



Management Development Feedback Instruments

By: Paul Knudstrup

The following information is designed to suggest some of the issues that should be kept in mind when evaluating management development feedback instruments. There are a wide variety of these types of tools available, commonly called 360° feedback surveys. Some are excellent; some are rather poor. Determining which specific instruments will best fit an organization's needs is perhaps the most critical step in making a decision. At Midwest Consulting Group we use the following criteria to evaluate these tools.

- **General Approach** – early on we decided that using a behavioral-based tool would be important for our clients. Some instruments are focused on attitudes or general attributes, which are not really measurable and which limit their value and utility. When we need to also gather qualitative or subjective information, we either add items or include some sort of appendix or comment sheet.
- **Specific or General Feedback** – when gathering feedback from those around them, most managers want more, rather than less, detail. This requires an instrument that lists specific behaviors and provides a reasonably wide scale for responses. We have found a 1 – 5 or 1 – 7 Likkert Scale seems to work best. For example, a scale might run from 1 (“Never” does the behavior) to 7 (“Always”); experience shows this to be preferable to a more narrow scale. We wanted a “data-rich” tool with lots of specific feedback.
- **Suitable for a Range of Levels** – we looked for an instrument which covered as broad a range of position levels as possible. Some instruments were suitable for only lower-level managers, while some seemed to apply only to senior level people. We wanted a tool that would work well with individuals from first-line supervisors up to vice-presidents and CEO's. Differing organizational levels will, of course, have different frequencies depending on the specific behaviors. A senior executive would probably be perceived as doing behaviors associated with strategy issues very frequently. A first-line supervisor would more frequently do behaviors related to coaching and performance feedback but would be less likely to do strategy-related activities.
- **Width of Feedback** – we found some surveys gather feedback from only three perspective – Boss, Self, and “Others”. We wanted to be able to separate the perceptions of a manager's

Employees from those of his/her Peers. Experience has shown that the perceptions of ones direct reports are frequently different than that of the Boss or Peers. Being able to pinpoint the factors and behaviors that have similar scores across four perspectives increases the value of the feedback to a great extent. When a manager can graphically see that, for example, the Employees uniformly give low scores in “Makes sure people know what they are expected to do before they begin” it is hard for that manager to ignore those results. Separate lines of data makes it relatively easy to determine which behaviors/factors are Strengths and which are Opportunities for improvement.

- **Validity and Reliability** – some publishers appear to have failed to do their homework from a statistical standpoint. We sought an instrument that had been successfully validated using accepted statistical measures. Having a high level of initial internal factor reliability is important. When the publisher is able to provide you with evidence of solid statistical tests to support their instrument, your confidence increases. Post-participation surveys to determine face validity for the instrument is important too, but not enough by itself. As you examine tools to use in your organization, make sure the publisher has done their statistical homework.

- **Norm Group Issues** – how big is the comparison group or norm group? Some instruments use a database containing the scores of all past participants. In the case of the tool we use the most, that means individual participant’s scores are compared to those of about 15,000 other managers. Other instruments may use some other standard, such as a group of fixed size. What is the composition or make-up of the norm group? What are the demographics of the group, and does that correspond sufficiently to your organization to be of value to your participants. Just how current or up-to-date is the norm group? Is the group revised or updated regularly to reflect the scores of new participants and changes in scoring patterns?

- **Confidentiality** – we were very concerned about having a process that is totally confidential. In order to maximize the value to the participant, responses (except for Boss and Self, obviously) need to be anonymous. Completed forms should not be gathered by anyone inside the company (HR or, even worse, the manager him/herself) but should be sent directly to an independent outside processor. And, results should be made available only to the individual participant, rather than being sent to the company. We believe doing otherwise destroys confidentiality and severely reduces the value of the process. Providing the company with aggregate data on a group of managers is desirable (and should be part of the project), but individual results should not be distributed to anyone other than the individual participant.

- **Ease of Use** – we wanted an instrument which was easily understood by the manager participants as well as those who would be completing the forms. We looked for survey items that were clear and to which respondents could easily react. Asking for feedback on complex or multiple-behavior items results in confusion and mis-interpretation of what the item “means”. Some of the instruments we reviewed were not single-behavior focused, which caused us to be concerned about the usefulness of the responses. We also wanted to make sure that the

administrative side of the process was manageable; we wanted a tool that was not only easy to fill out, but would provide individual results which had a high degree of utility for the participants. Finally, we wanted those results to be presented in a variety of formats to meet the needs of participants with different preferences for processing information.

- **Cost** – the cost of the instruments and scoring represents only a portion of the total cost of a feedback project. While we were able to find surveys that were cheaper than the one we selected, they were unable to meet most of our other criteria.

The above information and perspective should assist clients in evaluating various instruments and selecting those that best fit your needs. We welcome your questions, comments, and inquiries.

To learn more about the specific management development feedback tools used by Midwest Consulting Group, contact us today.