

A Case Study

Introduction

Sam is in a middle management position with a large company and is keen to progress to a more senior position. She wants to become more involved in the company's marketing and customer service initiatives. Her organisation is committed to a development program that will help her to progress over the next six months. Sam's manager agreed to try and pinpoint her strengths and development needs using Full Circle Feedback. Two other people in the organisation have similar needs and have been through the same process. Sam's manager was also interested in finding a valid and simple feedback process that would complement the company's existing Performance Management System, which current system focuses on performance targets, but has little emphasis on the process of achieving them.

Sam's Full Circle Feedback experience is outlined in the following pages.

The initial steps

1. It was agreed that the aim of the project was to assist Sam's development and to pilot a potential new component of the company's Performance Management System. A survey of Sam's performance in a number of areas was designed based upon the organisation's leadership framework.

2. A rating team of seven people was selected by Sam. It was made up of her manager, three peers and three direct reports.
3. The rating team, who all interacted regularly with Sam, read the briefing information on the website to gain information about the project and how to be an effective rater. They were emailed a password and asked to rate Sam's performance in each area. They also had to rate each area in terms of its desirability or importance.
4. The surveys were completed online. Once complete, the surveys were automatically and confidentially stored in the Full Circle Feedback database.
5. Sam's report is presented in a condensed format on the following pages.

The report

Current performance perceptions

The first page of Sam's report gave him an overall summary of his performance. Each of the five key result areas is shown as a segment of the circle. Sam could easily see how her own ratings in each area with those of her manager (represented by the *) and the average rating of her rating team. Her strengths and areas for development can be easily identified.

Sam's comments

I found the Current Performance Perceptions Profile useful as I could see at a glance how everyone, including myself was rating my performance. It was very interesting to note that my self-perception was reasonably close to the team rating. I work more closely with the team than with my manager and yet my manager is rating me higher than the team. I think they know me warts and all!

Manager's comments

I am a little surprised that my own ratings are higher than everyone else's, including Sam's. I do find her very reliable and competent. We will need to explore this gap together. She seems to have a pretty good grasp on how others perceive her at work.

Current Performance Perceptions – Change Management

The Key Result Area – Change Management details the results for each question.

Sam's comments

I looked at each question and reflected on what I am doing or not doing to make people rate me that way. For instance in, number two, "Works effectively in ambiguous situations", I think that it relates to the fact I always tend to be the one in meetings asking questions about the future. I am a very structured, measured person and I would like to develop more flexibility and spontaneity.

Manager's comments

As a manager I believe it is important to be able to give people specific feedback about what they are currently doing well and how they need to improve. These comprehensive reports gave us this data.

I noticed my more favourable rating on most questions. Number two is interesting – I know Sam is pretty conservative but I find that I can ask her to pick up the ball and run with it. On number five I rated Sam the lowest as this is because whilst I think Sam copes with change reasonably well I do not see her taking the initiative. I would like her to focus on this.

Current Performance Perspectives Report (summary circle)

The rating team's score was then broken down into sub-groups for each Key Result Area.

Sam's comments

There doesn't seem to be too much difference between how my Peers and Direct Reports rate me. I'm really pleased about that as I try to be consistent with everyone. My Direct Reports rate me more highly on Commercial Acumen which is pleasing as I am always emphasising the importance of efficiency.

Manager's comments

Obviously what strikes me once again is my higher rating. Everyone else seems to be pretty much in agreement. I think it may have something to do with the fact that I have worked with Sam in two previous roles and have developed a very good understanding of and respect for her skills.

Current Performance Perspectives – Commercial Acumen

Sam's comments

I am pleased to see how highly my Direct Reports rated me on customer service. It is something I really have been pushing at our weekly meetings. I know I need to work on my assertiveness skills in regard to putting the case forward for more resources. The rating on number four has reinforced that for me and I need to do something now.

Manager's comments

I really do value Sam's level head and her practical approach to things. I'm going to talk to her about how she can evaluate the resource issues that seem to exist in her team.

Current Performance/Importance

Everyone rated each area according to its importance as well as rating Sam's current performance. The two scales are compared in this summary graph.

Sam's comments

This report helped me to understand how well I am performing in areas that people think are important. I seem to be meeting my manager's expectations which is reassuring as she can be hard to read at times. The report shows that I think I could be doing better in all Key Result Areas. There is a gap between how the team thinks I am performing and what they want in all areas apart from Commercial Acumen and that is something I am going to have to explore further.

Manager's comments

We are trying to do more and more with fewer resources and this report helped us to discuss focus and priorities. I'm pretty happy with the way Sam is handling her current role. However, the gaps in the team rating led to an interesting discussion. They are a very motivated group and have high expectations of everyone.

Current Performance/Importance – Organisation Skills

The comparison between Sam's performance and its perceived importance was broken down in each of the five Key Result Areas and explored in more detail.

Sam's comments

I found these reports interesting as they break down the information and allow me to get an in-depth understanding before I work out what I need and want to do. I did notice the big gap on number four and I think it relates to the issues I mentioned earlier about my capacity to be flexible. My manager really only sees what I manage to achieve, whereas the team sees the process and knows how stressed I get when I feel overloaded. I also don't think I delegate well – I would rather do things myself.

Manager's comments

We had a really good discussion about what is important, with a particular focus on the future. I was interested to see what the team felt was important. Sam and I discussed the two items with the largest gaps and we both agreed that they related to her need for structure and to feel in control. I was not aware of the strength of these issues for Sam.

Importance Perspectives Report (Summary Circle)

The importance ratings are broken down so each sub-group's rating can be viewed.

Sam's comments

There doesn't seem to be too much difference between what different members of the rating team think is important. The manager rating is high and I would have expected that as the standards are high and I am made aware of them. It is useful to see what your manager thinks it is important.

Manager's comments

It is interesting to see that I place the highest importance on everything, although I am not really surprised as we are under a lot of pressure to achieve results and I think I pass that message on.

Importance Perspectives Report – Personal Effectiveness

Sam's comments

I'm not surprised to see the lower score on number four as I have just completed a series of leadership programs that have been very time consuming. We have had discussions in the team and my focus is now on putting things into practice.

Manager's comments

The low rating I gave Sam for number four reflects a conversation I had with her recently about how much time she has spent attending courses and seminars in the last year. Whilst I think ongoing learning is imperative, it needs to be balanced with spending enough time with her team.

Snapshots

The final graphic report provided Sam with a 'snapshot' of some of her strengths and weaknesses. She and the members of her rating team selected five strengths and five challenges from a list of 20 customised items. The performance snapshot displays the top five strengths and challenges.

Sam's comments

This report really reinforced all the other feedback. I know I am good at the micro-management and focusing on customers. My big challenge is to think and act in a more strategic manner.

Manager's comments

This really summarises how I see Sam's pathway in terms of her career development. She has a number of strengths that I really rely upon but we need to focus on gaining skills that are needed in senior management as that is where she wants to head.

Note: the following reports have not been shown in the Case Study.

- Individual/Group Report – compares an individual participant's result with the averaged results of all other participants in their FCF-360 project.
- Group Report – provides an overall summary of all the results of all project participants.
- Cumulative Report – allows an organisation to combine reports on a regional, national or international basis.

Turning Feedback into Action

Sam used her Learning Guide (which accompanies each report) to further analyse her results and to target action for the future. She met with her manager and they had a comprehensive discussion about the results and key learning points to be gained. Sam completed the Full Circle Action Plan that accompanied her report. Every three months she received a reminder about her report and Action Plan through the Results Tracker process. She updated the Action Plan and built up a development journal throughout the year. Sam and her manager agreed that he will complete another Full Circle Feedback survey at the end of the year.

Sam's comments

Receiving the Results Tracker and updating the Action Plan every three months helped me to keep alive the insights I had gained and the plans I had made. I also found that by sending the updated plan on to my rating team I was really committed to making things happen. It only took me about 15 minutes to update the plan and it was time well spent.

Manager's comments

Receiving an Action Plan from Sam every three months meant that I was aware of what she was going to work on and how I might support her. It also meant that we were all giving each other feedback throughout the year and not just at survey time. Sam is very focused and committed to improving her performance.