ENHANCING 360-DEGREE FEEDBACK FOR INDIVIDUAL ASSESSMENT AND ORGANIZATION DEVELOPMENT: METHODS AND LESSONS FROM THE FIELD

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ABSTRACT

Benchmark surveys regarding talent management assessment practices and interventions of choice for organization development (OD) practitioners have shown 360-degree feedback to be a popular tool for both development and decision-making in the field today. Although much has been written about implementing 360-degree feedback since its inception in the 1990s, few longitudinal case examples exist where interventions have been applied and their impact measured successfully. This chapter closes the gap by providing research findings and key learnings from five different implementation strategies for enhancing 360-degree feedback in a large multi-national organization. Recommendations and implications for future research are discussed.

Keywords: 360-degree feedback; organization development; talent management; leadership pipeline; high-potential; survey ratings; assessment; individual development

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INTRODUCTION

Of all the tools and interventions available to organization development (OD) practitioners and industrial-organizational (I-O) psychologists today, few have remained as consistently popular or in use as the process of 360-degree feedback (Bracken, Rose, & Church, 2016). The concept of using data-based methods for driving individual and organizational change is a cornerstone of the field of OD (Burke, 1982, 2014; Nadler, 1977; Waclawski & Church, 2002) and is grounded in the basic Lewinian principles of action research (Lewin, 1951, 1958).

First popularized in the 1990s as a tool for leadership development (e.g., Bernardin, 1986; Bracken, 1994; London & Beatty, 1993) and organizational change interventions (e.g., Church, Waclawski, & Burke, 2001) it has since become one of the most commonly used methods for both development and decision-making today. Benchmark surveys of the talent management practices of top development companies, for example, have reported that 360-degree feedback is one of the three most commonly used tools for identifying and developing high-potential and senior executive talent (Church & Rotolo, 2013; Church, Rotolo, Ginther, & Levine, 2015; Silzer & Church, 2010). Even among broader organizational samples, 360-degree feedback is reportedly used in over 50% of employee development and talent management applications (3D Group, 2016). As Bracken et al. (2016) note, there has been a clear shift over the past three decades in the use of 360-degree results from being primarily an individual development tool to one that is used to make important organizational decisions. It would appear that O'Reilly (1994) was right when proclaiming in Fortune magazine that "360 degree feedback can change your life" though probably far beyond what was intended at the time.

Despite the popularity of this data-driven process, however, it is interesting to note there has been relatively few applied research studies conducted since the original work of the 1990s on how to enhance the effectiveness of 360-degree applications. This is problematic for a number of reasons. First, the impact of technology on the process of designing items, launching 360-degree surveys, and providing feedback has dramatically changed the landscape for who delivers these processes, and yet little has been written about what this means for the field. Second, generation Y and the emerging generation Z are demanding feedback more regularly and earlier in their careers (e.g., Meister & Willyerd, 2010; Zemke, Raines, & Filipczak, 2013), yet there has been limited adaptation of the process for ensuring relevance or accountability. The standard approach to developing a leadership competency model and rolling out a 360-feedback program seems restricted in its ability to develop individual skills and capabilities at multiple levels of career growth and development. Finally, and perhaps most importantly from an organizational perspective, the increasing importance of talent management in companies today along with the utilization of 360-degree data as the most commonly used tool for high-potential

identification has increased the visibility of some of its methodological shortcomings. Issues of relevance, rater biases, and ceiling effects are well known and documented (e.g., Bracken et al., 2016; Nowack & Mashihi, 2012), yet few options other than rater training (e.g., Antonioni, 1996; Bracken & Rotolo, in press) have proven to be successful in enhancing variability except in smaller research applications. More research is needed that demonstrates the effectiveness of 360-degree systems over time and how they can be enhanced to provide greater value for organizations.

The purpose of this chapter is to contribute to the literature in this area by providing a case example of five key implementation interventions to a large-scale and well-established 360-degree feedback system over the course of a number of years in a large multi-national corporation. Each of these interventions resulted in significant enhancements to the quality and impact of the process for individuals and the organization over time. The chapter begins with an overview of the evolution and current utilization of 360-degree systems processes in organizations including a discussion of the key differences between using 360 degree in a more traditional OD (development-only) versus contemporary talent management (decision-making) context. This is followed by a summary of several key challenges impacting the effective utilization of 360 degree results in organizations today. Next, quantitative and qualitative research findings highlighting the impact of five different interventions that one organization has made to their ongoing 360-degree programs drive greater utilization and impact of their data are presented. These five interventions represent both methodological enhancements as well as new approaches for application and include:

(1) deploying a multi-level and future-focused validated behavioral model to enhance relevance for early career, mid-level, and senior level leaders for both individual development and organizational decision-making purposes;
(2) offering simultaneous as well as traditional sequential rating response options to drive greater calibration and differentiation among scores;
(3) modifying the weighting of rater categories as part of the aggregated score to ensure greater alignment of results with a more talent management versus purely development focused mindset;
(4) integrating the 360-degree results with personality assessments using a cadre of internally certified feedback providers to enhance the insights provided in one-on-one debrief sessions for thousands of employees; and
(5) aligning different tools and messaging to ensure each set of assessments is used for the most appropriate outcome (e.g., one primarily for individual development, one strictly for performance management, and one specifically for talent management).

This chapter concludes with learnings and implications for practice and future research.

A BRIEF OVERVIEW AND EVOLUTION OF THE PROCESS OF 360-DEGREE FEEDBACK

The process of collecting behaviorally based feedback from others to increase self-awareness and enhance individual development and organizational decision-making, also known as 360-degree feedback, is not a new concept. The basic premise which is grounded in classic OD action research methodology (e.g., Burke, 1982; Lewin, 1951, 1958; Nadler, 1977) is that feedback from others about how an individual behaves in the workplace against some standard is used to create a felt need for change, and in turn, is used to develop an individual action plan with interventions (e.g., coaching, training, and skill building) to build upon strengths and enhance opportunity areas. Given that the underlying processes by which 360-degree feedback operates have been covered in depth elsewhere (e.g., Bracken, Timmreck, & Church, 2001; Church et al., 2001; Church, Walker, & Brockner, 2002; Lepsinger & Lucia, 1997; London, 1997; London & Beatty, 1993), the reader is directed to those sources for more in-depth information.

First introduced in the 1960s as both an approach to improving individual-other relations (Church & Burke, in press) and a means for assessing leadership capability (Hedge, Borman, & Birkeland, 2001), the approach became popular in the 1990s in response to the recognition that manager and leader effectiveness drive organizational outcomes (e.g., Burke & Litwin, 1992; Kotter & Heskett, 1992; Kouzes & Posner, 1987). During that initial wave of popularity, 360-degree feedback became one of the most frequently recommended interventions for OD practitioners, I-O psychologists, and even human resource (HR) professionals more broadly (e.g., Bracken, 1994; Church, 1995, 1997; Edwards & Ewen, 1996; London & Beatty, 1993; Yammarino & Atwater, 1997). As a consequence, a number of articles, special journal issues (e.g., in *Group & Organization Management* and *Human Resource Management*), chapters, and books were published on the best methods for designing and implementing the process (e.g., Bracken et al., 2001; Church & Bracken, 1997; Church et al., 2002; Lepsinger & Lucia, 1997; London, 1997; Tornow, 1993). The majority of these focused on what might be called "getting the basics right." Topics often included the importance of gaining senior leadership support, ensuring 360-degree survey items were behaviorally based, delivering feedback reports with end-users in mind (e.g., that emphasized self-other and normative comparisons), and ensuring confidentiality is maintained throughout the process.

Typically, the approach followed a similar pattern (but from a systems implementation and design standpoint) to the classic OD consulting model of entry, contracting, data collection, feedback, intervention, and evaluation. Church and Waclawski (2001) offered a five-phased approach to designing a

multi-rater feedback system which summarizes the basic models in use at the time. Fig. 1 provides an updated version of their framework.

The key distinction made in this new version of the framework is the separation and expansion of the original step 4 (feedback delivery) into two distinct steps 4 (feedback and insights) and 5 (action planning and accountability). This has been done to reflect both research and practice findings regarding (1) the importance and quality of the insights generated from the feedback not just the data itself and (2) the fact that many 360-degree applications have limited impact where action plans and accountability are not a formal part of the process (Bracken et al., 2016; Church, Delgiudice, & Margulies, 2017; Nowack & Mashihi, 2012; Smither & Walker, 2001). In the present model, it is also important to note that the concept of impact has been added to follow-up in step 6 as well given the increasing importance of measuring the return on investment (ROI) of OD related interventions (Church, 2017).

In reviewing this framework, it should be evident that it is purpose independent. In other words, the same approach can be applied to the design and implementation of 360-degree feedback systems whether they are intended for development-only or decision-making purposes. There are a number of key differences, however, within each step that need to be addressed depending on the type of application. This is because there are fundamental differences in values, emphasis, and measurement qualities between two approaches. Given that many organizations have already moved forward in their use of 360-degree results for decision-making or are in the process of doing so (3D Group, 2016; Bracken et al., 2016; Church & Rotolo, 2013; Thornton, Johnson, & Church, 2017), it is important to understand these key differences. The following section highlights how a development (OD) versus decision-making (talent management, TM) approach can have a significant impact on design implications with a particular emphasis on some of the key challenges with 360-degree systems that organizations face.

DEVELOPMENT (OD) VERSUS DECISION-MAKING (TM) IN 360-DEGREE FEEDBACK APPLICATIONS

At the most basic level, the distinction between developmental (OD) related 360-degree systems and those intended for making decisions about individuals (TM) is simply about purpose and outcomes. OD interventions that use 360-degree feedback solely for individual development (or even those implementing feedback for more strategic, large-scale change purposes) are designed to ensure that only the focal individual (i.e., the participant) receives the feedback (Church, Shull, & Burke, 2018). While external coaches may have access to the data to help in development planning, results are strictly confidential and not shared with managers, HR, or TM practitioners. Thus, they cannot be used to influence any organizational decisions. In contrast, 360-degree systems designed

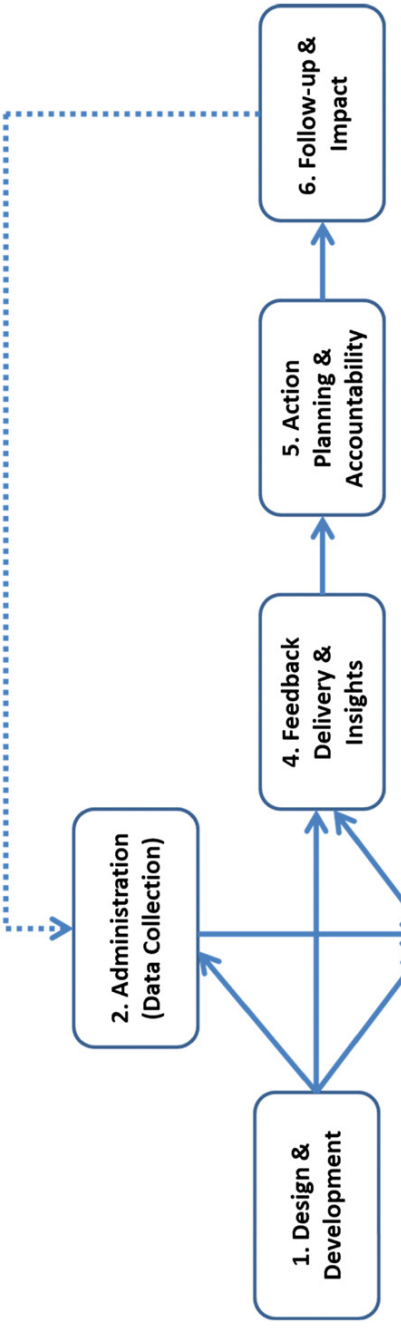


Fig. 1. 360-degree Feedback Implementation Framework. *Source:* Adapted from Church and Waclawski (2001).

for decision-making purposes yield data that are shared internally with one or more parties outside the focal individual and are used to influence talent related outcomes. These can include promotions or other job placement decisions, identification, or confirmation (or even disconfirmation) of high-potential status, placement on succession slates for future roles, participation in leadership programs, and other development activities reserved for special talent pools.

Church and colleagues (2013; 2018) discuss these differences as representing a "focus on the many" versus a "focus on the few" regarding three key areas:

(1) the purpose of the intervention and data collected;
(2) the types of leadership/measurement models used; and
(3) the extent of the use of data for decision-making and the degree of transparency in doing so.

These three elements have significant implications for the design and implementation of 360-degree feedback systems. Table 1 provides an overview of important design questions that need to be answered in this context.

Clearly, the type of approach (i.e., development vs decision-making) makes a significant difference in the implementation of the process and across all phases of the feedback model. In addition, issues such as the level of transparency with how the data are to be used, policies regarding updating 360-degree

Table 1. Implications of an OD versus TM Mindset on 360-degree Feedback Design.

Design Questions	Development (OD)	Decision-making (TM)
• What type of data (i.e., what models/content) are being measured?	• Indicators of organizational values or desired culture • Current behaviors of successful leaders today • Desired behaviors reflective of new leadership model	• Behaviors that predict current behaviors required for critical performance outcomes • Behaviors that predict future leadership potential • Future-focused behaviors linked to business strategy or new capabilities
• What are the intended uses of the results?	• Individual development planning • Individual or team coaching • Leadership programs • Organizational change	• High-potential identification • Succession planning (slating) • Talent reviews and promotions • Fit to leader/role profiles • Performance management • Organizational change
• Who will have access to the results and/or at what level of detail?	• Individual participants • External OD practitioners • External executive coaches	• Managers • Human resources professionals • Internal and external OD • Talent management leaders • Senior leadership • CEO/Board of directors

results and whether participation in the process is voluntary or mandatory are all critical components to consider as well. When used for TM purposes, however, the level of detail, rigor, and focus on the end-to-end execution increases drastically. These issues are very similar to the considerations needed when approaching the use of personality in OD applications as have been described elsewhere (Church et al., 2015).

Despite the differences in the use of 360-degree results for OD versus TM, there are some key areas of consistency which have implications for ensuring the effectiveness of the feedback process. Church et al. (2018) point out to two areas where the OD and TM mindset align in their values structure. Both of these apply directly to 360-degree feedback and consist of (1) a commitment to participant feedback and development and (2) a commitment to organizational insights and capability. In short, regardless of the approach to 360-degree feedback, the overall consensus among practitioners is that feedback should be delivered to individuals with a focus on creating an action plan for development, whether or not the data are used for other decisions or not (Bracken et al., 2016). As noted by Church and Rotolo (2013), only 8% of top companies use assessment data for decision-making with no developmental emphasis, and 3D Group reported an emphasis on personnel decisions at only 5%. This means that regardless of purpose ensuring that 360-degree results are meaningful to participants and used for developmental outcomes remains a critical component of the process. It is a fundamental and basic value of OD practitioners to deliver the feedback if collected and work with the individual to help them grow. Importantly, however, just giving the feedback alone may not be enough. The quality of one's interpretation and coaching skills are critically important for delivering assessment and development feedback at the individual (micro) level and have been shown to make a significant difference in the effectiveness of a program overall (Church et al., 2017).

But the individual is not the only intended client from a broader OD perspective. As the second point indicates, it is incumbent upon OD professionals to take advantage of the data collected from 360-degree feedback (and other related tools such as personality measures – see Church et al., 2015) and aggregate and link them at different units of analysis to deliver additional insights (Church & Dutta, 2013; Church et al., 2002). These insights can be a powerful means for identifying key drivers of culture, performance, engagement, and other important outcomes including the evaluation of these types of programs and interventions from an ROI perspective (Church, 2017). Moreover, the ability to work with data at the group (meso) and organization (macro) levels is equally important for understanding the impact of these tools as well as whether or not they are working optimally according to their intended purpose. Without a proficient working knowledge of measurement theory, statistics, or behavioral item construction, or validation, for example, it would be difficult for the average OD practitioner to critically evaluate the impact of bespoke 360-degree feedback interventions (Church, 2017; Church & Dutta, 2013).

While these have not been the content areas or capabilities typically developed in OD professionals, as organizations continue to move toward digitization, robotics, and Big Data analytics models (Church & Burke, 2017; Dotlich, 2018; Guzzo, Fink, King, Tonidandel, & Landis, 2015; McAfee & Brynjolfsson, 2012), these are skills that cannot be ignored for much longer. The pressure on leaders and particularly HR practitioners to use analytics for making decisions about talent has never been greater. As a consequence, 360-degree feedback applications need to have the best possible measurement properties. After all, the less useful the data obtained from the process, the less strategic the decisions made from it will be.

KEY CHALLENGES REGARDING THE EFFECTIVENESS AND IMPACT OF 360-DEGREE FEEDBACK

Given the critical pressure and need for 360-degree systems to have an impact beyond just the individual level, it serves as an amplifying force on the existing challenges associated with this methodology. While an exhaustive list is beyond the scope of this chapter (see Bracken et al., 2001, 2016; Nowack & Mashihi, 2012 for more), there are several important issues that remain on the minds of both researchers and practitioners particularly when these tools are used in large-scale applications for TM processes such as high-potential identification, internal placement and promotion decisions, and succession planning.

First and foremost, the measurement instrument used must be valid. Because individuals are being compared to one another in the context of talent reviews, there is a critical need for the measure (survey items) used in the 360-degree feedback process to be empirically validated. While validation is a best practice in general, it is not required for development-only applications where results are primarily used to evaluate strengths and opportunities within individuals and placement decisions are not being made. As soon as the results are to be used, however, the measurement properties and quality of the data becomes vital to ensuring the right decisions are being made and the organization is protected from legal risk regarding such issues as adverse impact (Church, in press; Church & Rotolo, 2013; Scott & Reynolds, 2010). This means the data must be predictive of either current or future performance in the organization against a discrete performance-based outcome.

Second, the leadership or assessment framework should be highly relevant and engaging. Whatever model is employed in the 360-degree process should be designed to have maximum value to the individuals receiving the feedback and development efforts. If individuals are expected to focus their developmental efforts toward a specific set of behavioral indicators in order to deliver against performance goals and achieve their career aspirations, the content measured

must have enough depth and relevance to provide the appropriate level of guidance. From an OD context, in order to ensure that change is occurring in the desired direction and there is significant engagement from employees in the process, the model must be meaningful as well. Often this means being focused on the values, mission/vision or clearly articulated strategy of the organization as well as embodied and modeled by senior leadership (Burke & Litwin, 1992). This is one of the central reasons why generic (non-customized) leadership models used for one-off 360s offered from external consulting firms are not as effective particularly in OD or TM contexts (Church & Burke, in press; Church et al., 2001, 2002; Church & Waclawski, 2001).

Third, the data generated should differentiate among participants. Although by definition if the model is valid, it will also ensure some degree of differentiation in the ratings obtained, often organizations are concerned with ceiling effects in 360-degree feedback results particularly at the senior most levels (Bracken et al., 2016). While results that are negatively skewed with mean behavioral scores clustered at the high end of the scale can be challenging to work with in developmental contexts, a skilled coach or OD practitioner can still assist an individual in focusing on enhancing strengths even when clear opportunities may not be evident. In contrast, from a decision-making perspective, the lack of differentiation makes comparing individuals against profile fit indices challenging as a significantly greater proportion of participants appear to have strengths across the competencies measured and "fit" by default. It is difficult to explain to senior executives and HR professionals why 360-degree results are useful when everyone appears to be embodying the vast majority of a given suite of leadership competencies or behaviors. It is even more of a problem when those behaviors are meant to be indicators of successful performance and yet some individuals may not be viewed as being particularly effective (yet they still obtain "high" ratings on the tool).

Fourth, the feedback process should focus on maximizing self-awareness and not just behaviors. While leadership behaviors are by far easier to change than say more fundamental characteristics such as personality and cognitive skills (Church, 2015; Church & Silzer, 2014), by including other measures such as personality assessments along with the 360-degree results those providing feedback and the individual recipients are in a much better position to understand the underlying causes for their actions (Burke & Noumair, 2002; Church et al., 2015; Dotlich & Cairo, 2003). As a result, they are in a position to identify alternate strategies and behavioral workarounds for personality derailers and other deficits that are driving their less effective leadership outcomes in the first place.

Finally, ensuring clarity of purpose and transparency of the feedback process are critical. While 360-degree feedback systems are common-place in organizations today, often the purpose of these tools is somewhat blended between development-only

and decision-making applications. If organizations are not fully transparent about the purposes of the tool(s) in use or who has access to the results (see Table 1), employees may respond with a variety of negative attitudes, intentional rater biases, or simply not engage in the process at all. Moreover, these issues can lead to broader negative outcomes for the organization as well with respect to the employee engagement and even ligation risk downstream.

The challenges described above are common to many 360-degree feedback systems in large-scale organizational settings and there are a number of potential interventions for addressing these. A good process design that considers all five phases of the implementation may address some of them naturally. For example, research has shown that highly facilitated feedback delivery sessions with coaching engagements are more likely to produce change than a "desk-drop" approach and formal follow-up actions have been shown to enhance accountability in 360-degree feedback programs (Bracken et al., 2016; London, Smither, & Adsit, 1997; Smither & Walker, 2001). In general, however, based on the level of concerns raised by practitioners and internal leaders, these actions do not go far enough to ensuring 360-degree feedback systems produce the maximum benefit of which they are capable.

IMPLEMENTATION STRATEGIES FOR ENHANCING 360-DEGREE FEEDBACK

Over the past number of years leading the design and implementation of multiple 360-degree feedback systems at PepsiCo, a large multi-national consumer products organization, we have had the opportunity to explore a number of strategies and interventions targeted at addressing many of these concerns. While not all of them have been successful, many have been and in some cases multiple system implementations have been included. In particular, we have seen the significant impact of five specific strategies and interventions that span all phases of the implementation process. Moreover, the impact has addressed these issues in different ways, some uniquely and some in combination. Each of these implementation strategies (i.e., which were originally designed and tested as pilot OD interventions) is described in detail below. The first example provides additional context regarding the evolution of the leadership frameworks on which the 360-degree feedback systems are based.

Design a Multi-level and Future-focused Behavioral Model to Drive Relevance and Meaning

Over the last 10–15 years, there have been significant changes in the nature of business, and the way people work together in organizations has evolved

significantly (Boudreau, Jesuthasan, & Creelman, 2015; Church & Burke, 2017). The pace of change, and expectations to keep abreast of changes, is not likely to diminish. Transformation in many businesses today is as much about the way colleagues need to work together to be effective across technological, generational, and cultural boundaries as it is about the product portfolios, brands, and business models. These new ways of working require different leadership behaviors and greater flexibility to adapt and learn new skills quickly.

We have experienced these types of change at PepsiCo as well. In general, the organization has been known for its progressive practices around talent management, HR, and leadership development programs including the integrated and systematic use of 360-degree feedback systems to drive individual development (e.g., Alziari, 2001; Bracken & Church, 2013; Church, 2015; Church et al., 2012; Church & Herena, 2003; Church & Silzer, 2014; Church & Waclawski, 2010; Corporate Leadership Council, 2005; Happich & Church, 2016; Oliver, Church, Lewis, & Desrosiers, 2009; Pearson, 1987; Thomas & Creary, 2009; Tichy & DeRose, 1996; Trudell & Church, 2016). Not surprisingly, as part of its ongoing processes for ensuring continued relevance and focus on the right strategic content for talent development, the organization has implemented multiple adaptions of its core leadership competency models in over the past three decades.

Typically, a change in either senior leadership or strategic direction (or both) has (have) resulted in a review and revision of the current model and at pivotal times in the organization's history when it was critical to examine the qualities required of leaders to drive the business forward. Consistent with the Burke-Litwin model (Burke-Litwin, 1992), these have almost always been driven from the top of the organization but linked to other key elements in the broader organizational system such as the mission/vision, values, survey and feedback processes, management practices, climate, and performance appraisal processes. Some of the internal reviews of the leadership framework have led to minor changes in a few competencies and their definitions of behaviors; others have yielded significant restructuring of the framework with entirely new sets of competencies and associated behaviors. It wasn't until more recent changes, however, that the model really adapted to focus on the future needs of the organization.

In the 1990s, PepsiCo identified three leadership imperatives reflecting the implicit culture of the company at the time: strategy (Setting the Agenda), culture, and relationships (Taking Others with You), and results (Doing It the Right Way). In 2001, in response to new leadership direction, while those 3 imperatives remained in place reflecting the dominant elements of the culture, 17 new competencies were identified through a series of top down interviews and focus groups with senior leaders. The revisions were based on data that reflected what those seniors had demonstrated in their career histories to be successful. In short, the model for success for new leaders to be successful was based on what it took the current incumbents to get there.

Given that the emphasis at the time was on providing a general framework for leadership success and 360-degree feedback results were primarily used for developmental purposes only (i.e., an OD approach), the 2001 model targeted a mid-level leader profile based on the competencies and behaviors required for success at that generic position in the management structure. In total, there were 56 items in the new survey (up from 24 in the prior version from the late 1990s introduced under the rubric of simplicity) which were applied to everyone who participated. In general, the model was well received by the organization as the latest thinking at the time and was used as the basis for a mandatory 360-degree feedback program with results given to approximately 8,000–10,000 employees (alternating in two year required participant cycles of 4,000–5,000 each) every year from 2001 to 2006. Although the data generated were relevant and useful for individual development and described as an "input into other HR processes," the feedback was not consistently used at the organizational level. Thus, there was some degree of inconsistency in understanding of the purpose because the full commitment to integration with TM was not yet there on the part of HR and senior leaders, as well a lack of firm belief in the predictive nature of the feedback.

In addition, given the target audience for the item content, it became apparent over time that employees at levels more senior would score too positively in their results (i.e., having a high ceiling effect) making their data less useful even for development purposes, while employees at levels more junior would score too low making those employees feel somewhat disheartened about their results given the level of stretch implied only for them. The net result was a relatively linear set of data that did not serve to differentiate employees beyond the level at which they were at in the first place (see Fig. 2).

Following a change in organizational leadership, and a new emphasis on ensuring the results from the 360-degree feedback, processes were used more effectively to drive deep-seated individual development planning and change; the need for greater relevancy of the content to both participants and the

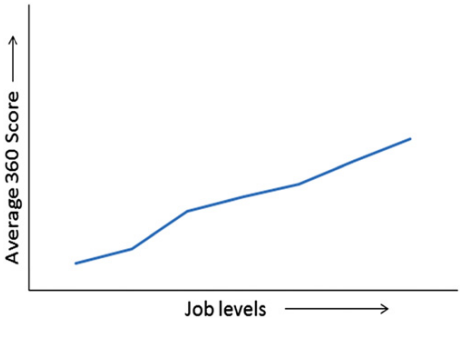


Fig. 2. General Pattern of 360-Degree Feedback Results by Organizational Level.

organization was clear. Thus, the Leadership and Individual Effectiveness Model (LIEM) and subsequent 360-degree feedback process was introduced in 2007 with an entirely different design strategy. This was our first attempt at introducing a multi-level approach. Although the content was framed against the same three leadership imperatives that had been in place since the 1990s, this time there were only nine competencies identified as critical for leader success. In order to ensure greater relevance and impact with multiple levels of employees, the content was developed using more of a bottom-up OD approach.

Once again, the focus was on identifying those behaviors that were required for success in the organization today though certain dimensions (e.g., Creating an Inclusive Culture, Collaborating and Influencing) were more forward leaning in their intent to drive culture change for the organization over time. Multiple focus groups and task force reviews were used with a variety of employees across all functions and business sectors to create a set of behaviors for the 360-degree feedback process that would apply at different predetermined levels. Using the concept of the leadership pipeline (Charan, Drotter, & Noel, 2001), we identified three distinct segments of the population (based on key transitions) to triangulate the behavioral item content. Thus, while the nine competencies were the same across all employees, the behaviors within each competency were tiered by level (i.e., for individual contributors, leaders, and senior leaders). In addition, the design included both a core set of behaviors expected of all employees, and a separate set of 12 items for those who were people leaders in the organization. This latter decision was done in part to reflect the organization's increasing emphasis on diversity and inclusion (Church, Rotolo, Shull, & Tuller, 2014; Thomas & Creary, 2009)

As the LIEM was the basis for the organization's ongoing 360-degree feedback program, the design of the model resulted in the shortest survey for individual contributors (29 items), and doubled the length for leaders and senior leaders (58 items). Although including items more relevant to expectations at different job levels was a huge advancement at the time and well received by both employees and others in the organization more broadly, the design raised some concerns over the long-term.

First, the length of the survey for the leaders and senior leader populations was simply too long. While 360-degree surveys in the 1990s of 60+ items were quite standard, as with most organizations the appetite for completing lengthy surveys was diminishing. Not only did the survey include more items at 58 for the majority of the target group which took longer for employees to complete, but, in addition, the typical rater list for these leaders included mostly other leaders. Thus, participants were asked to complete multiple surveys as raters at the same time on each other – in some cases as many as 20 or more in a given window. While the same issue had been present in the 2001–2006 process, the impact of this issue was somewhat mitigated by efforts to limit the number of participants at any one time and the removal of the "requirement" for bi-annual 360-degree for certain levels. Participation was encouraged for "people who

really need it" (e.g., participation in a leadership program with 360-degree as a component) and was not yet, however, based on TM needs to identify or differentiate talent.

Second, the 29 core items applicable to all employees once again yielded significantly different mean scores by job levels (reflecting the same pattern as in the prior model). The scale used at the time measured the extent to which a behavior was observed from "a small extent" to "a great extent" on a five-point Likert scale. It was found that the average of core items would increase as the job levels increased from junior to senior levels, the higher the leader's level, the higher the average score. The restriction of range among employees in a certain level became an increasing concern as interest grew by leadership and HR regarding the use of 360-degree results to inform TM decisions. Now that the organization was fully comfortable with the stability of the 360-degree system and results were being considered for decision-making applications, measurement issues became much more critical than they had been before when the process was largely development focused.

These factors, along with a new more strategic focus on talent assessment and development (Trudell & Church, 2016), resulted in a change to the model once again in 2015. This time, however, the shift was not driven by new senior leadership nor was the approach focused on replicating the success formula of the past. Rather, we took the learnings from multiple sources including (1) the first two iterations of the leadership competencies, (2) what worked and didn't work in the prior 360-degree feedback systems, and (3) insights from parallel internal assessment projects specifically designed for segmentation and predicting future success based on the latest thinking on leadership potential in I-O psychology (Silzer & Church, 2009), and developed an entirely new framework. This framework is the same one used in the organization's Leadership Assessment and Development (LeAD) program based on the *Leadership Potential BluePrint* (Silzer, Church, Rotolo, & Scott, 2016).

We began the process by considering the prospect of replacing the PepsiCo leadership imperatives this time. After all, one could argue that to truly drive change, the "big 3" would need to shift as well. After considerable field input and debate, however, it was decided that the three leadership imperatives would remain the backbone for the new model as they represented how employees thought about both the corporate culture and leadership in general. Change in these constructs would be too fundamental and distracting from the core purpose of the redesign.

Combining the best of both prior design approaches, the content changes were grounded in themes derived from both a top down and bottom up approach. Interviews with senior leaders and focus groups at multiple levels were conducted but this time with a specific emphasis on the knowledge, skills, and abilities (KSAs) needed of leaders of the future to be successful given the organization's strategic business and emerging talent agenda. Rather than roll the model out broadly, however, it was implemented first using a predictive framework with high-potential

leaders at multiple levels as part of the organizations new assessment and development architecture called LeAD (Church & Rotolo, 2016; Church & Silzer, 2014; Happich & Church, 2016; Trudell & Church, 2016). This enabled both the validation of the model to predict future success (and therefore its use in TM applications for decision-making) as well as refinement of the constructs.

The competencies and subsequent behaviors used for the 360-degree feedback process were ultimately aligned with senior leadership and reflected a highly aspirational intent. Although similar to an OD approach, the emphasis was on meeting the future strategic demands of the business as much as reflecting a desired culture. Concepts such as "Smart Innovator" and "Sophisticated Strategist and Conceptual Thinker" replaced the older "Innovating" and "Decision Making" competencies. In addition, while an emphasis on "Creating an Inclusive Culture" remained, a new competency reflecting "Global Acumen" was also introduced. Finally, the impact of collaboration shifted from being an element of the Imperative regarding culture and people (*Taking Others with You*) to the Imperative that focused on results and how they were to be achieved (*Doing It the Right Way*).

In short, a new future-focused aspirational and yet also empirically validated framework was created that significantly raised the standard of behavior for all levels in the organization. The change also included a major revamp of the people manager behaviors which were part of the performance management process, with a greater balance of leaders' actions, or the "how" they should get results done, with the "what" is accomplished in terms of their business results. Fig. 3 provides an overview of the shift in emphasis and how this was described to employees during the rollout of the Leadership Excellence Framework (LEF).

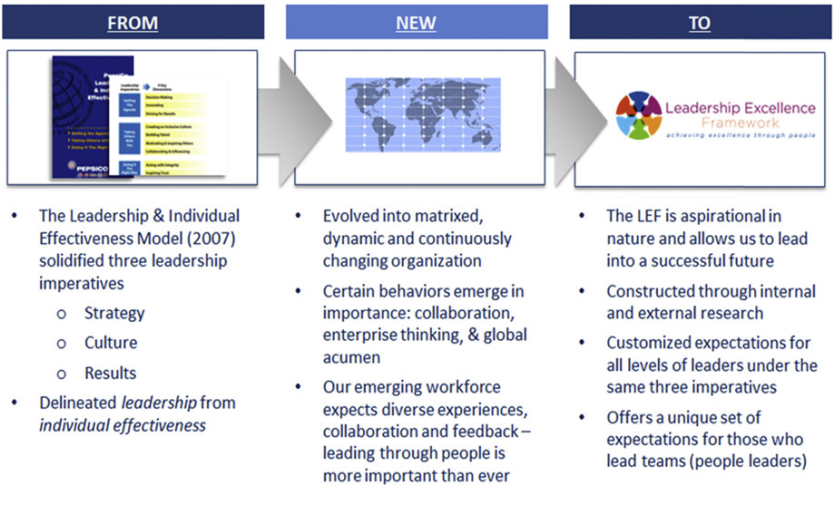


Fig. 3. Leadership Model in Transition.

The resulting model, launched in 2016, was labeled the LEF. The LEF has the broadest applicability across the employee population of all the historical models, while also differentiating behaviors by the same key leadership transitions that worked so well in the past. The principle message in the LEF is that all employees are leaders and the expectations between transitions are clearly articulated in a fully transparent manner. There are 10 leadership competencies in this version that represent a significantly higher level of capability overall from the previous model's definition. In order to enhance the utilization of the framework, the competency definitions have been broken out into subconstructs and the progression of the behaviors across three levels are aligned to individual contributor, team leader, and leader of teams (which is more directly in-line with Charan et al., 2001). From an implication standpoint, and to ease rater burden associated with the long surveys of the past, however, the model is structured with only three unique behaviors measuring each competency at each level (see Fig. 4).

Further, in an effort to correct the range restriction seen with the previous scale (e.g., from a small extent to a great extent), the rating scale for the 360-degree feedback survey based upon LEF was changed to be a frequency of observation ("rarely" to "almost always" on a five-point Likert scale). There was also a change in how the norms were calculated with LEF. In order to enable the comparison of leaders globally and with a more current frame of reference in TM processes, the norms were targeted at the global level and designed to be rolling over two years (so they move with the item trends). This enabled the comparison of talent strengths and opportunities across individuals against a consistent and predictive set of competencies across the world over the previous two years. The 10 competencies in the LEF had some partial

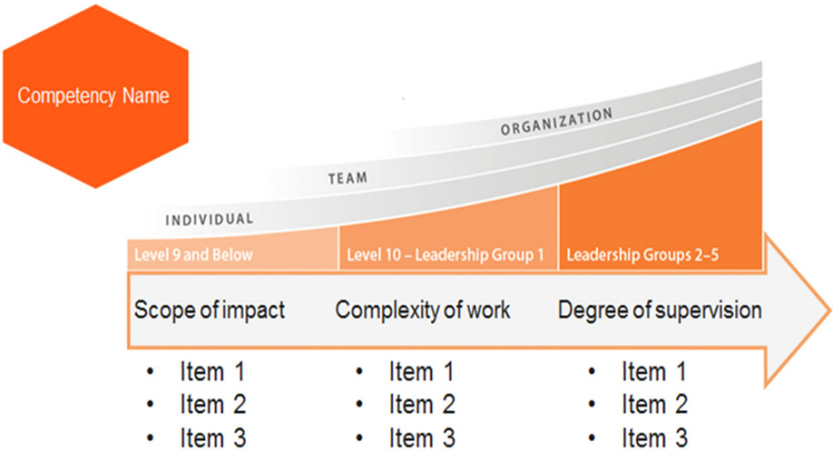


Fig. 4. Sample of Tiered Competency and Behavioral Framework Used in the LEF.

overlap to the competencies in the previous model as noted above but all had updated, future oriented behaviors. Comparing LEF to the previous model yielded a degree of familiarity for employees but there were several important changes to reflect the organization's business changes and the broader external environment impacting demands on leaders.

Although the latest change in the model is still in its first few years of implementation and integration, the effectiveness of the 360-degree feedback process based on the more relevant and tailored content is already being observed. Apart from the fact that the new validated framework is also being used for TM purposes as part of the ongoing assessment and development agenda, at the broader level, we have seen a number of positive feedback related outcomes. First, we have seen significant improvements in data quality with greater differentiation in ratings, higher standard deviations and ranges at the item levels, and greater segmentation between the levels of scores by each of the key transition groups. Thus, our preliminary findings indicate that a multi-level behavior model can positively impact differentiation across levels and enhance the results for use in both development and decision-making contexts. This is particularly important at the senior levels where the ratings have shown lower ceiling effects than in prior models. Second, lower mean ratings overall on new future oriented item content suggest that we are indeed communicating, measuring, and reinforcing more aspirational behaviors than in the past which is part of the organization's broader talent strategy. Third, keeping the imperatives, the same over the years provided an element of consistency and familiarity with the framework which enabled a focus on the changing content underneath rather than introducing an entirely new set of imperatives to the organization. Employee feedback has been very positive and there is an inspirational quality to the model unlike those in the past. Finally, moving to a much shorter set of items (at only 30 per survey) has dramatically reduced the time allocation and response burden on those completing the surveys and particularly at senior levels. We have already seen greater completion rates among certain groups (e.g., self and manager responses) compared with the prior survey process as a result of this change as well. Given the process is targeted this time at individuals needing feedback either for their own developmental purposes or for those identified for input in TM-related processes, the focus remains on those who will benefit from the feedback the most. The ways in which the feedbacks are delivered and action plans developed will be discussed shortly.

Collect Data via a Simultaneous Ratings Survey Process to Drive Calibrated Assessments

As discussed earlier, one of the more common issues associated with 360-degree feedback data is that results often exhibit ceiling effects. Although tiered item content and scale changes (described above) can make an improvement, as can

targeted rater training (Antonioni, 1996; Bracken & Rotolo, in press), generally speaking, there is a consistent trend in 360-degree applications for raters to use the higher ends of the scale as is the case with many performance management systems (Pulakos, Mueller Hanson, Arad, & Moye, 2015). Moreover, this challenge typically increases as the focal participants and the raters themselves are from higher levels in the management structure. There are several reasons for this phenomena including organizational cultural tendencies in ratings, general upward perceptions of leaders in their demonstration of behaviors, fear of retribution due to lack of perceived (or real) confidentiality, intentional gaming of responses to either improve or damage a focal leader's results and thereby impact some TM-related outcomes, and a lack of attention to the process or the importance of having variability in ratings in the first place. Some of these can be addressed with marginal success through elements in the design and administration process as well.

One of the more critical gaps, however, in most 360-degree feedback processes is the absence of a specific comparison group available during the rating process. Although scale changes can be implemented to approximate this construct (e.g., 1 = worse than most/one of the least effective leaders in this area, 3 = about the same as his or her peers, 5 = better than most/a role model for this behavior), the psychological rating dynamic remains unspecified and hypothetical. As such individual raters are left to choose their own relative comparison frameworks and this might reflect wildly different sets of expectations, norms, or standards. In addition, most 360-degree survey processes are sequential in nature. Online links are provided for each person to be rated and the individual rater chooses the focal individual's survey to complete one at a time. While some systems allow review, edit, and save features, others actually force the rater to complete the process and submit it effectively locking down the response for analysis before moving to the next ratee. This means that by default each rater is providing a unique within-person set of ratings reflecting that individual's strengths and opportunities relative to their own judgment of whether the leader performs those behaviors (i.e., reflecting a single point of comparison). It is no wonder then that individual ratings biases, cultural artifacts, scale, and content effects are at the forefront of the rating process at that moment in time.

Another way of collecting raters in a 360-degree feedback process, however, is to offer a method for the real-time calibration of ratings across like group of individuals. The use of calibration meetings (or relative comparisons between individuals) has been a long standing practice in both performance management and TM since the 1990s (Armstrong & Baron, 2005; Church & Waclawski, 2010; Effron & Ort, 2010; Silzer & Dowell, 2010). The concept is simple: ratings of performance or potential are first identified for the individual based on a specific set of criteria and then in a group meeting of peers, and the rating is evaluated to remain the same or be adjusted up or down based on the relative comparison to others at the same general focal rating level based on a discussion of accomplishments, behaviors, or capabilities demonstrated. At PepsiCo, we

have applied this same calibration ratings construct to the process of 360-degree feedback and labeled it "simultaneous ratings" in our communications.

As part of the evolution of the leadership models and 360-degree feedback program in the organization discussed earlier, and in an effort to drive greater ratings differentiation at all levels in the program (not just the senior leader level) we introduced the simultaneous ratings approach with the 2007 process rollout. The concept was simple: for those raters with multiple focal surveys to complete, offer the option of rating sequentially as always, or allow them to select any or all of focal ratees from the same survey level (e.g., leaders or senior leaders – the questionnaire form and items had to be the same) and rate them at the same time in a customized online comparison grid. The grid was auto-generated with as many comparison columns as needed and presented the competencies and associated behaviors in the rows and individuals in each of the column headings. Table 2 provides a sample of this approach.

In this simple example, the individual rater is being asked to rate six different individuals: her manager and five different peers all of whom are using the same survey form (e.g., the one designed for mid-level leaders). Based on the data provided, it is evident that the manager sets the highest level or behavioral example for item 1, while Peer 4 demonstrates the low end of the scale with the others falling in between. Conversely, Peer 5 is the exemplar for item 4 and has scored higher than even the manager on this behavior. The total scores listed clearly show that while the manager scored higher than most of the peers overall, Peer 3 was in fact the highest rated leader overall across the six items in total. Clearly using a methodology such as this ensures that behavioral comparisons will be made at the individual ratings level.

By offering the simultaneous ratings approach, it became an easy task for raters to line-up those for whom they had to rate and make a quick and calibrated set of ratings. Since the raters had the choice of which surveys to complete this way, we sought to minimize the issue of unfair comparisons. They

Table 2. Sample Rater Calibration Process.

Leadership Competencies and Behaviors	Manager Rating	Peer 1 Rating	Peer 2 Rating	Peer 3 Rating	Peer 4 Rating	Peer 5 Rating
Item 1	5	4	3	4	2	3
Item 2	4	3	3	5	2	2
Item 3	4	2	2	4	3	4
Item 4	3	4	4	4	2	5
Item 5	5	3	5	5	4	3
Item 6	4	3	4	4	4	3
Average rating	4.17	3.33	3.50	4.33	2.83	3.33

Note: Example assumes that all individuals being rated are using the same level of survey form (i.e., set of items) using a 1 to 5 scale.

were the best judges of which comparisons were valid and appropriate (not the system or the administrators). The theory was that by enabling a calibration process of this kind, the scale would be used more widely, increasing variability and thus mean ratings would decrease (reducing the ceiling effect). In addition, since there was already some element of comparison being applied at the rater level, the ratings would in fact be more robust overall. Finally, a side benefit of the approach was that it would take raters significantly less time to complete their ratings as they could essentially do a group of people at once and with greater speed and clarity. It is important to note as well that this was not a forced ranking approach (i.e., no distribution was required to be met), simply that a table essentially was being presented to scorecard and compare behavior across one or more individuals. The option was also entirely voluntary and sequential ratings could also be pursued if preferred.

In order to examine the impact of the pilot design, we let the process run for a few years until full implementation in 2010. This allowed individuals to become comfortable with having the choice during process and the 360-degree system to stabilize. We then collected ratings data from three full years of administration (from 2010 to 2012) representing data from over 20,000 sets of unique 360-degree feedback ratings. The content was based on the mid-level leader survey using the 58 behavioral items described earlier. Individual contributors were not included given they often had fewer than two focal individuals to rate. Participants represent all five business sectors in the organization and cut across all levels of management. Table 3 provides a summary of the data collected and those using simultaneous versus sequential feedback.

Overall, 10% or 2,066 ratings were collected using the simultaneous method. Although the majority of the data collected using this method were from peers, the primary users were actually managers and dotted managers (i.e., rating multiple direct reports at the same time). As might be expected, very few direct

Table 3. Utilization of Simultaneous Feedback Options by Rater Type.

Rater Type	Sequential	Simultaneous	Total
Manager	81%	19%	2,028
	($n = 1,644$)	($n = 384$)	
Dotted manager	81%	19%	667
	($n = 543$)	($n = 124$)	
Direct reports	98%	2%	8,296
	($n = 8,130$)	($n = 166$)	
Peers	85%	15%	9,201
	($n = 7,809$)	($n = 1,392$)	
Total	90%	10%	20,192
	($n = 18,126$)	($n = 2,066$)	

reports used this method as it would be highly unlikely that they would have more than one manager, and if they did, both managers (direct and dotted) would be participants at the same time. Although voluntary in nature, there was clearly evidence of some interest in the use of this approach by participants to help them drive more direct comparisons.

Next, the data were aggregated by the focal participant being rated and coded for whether simultaneous ratings were used as part of their results or not. The results yielded unique sets of data for 4,659 cases. When aggregated, the patterns became clearer. Approximately 22% of managers and dotted managers used the simultaneous approach, while almost 27% of direct reports and peers averages were based on simultaneous ratings in their data. In other words, the utilization of simultaneous ratings was more likely to occur by the focal individual in question and the number of raters they had invited to rate them. Using these data to test for statistical differences at the individual focal leader level, we found significant differences between those individuals with simultaneous ratings ($n = 402$) included in their results and those without ($n = 3{,}804$) in the total average ratings given across all 58 items $F = 13.71$, $p < 0.01$, the standard deviation of the total average $F = 5.12$, $p < 0.05$, and the number of don't know's provided $F = 8.30$, $p < 0.01$. Based on the mean scores, it was apparent that the use of simultaneous ratings significantly lowered the overall average rating from 3.89 to 3.78, increased the overall variability slightly from 0.54 to 0.56, and reduced the number of don't know's from 2.77 to 1.97 all of which are positive outcomes. Although these values may seem relatively small, it is important to remember that these effects are across the entire average of 58 items. At the individual rating level, the impact would be more pronounced. Results from the competency by competency analyses yielded the same pattern but with substantially higher F values (e.g., $F = 12.45$, $p < 0.001$ for competency 1, $F = 16.60$, $p < 0.001$ for competency 2) across all nine competencies in the model.

Going one step further, we plotted the relationship between the number of raters completed (collapsing them into categories of 2 to 5+) using the simultaneous methodology and the total mean scores. Although the numbers are small, the pattern is consistent with the impact of the use of this methodology (see Fig. 5). These results were significant once again for the total score $F = 4.70$, $p < 0.001$ but not for the other two outcome variables at this level of granularity.

In sum, the implementation strategy had the desired effect on all aspects of improving data quality including reducing the ceiling effect, increasing variability, and a surprise benefit of reducing skipped items. Given that the process was voluntary, there is the possibility that the results reflect an inherent bias on the part of those individuals selecting the methodology in the first place to provide greater differentiated ratings. In addition, some researchers could argue that this type of approach changes the nature of the survey itself in some cases to a relative comparison versus absolute – so now we may be comparing leaders

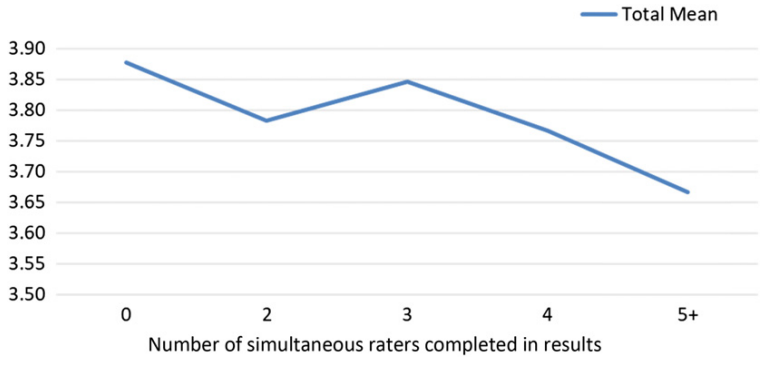


Fig. 5. Impact of Simultaneous Ratings on Total Aggregated Ratings Scores across 58 Behaviors.

some rated based on absolute and others based on relative which has the potential to add another layer of complexity when interpreting the results.

Despite these challenges, the outcome represents a significant improvement in the total ratings received in the 360-degree process. The bigger issue in using this process more systemically is the consideration of whether or not to require it in those cases where two or more focal targets are present. Despite the impact of these findings, the organization has not moved forward with a more formal recommendation of this kind. It is also important to note that many online systems are not well equipped to handle this type of rating process today. In time, we expect the simultaneous approach to become a more standard option (if not a required one) in future organizational applications.

Analyze and Report Using Equal Category Weighting to Drive Aligned Talent Comparisons

Moving to the reporting phase of the 360-degree feedback process, one of the key elements in determining how well the results will be internalized and used by HR and line leaders is how the data are actually scored. While simple flat averages across all raters has been the norm for many years since the inception of 360-degree feedback (Bracken et al., 2001) we consider this to be more appropriate for developmental applications than decision-making ones. Despite some academic research suggesting that the naturally occurring rater groups (e.g., direct reports, peers, customers, etc.) may be less aligned in their rating patterns within rater groups than practitioners and participants might like to believe (e.g., Mount, Judge, Scullen, Sytsma, & Hezlett, 1998), there has been no movement that we are aware of to try and recombine responses to maximize the variability from that perspective. The ability to interpret the data and create

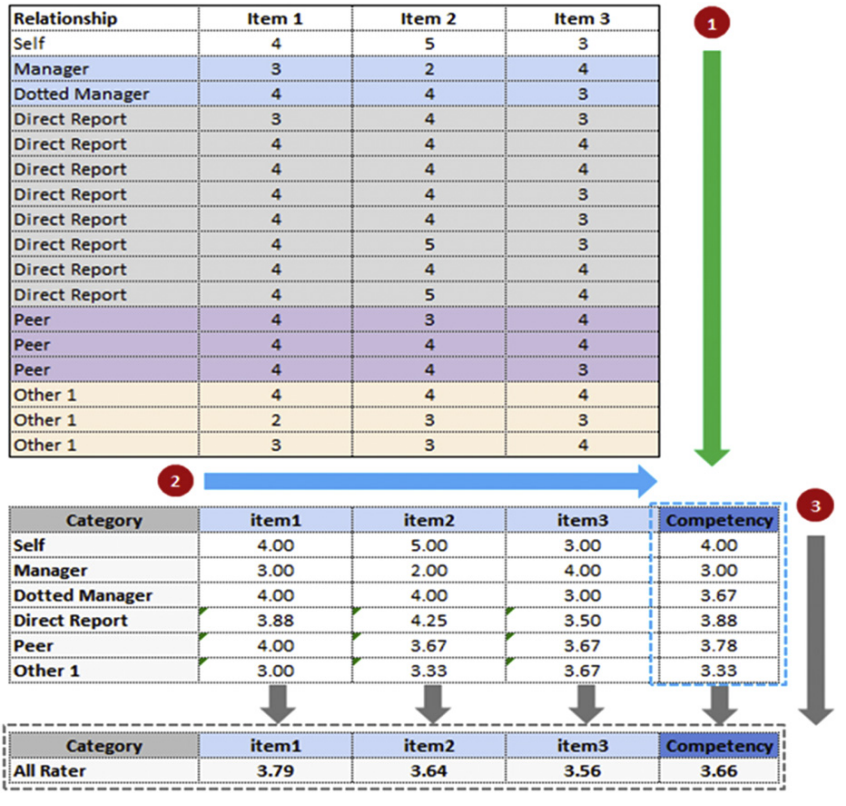
development actions against some unknown group of recombined raters simply isn't practical or relevant in an actual organizational setting. Instead, the emphasis has been on modifying the scoring calculations to more appropriately reflect the internal reality. Some organizations have implemented weighted averages by the standard rater type to enhance the relevance and impact in TM-related processes. This is due in part because this approach will better equalize the pattern of ratings across different groups and different sizes of rater populations, as well as more appropriately reflect the perspective of the manager who plays a more dominant role in TM processes (Church, in press).

It is worth noting that overall average scores on a 360-degree survey are typically calculated at both the dimension and item levels, and represent the extent (or frequency) to which an individual demonstrates the behaviors associated with a particular competency as reported through individual rater categories. In most traditional methods for reporting 360-degree feedback results, a simple summary mean score is derived for "all raters." However, unlike the well-known practice of "weighting by all raters" (either as a straight mean across all respondents or a mean across individual rater category means), we have chosen to implement the method of "weighting by rater perspective" (i.e., using a mean of the sum of means) in our 360-degree feedback process. The weighting by rater perspective results in each rater category being given equal proportion regardless of the number of total raters included. In short, whether a focal individual has 5 or 25 direct reports, the average of those ratings will be counted as only one perspective which is equally weighted to that of the manager rating, and the average peer rating (e.g., 1/3, 1/3, and 1/3 of the total overall score). Under normal circumstances when ratings are well distributed across all rater groups, the differences between methodologies tend to be relatively minor. However, when major differences in rater perceptions exist or there is missing data across a number of items, the impact can be significant.

Figs. 6 and 7 illustrate how this calculation is performed and highlights the differences that can exist in mean scores when missing values are present. Fig. 6 provides a robust set of responses to three items that cluster under one competency. Fig. 7 provides a more limited set of responses to the same items and competency by introducing missing values (and perhaps a good indication that item 3 should cause concern).

In either case, means weighted by perspective are derived by first averaging down raters within a group and then across items. The All Rater mean (i.e., summary mean score) is calculated by summing the average of each individual rater group mean and diving by the total number of rater groups for each item and competency.

Weighting individual rater categories as part of the aggregated summary score ensures greater alignment with a TM versus purely development mindset. If the 360-degree feedback were not integrated into assessment metrics and used to inform talent related decisions, then perhaps this methodology would be less crucial. However, as mentioned previously, these 360-degree results are used as input into high-potential identification and confirmation programs.



Relationship	Item 1	Item 2	Item 3
Self	4	5	3
Manager	3	2	4
Dotted Manager	4	4	3
Direct Report	3	4	3
Direct Report	4	4	4
Direct Report	4	4	4
Direct Report	4	4	3
Direct Report	4	4	3
Direct Report	4	5	3
Direct Report	4	4	4
Direct Report	4	5	4
Peer	4	3	4
Peer	4	4	4
Peer	4	4	3
Other 1	4	4	4
Other 1	2	3	3
Other 1	3	3	4

Category	item1	item2	item3	Competency
Self	4.00	5.00	3.00	4.00
Manager	3.00	2.00	4.00	3.00
Dotted Manager	4.00	4.00	3.00	3.67
Direct Report	3.88	4.25	3.50	3.88
Peer	4.00	3.67	3.67	3.78
Other 1	3.00	3.33	3.67	3.33

Category	item1	item2	item3	Competency
All Rater	3.79	3.64	3.56	3.66

Fig. 6. Impact of Weighting by Rater Perspective When Complete Responses Are Present.

This application inherently becomes about differentiating employees (Church, 2013, 2014; Church et al., 2018) and pushes the design components into the realm of a strategic 360-degree process (Bracken, in press). The enhancement leads to greater impact and utilization of 360-degree feedback in TM and succession planning discussions as well. As Church (in press) notes, this method better aligns with the talent review process because it ensures that a manager's feedback is not over shadowed by a potentially greater number of raters from other categories (i.e., peers, direct reports, customers, etc.). As a result, the results are more convergent with a manager's perspective of the employee which, given the role of the manager in TM discussions and decision-making, is critical.

Further, the developmental emphasis of the feedback is in no way diminished. It is simply somewhat weighted differently. Using this methodology ensures the employee receives clear feedback regarding the impact of their manager's perceptions on their behavior with an emphasis on how a few points of

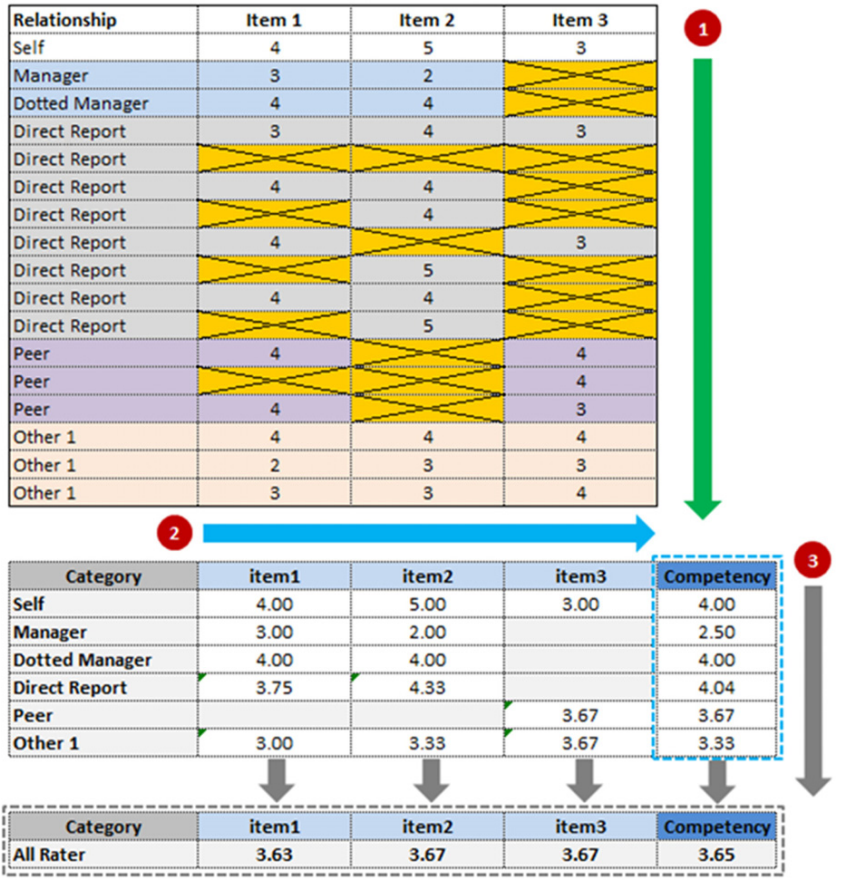


Fig. 7. Impact of Weighting by Rater Perspective on Results When Missing Data Are Present.

critical feedback can have a more significant impact (which is generally reflective of reality in organizations). Case in point, Fig. 7 portrays a scenario in which there is disagreement among ratings, particularly those provided by the manager on the second item. Here, the manager is sending a clear message that this behavior is being demonstrated well below expectations. Had the method been to simply average across all raters, the all rater mean score in Example 1 and Example 2 would have been 3.92 and 4.00, respectively (Other 1 not included). While the difference between 3.64 and 3.92 or 3.67 and 4.00 on one item may not substantially change the overall dimension score, the manager's perspective has certainly been accounted for at the item level and will bring attention to a need to work on this specific behavior during the feedback

process. With the manager's perspective being a third of the overall mean score, it behooves the employee to focus on these insights and use them to build a high caliber development plan for enhancing their performance.

Conger and Church (2018) identified this aspect of reading one's manager as one of their five "X Factors" of high potentials calling it "situation sensing" which is essentially the capacity to sense the managers' priorities and imperatives. In addition, their fifth X Factor of "catalytic learning" is also important here as it reflects one's ability to continue learning through feedback. Through this integration with TM processes, 360-degree feedback results continue to be key drivers of change as the employee shifts energy to the behaviors that will have the greatest impact on their development outcomes. So, the OD perspective is not lost, it is simply expanded to include a greater emphasis on what matters in a decision-making context.

It is important to note that as the application of 360-degree feedback becomes more embedded in these talent related practices, it will likely place an increased emphasis on those participating in the process to develop greater foresight and prudence with regard to rater selection. Weighting overall summary scores by perspective will likely lead to a more active and thoughtful approach taken when selecting raters such that nominations will become more meaningfully grouped together. For example, it makes good sense to split a group of peers into two separate categories (i.e., functional peers and line peers embedded in the business unit) when it is clear that each group represents only of a handful of perspectives under the weighting by rater perspective method. In time, once the implications are well recognized by the end user, this method will also likely contribute to more accountability with development planning as feedback is more easily internalized and acted upon when the stakes are high.

Deliver Feedback Integrated with Valid Personality Measures to Drive Enhanced Insights for Development Planning

The next implementation strategy for enhancing the 360-degree process involves the formal introduction of an integrated suite of personality measures tied directly to the feedback delivery and insights phase of the model. While the practice of linking 360-degree behaviors to personality dimensions is not new and dates back to OD interventions from the 1990s (e.g., Burke & Noumair, 2002), and in fact the use of personality in OD has its roots even deeper in the field than that (Church et al., 2015), the way in which PepsiCo designed and implemented the use of the personality assessments was both large-scale and fully integrated with the overall OD and later TM processes. As such, it represents an interesting example of another level of intervention above and beyond the simple pairing of a set of instruments together in a coaching or leadership development context. While the latter approaches are perfectly fine for

individual development efforts, the "360-Hogan" process as it was called for a number of years was focused on driving deeper insights, self-awareness, behavior change, and accountability than had been seen prior in the organization. Feedback from hundreds of participants post the program indicated that 85% felt it was a better developmental experience than most others they had experienced before (including 23% who noted it was one of the best in their careers to date).

The implementation of a personality suite as a formal intervention to support greater insights from the 360-degree feedback process originated at the same time as the change in leadership in 2006. As noted earlier, pressure had been building on the system to reduce the burden of the prior 360-degree process but also to ensure it was having the maximum impact on developmental actions and outcomes. While the organization had been excelling at executing the process, conducting between 4,000 and 5,000 360-degree feedback surveys each year between 2001 and 2005, there were some questions as to whether these were having the impact on leadership capability that had been intended. Thus, following a critical review of both the leadership model content as well as the process, we decided to explore the use of other tools that could add further insights and "ah-hah" moments to the feedback process. After some discussion and consideration, we noted that those internal leadership programs with the most impact currently were ones where both 360-degree feedback and other tools, primarily personality assessments, were also involved. While this was only present in a small cadre of programs conducted mostly in the international side of the business (and led by Mike White – the CEO of PepsiCo International at the time), the developmental outcomes in terms of performance and promotion rates post the program were excellent (Oliver et al., 2009). Thus we decided as an internal OD organization to pursue the use of personality measures as a core part of the new 360-degree feedback process under development.

As part of this design period, we evaluated a large number of existing personality tools in the marketplace and ultimately selected the Hogan Personality Assessment suite (Hogan Assessment Systems Inc., 2009). This decision was based on a number of factors including the (1) underlying constructs being measured – that is, the Big Five factors of personality (McCrae & Costa, 1987), (2) the face validity of the item content (i.e., not too psychological and potential off-putting in nature – a pilot study done in the company a year earlier indicated that 85% of employees who took the assessments felt comfortable answering the questions), (3) prior positive experience internally with the tool in leadership development and coaching programs, and (4) strong validation research and scientific rigor behind the measure. There were other well-researched and valid personality tools on the market, and other tools such as the Myers Briggs Type Indicator and the DISC were already present and in use in the organization in other types of OD interventions. However, we aligned to Hogan in large part because we anticipated that one day the tool could be used for more than just development purposes. As the roots of the Hogan suite are based in selection testing, it was highly likely to us that over

time there would be pull to use the data in a more predictive or review-based manner. As Church et al. (2015) have noted, ensuring the validity of the personality tool in use is equally important as doing the same for the 360-degree feedback process if both are eventually going to be used for TM-related decisions. Knowing the culture of the organization, this is what we did.

Thus, once the new leadership model and 360-degree feedback system had been completed and launched to focus on only the people who could benefit the most from it by targeting significantly deeper and more meaningful insights, we also launched the new Hogan process along with it. In short, no employee was to receive 360-degree feedback alone without the benefit of having a full Hogan suite (i.e., all three measures – the Hogan Personality Inventory-HPI, the Hogan Development Survey-HDS, and the Motives, Values and Preferences Inventory-MVPI). In addition, given the deep psychological nature of the Hogan tools and the new level of skills and capability required of feedback facilitators to coach participants on the integrated feedback process and make the right connections, we mandated two additional criteria for participation: (1) that individual recipients had to have at least a 90 minute session (preferably 2 hours) 1 to 1 with the feedback provider and (2) that the feedback provider must be fully certified to deliver the integrated results via a custom 2.5 day program delivered jointly by Hogan and PepsiCo resources. Finally, given the nature of our organizational culture, we decided to deploy an internal feedback facilitator model rather than rely on external consultants (with a few exceptions such as for those in HR).

Thus, from 2007 onward, we began conducting rolling certification workshops of about 20–25 individuals each with internal OD, HR, and the occasional line manager to prepare them as certified feedback provides of the new 360-degree Hogan process. During the first year, we certified over 100 employees in the new process, and within just a few years we had over 250 internal feedback providers available. As a result of this approach, based on a combination of capacity, cost, and the newness of the system, we had approximately 500–600 participants each year go through the program, at least initially (until other factors began to force a different set of changes). This represented quite a shift in emphasis and engagement from 5,000 to 500. Thus, an invitation to be part of the new 360-degree process became quite a different level of messaging and commitment on the part of the organization. Fortunately, however, the launch of the new 12-item upward manager feedback tool (to be described in more detail below) which was conducted on an annual basis for all people managers helped offset the lack of feedback in general. For the leadership population, however, 360-degree feedback became a much more significant developmental event.

Although personality is a foundational construct by nature (Silzer & Church, 2009) and very difficult to change on its own, there is a number of options when it comes to developing work-around strategies. The emphasis in the feedback process was therefore on understanding how one's underlying personality tendencies served as drivers of performance and derailers as manifested

in the workplace. The Hogan is a strong tool for use in these types of applications (Church et al., 2015; Dotlich & Cairo, 2003). Custom reports and tools linking personality constructs to behaviors in the LIEM along with practice sessions, fishbowl activities, and dummy data sets provided extremely helpful condition in certifying individuals to deliver the results. There was also a formal test which is required to be passed to this date to enable the use of the results as a feedback provider.

Also as part of the process, all feedback sessions were tracked the first few years to ensure we had full compliance of the 1−1 sessions being held by certified facilitators. We conducted follow-up surveys of participants after the feedback sessions to determine whether the new approach and use of the Hogan suite was adding value or not. Results from the first two years of these surveys were very positive with participants endorsing the success of the program and its impact beyond the prior 360-degree feedback implementations. Fig. 8 provides the survey response data received over the course of the first two years of tracking.

Overall, the 360-degree Hogan process was a significant success in its initial incarnation and generated significant pull for the feedback process and enhanced development efforts. A few years later, however, the competency model began to get "stale," particularly because of the length of the item set at 58 questions overall and the lack of predictive nature of the content which limited its use in TM processes. Thus, a newer model was once again designed and launched.

One interesting additional point: in the context of the discussion about OD versus TM-related 360-degree applications, as part of the certification workshop, it was made very clear to those being trained originally that while the 360-degree results were available to share with managers and HR as an input into TM processes as always the Hogan reports were not meant for that at the time. The stance was a "hard line in the sand" given concerns expressed over the potential misuse of the information among those not qualified to interpret the results. Over time, however, as the pull increased for data-based insights into TM-related decisions, the Hogan results did eventually factor into the more predictive high-potential assessment program (LeAD) and shift in the way it was used and communicated internally. As a consequence, and to avoid sending mixed messages around development versus decision-making with the tools, we reduced our emphasis on using the Hogan tools as a core development process and focused them more on the formal assessment programs. Today, the personality plays an integral role in the identification and accelerated development of potential at all levels, and is less of a "core development" focus. But it remains integrated with 360-degree feedback for the right audiences and a custom certification process (even more advanced than in the past) is required to engage in the feedback process. In some ways, the learnings from this application are to be careful what you wish for as you just might get it.

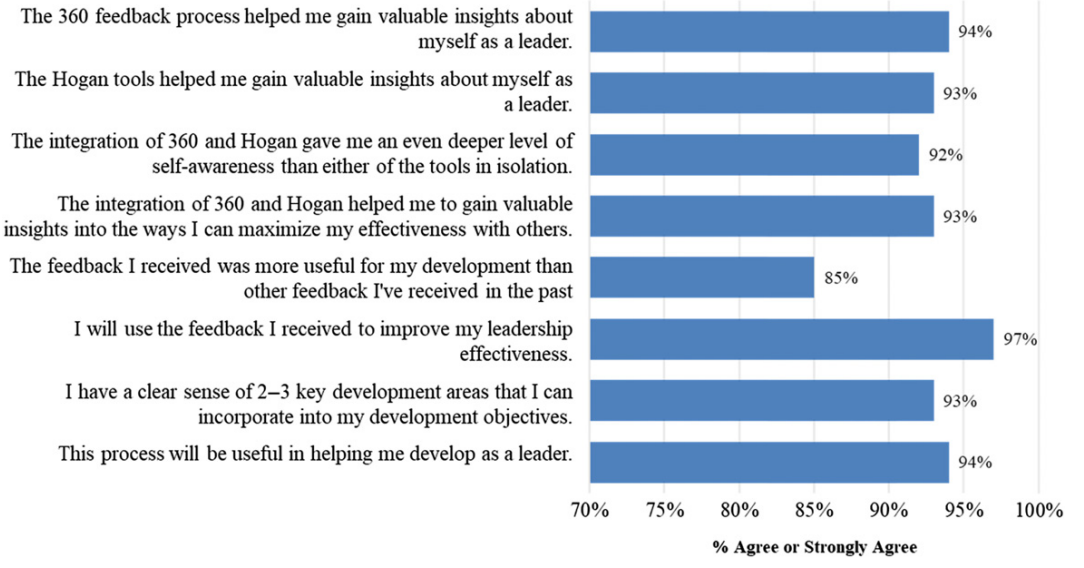


Fig. 8. Participant Evaluation Results Regarding the Hogan-360-degree Feedback Process.

Deliver Clearly Differentiated Tools with Different Purposes to Drive Unique Outcomes

The last area of intervention in our 360-degree processes at PepsiCo concerns the use of different assessment processes, purposes, and transparency of those applications. As 360-degree tools get more sophisticated in solving some of the pervasive challenges that have plagued 360s for decades (e.g., lack of variability in ratings, interpretation of rater group differences, and understanding cultural implications), we have seen a recent trend toward expanding the application of 360-degree, including a resurgence into the area of performance management. As noted earlier, while this has been an area of great interest over the years and should be considered as part of a broader TM approach (e.g., Bracken & Church, 2013; Effron & Ort, 2010), this has been one of the most hotly debated areas.

In fact, whether to use 360-degree information for development or decision-making purposes has been a debate since 360-degree feedback gained popularity in the 1990s. There are a number of clear reasons for focusing 360-degree on development interventions. As summarized by London (2001):

- Peers and subordinates are often in a better position than the manager to evaluate many aspects of a leader's performance.
- 360-degree results enhance self-awareness through self-reflection, facilitating behavior change.
- Leaders value the opinions of others and feel accountable to respond to them.
- 360-degree is a platform for training one's own achievements and compare oneself against others (through normative information).

Advocates for the use of 360-degree in administrative and TM-related decisions (e.g., performance ratings, pay or promotion decisions) often cite the same reasons; in particular that information about a leader's performance is more reliable and holistic when it comes from a variety of sources. Surveys collected from multiple observers provide a structured way to gather such information. However the historical concern was that 360-degree raters would not provide accurate ratings for either fear of reprisal or that raters could sabotage the leader's ratings if the raters had a vested interest in the results (e.g., as peers being compared with the focal leader).

Interestingly, such concerns about 360-degree used for administrative decisions seem to be lessening. According to 3D Group's (2016) benchmarking study, more companies are trending toward using the data for decision-making than just a few years ago. According to the study, in 2013, 37% of companies used 360-degree for self-directed development only. A mere three years later, only 24% of companies indicated that they use 360-degree for solely for a development purpose. Further, companies using 360-degree for performance

management tend to use the information for a mix of development and decision-making purposes versus pure decision-making.

It is apparent to us that when organizations put the time and energy into gathering 360-degree data, they strive to use it for a multitude of purposes. In fact, the 3D group benchmarking study (2016) found that almost half (46%) of companies use the same survey for all feedback recipients. Toegel and Conger (2003) have argued that 360-degree assessment can be usefully applied to both developmental and administrative purposes, but that no single 360-degree process should be used for both purposes simultaneously. In addition to the pitfalls discussed above, they point out that some of the same characteristics that make 360-degree ratings ideal for developmental use also compromise their administrative value. For example, lack of agreement among raters can be informative in a developmental context because ratees become aware of how various observers perceive them differently. However, in administrative applications, such disagreement is problematic for organizations needing to integrate discrepant ratings into a measure of overall performance.

In our view, having separate 360-degree feedback tools and processes that are differentiated by the purpose that each tool serves provides several advantages and allows each process to be designed in a way that alleviates each of the potential pitfalls cited above – for example, rater selection, content specificity, use of and access to the data, etc. can be tailored to each purpose.

PepsiCo evolved into such a multi-process multi-rater solution over the course of several years. As described earlier in this chapter, PepsiCo's 360-degree processes can be traced back to the 1980s and continues to be the primary assessment of the company's leadership competencies, providing periodic feedback for all people leaders every two to three years. In 2008, as part of the revamped leadership model, we created a short 12-item upward feedback instrument called the Manager Quality Performance Index (MQPI). Following the launch of the tool it has been administered yearly to all direct reports to evaluate their people managers (with three or more direct reports) on key behaviors that describe successful people management. The results not only provide important and detailed feedback to the people manager, but they also are used by the focal leader's manager to help inform performance management ratings (as a soft data point).

The MQPI represents a distinctly different survey from the core 360-degree feedback process (though they were packaged together as a framework for employees) and as such the tools had clearly differentiated purposes with different timing, tools, reports, and rules for inclusion (Bracken & Church, 2013; Church, Tuller, & Desrosiers, 2013). For example, while the 360 feedback process allows participants to select their raters and we encourage all direct reports be invited to the process, the MQPI requires all direct reports be part of the process (including administrative staff and more junior employees). The theory is that leadership behaviors may not always be observable by all types of raters, but manager quality should be something everyone can rate. Importantly, the

MQPI is also a direct report only tool with no self or manager ratings so it's quick and easy to administer with little chance of rater burden or overlap. Over time the program has developed quite an internal brand and has been taken all the way down to the supervisory level in certain parts of the business.

In 2016, along with the creation of the LEF, we refreshed the MQPI instrument as well with a new set of 15 items to further refine the construct. We also rebranded the instrument as PepsiCo's Essentials for People Leaders (PEPL; pronounced "people"). Even though our leadership competencies included aspects of talent development and people management, we created the MQPI (and now PEPL) as a separate process for the following reasons:

- It allows us to assess people manager capability in more detail than the 360-degree permits.
- It allows us to craft communications and messaging specific to the MQPI.
- From a culture change perspective, the separate process highlights the organization's emphasis on manager quality.
- To reinforce such an emphasis, linking the MQPI to the performance management process allows the company to hold managers accountable for these behaviors.

More recently, as part of our performance management redesign, we instituted another multi-source instrument specifically for performance feedback, the Network Check-in Survey. This feedback is from an individual's performance network and aims to gather input from those that he/she interacts with regularly to get their work accomplished. In our needs assessment, we found that leaders and employees felt our current PMP process placed too much emphasis on the outcomes of our work (what gets done), and less on how work gets done. This new multi-source tool is tailored to the individual, focusing on just three behaviors in which the individual needs to be proficient (the how) to facilitate the achievement of his or her objectives (the what) for the year. The individual chooses the three behaviors with his or her manager, which then forms the basis of the multi-source survey. This survey is conducted twice a year, and feeds directly into the performance management tool for both the manager and employee to review and discuss.

Table 4 shows a comparison of PepsiCo's current three multi-rater feedback processes. One of these is a full 360-degree process, one is upward only, and the other is the network tool. As can be seen from the table, the three processes all use multi-source assessment but in different forms and for different purposes. In light of all of the resources required to build and maintain these separate systems, our view is that this separation helps to ensure the integrity of the data and provides better results.

Although the Network Check-in is too new to draw any conclusions of the results, examining multiple years of data across the developmental-focus 360-degree and the primarily administrative MQPI shows that the mean ratings of

Table 4. Comparison of Multi-rater Feedback Tools.

	360-Degree Feedback	Manager Quality Performance Index/PepsiCo Essentials for People Leaders	Network Check-in Survey
Purpose	Dual purpose – development feedback (core), and talent management (LeAD)	Dual purpose – development and administrative	Performance feedback
Focal audience	Executives and senior management, middle-management, and individual contributors	People managers (with >3 direct reports)	All professional employees
Raters	Self, manager, peers, direct reports	Direct reports	Peers and others they work with
Content	Leadership competencies	People manager behaviors	Critical behaviors
Instrument length	30 items (content varies by level)	15 items	3 items
Decision-making	Talent reviews, high-potential classification, and succession planning (slating)	Performance management and talent reviews	Performance management
Timing	Once every two to three years (core) or as needed (LeAD)	Annually	Twice per year

the MQPI are generally consistent with (if not slightly lower) than the data obtained from the 360-degree feedback process on the same individuals. Further, the MQPI shows a greater distribution of ratings (SD of 0.56 for MQPI vs SD of 0.34 for the current 360-degree measure). Interestingly enough, our findings are in direct contrast to warnings in the literature (e.g., Craig & Hannum, 2006) that administrative use of 360-degree will result in highly negatively skewed distributions for fear of reprisal. Clearly, however, the use of feedback measures as inputs into decision-making is not something that is overly concerning in the current organizational culture and in fact the separation in tools seems to have had major benefits.

In summary, although benchmarking has shown that employees have less trust in 360-degree systems that are used for administrative purposes (3D Group, 2016), we believe that we have been successful in implementing these different 360-degree solutions because we have addressed each process holistically and from OD systems perspective (even if some of the tools are also used for TM-related purposes):

- *Content* – We have crafted the content (including rating scales) of each instrument for the specific purpose in which it was intended.
- *Administration* – The survey length, administration timing, and frequency are specific to the purpose of each. For example, the tools used for administrative purposes are shorter but more frequent than our developmental-focus 360-degree.

- *Communications* – We make it very clear to participants and raters how each process is used, who sees the data, and how the data are used.
- *Rater training* – We have tailored rater training for each purpose. For example, our training for PEPL/MQPI is in-depth, focused, and just in time. Our training for 360-degree is more general and covers more breadth. This is consistent with external benchmarks (3D Group, 2016).
- *Reporting* – Our reports vary greatly by purpose, as does access to the data. The 360-degree is very detailed and is fed back to the participant by a trained 360-degree facilitator in a 90–120 minute feedback session (either as part of a general program of a high-potential assessment process). The Network Check-in and PEPL/MQPI are short, descriptive reports. In terms of access, although the manager of the focal leader has access to all of them, we encourage the participant to share the 360-degree with their manager. The PEPL/MQPI reports are sent to the manager after the participant receives them. The Network Check-in feedback are available to both participant and manager in real-time on the participant's performance dashboard.

COMPARATIVE ANALYSIS DISCUSSION

Overall, the five key implementation interventions discussed in this chapter resulted in significant and unique enhancements to the quality and impact of the 360-degree feedback process for both individuals and the organization. They highlight an important shift in the use data (i.e., from being primarily developmental to being more robust, targeted, and impactful for stretching leaders toward key organizational outcomes and supporting talent decisions). Although not all of the design choices were implemented at the same time or for the same exact reasons, they were all intended to improve upon certain challenges that have been identified as common and inherent issues in 360-degree feedback systems and which were experienced throughout the evolution of the program.

More specifically, these interventions addressed the issues of measurement quality and instrument validity, content and developmental relevance to the target population receiving the feedback, a focus on increasing the level of self-awareness and insights generated, the importance of talent differentiation and talent segmentation in the results obtained to improve organizational decision-making, and ensuring transparency in the process. Interestingly, these enhancements also align nicely with the implementation framework established by Church and Waclawski (2001) and expanded upon in Fig. 1. In particular, each intervention targeted one or more of these critical design phases and demonstrated that it is possible to improve a process as well established in the literature as 360-degree feedback. Moreover, these were effective even in an organization where feedback tools are a part of the cultural fabric of the organization and have been for well over three decades.

Table 5 presents a summary of each intervention described in this chapter with a focus on the key outcomes as they align to the 360-degree implementation framework. By reviewing the different approaches employed in this context, it is possible to consider how these might be applied to other 360-degree feedback systems in various stages of development and/or in other organizational contexts. It also highlights where other OD or TM practitioners might want to modify their current practices to impact their overall system effectiveness.

Starting with phase (1) which focuses on design and development phase, the key changes made concerned the content of the model itself. In the context of PepsiCo, this meant designing and deploying a multi-level behavioral model (in the first revision of the model discussed) to better differentiate among behaviors and ensure the feedback provided was more relevant and engaging to the individual. By ensuring employees had a more appropriate set of behaviors upon which to focus their development, we created significant pull for the feedback at multiple levels within the organization as individuals were intrigued by the behaviors needed to be successful at each level of management. It also enabled the organization to compare and contrast talent within each set of behaviors (using the same underlying set of competencies) which allowed for more nuanced considerations regarding strengths and opportunities in talent discussions. The second version of the multi-level framework took the content one step further by outlining those behaviors required for future success. Once the tools had gained sufficient traction for use in a decision-making context, the need to identify and differentiate by future capabilities needed made both the content more relevant for participants as well as the feedback more important for talent planning and succession efforts. While this also required that the content be put through a rigorous validation process (required for using this type of data in a TM context), having done so, the level of confidence in the quality and predictive nature of the results was ensured. This enabled the 360-degree process to become an integral part of the broader talent development architecture.

Other organizations could deploy this same type of methodology either during an initial design phase for a new system or during an overhaul to an existing model as was the case in this applied setting. The critical questions to be solved would reflect (1) the number of different levels of behaviors needed to cover the target audience, (2) the degree to which the content should reflect the current state or some future-focused set of capabilities, and (3) the extent to which the data will be used either now or in the future for talent decision-making which would result in the need for formal validation research.

Next, for phase (2) administration, we implemented a new way of collecting data that enabled the individual rater to choose their comparison groups when making ratings. This enabled a real-time calibration process for those taking advantage of this approach which resulted in significantly lower mean scores, greater variability in ratings, and fewer skipped items overall. In short, by offering this simultaneous ratings approach, we were able to positively impact the quality of the ratings data obtained and ensure a greater level of differentiation

Table 5. Summary of 360 Feedback Interventions and Outcomes.

	360 Feedback Implementation Framework					
	(1) Design and Development	(2) Administration (Data Collection)	(3) Analysis and Reporting	(4) Feedback Delivery and Insights	(5) Action Planning and Accountability	(6) Follow-up and Impact
Application/ intervention	Designed a multi-level and future-focused behavioral model to drive relevance and meaning	Collected survey data using simultaneous ratings to drive calibrated information	Analyzed and reported using equal category weighting to drive aligned comparisons	Integrated feedback with personality tools to generate new insights for development	Delivered clearly differentiated tools with different purposes to drive unique outcomes	Focus on the right development priorities and use data to make informed decisions
Factors leading to application	• Stable well-established system but targeted at single group of leaders • Relevance questioned at both, more senior and more junior levels	• Lack of variation in ratings collected • Ceiling effect on a 5pt scale particularly among senior raters	• Average ratings unduly influenced by different sized groups • Results being used as input into assessment processes/ practices	• Feedback delivery was too large scale • Committed to delivering greater individual insights	• Feedback from tools used inconsistently as inputs • Need to be clearer and more systematic in how data is used	• Desire to show impact over time • Committed to group and organizational insights/capability
Purpose	• Drive greater relevance and differentiation across organizational hierarchy • Align behaviors to current and future-focused performance requirements for success • Ensure a fully validated model for use in TM	• Drive greater ratings differentiation overall • Reduce the ceiling effect among all groups • Establish specific comparison group within level of the same set of behaviors	• Equalize pattern of ratings across different sized groups/rater population • Better reflect perspective of the manager (dominant role in TM)	• Maximize self-awareness and understanding of drivers of behavior • Greater emphasis on what matters in a decision-making context/helping people with derailers	• Segment feedback tools and processes to ensure clarity • Ensure transparency and purpose is clear (i.e., how will results be used, who see those results)	• Integrate results into organizational systems to inform talent development and decision-making • Ensure robust capability in analytics insights

Outcomes	• Behaviors more relevant by job level and feedback more meaningful • Enhanced employee pull to be included in process • Enhanced pull to use results in talent decisions	• Better data quality – reduced ceiling effect, greater variability, and fewer skipped items • Strong end-user support for process and content approach	• Enhanced the relevance and impact of feedback to TM-related processes • Reduces impact of different size teams/groups of raters	• Enhanced employee experience and insights from the feedback • Greater attention to feedback delivery 1–1 • Stronger predictive models for TM	• Enhanced caliber of development plans by purpose • Greater use of data and accountability • Greater pull for different tools	• Enhanced ability to spot trends, and observe change in the right direction • Evidence-based care for impact

among respondents. This practice addresses one of the biggest issues that many senior leaders (and sponsors) in organizations have with 360-degree feedback results (i.e., that they simply yield too positive ratings and/or there is not enough variability in scores). While not every participant opted to utilize this method to complete their ratings, nor is it always possible to do so if only a limited number of rater groups overlap in a single administration, those that did saw the benefits in improved data quality. This change in the way people respond to 360-degree feedback impacts both scores at the individual level as well as the norms for the organization overall.

While we would advocate for this practice in organizations where ceiling effects and variability are major concerns, there are some important caveats. First, it is important to recognize that not everyone participating will be subject to the same comparison process (each rater has a unique set of comparison for his/her calibration) so there could be added complexity to interpretation and norming particularly in smaller scale 360-degree systems. Unless one is deploying this approach with in-tact groups (e.g., all peers rating each other), it is difficult to mandate a given set of comparison points. Also, not all 360-degree systems or software vendors offer this approach as part of their standard package. Because it requires more complex programing and is often, therefore, a custom application, organizations need to know in advance that this is an approach they would like to pursue when designing their overall program. Finally, implementing a rating process like this will influence the norms collected and doing so "midstream" could create unfair comparisons with those assessed after the process went into production compared with those who went under a more traditional sequential rating process. Nevertheless, this approach was extremely well received by end-users both from a process (i.e., it's easier and faster to complete) and content perspective (it makes more sense to them) and it produces better data, so it is worth considering.

Although phase (3) analysis and reporting might seem like a relatively simple task, our approach to using equal category weighing has made a significant impact on the perceived credibility of the results obtained particularly in the context of talent reviews and decision-making. The standard approach to weighting all responses equally regardless of perspective has been around since the inception of 360-degree feedback and reflects the basic idea that all feedback should be equal. While it has its strengths regarding generating overall strengths and opportunities across a given set of raters, it does not adequately account for the impact of different groups and in particular the importance that the manager plays in a talent context. When it comes to decision-making (e.g., succession, promotions, determination of high-potential status), the manager has a unique and critically important perspective that needs to be weighted much more significantly than one out of 10, 15, or 20 raters. After all, they are often the ones making the decision in the end and certainly one of the key advocates for the career success of the individual. Thus, our approach to equal category weighing allows the different perspectives in the 360-degree feedback

process (e.g., manager, direct reports, and peers – though this could easily be extended to include other intact groups such as customers or different subsets of colleagues) to be considered on a level playing field. Each perspective adds value and should be reflected as one source of data regardless of how many were included in that group.

Other organizations could easily adopt this scoring rubric. It requires a different calculation process than is typically the case but it's neither unique nor particularly difficult to implement. In our experience, it has enabled much more robust and balanced discussions regarding the talent as leaders (and HR professionals) in the room are not prone to dismiss the feedback when one or another group is overly positive or negative in someone's report. The case of the "peers love him," but the "direct reports don't" is clearly visible in the mean scores still (as they would be in the standard averaging method), but the size of the teams responding do not unduly influence the overall scores in either direction. The potential concern, of course, is that managers do have their own significant impact (based on their rating tendencies) which needs to be carefully communicated. It puts a greater burden on them to be thoughtful about the ratings as they no longer "wash out" among the others as in basic averaging systems. In addition, as we demonstrated earlier, missing data can cause some unique problems with this approach as well. However, when deploying 360-degree feedback for talent decision-making, we would caution against using incomplete 360-degree results in any case.

The next phase (4) of feedback and delivery represents the critical point at which the data are given to the individual. The emphasis here is on ensuring the tools and process focus on producing the right types of insights that drive greater self-awareness which will, in turn, lead to energy for change (in the classic OD model). Thus most 360-degree feedback processes cover strengths, opportunities, blind spots, differences between groups, normative comparisons, etc. While this works well for many people, in our experience, the use of additional tools that get at the underlying reasons for why people behave the way they do (e.g., personality and values measures) and under unique conditions (e.g., high stress) provides a significantly greater level of impact than just the behavioral data alone. The pairing of personality data with 360-degree results has been a common enough practice over the years (Church et al., 2015), yet one that requires additional effort, resources, and capability to execute well. In our case, by introducing the Hogan personality suite and ensuring a fully capable delivery process through the use of internally certified feedback facilitators, we were able to significantly enhance the feedback experience and insights gained from the traditional 360-degree process. User feedback was extremely positive and has remained that way since the launch of the tools in combination almost a decade ago. Since that time, however, and critical to the discussion of 360-degree feedback as a purely developmental tool to one that is more for talent decision-making, we also moved in the direction of using the integrated personality data to provide a better predictive model of leadership potential. This has resulted in a more robust and predictive assessment

process and has increased the importance of the paired approach. The developmental nature of the feedback remains critically important, however, as individuals find incredible value in understanding their personality dispositions and how those drive behaviors that are important for their careers and continued success. In our case, the use of the Hogan suite was strategic in that the tool has strong measurement properties and was validated internally for these types of applications.

Other organizations interested in using personality tools to augment their 360-degree feedback programs would be encouraged to do so if they can meet the needed requirements. First, the measures identified should be of high quality with sound theoretical grounding (e.g., in the big five) and with a strong research base in validation research. Even if there is no intention of using the personality data currently for TM processes, if it were to happen in the future, the risk would be significant if the tools themselves were suspect from a psychometric or conceptual standpoint. Second, the organization needs to have the right level of capability required to deliver high-quality feedback discussions. Our strong recommendation would be not to couple personality results with 360-degree feedback unless this process was facilitated. While behavioral data are objective, personality data are much more nuanced and require a deeper understanding of the tools being used. In addition, the connection between tools is not always obvious to those untrained in psychological measures. Personality feedback poorly delivered (or not facilitated at all) can be damaging to individuals and should be avoided. Done well, however, this is a powerful combination and can be used for coaching, leadership development programs, or TM applications as is the case here.

Following closely with the feedback process of the implementation of any 360-degree system is the importance of phase (5) ensuring robust action plans occur afterward and there is accountability for action. To drive improvements in this phase of the framework, we focused on ensuring clear communications and transparency in the use of our feedback tools. We did this two ways: (1) by designing and implementing different tools for different purposes and (2) by clearly defining how each worked and for what audiences they were intended. Specifically, we created tools for development applications (e.g., 360-degree feedback aimed at individual development efforts), performance management inputs (e.g., the MQPI/PEPL models of short upward only measures regarding how managers relate to their people), and assessment focused 360-degree measures (e.g., for use in TM and high-potential identification and talent review processes). While all have a strong development focus, some represent more direct links to various processes than do others. Although it took us a number of years to evolve to a clear set of differentiated tools, the organization is now quite comfortable with the range of offerings and there is significant pull for each of them and for their own respective purposes. In addition, we have introduced new tools around networking as well which are quickly becoming the next generation of inputs for our performance management process. All of these efforts

have led to higher quality development plans overall as they directly related to the process in question (e.g., manager quality, future leadership success, general skill building). They have also led to more accountability as the data are used for specific purposes such as performance management and talent reviews (and integrated into the organization's talent systems). Finally, by having these tools clearly delineated there is greater pull for their use as well for the right reasons.

In the emerging workforce, transparency is a key value and one that must be adopted by organizations if they wish to attract and retain the very best people. Internal research on our LeAD programs particularly with early career talent has shown that employees are quite comfortable being told where they stand if it is clear what the tools are meant to measure, and feedback is delivered in a developmental context (Church & Rotolo, 2016). For organizations considering introducing a new 360-degree feedback process, the answer is relatively straightforward – define the process and be transparent about it. However, for those who may be migrating from a development only program to one that is now having more influence in TM-related processes, the change management impact should be considered carefully. Just changing direction on employees midstream is never a good practice. Our recommendation would be to find a natural transition point, either a redesign effort or some other reason for the change, and introduce the shift in emphasis at that time along with supporting training and resources. In some cases, such as with the MQPI, a "practice year" where data are collected on a new or revised tool but that doesn't yet count might also be helpful to allow the organization to better adjust to the change.

Finally, although we did not describe an intervention in this chapter specifically on the last phase (6) follow-up and impact of the implementation model, we have engaged in a number of other efforts some more broadly than 360-degree feedback to ensure all the tools in our HR system are used and have follow-up measurement behind them. Partly this is an exercise in data analytics (Church, 2017) and partly it involves using short targeted follow-up "mini-360" measures to look for behavior change, surveys for attitude impact, and the like. In the end, however, all these strategies for enhancing 360-degree feedback have resulted in a set of data-driven OD and TM processes that have significantly impacted individuals and the organization both from a developmental standpoint and a predictive one concerning talent related outcomes than ever before. When considering this suite of interventions, the key question for other organizations will rest on which enhancements are the most feasible and which problems they are intended to solve.

LEARNINGS AND IMPLICATIONS FOR PRACTICE AND RESEARCH

Given the various design and implementation strategies outlined above, it is clear that there are still interventions both well known and emerging that can

be used to enhance the quality and impact of 360-degree feedback systems in organizations today. While the methodology of collecting data from multiple sources may not have evolved much beyond the use of technology (over paper), there remain compelling applications and recommendations for practice that can have a significant impact on how these tools are used for individual development and change efforts and for TM-related processes. Although not all of these interventions may be applicable to all contexts or systems, and some require a culture of general foundational level of the acceptance of feedback, development planning, and talent focus, we hope the practitioners can identify one or more areas that might prove useful in enhancing their existing systems or in the design of new ones.

These examples are far from all the options available to practitioners today. To continue to understand and enhance the effectiveness of 360-degree feedback, listed below are some potential topics for researchers and practitioners to investigate further.

Evaluate the impact of industry trends. Organizations are changing at an unprecedented pace, reshaping how we approach, how work gets done, and shifting how OD, I-O, TM, and HR practitioners bring value to the workplace (Church & Burke, 2017). Oftentimes, practitioners find it challenging to strike a balance between maximizing efficiencies in our processes with the need to configure customized solutions that meet the needs of a target audience without sacrificing scale. Researchers on the other hand still find discomfort in the tradeoffs made between purity and practicality (rightfully so). Although current trends are abundant and ever-evolving, there are three major developments (arguably driven by technology) that will impact how organizations might operationalize 360-degree feedback practices in the future.

First, technology is no longer just an integration into our personal and work life. Rather, it is reshaping how we view and interact with the world and those around us. Although technology has led to greater 360-degree feedback utilization, increased response rates, and more efficient communication processes (Bracken et al., 2016), researchers still need to better understand the impact of accessibility on quality especially as "smart" technology elements are implemented. Some smart features that may have an impact on rating quality include:

- smart survey launch (e.g., 360-degree processes might automatically be launched from a system with certain triggers such as an employee's time in role);
- smart rater selection (e.g., surveys are sent to raters based on criteria from HR systems such as selecting peers and perhaps without the focal rater's participation or review); and
- smart display logic and filter options (e.g., measurement content comprising the assessment might include certain items for specific participants such as items relating to a function or part of the business).

These "smart" features can be helpful to minimize administrative burdens, but may need careful monitoring until they are applied correctly. Peer rater selection is a great example of how the technology will help the administration of the process, but may take some time to ensure accuracy. More specifically, smart technology will need to be trained to identify not just peers in a formal structure, but peers with whom the participant interacts both inside and outside the organization. Until technology becomes smarter at identifying who the individual is and the appropriate nature of their peer relationships within the organization, careful review of the rater list prior to survey launch will be critical for valid and accurate responses.

Other research areas related to technology include evaluating different devices (e.g., mobile, smart watches, and virtual reality technologies) and mechanisms to collect data, and different approaches to delivering feedback (digital versus traditional face-to-face feedback debriefs). There is also an opportunity to look at the impact of self-initiated 360-degree feedback processes such as reaching out to raters directly (e.g., launch notes to a participant's manager to remind them of their role in the 360-degree process), providing opportunities to dive deeper into one's results (e.g., online reports that can link out to learning resources by item and competency automatically or even enroll you in courses or solicit internal or external coaches and mentors based on matching criteria), and tying development areas to follow-up efforts (e.g., building a mini-360-degree at some time in the future based on someone's development priorities to see what progress was made).

Technology also impacts the speed at which employees work, make decisions, and expect feedback. Today, organizations are continuing to rely on pulse surveys of engagement, providing real-time performance input and self-initiated 360-degree feedback. With faster, agile, and more responsive ways of working, feedback captured in a timely manner will be needed for employees to stay better informed on progress, identify and overcome barriers, and improve areas of opportunity. This is clearly what the next generation of workers want as well (Meister & Willyerd, 2010; Zemke et al., 2013). These demands will also require our survey platforms to evolve, allowing for greater flexibility in administration and reporting. Research looking at the impact of more frequent feedback and continuously listening across various OD processes will be important to understand as this trend continues to grow.

Similarly, organizations are evolving into new more fluid forms and structures (Boudreau et al., 2015; Church & Burke, 2017) which present unique challenges. Agile teams are being created, for example, for a variety of different purposes (e.g., to find a solution to a recent barrier or challenges or to develop a new product). These teams are typically cross-functional, focused, and fast working with immediate deliverables to accomplish a goal (Rigby, Sutherland, & Takeuchi, 2016). As a result of the emergence of these teams, researchers are encouraged to look at the implications of using 360-degree feedback in TM processes as it relates to the quality of ratings obtained (i.e., valid and reliable

data). What is the appropriate rater-participant exposure needed to accurately represent the employees' behaviors? What is the timeframe for when a past team member is qualified to accurately speak to the participant's current behaviors? How often does an employee need to receive feedback to be successful on this type of team? All of these will be important questions for the future.

The need for more advanced analytics is another trend that can impact the design, implementation, and effective utilization of 360-degree feedback. As noted earlier, there is greater pressure for OD professionals to become experts in analytics, yet few formal academic programs are training practitioners in these areas (Church & Burke, 2017). Increased analytic capability can help the OD field demonstrate the ROI of 360-degree processes as well as integrate and understand OD initiatives at a more holistic level. Organizations can tie data from 360-degree results with other various data points (e.g., learning and development records, other feedback scores, and performance) to tell a greater story by identifying trends across the business. Seeing data in aggregate and linking with other data can help identify more holistic themes as input into the business direction and strategy, but how do we know which data and approach are best for what purposes? What combination of data are more useful?

More research on rating quality. Although we have seen the significant impact of our various interventions on rating quality and variability, there is always an opportunity for further improvements. In most organizations, 360-degree feedback is consistently positively skewed. Researchers should continue to focus on ways to improve the quality of ratings and drive greater variance. This would help employees and leaders identify areas to grow and help differentiate talent for decision-making purposes. Some research considerations include the evaluation of different rating scales, rater error training, rater feedback to guide more quality ratings, the impact of simultaneous ratings on rating quality, and other techniques that could help increase the reliability and validity of ratings.

More research on sustainable behavior change. The primary goal of 360-degree feedback is to increase self-awareness and help employees understand their strengths and areas for improvement, ultimately driving behavior change. There is an opportunity for researchers to compare the change in behavior depending on the purpose of the tool (decision-making vs development). Do we see more or less behavior change when using a suite of assessments (e.g., in combination with upward manager feedback or a personality inventory) or the 360-degree feedback assessment alone? Do we see a greater change when there is follow-up (e.g., another 360 degree or a mini survey to assess behavior change after the initial 360-degree feedback report) and, if so, how much and how often are these follow-ups needed to influence more change? Does a more continuous listening approach impact the change delta? Does an accountability partner help influence the amount of change made (e.g., manager involvement, coach, peer)? While individual characteristics (i.e., motivation) are certainly at play, it would be wise to discern the impact of 360-degree feedback applications on behavioral change at the individual, team, and organizational levels.

More segmented research. Although there is a great amount of literature available on 360-degree feedback in general, there is an opportunity to better segment the studies to understand the impact of various independent variables (Bracken et al., 2016). In addition, it would seem that some of the 360-degree related research has simply stopped or has fallen off altogether. It is strongly suggested that researchers continue to conduct more specific research on various topics to include the impact of different purposes, different participant selection methods, cross-cultural differences particularly as these relate to organization values and norms versus national and geopolitical ones, the impact of different methods and sources of deliverer (e.g., coach, manager, external), the importance of transparency, and, of course, more research on different formats and designs (content, scales, and reports).

CONCLUSION

In sum, 360-degree feedback has come a long way since its inception as a simple interpersonal feedback tool for enhancing relationships and making personnel decisions in early managerial and military applications. From a fad in the 1990s to a fixture in the present day, the emphasis now must be on ensuring we have the most robust systems and tools possible to ensure we help employees focus on the right developmental priorities, and that organizations are using the data obtained from these processes to make best informed TM decisions possible.

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