Your appraisal360 user guide

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Getting started

I am a manager or trainer controlling the 360 feedback process for a number of clients or employees (appraisees).

- Go to the section entitled "Managing a 360 project."

I am an appraisee doing a 360 under the supervision of a trainer or manager.

- Go to the section entitled "Doing my own 360."

I am a respondent and have been asked to give feedback on someone who is having a 360 report done.

- Go to the section entitled "Responding to a request for feedback."

I am an individual doing a 360 assessment independently or doing the free trial.

- Go to the section entitled "Using Appraisal360 independently."

Managing an Appraisal360 project

Your Appraisal360 trainer's account allows you to manage a group of people through the 360 feedback process. It enables you to:

- Purchase the worksets that your clients will need
- Manage your inventory of unused worksets and assign them to clients as and when required
- Monitor the progress of your clients as they complete their worksets and send out reminders as necessary
- Manage the way in which the process runs and end reports are delivered to your clients.

Signup

Before you can use Appraisal360 you will need to sign up for a trainer's account. Follow the trainer's account signup link http://www.appraisal360.co.uk/register_trainer from the Instant360 page – and then fill out your details in the registration page. When you save the form you will be sent an email with an activation link. Click on the link to validate your email address and activate your account. You can then login in the normal way using your username and password.

If you do not receive the email, check your spam filter. This is the most common reason for emails not being received.

Trainer Control Panel (TCP)

The trainer control panel is the screen you land on when you first login. All the main functions of managing your 360 projects are performed from here. It allows you to:

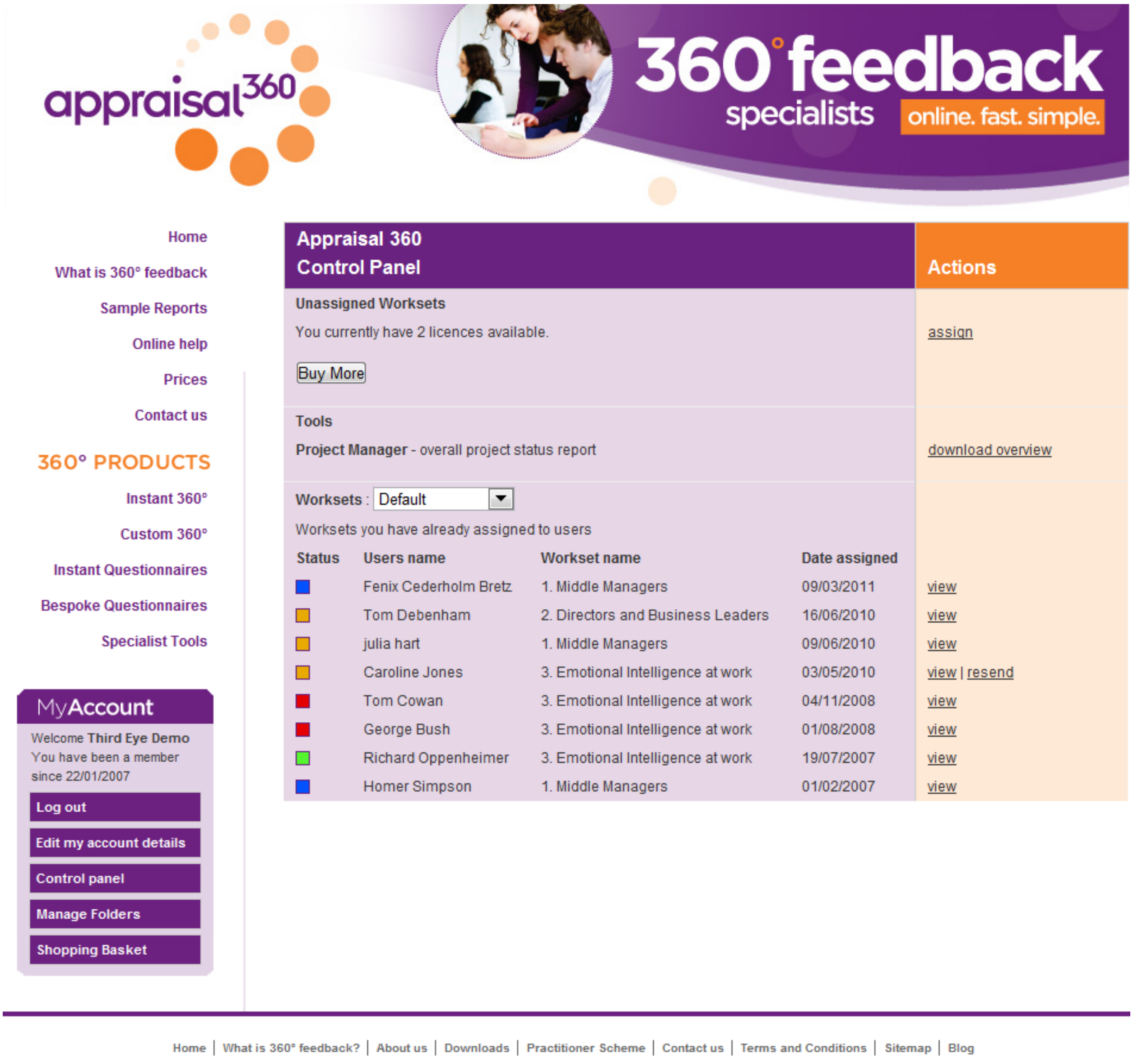
- Manage your inventory of unassigned worksets
- See at a glance how your clients are progressing with their worksets
- Drill down to each individual workset to check details, send reminders and access reports
- Organise your worksets into folders
- Purchase more worksets if you choose to use the online shop.

You can return to the TCP at any time by clicking the <Control Panel> link at the left of your screen.

Purchasing Worksets

If you have no unassigned worksets in your account you will be directed to the products page where you can purchase as many worksets as you want and pay for them by credit card. This all works much like any online shop and discounts are applied at the purchase stage.

Alternatively you can contact us directly to arrange your purchase. If you prefer to pay offline you can do so and we will credit your account once we receive your payment.



The Trainer Control Panel

Assigning Worksets

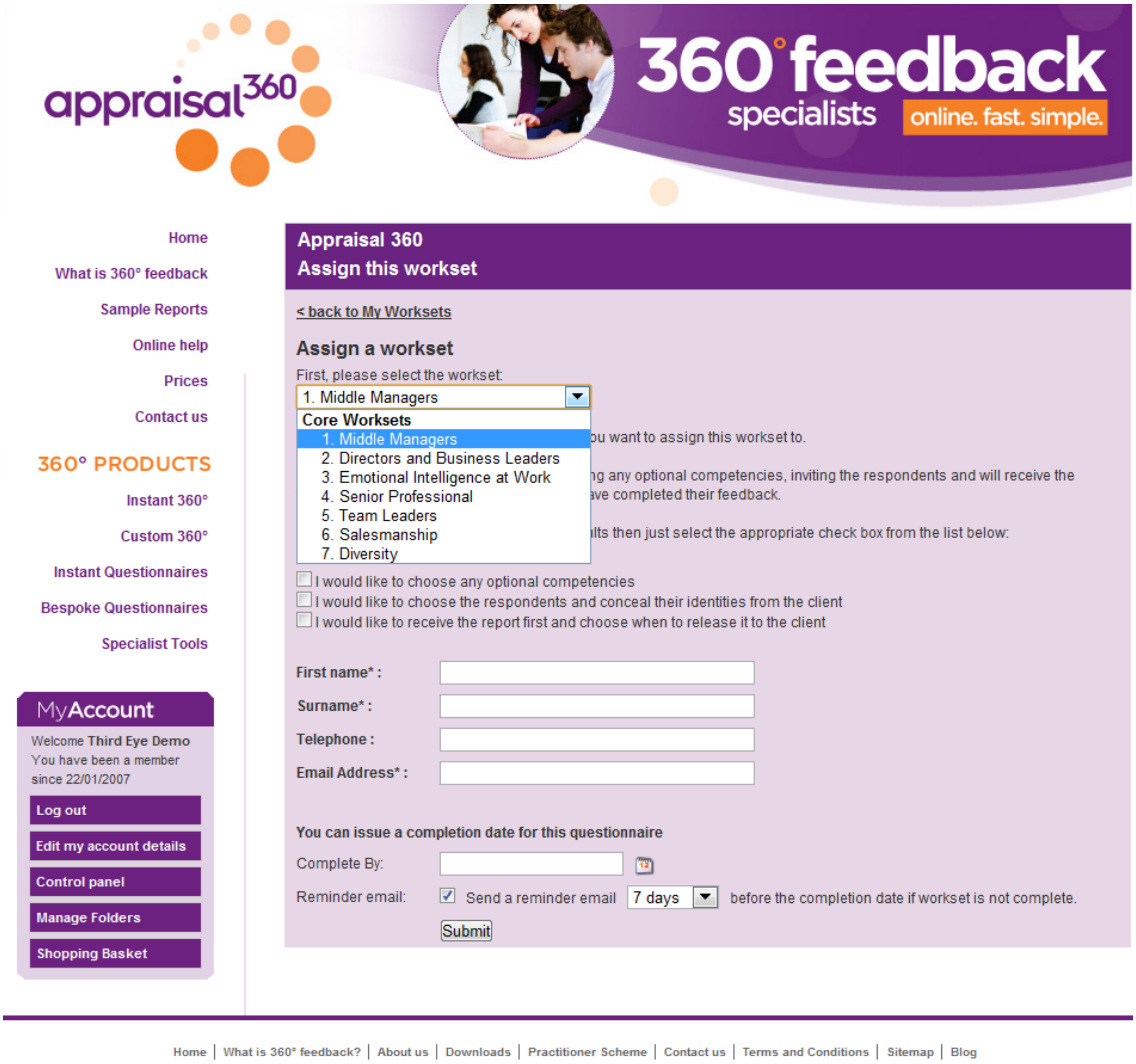
To assign a workset to one of your clients simply choose one of the unassigned worksets from your inventory and then click on the <assign> link to the right. You will then see a new screen where you can select which questionnaire you want to use and set a number of options with regard to that particular client. Enter the name and email address of your client.

By default your client will have full control of the process, but you can choose at this stage to take control of a number of aspects:

- Selecting which competencies are to be included in the questionnaire if that workset has optional competencies
- Selecting the respondents who will be giving feedback

- Choosing to receive the completed feedback report so that you can see it before you release it to the client.
- Select a completion date and choose whether you wish the system to send automated reminders.

Enter the name and email address of the client and he or she will receive an email to say that the 360 is now ready for use.



If you change your mind about the allocation of a workset to a client you can <cancel> the assignment and return the workset to your inventory, so long as the client has not started to use it.

If you have decided to choose the competencies on the appraisee's behalf you will need to do this now before the process can go any further. Click the <build> or <start> link that appears in your TCP next to the workset in question and follow the on-screen instructions. It is important that you do this immediately or you will not be able to complete the assignment of the workset.

Monitoring progress

Once you have assigned a workset to an appraisee it will appear in your list of assigned worksets. A red/amber/green indicator tells you at a glance whether the appraisee has started the process, the process is in progress or the report is completed.

If the appraisee has not yet activated his or her account then there will be a <resend email> link next to that workset under Actions. This will disappear once the appraisee has logged in for the first time.

Clicking the <view> link to the right brings up the Workset Control Panel (WCP), which allows you to check out the details. You can also see how far the respondents have got in filling out the feedback questionnaires and send reminders if necessary.

The <edit settings> button allows you to change the options that you selected when you assigned the workset.

A blue indicator next to the workset tells you that there is a problem that needs attention – normally a bounced email. Select <resend email> and you will be able to edit the address before resending.

Once the report is ready you can control whether the appraisee can see it, using the control on the left of the screen.

Custom Questionnaires

If you have your own questionnaire or competency framework which you wish to use instead of using one of our standard ones, then this will be shown in the list of available questionnaires when you assign the workset.

To load custom questionnaires onto the system you can either a) use our Competency Profiler Tool to create them yourself, or b) we can upload them onto the system for you. Either way you can contact us to discuss your options.

Doing my own 360

Your 360 appraisal will start when you receive an automated email from Appraisal360 informing you that you have been assigned a workset by your trainer or manager. You will need to follow the instructions in this email:

- Click the link in the email to activate your account
- Create a username and password so that you can login to the system when you need to
- Save these details and then login.

Once you have logged in you will see your Appraisee Control Panel and your new workset will be listed. Clicking the <start> link to the right of the screen will take you to the Workset Control Panel. You will now need to do three things:

- Select your competencies (if your trainer has not already done this for you)
- Select your respondents (if your trainer has not already done this for you)
- Complete your self-perception questionnaire.

Workset Control Panel

The control panel is where you control the 360 process. It is here that you:

- Choose who will be giving you feedback (your respondents)
- Complete your self-perception
- Monitor progress and send reminders
- View your report when it is ready
- Download the workbook which accompanies your workset.

Choosing Your Competencies

Your workset will probably come with a number of mandatory pre-set competencies – these are behaviours which are seen as vital for anyone in your position. But you may also have the chance to choose a number of additional optional competencies. The system will tell you how many you can choose. You may wish to discuss your choice with your trainer/manager. Check the boxes next to the optional competencies you want and then click the <submit> button at the bottom of the screen to create the questionnaires.

Now you are ready to complete your self-perception and invite your chosen respondents to fill in your online questionnaire.

Self-Perception

Fill in your own self-perception by following the <fill-in> link on the control panel. You can save your work at any time and come back later if you wish. We recommend that you fill in the questionnaire fairly quickly without dwelling on each question too much, as your initial response is normally the right one and you must answer every question, including the free text questions at the end of the questionnaire. You will always have a “Don’t know” option if you feel unable to answer any given question and it is sufficient to enter just a single character into a free text question if you have nothing further to say.

Invite Respondents

In your control panel you have a control to “Add another respondent”: click on <add> and enter the name and email address of your first respondent in the pop-up window – and select the relationship you have with the respondent from the pull-down menu. Click <send email> and your respondent will receive an email asking them to fill in a respondent questionnaire.

You can add as many respondents as you wish but for best results we recommend about 6-8.

You can check the progress of your respondents at any time by looking at the coloured progress indicators next to each one and send reminders, <re-send email> or <remove> respondents at will.

If a respondent has a blue tag next to their name then it means that the email has bounced. Click on the <resend email> button and check the email address before resending. The system will not allow you to resend to an address which has already bounced.

If a respondent does not receive their email check that the email address is correct by clicking the <re-send email> link and checking the address. If the address is correct, then ask him or her to check the junk email folder.

Viewing Your Report

Once the last respondent has completed you will be able to view your report by clicking the <view> link in your control panel. Your trainer may be withholding the report until he or she is ready to discuss it with you.

You can download and print out an A4 PDF version of your report by selecting the <Export to PDF> option from the control panel menu.

The Workset Control Panel

Responding to a request for feedback

Your request for feedback will come in the form of an automated email. Read the email carefully and click the <questionnaire> link to access the online questionnaire.

You do not need to login to the system to complete a respondent questionnaire.

You must answer every question, including any free text questions – although a single character will suffice if you have nothing further to say.

We recommend that you fill in the questionnaire fairly quickly without dwelling on each question too much, as your initial response is normally the right one.

You can save your work at any time but you must keep the email or you will not be able to access it again. If you lose it, then you can ask for it to be resent.

Once your questionnaire is completed it will be locked and you cannot access it again. However, in the event of a serious mistake we can unlock it for you.

Using Appraisal360 independently

You can use Appraisal360 independently of any manager or trainer if you wish. You will be able to choose from one of our standard range of competency frameworks and complete the process in much the same way as described in the section “Doing my own 360” and access your report when it is ready.

However, you will need to pay before you can access your full feedback report and the number of respondents you can assign will be restricted until your payment is received.

Choosing your product

When you are ready to start, click the <Try before you buy> link and follow the on-screen instructions. Click the <Learn more> link to find what is included in each workset or consult our product guide.

Signup

Once you have finished your self-perception questionnaire you will be asked to register and we will send you a confirmation email which you must act on before you can login to your account to assign your respondents.

Purchasing

To remove the restrictions on your free trial account you can:

a) Pay online with your credit card
b) Contact us to arrange payment and upgrade

You should now follow the instructions as per the section “Doing my own 360”

Viewing and reading your report

As soon as your report is ready a new link will appear in the workset control panel. This will allow you to look at your report online.

To generate the full feedback report in printable PDF format you should select <Export to PDF> from the menu, alternatively you can export it to Excel spreadsheet (.xls) format by clicking the <Export to .XLS> link on the report page. The PDF option will create a downloadable A4 report similar to that on our <Sample Reports> page http://www.appraisal360.co.uk/sample_reports and is more comprehensive than the online version.

We recommend that you use the workbook that you can download from the website at www.appraisal360.co.uk/downloads to help you examine your report and interpret the results and working alongside your mentor or trainer if you have one.

Score	1	2	3	4	5
Frequency	Almost never	Not very often	Some of the time	Most of the time	Nearly always
Ability	Clear weakness	Not very good	Good	Very good	Clear strength
Effectiveness	1-20%	21-40%	41-60%	61-80%	81-100%

My Report
Competency Summary

< Back to Control Panel

Competency		Average
Emotion Coaching The ability to help others develop their emotional capabilities both by direct intervention and example	Your average:	4.15
	Feedback average:	3.92
Managing Relationships The ability to manage relationships effectively and build networks of relationships	Your average:	4.15
	Feedback average:	3.90
Managing Emotions The ability to control unproductive behaviours, manage internal states, impulses and resources	Your average:	3.92
	Feedback average:	3.83
Self Motivation The ability to pursue goals with commitment, passion, energy and emotion	Your average:	4.00
	Feedback average:	3.83
Self Awareness The ability to see ourselves with our own eyes and to understand the ways we impact the world we live in	Your average:	4.08
	Feedback average:	3.81

The top part of your report shows a summary of the competencies in the questionnaire and how overall your self-perception compares to the scores you got through feedback. Your highest-scoring competency (based on feedback scores) is shown at the top and the lowest scoring is at the bottom.

In the second part of the report each competency is broken down into its component questions, showing how you rated yourself and how your respondents rated you. If you chose to allocate relationships to your respondents (e.g. boss, peer, junior) when you assigned them, these will be indicated by the different colours in the report figures. The first figure in the individual feedback scores always represents the same person, the next one the second, and so on, so that you can see if one person consistently scored you high/low or whatever. However, the order will change each time you call up the report so as to help preserve the anonymity of the respondents.

In detail
Self Motivation

Self Motivation
The ability to pursue goals with commitment, passion, energy and emotion

Your average: 4.00
Feedback average: 3.83

Behaviours

Constantly strives to improve performance
Your own answer: 4 Average feedback: 4.60
Individual Feedback: 5, 5, 5, 5, 3,

Is motivated by hope of success rather than fear of failure
Your own answer: 4 Average feedback: 4.20
Individual Feedback: 5, 4, 4, 3, 5,

Sets challenging goals
Your own answer: 5 Average feedback: 4.00
Individual Feedback: 4, 4, 3, 5, 4,

Is ready to seize opportunities
Your own answer: 4 Average feedback: 4.00
Individual Feedback: 4, 5, N/A, 4, 3,

Bounces back quickly after a set-back
Your own answer: 4 Average feedback: 3.80
Individual Feedback: 4, 5, 3, 5, 2,

Able to lift energy level to tackle and complete boring tasks
Your own answer: 3 Average feedback: 3.80
Individual Feedback: 5, 2, 5, 5, 2,

Mobilises others through own efforts
Your own answer: 4 Average feedback: 3.60
Individual Feedback: 3, 4, 3, 5, 3,

Looks at set-backs objectively
Your own answer: 4 Average feedback: 3.60
Individual Feedback: 3, 5, 4, 4, 2,

Kick-starts self into action when needed
Your own answer: 4 Average feedback: 3.60
Individual Feedback: 4, 5, 3, 4, 2,

Is driven to meet objectives and standards
Your own answer: 4 Average feedback: 3.50
Individual Feedback: 3, N/A, 4, 4, 3,

Makes personal sacrifices to meet a higher goal
Your own answer: 4 Average feedback: 3.40
Individual Feedback: 3, 4, 4, 4, 2,

If your questionnaire included some free text questions, these will be shown at the end of your report.

Definitions

Appraisee or Candidate	The person who is the subject of the 360 assessment and whom the report is about.
Behaviour	Something that you do that is part of a particular competency. For example: “Listens to and considers others’ views” is part of the Communication competency.
Competency	A particular skill area that has been identified as important to the job you do. For example, Leadership or Communication.
Feedback	The opinions and perceptions of the respondents.
Report	The output from the process comprising the combined feedback from all the respondents plus the appraisee’s self-perception.
Respondent	The people who have been asked to give their feedback on the appraisee.
Self-Perception	The opinions that the appraisee gives of him or herself.
Trainer	The person who is responsible for managing the process of allocation, progressing and completion of 360s for a number of appraisees.
Workset	A user license which covers all the questionnaires, the report and the workbook for one apprais. One workset will deliver a report for one appraisee.