Saville assessment

Wave 360

Project Management Guidance & Example Briefing Templates

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CONTENTS

Introduction

This document contains resources to support the project management of a 360 program. It contains guidance and templates to support administration, including key considerations and elements a Project Manager may wish to include in the relevant stages.

Get in touch with a Saville consultant to discuss ideas specific to your 360 program [info@savilleassessment.com]

Project Timeline & Considerationss

Project Milestones

Example timeline and considerations

Milestone	High-level Considerations	Additional Materials
Project scoping & planning	• What are the drivers for the 360 program? • What is the expected outcome? • How will it fit into a wider development agenda?	
Nominate assessees	Consider the talent development agenda and context for program.	
Contact and brief assessees	Consider who the communication should come from.	Assessee Invite Email template available on request.
Nominate and sign off raters	Consider ways to encourage participant ownership.	Rater Nomination Form available on request.
Contact raters	Assessees should not contact raters until nominations have been signed off.	Rater Invite Email template available on request.
Setup the 360 assessment project	Complete the Managed Services Request Form and send to Managed Services (managed.services@savilleassessment.com). Oasys users can setup 360 projects self sufficiently, speak to a Saville Consultant for support with this.	For Managed Services users, use Managed Services Request Form. For Oasys Users, use Bulk Upload Form for larger groups and return to Managed Services.

In a Team 360 Program, or one that targets Senior Leaders, it can often increase buy-in if the team leader also partakes in the 360 as an assessee, particularly if it has been initiated by them.

Project Timeline & Considerationss

Project Milestones

Example timeline and considerations

Milestone	High-level Considerations	Additional Materials
Launch 360 Questionnaire	Oasys email invites to go out to all participants (assessees and raters). Will raters be nominated for multiple participants, does the completion window account for this?	
First reminder	To be set at an appropriate time interval depending on the length of completion phase. This could go out from Oasys.	
Final reminder	Final reminder to encourage completion. It is best for this communication to go out from both Oasys and the client Project Manager.	
Soft close	This should be the deadline conveyed to participants. Use the time between soft and final close to ensure minimum completion rates are met and where it is not possible, decide on alternative actions.	
Final close	Final project close on Oasys - no further completion will be possible beyond this point.	
Generation of report(s)	Reports should not be generated until the assessment project has been closed on Oasys.	

Project Timeline & Considerationss

Project Milestones

Example timeline and considerations

Milestone	High-level Considerations	Additional Materials
Identify feedback provider team	Book in time as far ahead as possible.	
Schedule assessee feedback sessions	Book in time as far ahead as possible.	Example wording available by request.
Conduct feedback provider briefing	Can be scheduled in parallel with the 360 assessment completion stage.	
Delivery of feedback sessions	Refer to materials in 360 accreditation course and the 360 Behavioral Profile User Guide for best practice when feeding back the reports.	
Wash-up session	To be conducted with the feedback provider team when all feedback sessions have been delivered.	
Project debrief and evaluation	To be conducted with the project team.	

Factors to Consider Ahead of Starting a 360 Program

Make your 360 Program a Success

Factors to consider before starting

The Wave 360 is a powerful tool to drive in-depth talent development. Gathering feedback from different perspectives can reveal blind spots, but it can equally create a layer of complexity that impacts the outcome of the program. Below are factors to consider to get the most value from a 360 program.

Participant Readiness

The participants and their raters should work closely together and have regular opportunities to interact and collaborate. Teams with more siloed or remote structure may have fewer interactions and be less ready for a 360 program. Encouraging a culture of collaboration and interactivity across individuals and teams can improve readiness.

Clarity of Purpose

A 360 program is more than a performance management process, maximize the value of the program by emphasising the feedback process and the participants' role to take forward a clearly defined set of development actions.

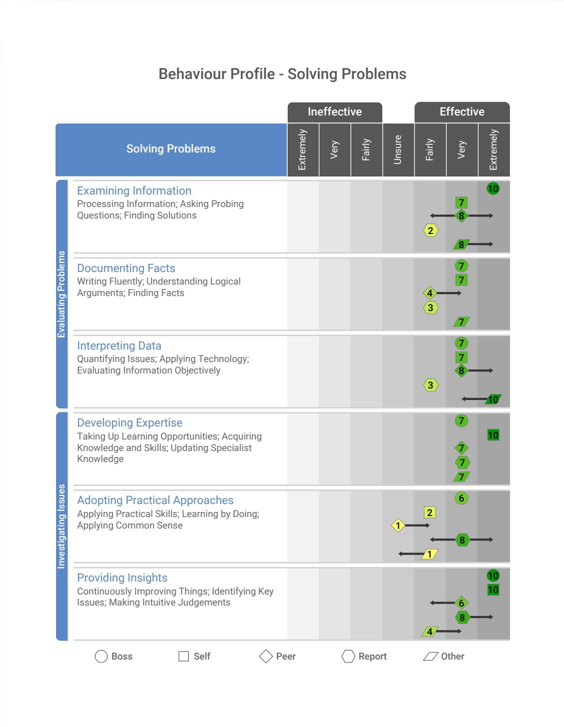
Access to Trained Feedback Providers

Owing to the potentially sensitive nature of 360 assessments, individuals responsible for giving feedback should be accredited to use the Saville Performance or Leadership Impact 360 tools. They should also be upskilled to help participants understand their results and develop action plans based upon the feedback. Note, the 360 Behavioral Profile does not require a trained user to interpret.

Speak to a Saville consultant for a further conversation about these factors. Additional resources on how to make your 360 program a success are also available by request.

Project Launch & Setup

Decide on Which 360 Tool to Use

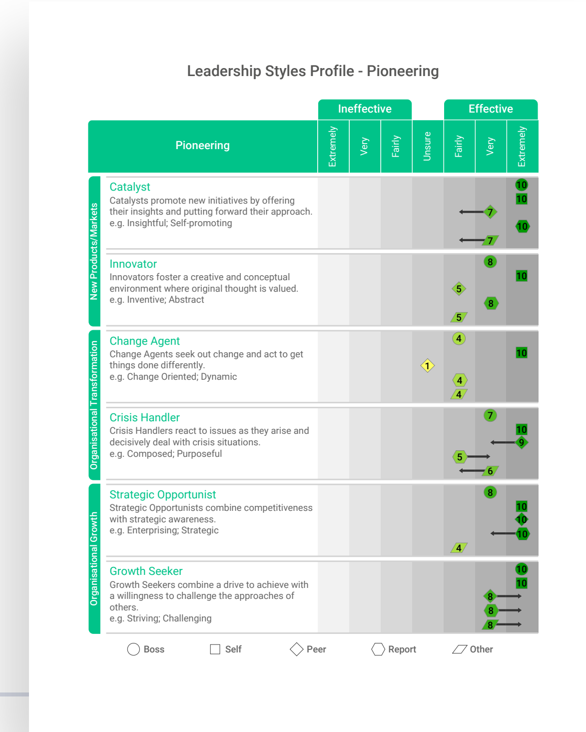


performance 360

- Underpinned by the standard Wave model
- Assesses an individual's effectiveness against standard behavioral areas
- Suitable to support development at any level

leadership impact 360

- Underpinned by the Leadership Impact model
- Assesses a Leader's perceived level of impact across nine impact areas and leadership styles
- Suitable to support development of senior manager or executive level individuals



Saville Assessment have the expertise to provide group-level analysis of 360 results to support team development. Speak to a Saville consultant to discuss your requirements and associated costs.

360 Project Launch

Make your 360 Program a Success

Prior to the launch of the 360 questionnaire, both assessees and raters need to be informed clearly about the purpose of the 360 program, and provisions in place to protect anonymity.

You may wish to include the following information:

- The purpose and context of the 360 program
- The stages of the 360 program, including administration, feedback and follow-up activities
- Approximate timescales of the 360 program, including when they will receive the links, length of time they have to complete the rankings, when feedback sessions will be taking place and when ratings must be completed by.
- Confidentiality and anonymity:
  - Who will have access to the reports?
  - How will the results be used?
  - Establish the boundaries of confidentiality for the feedback session.

For high-stakes 360 programs targeting senior leadership level participants, the Project Sponsor (the Team Leader responsible for the team's development) should convey the context of the program and set expectations for participation and ownership.

360 Project Launch

Project Sponsor Communication

To encourage participation and engagement with a senior level 360 program, it is suggested that communication from the project sponsor is tailored and specific to the organization and/or team's context. The overall purpose of project sponsor communication beyond the standard brief is to set the tone and encourage engagement.

Below are key pieces of information to include in the project sponsor's communication.

- The context and circumstances for undertaking a development program as a team, outlining the development need for the team, and individuals if appropriate.
- The rationale for using a 360 program to address the development need.
- The expectation around openness, honesty and constructive team support, including why it is important and how it can impact the success of the project.
- The guidelines around confidentiality, anonymity and who will have access to individual results and group-level results, if relevant.
- Any follow-up activities (the 'so-what' of the project) and the expectations around individual and group accountability.

It may also be useful to acknowledge any anticipated challenges and hurdles for success (e.g. finding time to complete ratings for team members), giving suggestions for workarounds if appropriate.

Raters

Selection & Guidance

Where possible, enable assesses and their line manager to select the raters they wish to receive feedback from

- By enabling assesses to select the raters they value, they are more likely to engage with and reflect on the feedback received.
- Line manager involvement can ensure that raters with a range of perspectives are included.
- Raters should be individuals that have worked closely with the assessee so that they have a broad perspective on their performance.

There are five rater categories available: Boss (minimum 1), Self (maximum 1), Peer, Report, and Other Stakeholders*

- Assessees should nominate no less than five individuals for Peer, Report and Other Stakeholders for breadth of feedback and to protect rater anonymity. A minimum of one nomination is required for the Self and Boss categories.
- Encourage assessees to pick individuals that they have worked closely and meaningfully with.
- It is not recommended to have very large numbers of raters per category as the key focus should be on good quality working relationships between the rater and the assessee.

The Project Manager should review the rater nominations with the following considerations

- Ensure a sufficient number of raters in each category - minimum 3 (recommendation 5+) in each of the Peers, Reports and Others categories.
- All of the raters should be individuals that have worked closely with the assessee (e.g. at least the last 3-6 months) so that they have a broad perspective on their performance at work.
- Watch for rater fatigue – has one individual been nominated by all assessees on the program?

Reports cannot be generated with less than 3 completions in each category (except for Self and Boss). Project Managers should encourage assessees to provide one or two extra nominations in the relevant categories to ensure minimum completion rates can be met subsequently. In exceptional cases, categories can be merged at the project level, by request to Managed Services, to meet minimum completion requirements for report generation. Speak to a Saville consultant to discuss the considerations.

*Not all rater categories need to be used; and the labels of the categories can be aligned with who sits in these categories to better reflect the relationship. This is configurable on project set-up

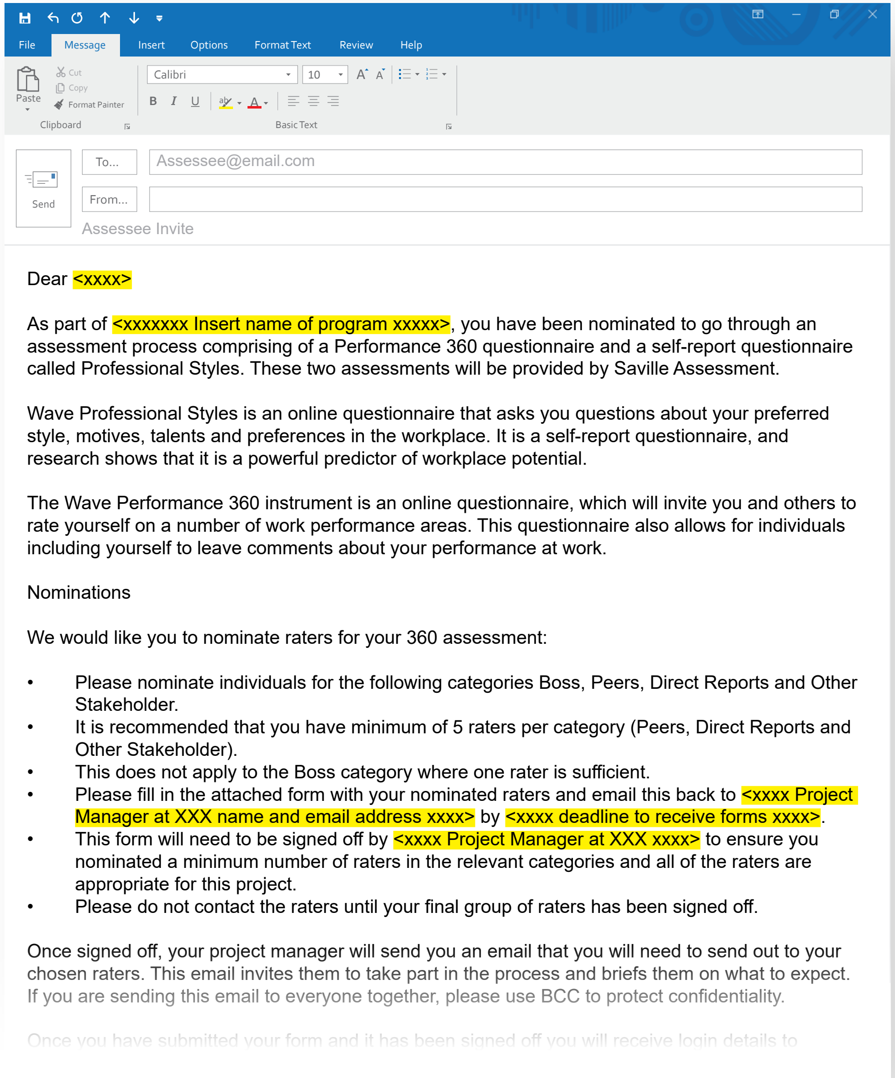
Participant Communication Template

For Assessees

An email template is available for Project Managers to support communication with assessees. For access to the template, please reach out to your Saville Consultant.

For those who wish to draft communication tailored to your corporate language, you may wish to include information such as:

- An overview of the assessments, which may include both the Professional Styles self assessment and 360 multi-rater instrument
- Instructions to provide rater nominations, including a link to the relevant forms to complete
- Approximate timescales
- Contact information



Dear <xxxx>

As part of <xxxxxxx Insert name of program xxxxx>, you have been nominated to go through an assessment process comprising of a Performance 360 questionnaire and a self-report questionnaire called Professional Styles. These two assessments will be provided by Saville Assessment.

Wave Professional Styles is an online questionnaire that asks you questions about your preferred style, motives, talents and preferences in the workplace. It is a self-report questionnaire, and research shows that it is a powerful predictor of workplace potential.

The Wave Performance 360 instrument is an online questionnaire, which will invite you and others to rate yourself on a number of work performance areas. This questionnaire also allows for individuals including yourself to leave comments about your performance at work.

Nominations

We would like you to nominate raters for your 360 assessment:

- Please nominate individuals for the following categories Boss, Peers, Direct Reports and Other Stakeholder.
- It is recommended that you have minimum of 5 raters per category (Peers, Direct Reports and Other Stakeholder).
- This does not apply to the Boss category where one rater is sufficient.
- Please fill in the attached form with your nominated raters and email this back to <xxxx Project Manager at XXX name and email address xxxx> by <xxxx deadline to receive forms xxxx>.
- This form will need to be signed off by <xxxx Project Manager at XXX xxxx> to ensure you nominated a minimum number of raters in the relevant categories and all of the raters are appropriate for this project.
- Please do not contact the raters until your final group of raters has been signed off.

Once signed off, your project manager will send you an email that you will need to send out to your chosen raters. This email invites them to take part in the process and briefs them on what to expect. If you are sending this email to everyone together, please use BCC to protect confidentiality.

Once you have submitted your form and it has been signed off you will receive login details to

Project Debrief & Washup

Following the completion of all feedback sessions, the Project Manager should schedule time with the feedback provider group for a wash-up session. Without breaching confidentiality, key themes and/or relevant observations should be discussed and collated as a group and fed back to the stakeholder. Areas of discussion may include:

- Overall engagement levels
- Common questions or comments made during the session
- Any surprising reactions
- Participant commitment levels to development action
- Any learnings from the feedback provider team

If a group analysis is also included as part of the project plan, key themes on strengths, challenge areas and common development actions should also be discussed. Ideally the quantitative results should be ready and reviewed prior to this session. The discussion should then focus on qualitative themes that support or contradict the data.

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