRITICAL SUCCESS SKILL	PERFORMANCE			EXPECTATIONS		
		Self	All Others	Difference	Self	All Others	Difference
BEST PRACTICE 1: Holder of Vision and Values™							
1	Reinforced Vision and Values	4	3.86	-0.14	5	4.14	-0.86
2	Models Principle	4	3.50	-0.50	4	4.14	0.14
3	Integrates Vision	4	3.78	-0.22	5	4.21	-0.79
4	Has Well-Defined Strategic Plan	3	3.29	0.29	4	4.28	0.28
5	Team Alignment with Vision	4	3.43	-0.57	3	4.14	1.14
6	Has Established Measurables	5	3.57	-1.43	5	4.07	-0.93
7	Has Integrated Organizational Values	5	3.57	-1.43	5	4.36	-0.64
8	Personal Values: Walks the Talk	4	3.72	-0.28	5	4.29	-0.71
9	Important to Develop Others	5	4.14	-0.86	5	4.43	-0.57
10	Communicates, Sustains Processes (Vision/Values)	5	3.50	-1.50	5	4.07	-0.93
	OVERALL AVERAGE BP 1	4.30	3.64	-0.66	4.60	4.21	-0.39

On the report above, this leader shows potential blind spots for Critical Success Skills #6, 7 and 10, with possible challenges arising around #9 as well. The differences seen in the Expectations column can be an indication that the leader has a different opinion as to the importance of a particular skill to his or her position. For example, in the report above, this leader does not think CSS #5 is as important as all of the other scorers. Conversely, this leader thinks that CSS #1, 3, 6 and 10 are more important than all other scorers.

HOW TO USE THIS REPORT *(continued)*

WHAT TO LOOK FOR
When reviewing these assessment reports, the coach should be alert to the following:

- Identifying the leader's greatest strengths represented by highest scores by all responders
- Identifying the leader's greatest challenges represented by lowest scores by all responders
- Difference between self and all others (blind spots and hidden strengths)
- Differences noted between scorers (For example, bosses may consistently score the leader higher or lower than all others, or customers may score consistently higher than peers, etc.)
- Trends and/or patterns which may indicate potential development opportunities
- A general direction from which to construct a solid Leadership Development Plan with the leader
- Information around which the leader is coached

CAUTIONS
There are a number of things to consider when evaluating the compiled data. These should be noted by the coach:

Time on the job: If the leader has not been in the position for which he or she is being rated for very long, the feedback will only be first impressions, and will not truly reflect the leader's abilities. This may, however, be an indication of how the leader is seen by others, or "comes across" currently and should not be ignored. For the most part, the best and most accurate data is obtained by raters who have known and worked with the leader for at least 3-5 years.

Kind of job: The leader's job description can have some bearing on their performance ratings, especially if the raters are not working in the same department. For example, jobs which are of a technical nature require different skill sets than those in general leadership positions, and the respondents may not have had opportunity to rate accurately due to differences in job descriptions. Another issue which can alter results is the presence of any recent downturn such as layoffs, turnarounds and shutdowns within the organization which may directly affect the person's position (positively or negatively).

Number of respondents: Generally we consider these numbers accurate ONLY if at least 2 persons have responded in each of the reported categories. Quite often only 1 boss will respond, and this should be noted when discussing results with the leader. If only one response is obtained for the peer, direct report or customer categories, the results may be considered helpful for coaching and general information, but should not be considered as hard and fast information about this leader. *(The graphic at the left shows the respondent count found on the title page of the assessment report.)*

Number of Respondents Surveyed for this Summary Report	
Self	1
Bosses	1
Peers	5
Direct Reports	6
Customers	4

Assessments are not used in isolation: These assessment reports are only one indicator of the leader's skills, abilities, strengths and challenges and as such, should not be used in isolation. The interview process and other assessments (i.e., Birkman, Meyers-Briggs, etc.) should all be considered in addition to this 360 feedback report. Coaches will be noticing nuances during the coaching conversations which will be helpful in making the feedback more accurate. Special circumstances for specific leaders (personal and professional) may also need to be considered.

HOW TO USE THIS REPORT *(continued)*

PRE AND POST ASSESSMENTS
Most often leadership initiatives will typically last for one year. It is very helpful to conduct feedback assessments both BEFORE an initiative and AFTER. This assessment report will either be a PRE-INITATIVE report, or a POST-report. After the initiative is completed, the two reports are compared for the leader's forward change and the organization's return on investment.

QUESTIONS
If you have any questions about any of the information contained in this report, please contact CoachWorks® International, Inc. directly.

COMMENT SHEET	PARTICIPANT NAME:	
Legacy Leadership 360 Feedback Results		
#	Best Practice/Critical Success Skill	Comments
BEST PRACTICE 1: Holder of Vision and Values™		
1	Reinforces Vision and Values	
2	Models Principles	
3	Integrates Vision	
4	Has Well-Defined Strategic Plan	
5	Team Alignment with Vision	
6	Has Established Measurables	
7	Has Integrated Organizational Values	
8	Personal Values: Walks the Talk	
9	Important to Develop Others	
10	Communicates, Sustains Processes (Vision/Values)	
BEST PRACTICE 2: Creator of Collaboration and Innovation™		
1	Creates Innovative Possibilities	
2	Fosters Trusting Environment	
3	Is Masterful Listener	
4	Comfortable Learning from Others	
5	Sees Opportunities in Disagreement	
6	Bigger Picture, Timely Questions	
7	Innovates for Future (and Models)	
8	Organizational/Marketplace Projection	
9	Can Discern Need (or not) for Change	
10	Facilitates Best Group Thinking	
BEST PRACTICE 3: Influencer of Inspiration and Leadership™		
1	Adept at Developing Relationships	
2	Positively Influences Others	
3	Models Positive Perspective	
4	Evokes Best in Others	
5	Acknowledges Contributions of Others	
6	Delegates for Development	
7	Showcases Others	
8	Is Inspiring Risk-Taker	
9	Minimizes Negative Impact of Decisions	
10	Accomplishes via Others w/ Humility, Fierce Resolve	
BEST PRACTICE 4: Advocator of Differences and Community™		
1	Takes a Stand, Advocates	
2	Mentors for Visibility of Others	
3	Advocates for Strengths-Based Culture	
4	Is a Connoisseur of Talent	
5	Insists on Team Diversity	
6	Seeks Cross-Functional Opportunities	
7	Promotes Inter-Department Collaboration	
8	Considers Impacts and Greater Opportunities	
9	Has Internal-External Communication	
10	Promotes United, Inclusive Environment	
BEST PRACTICE 5: Calibrator of Responsibility and Accountability™		
1	Has Strategic Plan with Checks/Balances	
2	"Finger on Pulse," Knows Milestone Status	
3	Team Members Clear About Responsibilities	
4	Requires Peak Performance, Gives Support	
5	Provides Feedback, Appropriate Action	
6	Has Personal, Organizational Accountabilities	
7	Has Action Plan w/Provision for Adjustments	
8	Models Urgency in Achievement, Change	
9	Is Alert to Trends, Re-calibrates	
10	Team Commitment w/ Appropriate Consequences	
Comments by:		Date:

Master Scoring Grid

Visually Ranking the Overall Averages
It is sometimes helpful to prepare a visual representation of the overall averages (page 27) for each Best Practice for the leader and the coach to review at a glance. If you wish to use this tool, transfer the overall average data to the appropriate boxes below by coloring in the appropriate shapes. Remember, this is a general tool, and will not reveal specific areas such as blind spots, hidden strengths and highest skills or pressing needs. It is used to get an overall idea of where this leader stands in his or her ability, as seen by self and all others, as a Legacy Leader®.

TOTAL SCORES And LEVELS	Best Practice									
	1 Holder of Vision and Values™		2 Creator of Collaboration and Innovation™		3 Influencer of Inspiration and Leadership™		4 Advocator of Differences and Community™		5 Calibrator of Responsibility and Accountability™	
	P Performance	E Expectation	P Performance	E Expectation	P Performance	E Expectation	P Performance	E Expectation	P Performance	E Expectation
Practice Mastery	4.6-5.0	4.6-5.0	4.6-5.0	4.6-5.0	4.6-5.0	4.6-5.0	4.6-5.0	4.6-5.0	4.6-5.0	4.6-5.0
Practice Proficiency	4.1-4.5	4.1-4.5	4.1-4.5	4.1-4.5	4.1-4.5	4.1-4.5	4.1-4.5	4.1-4.5	4.1-4.5	4.1-4.5
Practice Apprenticeship	2.6-4.0	2.6-4.0	2.6-4.0	2.6-4.0	2.6-4.0	2.6-4.0	2.6-4.0	2.6-4.0	2.6-4.0	2.6-4.0
Practice Knowledge	1.6-2.5	1.6-2.5	1.6-2.5	1.6-2.5	1.6-2.5	1.6-2.5	1.6-2.5	1.6-2.5	1.6-2.5	1.6-2.5
Practice Awareness	1.0-1.5	1.0-1.5	1.0-1.5	1.0-1.5	1.0-1.5	1.0-1.5	1.0-1.5	1.0-1.5	1.0-1.5	1.0-1.5

Online 360 Feedback Results

CASE STUDY Particpant #1
(Organization Name)

Number of Respondents Surveyed for this Summary Report	
Self	1
Bosses	3
Peers	3
Direct Reports	4
Customers	3

CoachWorks® International
Dallas, Texas USA
www.CoachWorks.com

CoachWorks® International
The LEGACY Leader® Company

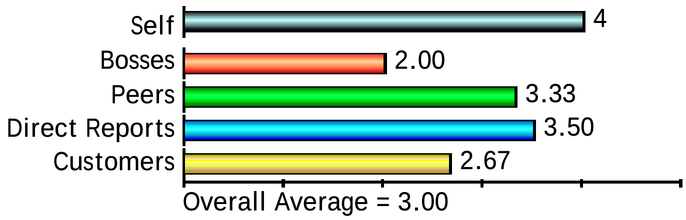
360 TOOL SCORING - Summary Report

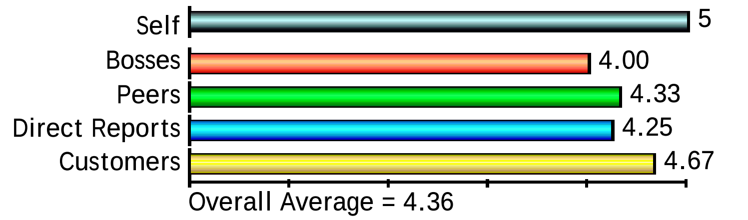
BP 1

Best Practice 1: Holder of Vision and Values™

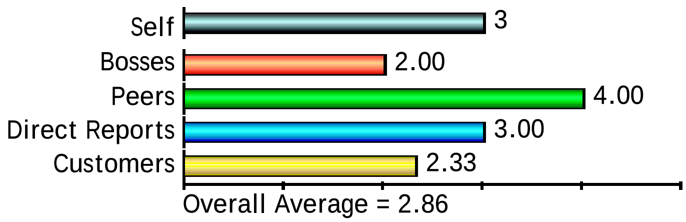
PERFORMANCE | **EXPECTATIONS**

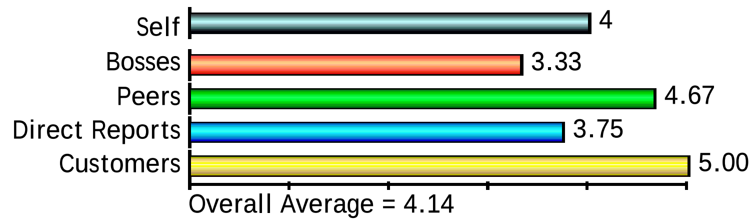
1. Consistently reinforces organization's vision and values.



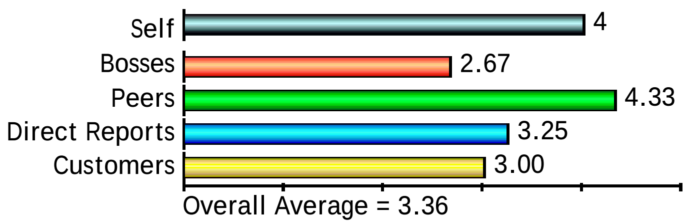


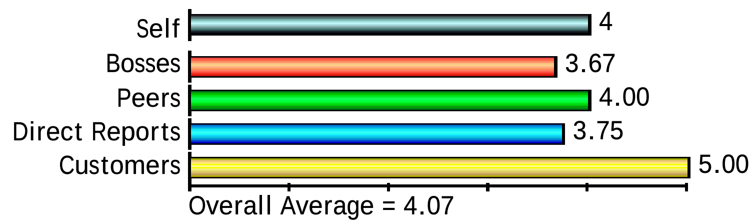
2. Intentionally models the guiding principles in everything he or she does with all stakeholders.



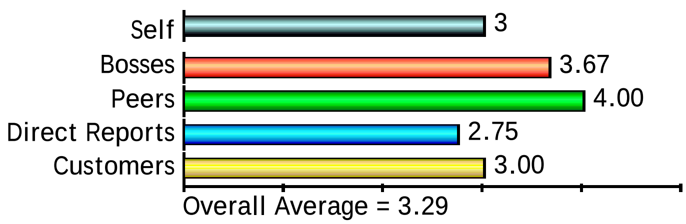


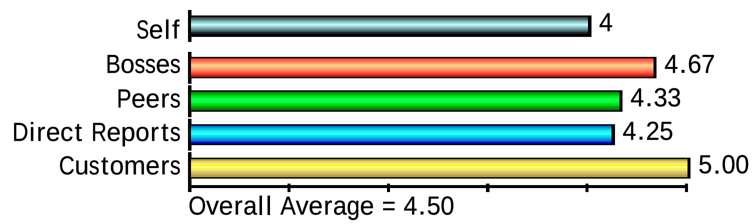
3. Personally integrates the organization's vision in all responsibilities.



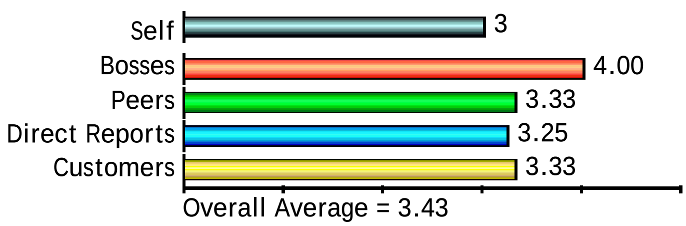


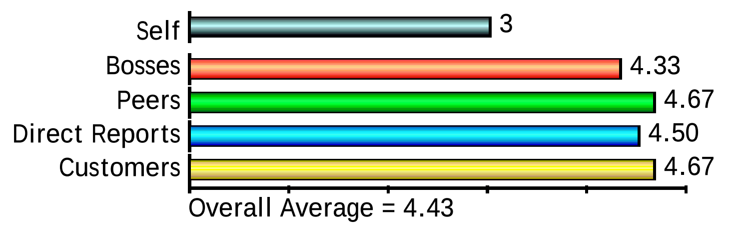
4. Has a well-defined strategic plan for accomplishing the goals of the vision.



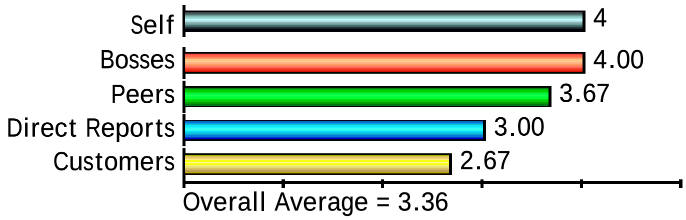


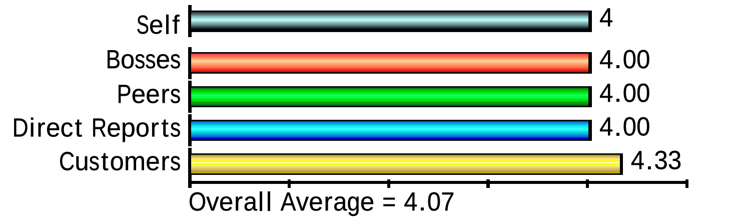
5. Person's team has translated and aligned its daily responsibilities with the goals of the organization.



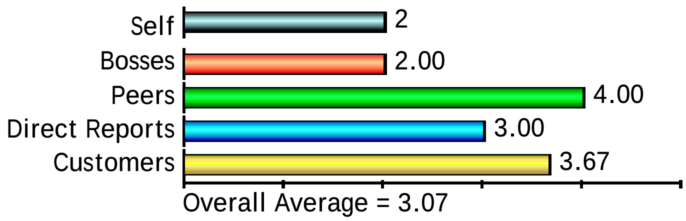


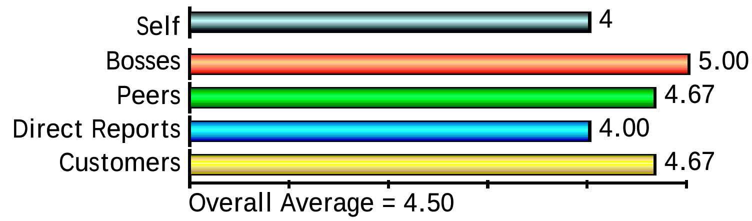
6. Establishes measurable milestones and benchmarks congruent with the vision.



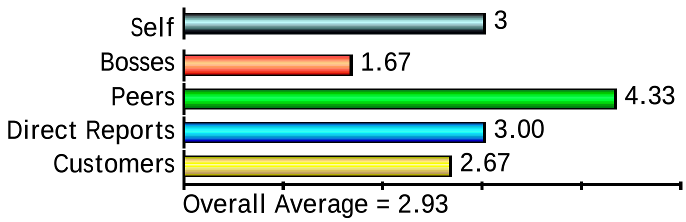


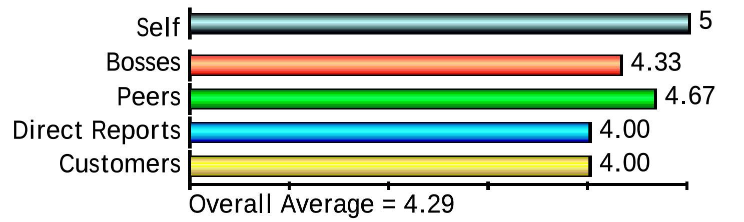
7. Ensures the organizational values are integrated in how we do business.



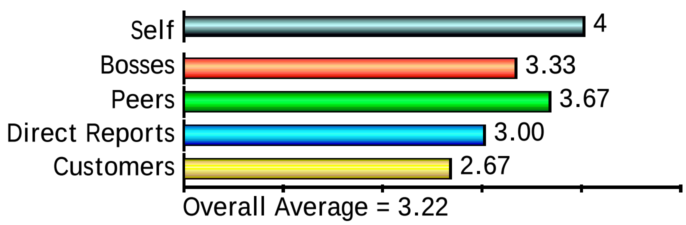


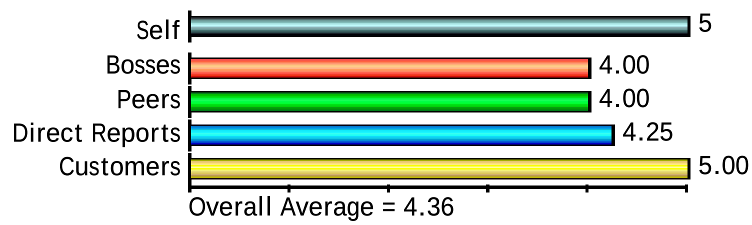
8. Has clearly identified personal values and "walks the talk" in everything he or she does.



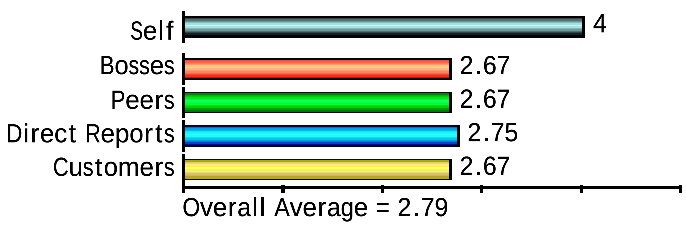


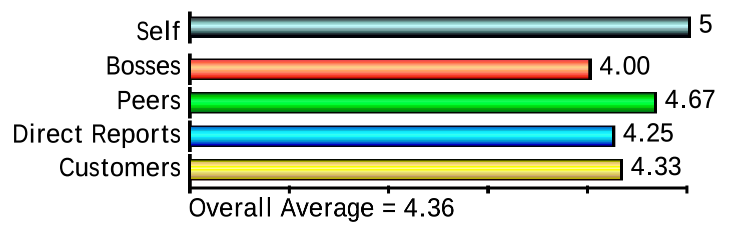
9. It is very important to this person that he or she develops the potential of others in the organization.





10. Effectively communicates and sustains processes and systems to achieve the organizational vision and values throughout his or her business area.





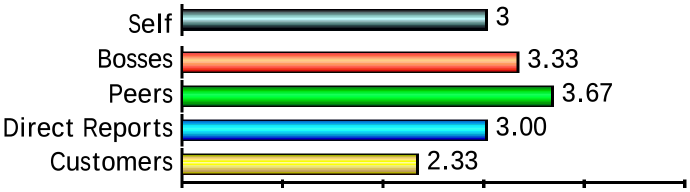
360 TOOL SCORING - Summary Report

BP 2

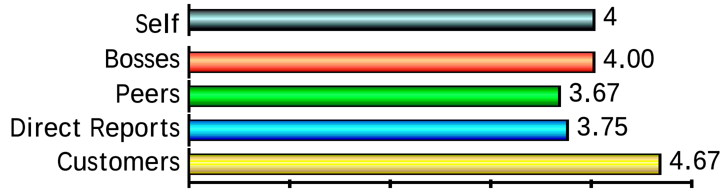
Best Practice 2: Creator of Collaboration and Innovation™

PERFORMANCE | **EXPECTATIONS**

1. Personally creates possibilities that are both innovative and sound for the organization.

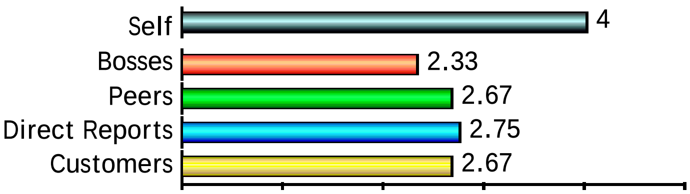


Overall Average = 3.07

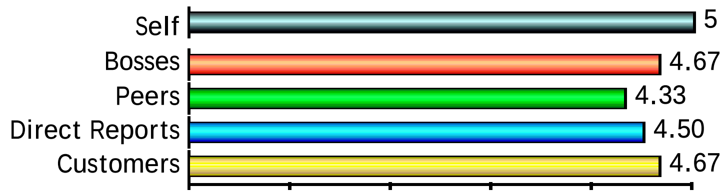


Overall Average = 4.00

2. Fosters a learning, trusting environment where true collaboration and innovation is unleashed.

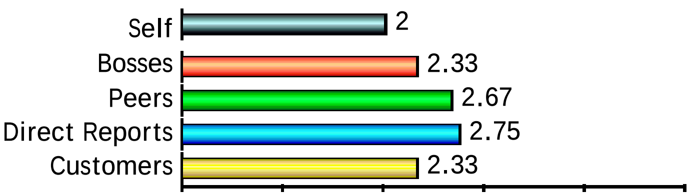


Overall Average = 2.72

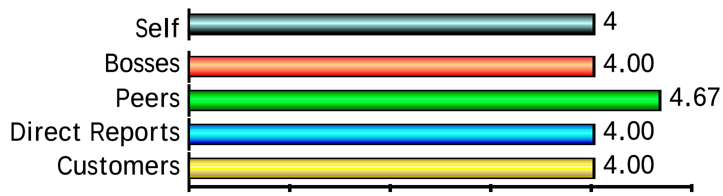


Overall Average = 4.57

3. Is a masterful listener for both what is said and what is not said.

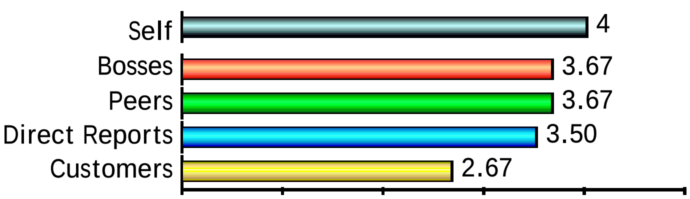


Overall Average = 2.50

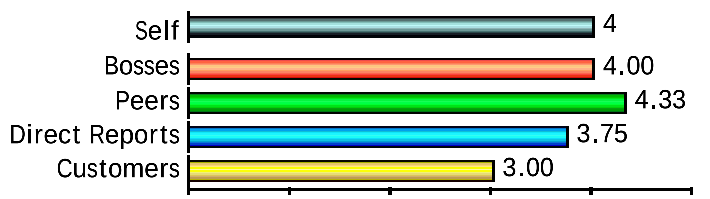


Overall Average = 4.14

4. Is comfortable not knowing "the answers" and learning from individual perspectives.

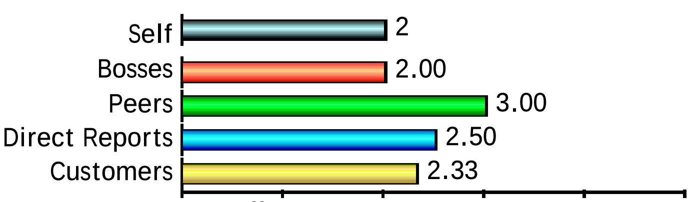


Overall Average = 3.43

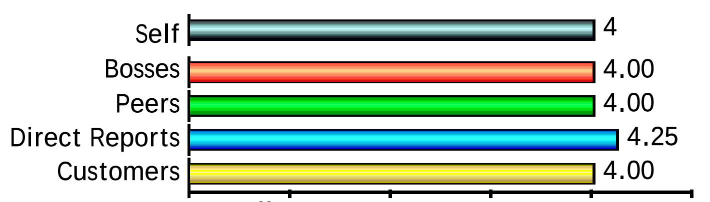


Overall Average = 3.78

5. Draws out differing perspectives and believes that disagreement is a learning opportunity.

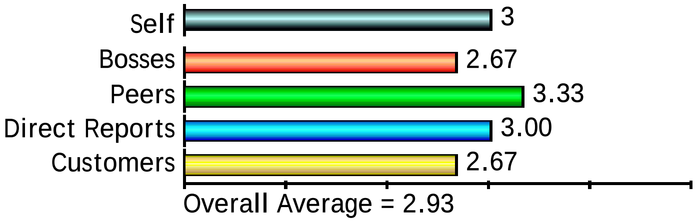


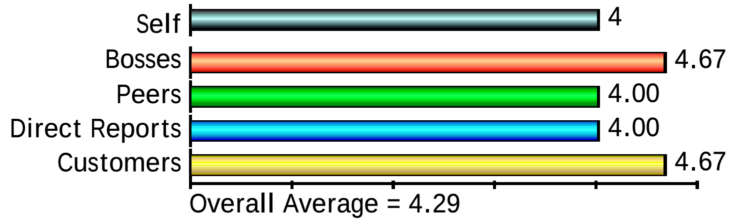
Overall Average = 2.43



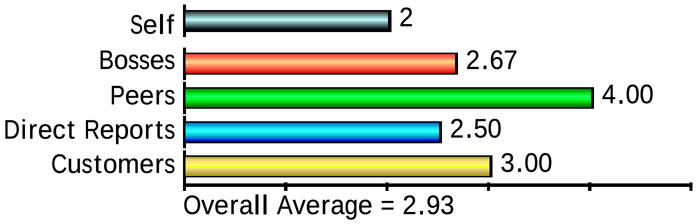
Overall Average = 4.07

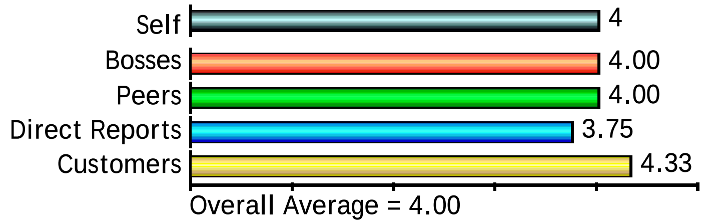
6. Keeps in mind the bigger picture which helps him or her ask timely, tough questions.



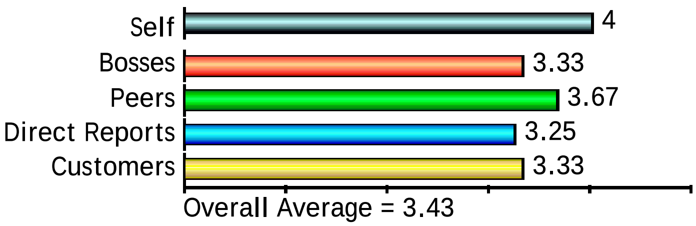


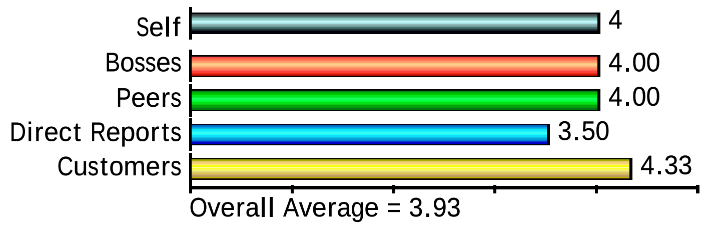
7. Sets the tone for thinking beyond where we are presently in order to innovate now for the future.



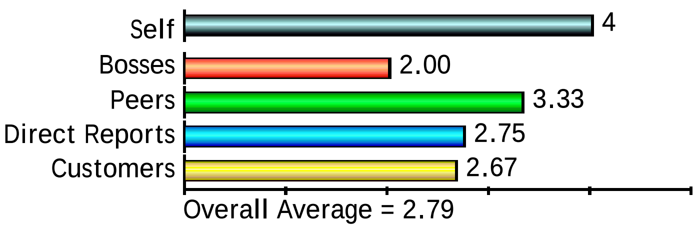


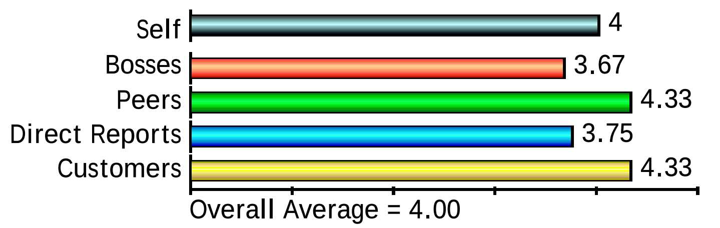
8. Can project how ideas may play out in the organization and marketplace.



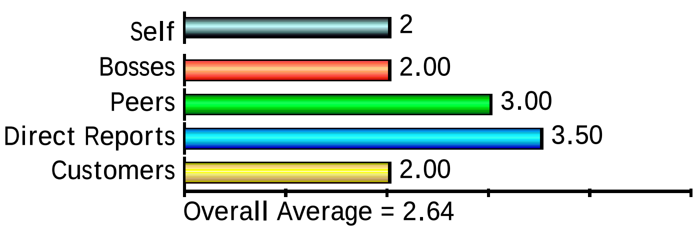


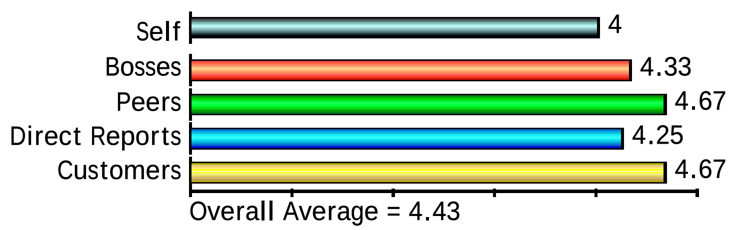
9. Can discern, and assist others to understand, when change needs to occur and when it does not.





10. Is a masterful facilitator of conversations such that everyone contributes their best thinking toward the task/issue at hand.

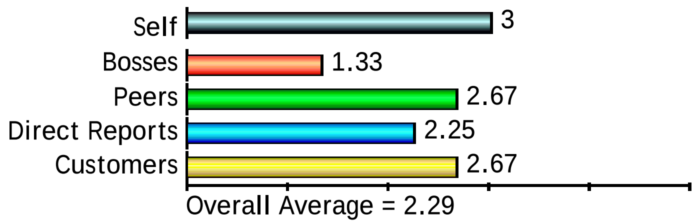


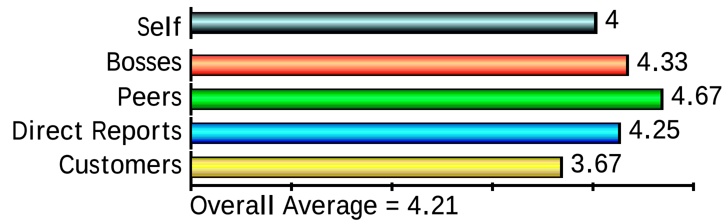


Best Practice 3: Influencer of Inspiration and Leadership™

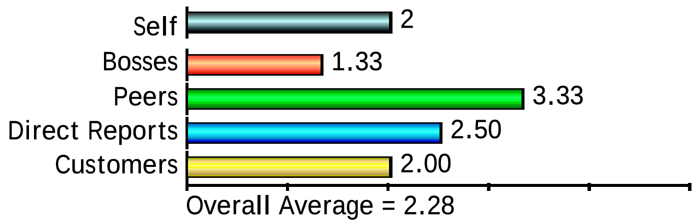
PERFORMANCE | **EXPECTATIONS**

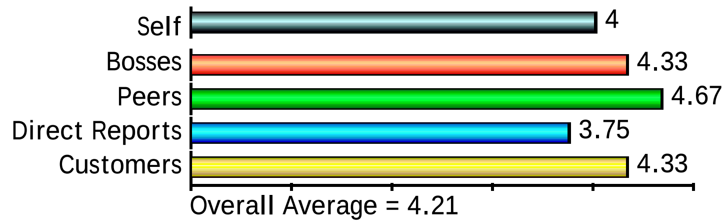
1. Is very adept at developing and maintaining relationships.



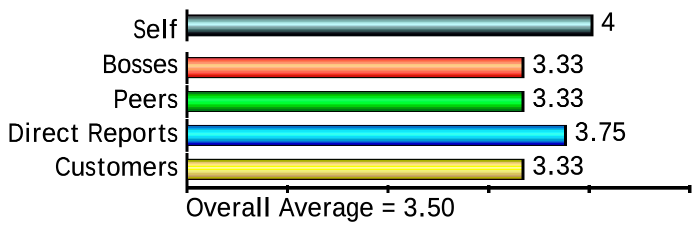


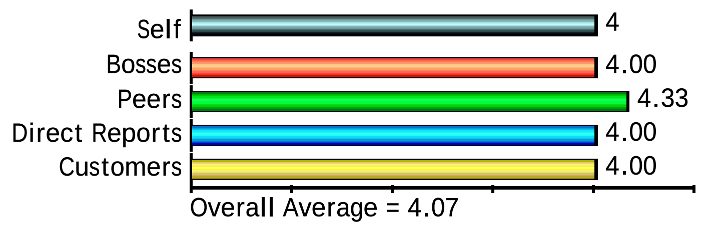
2. Uses his or her emotional intelligence and positive energy to influence others.



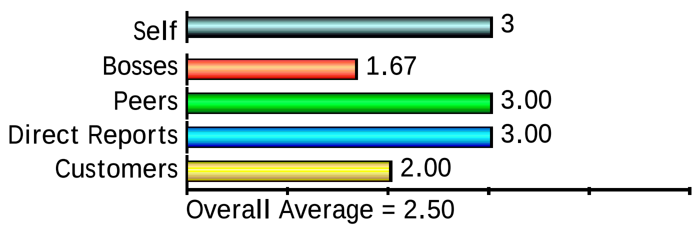


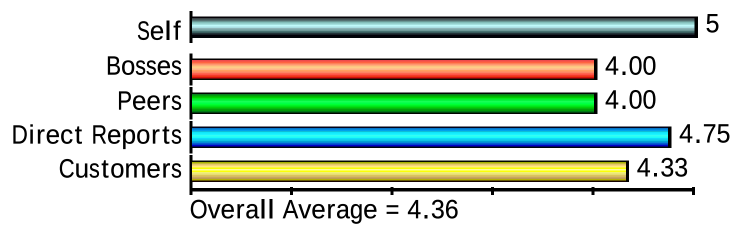
3. Chooses to model the positive perspective in all situations.



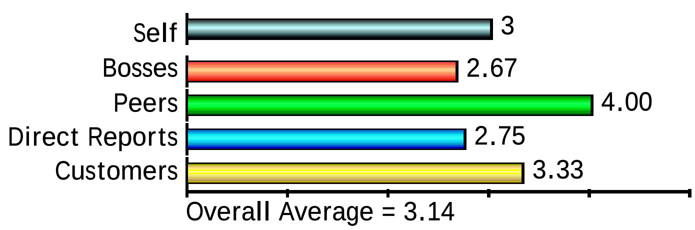


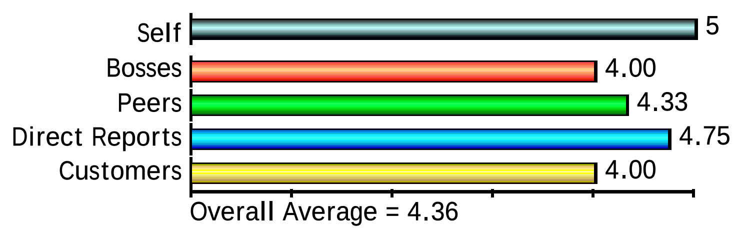
4. Brings out the best in people.



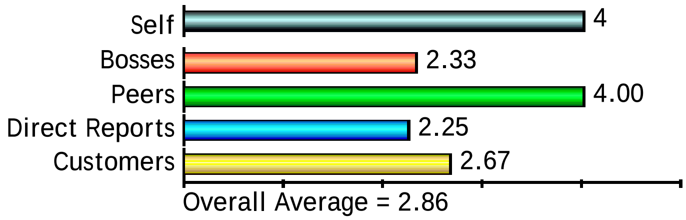


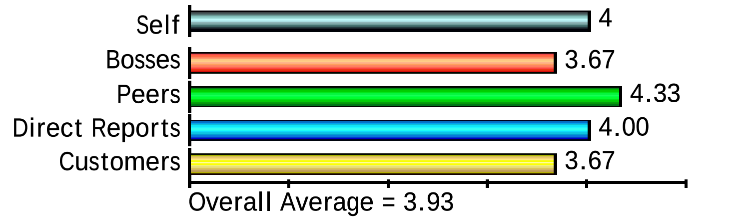
5. Constantly acknowledges and recognizes the attributes and contributions of others.



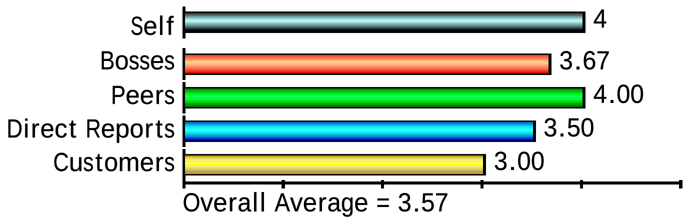


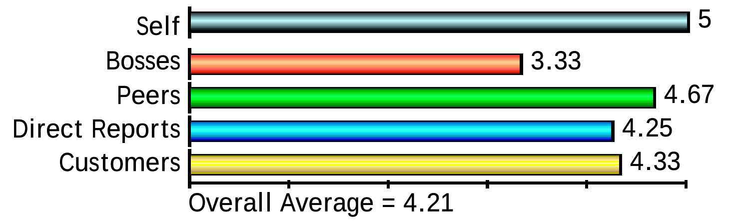
6. Intentionally delegates for the development of others.



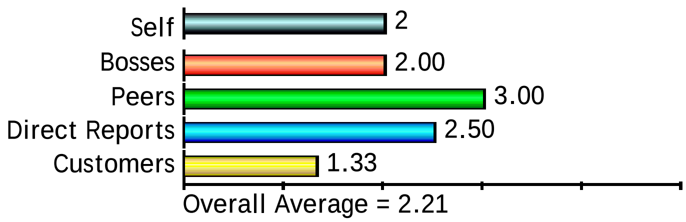


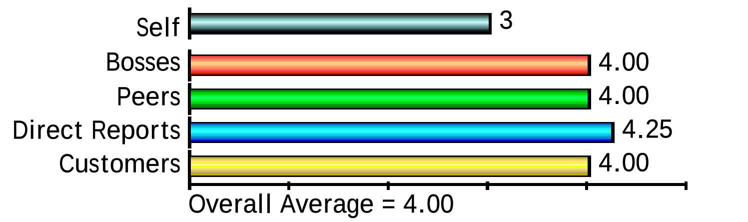
7. Leads with a constant focus on showcasing others rather than self.



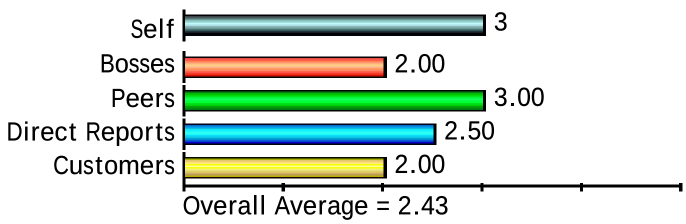


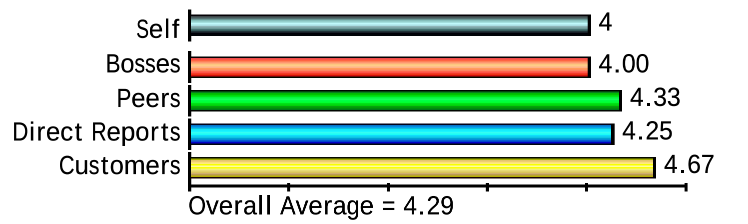
8. Has the ability and courage to take risks and inspire others to follow.



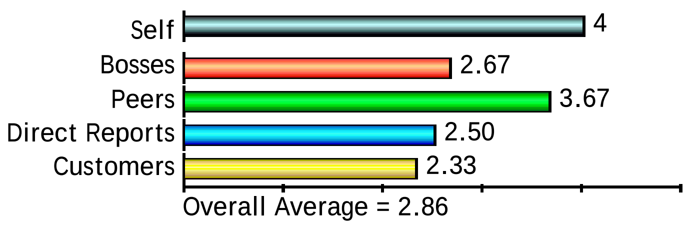


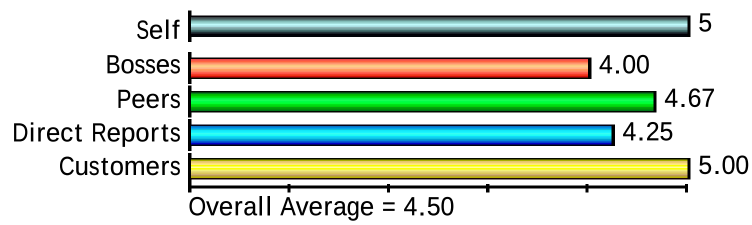
9. Is able to make tough decisions that have minimal negative impact.





10. Leads with humility and fierce resolve to accomplish the goals of the organization through others.





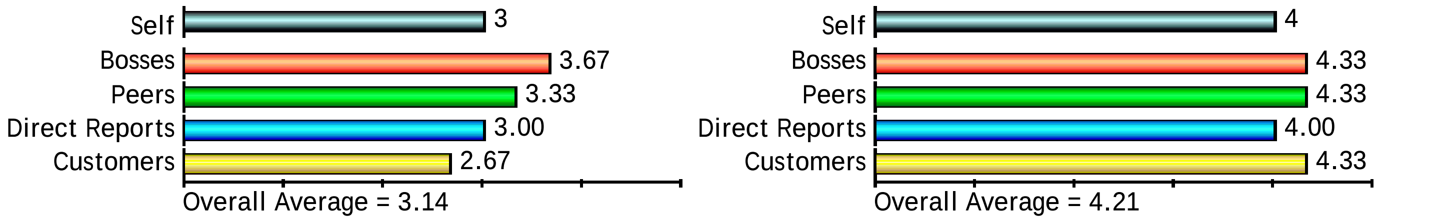
360 TOOL SCORING - Summary Report

BP 4

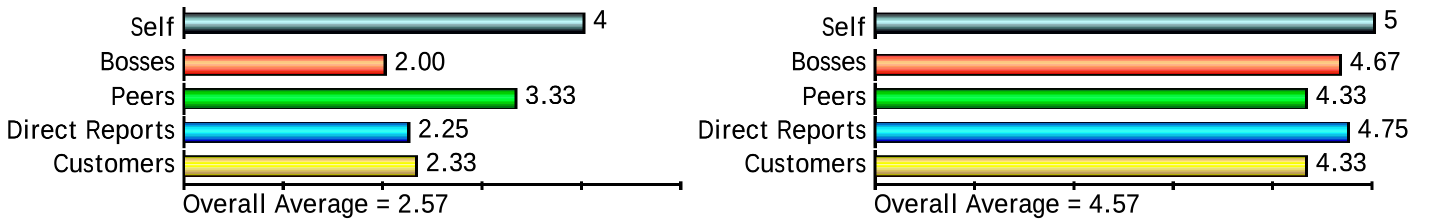
Best Practice 4: Advocator of Differences and Community™

PERFORMANCE | **EXPECTATIONS**

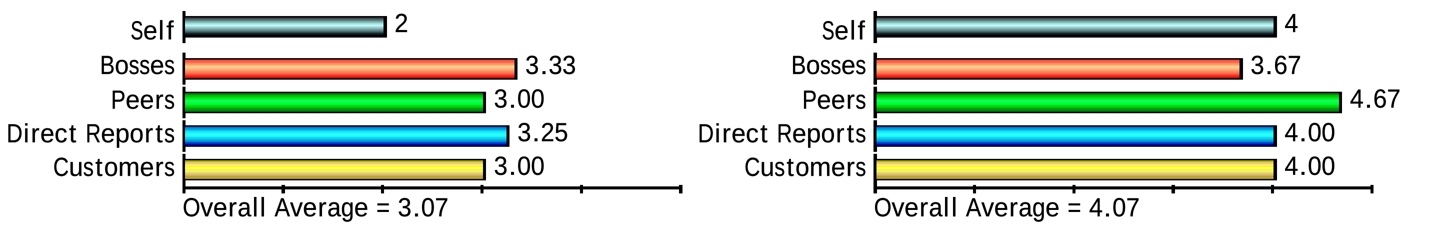
1. Is able to take a stand for a person, practice, or cause.



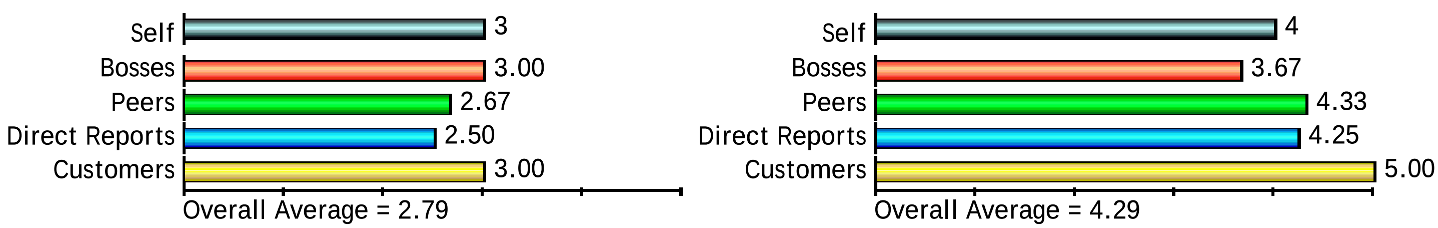
2. Constantly raises the visibility of individuals by mentoring and developing them.



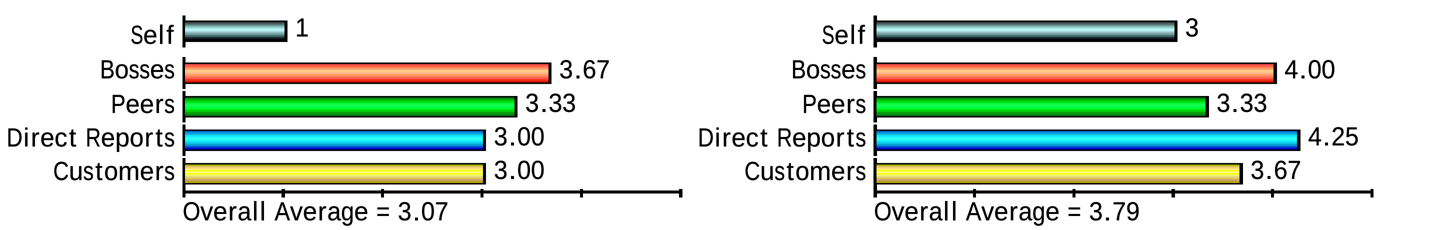
3. Is an advocate for a strengths-based culture where everyone works from their strengths.



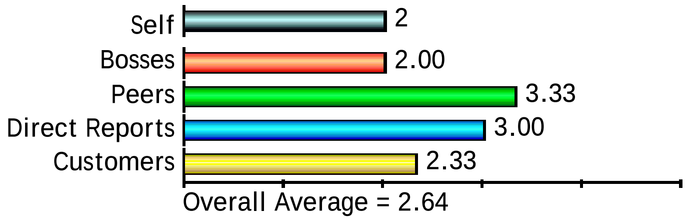
4. Is a connoisseur of talent, recognizing, valuing and utilizing the best each person has to offer.

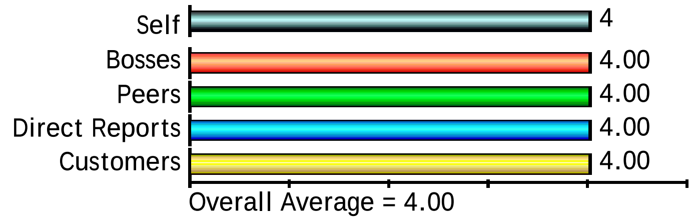


5. Insists on having teams of individuals with diverse approaches and capabilities.

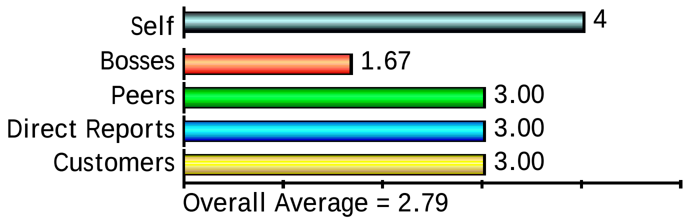


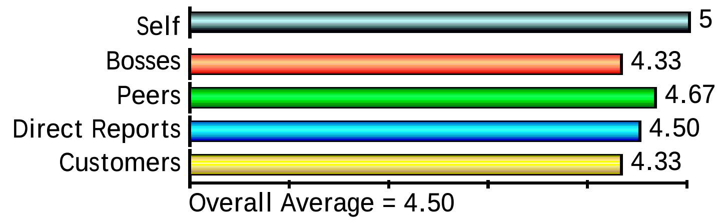
6. Looks for cross-functional opportunities where unique talent can be developed.



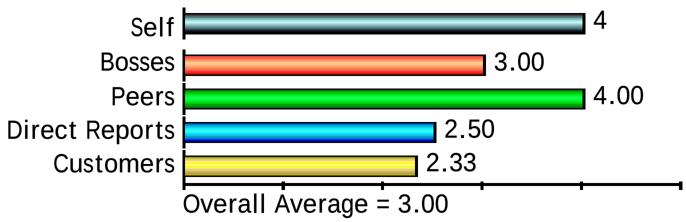


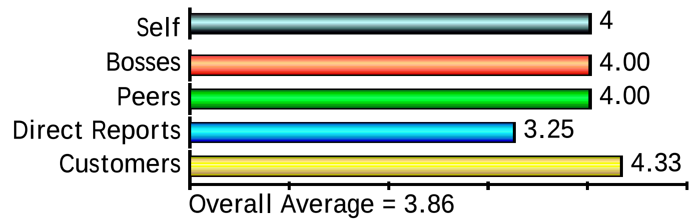
7. Promotes inter-departmental collaboration rather than "silo" orientation.



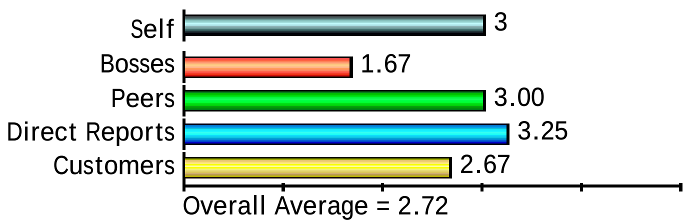


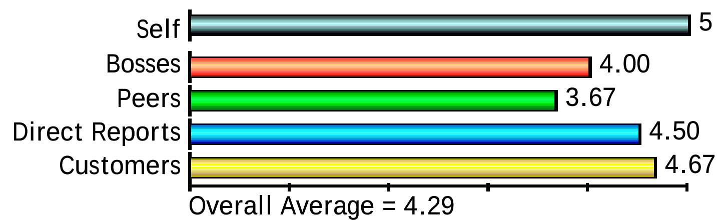
8. Considers the impact of actions on the greater community beyond organizational boundaries.



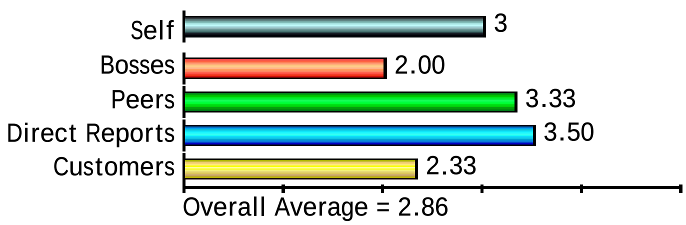


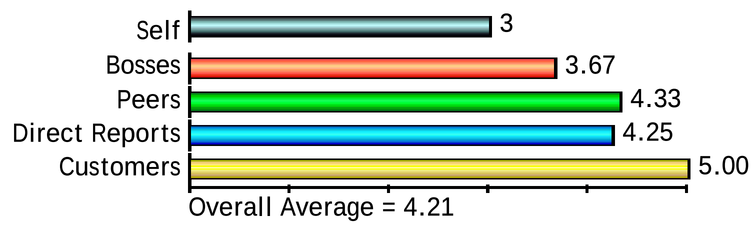
9. Has ongoing dialogue and involvement with internal and external communities.





10. Promotes an inclusive environment that unites towards a common focus.

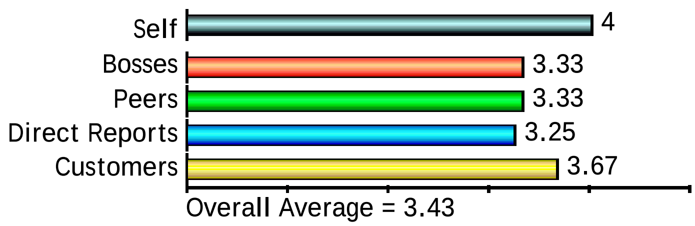


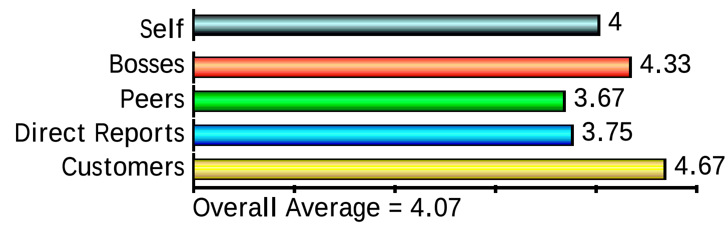


Best Practice 5: Calibrator of Responsibility and Accountability™

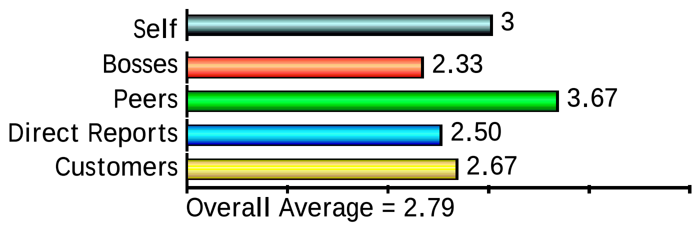
PERFORMANCE | **EXPECTATIONS**

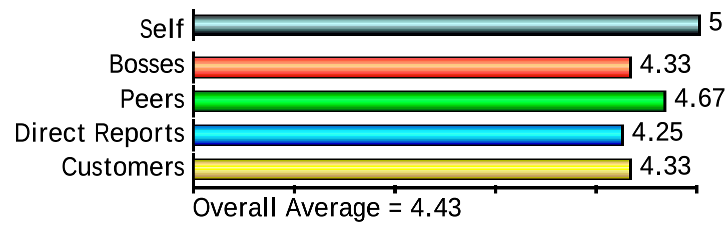
1. Executes the organization's strategic plan and uses appropriate checks and balances to reach the goals.



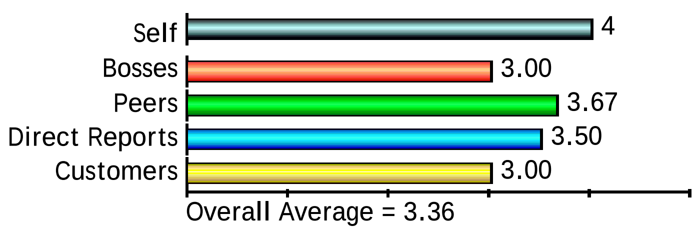


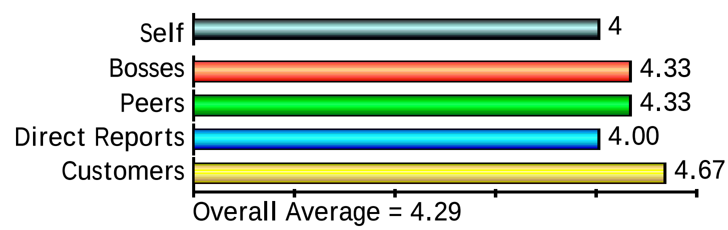
2. Has his or her "finger on the pulse" of the organization and knows milestone status.



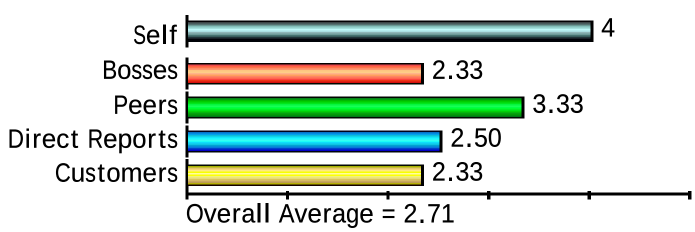


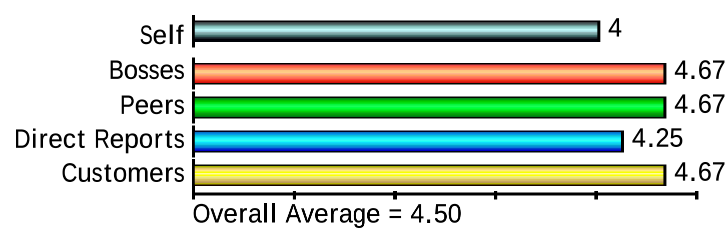
3. Individuals in this person's team are clear about position responsibilities and how they fit in the organization's direction and deliverables.



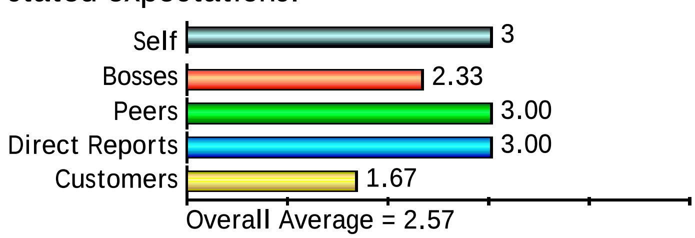


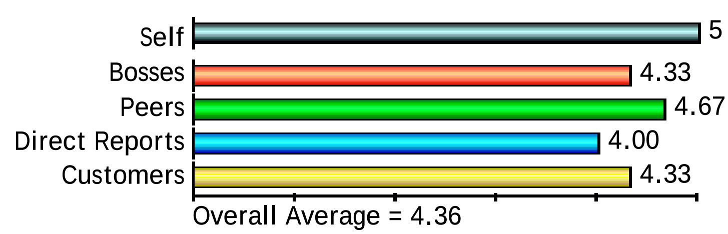
4. Requires peak performance and supports everyone with appropriate resources.



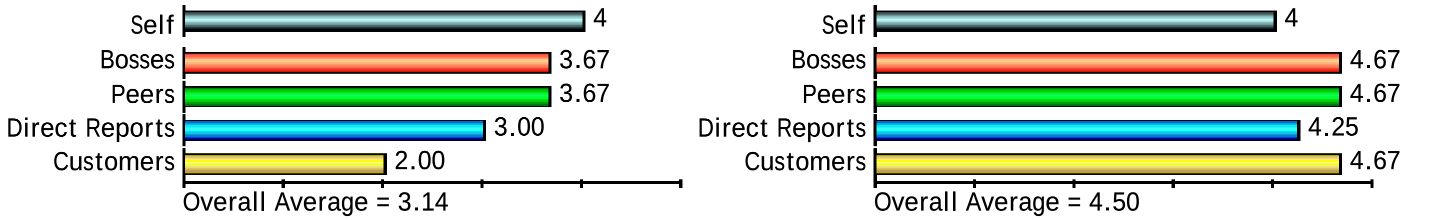


5. Provides regular feedback and coaching, and takes action when performance does not meet stated expectations.

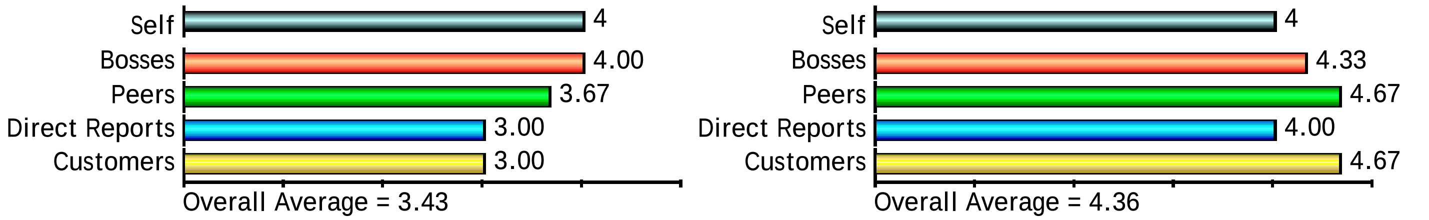




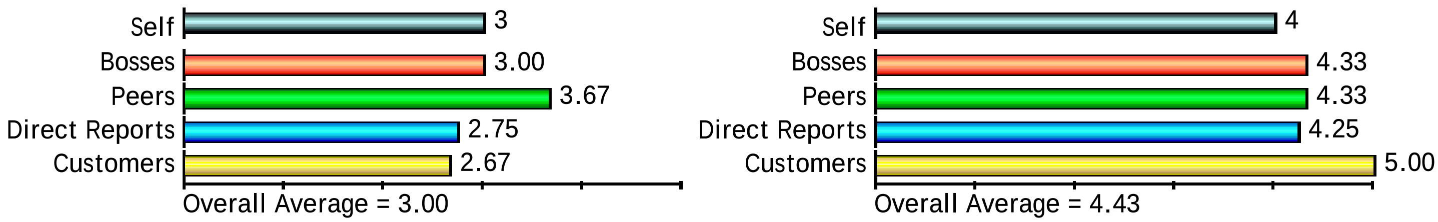
6. Has clearly defined accountabilities for self and the organization.



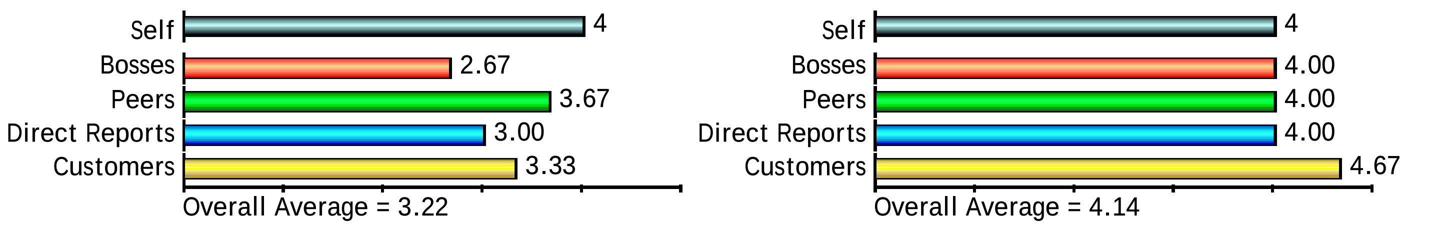
7. Has a clearly developed action plan with benchmarks and milestones, and provisions for making adjustments along the way.



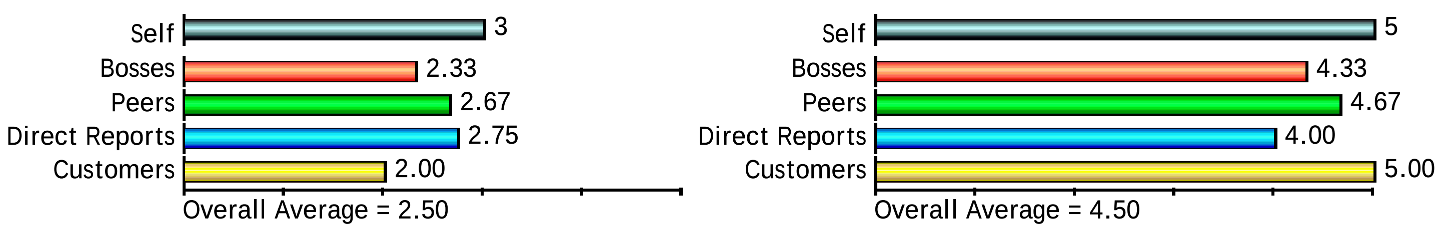
8. Models a sense of urgency both in getting things done and responding to change.



9. Is alert to trends that potentially affect results and re-calibrates action plans where necessary.



10. Has gained commitment from everyone in his or her areas of responsibility, and has established accountabilities with appropriate consequences and rewards.



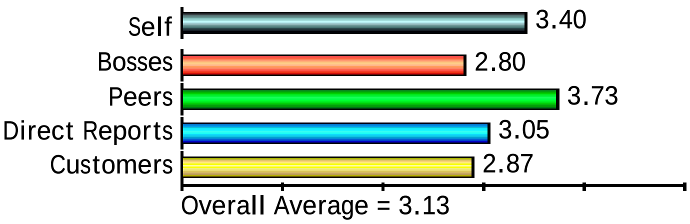
360 TOOL SCORING - Summary Report

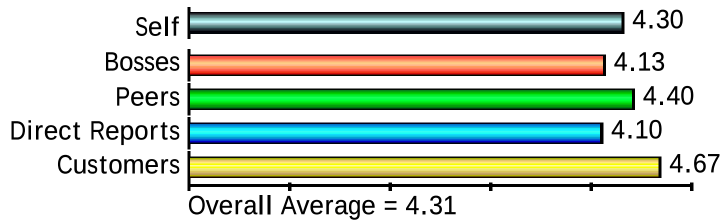
OVERALL AVERAGES

Best Practice Total Average

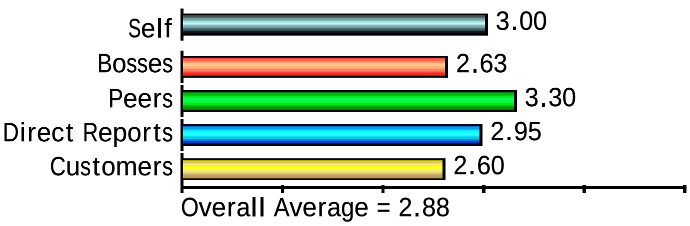
PERFORMANCE | **EXPECTATIONS**

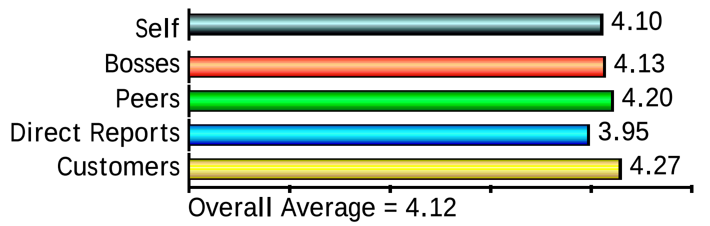
Best Practice 1: Holder of Vision and Values™



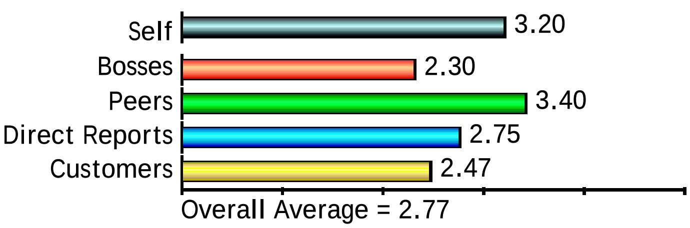


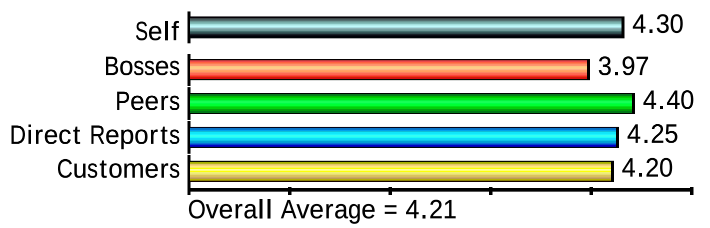
Best Practice 2: Creator of Collaboration and Innovation™



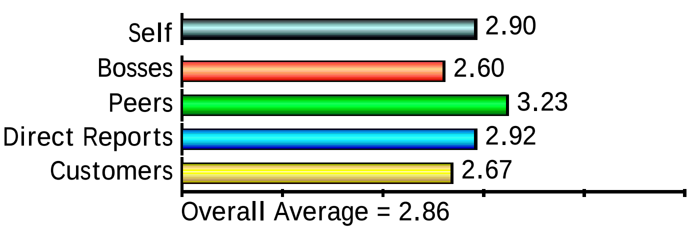


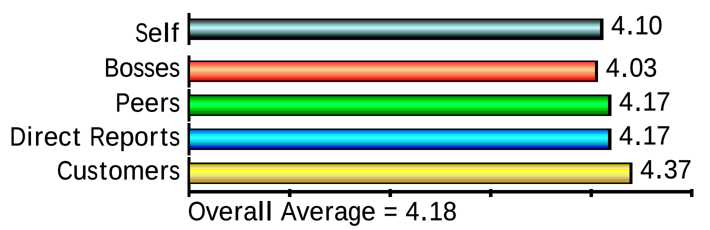
Best Practice 3: Influencer of Inspiration and Leadership™



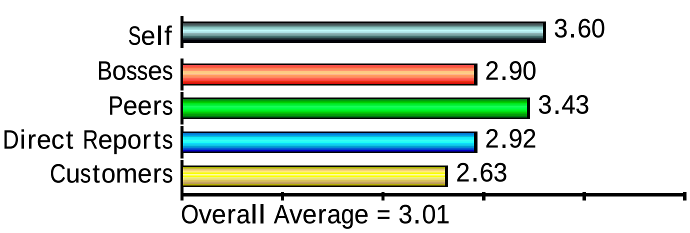


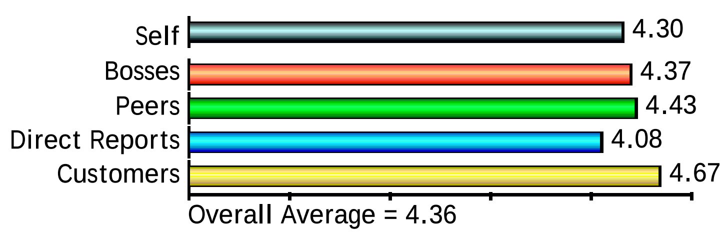
Best Practice 4: Advocator of Differences and Community™





Best Practice 5: Calibrator of Responsibility and Accountability™





Blind Spots and Hidden Strengths Report for Case Study 1							
CRITICAL SUCCESS SKILL		PERFORMANCE			EXPECTATIONS		
		Self	All Others	Difference	Self	All Others	Difference
BEST PRACTICE 1: Holder of Vision and Values™							
1	Reinforced Vision and Values	4	2.92	-1.08	5	4.31	-0.69
2	Models Principle	3	2.85	-0.15	4	4.15	0.15
3	Integrates Vision	4	3.31	-0.69	4	4.08	0.08
4	Has Well-Defined Strategic Plan	3	3.31	0.31	4	4.54	0.54
5	Team Alignment with Vision	3	3.46	0.46	3	4.54	1.54
6	Has Established Measurables	4	3.31	-0.69	4	4.08	0.08
7	Has Integrated Organizational Values	2	3.15	1.15	4	4.54	0.54
8	Personal Values: Walks the Talk	3	2.92	-0.08	5	4.23	-0.77
9	Important to Develop Others	4	3.15	-0.85	5	4.31	-0.69
10	Communicates, Sustains Processes (Vision/Values)	4	2.69	-1.31	5	4.31	-0.69
OVERALL AVERAGE BP 1		3.40	3.11	-0.29	4.30	4.31	0.01
BEST PRACTICE 2: Creator of Collaboration and Innovation™							
1	Creates Innovative Possibilities	3	3.08	0.08	4	4.00	0.00
2	Fosters Trusting Environment	4	2.62	-1.38	5	4.54	-0.46
3	Is Masterful Listener	2	2.54	0.54	4	4.15	0.15
4	Comfortable Learning from Others	4	3.39	-0.61	4	3.77	-0.23
5	See Opportunities in Disagreement	2	2.46	0.46	4	4.08	0.08
6	Bigger Picture, Timely Questions	3	2.92	-0.08	4	4.31	0.31
7	Innovates for Future (and Models)	2	3.00	1.00	4	4.00	0.00
8	Organizational/Marketplace Projection	4	3.38	-0.62	4	3.92	-0.08
9	Can Discern Need (or not) for Change	4	2.69	-1.31	4	4.00	0.00
10	Facilitates Best Group Thinking	2	2.69	0.69	4	4.46	0.46
OVERALL AVERAGE BP 2		3.00	2.88	-0.12	4.10	4.12	0.02

Blind Spots and Hidden Strengths Report for Case Study 1							
CRITICAL SUCCESS SKILL		PERFORMANCE			EXPECTATIONS		
		Self	All Others	Difference	Self	All Others	Difference
BEST PRACTICE 3: Influencer of Inspiration and Leadership™							
1	Adept at Developing Relationships	3	2.23	-0.77	4	4.23	0.23
2	Positively Influences Others	2	2.31	0.31	4	4.23	0.23
3	Models Positive Perspective	4	3.46	-0.54	4	4.08	0.08
4	Evokes Best in Others	3	2.46	-0.54	5	4.31	-0.69
5	Acknowledges Contributions of Others	3	3.15	0.15	5	4.31	-0.69
6	Delegates for Development	4	2.77	-1.23	4	3.92	-0.08
7	Showcases Others	4	3.54	-0.46	5	4.15	-0.85
8	Is Inspiring Risk-Taker	2	2.23	0.23	3	4.08	1.08
9	Minimizes Negative Impact of Decisions	3	2.38	-0.62	4	4.31	0.31
10	Accomplishes via Others w/Humility, Fierce Resolve	4	2.77	-1.23	5	4.46	-0.54
	OVERALL AVERAGE BP 3	3.20	2.73	-0.47	4.30	4.21	-0.09
BEST PRACTICE 4: Advocator of Differences and Community™							
1	Takes a Stand, Advocates	3	3.15	0.15	4	4.23	0.23
2	Mentors for Visibility of Others	4	2.46	-1.54	5	4.54	-0.46
3	Advocates for Strengths-Based Culture	2	3.15	1.15	4	4.08	0.08
4	Is a Connoisseur of Talent	3	2.77	-0.23	4	4.31	0.31
5	Insists on Team Diversity	1	3.23	2.23	3	3.85	0.85
6	Seeks Cross-Functional Opportunities	2	2.69	0.69	4	4.00	0.00
7	Promotes Inter-Department Collaboration	4	2.69	-1.31	5	4.46	-0.54
8	Considers Impacts and Greater Opportunities	4	2.92	-1.08	4	3.85	-0.15
9	Has Internal-External Communication	3	2.69	-0.31	5	4.23	-0.77
10	Promotes United, Inclusive Environment	3	2.84	-0.16	3	4.31	1.31
	OVERALL AVERAGE BP 4	2.90	2.86	-0.04	4.10	4.19	0.09

Blind Spots and Hidden Strengths Report for Case Study 1							
CRITICAL SUCCESS SKILL		PERFORMANCE			EXPECTATIONS		
		Self	All Others	Difference	Self	All Others	Difference
BEST PRACTICE 5: Calibrator of Responsibility and Accountability™							
1	Has Strategic Plan with Checks/Balances	4	3.38	-0.62	4	4.08	0.08
2	"Finger on Pulse," Knows Milestone Status	3	2.77	-0.23	5	4.38	-0.62
3	Team Members Clear About Responsibilities	4	3.31	-0.69	4	4.31	0.31
4	Requires Peak Performance	4	2.61	-1.39	4	4.54	0.54
5	Provides Feedback, Appropriate Action	3	2.54	-0.46	5	4.31	-0.69
6	Has Personal, Organizational Accountabilities	4	3.08	-0.92	4	4.54	0.54
7	Has Action Plan w/Provision for Adjustment	4	3.39	-0.61	4	4.39	0.39
8	Models Urgency in Achievement, Change	3	3.00	0.00	4	4.46	0.46
9	Is Alert to Trends, Re-calibrates	4	3.15	-0.85	4	4.15	0.15
10	Team Commitment w/Appropriate Consequences	3	2.46	-0.54	5	4.46	-0.54
OVERALL AVERAGE BP 5		3.60	2.97	-0.63	4.30	4.36	0.06

Participant's Name: CASE STUDY Participant

The following are comments made by raters. These comments are not sorted by category, and contain all comments made by all raters, separated by a single line.

COMMENTS:

Case needs to focus on conflict resolution and supporting his supervisors in dealing with personnel issues. He also needs to improve his relationship building with his peer group and other members of (company) managemnt team.

Sometimes the tough decisions are long in coming to fruition. I am not sure if this is particularly Case's fault, or (company)'s fault as a company. Important resources and opportunities have been lost due to a slow decision making process.

More emphasis on recognition of achievement and showing apreciation for the contributions of individuals would be an area of improvement. Teamwork, good communication and professional behavior also needs to be reinforced and followed up on. Perception is that more effort is required in engaging people by getting to know them versus a more distant approach.

This 360 degree evaluation was met with frustration and an unwillingness to complete. Evaluations have been completed in the past with no results, coaching has had no impact as Case indicates through his actions that he is not willing to foster a communicative, innovative strong team that will provide (company) with the accounting department it requires. Case has been fortunate to have very strong supervisors who continue to lead this department into success.

Case has not integrated himself or his accounting team into the entire (regional) organization as much as I had hoped. He, like many others around here, seems more focused on defending or covering mistakes when he should be focusing on identifying ways to prevent them from happening (root cause analysis and preventitive measures).

END OF COMMENTS