MERCER 360
MAIN CHARACTERISTICS
Mercer’s Point of View
360 assessment is a cornerstone of leadership development and talent planning

- Identifies **strengths and areas of development** for both individual leaders and teams of leaders
- Reveals competency gaps and **implications for the leadership pipeline**; informs talent development investments for future leaders
- Serves as a platform for conversation about **how leadership teams work together**
- Initiates a structured approach to **individual development planning** aligned with opportunities for improvement
Mercer’s Point of View
Successful 360 initiatives are more than just survey administration and reporting

<table>
<thead>
<tr>
<th>Critical 360 Components</th>
<th>Best-Practice Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Context &amp; Communication</td>
<td>• 360 participants clearly understand the purpose and outcomes of the initiative</td>
</tr>
<tr>
<td>Survey Design</td>
<td>• Survey content directly addresses mission-critical leadership behaviors</td>
</tr>
<tr>
<td></td>
<td>• Questions are designed to differentiate participant performance</td>
</tr>
<tr>
<td>Actionable Results</td>
<td>• 360 feedback is tied to development suggestions</td>
</tr>
<tr>
<td></td>
<td>• Participants are held accountable for making progress against their individual development plan</td>
</tr>
<tr>
<td>Integration with Talent Programs</td>
<td>• Results are used shape succession planning and learning and development priorities</td>
</tr>
</tbody>
</table>
360 Feedback

Rater feedback can be gathered from a variety of perspectives

- Direct Reports
- Peers
- Self
- Others (e.g., Internal Customers)

Sample Competencies

- Strategic Thinking
- Initiative
- Innovation
360 Assessment Surveys
The survey design process can accommodate a range of needs

- Three leadership levels: Leading Others, Leading Managers, Leading Business
- Library of competencies to select from
- Each competency has associated survey items
- Each survey item has associated development suggestions
- Rapid turnaround on survey set-up and reports
360 Assessment Surveys
Our standard assessment evaluates 16 Essential Leadership Competencies

<table>
<thead>
<tr>
<th>Essential leadership competencies</th>
<th>Strategic</th>
<th>Operational</th>
<th>People</th>
<th>Personal</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Creates strategy</td>
<td>Drives results</td>
<td>Inspires</td>
<td>Learning agility</td>
</tr>
<tr>
<td></td>
<td>Drives innovation</td>
<td>Customer focus</td>
<td>Coaches and develops others</td>
<td>Adaptability</td>
</tr>
<tr>
<td></td>
<td>Develops market</td>
<td>Collaborates with others</td>
<td>Drives performance</td>
<td>Courage</td>
</tr>
<tr>
<td></td>
<td>insights/business</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>intelligence</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mental agility</td>
<td>Influences and</td>
<td></td>
<td>Optimizes talent</td>
<td>Cultural sensitivity</td>
</tr>
<tr>
<td></td>
<td>networks</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sample organization specific

- Thinking horizontally
- Strategic risk-taking
- Decision excellence
- Financial or technical knowledge

- Priority setting
- Political savvy
- Compliance

- Building effective teams
- Develops capability
- Valuing diversity

- Integrity and trust
- Humility
- Energy and drive
- Self-control
- Work/life balance
360 Assessment Surveys
Also, Mercer’s online 360 platform allows for significant customization

1. Survey content and instructions
2. Performance and importance rating scales
3. Participant groupings by department or function (for group reports)
4. Client branding
5. Free form comments
6. Web-based selection of raters
7. Multiple languages
8. Manager approval of raters
9. Dispersion of ratings before rater completes survey
10. Real time dashboard to monitor survey completion progress
Assessment Survey Reports
Gaps between individual and others’ ratings are easily identified

Sample Item Results

<table>
<thead>
<tr>
<th>Competencies and Items</th>
<th>Performance Ratings</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Self</td>
</tr>
<tr>
<td>1.</td>
<td>4.00</td>
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<tr>
<td>2.</td>
<td>4.00</td>
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<tr>
<td>3.</td>
<td>4.00</td>
</tr>
<tr>
<td>4.</td>
<td>3.00</td>
</tr>
<tr>
<td>5.</td>
<td>3.00</td>
</tr>
<tr>
<td>6.</td>
<td>3.00</td>
</tr>
</tbody>
</table>

Development Feedback Report

Debra Simmons

Participant Information
Survey End: 12/31/2011 11:59:00 PM
Generated:

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Feedback Report For Debra Simmons - 12/31/2011 11:59:00 PM
### Development Suggestions by Competency Item

Each report includes development suggestions specific to participant results.

<table>
<thead>
<tr>
<th>Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Demonstrates enthusiasm around achieving results, even in difficult situations, and consistently reaches outcomes on time, on budget and without errors.</td>
</tr>
<tr>
<td>2. Takes responsibility to ensure that the quality of products, services or concepts meet the needs of internal and external customers.</td>
</tr>
<tr>
<td>3. Operates with speed and flexibility; doesn’t slow things down or become a bottleneck.</td>
</tr>
<tr>
<td>4. Proactively looks for ways to improve own and the team’s performance, capabilities and results.</td>
</tr>
<tr>
<td>5. Takes timely and effective action to deal with shortfalls, or problems in processes, and escalates if required.</td>
</tr>
</tbody>
</table>

#### SAMPLE

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### Development Suggestions for Item

- Before leaving work each day, take time to create a prioritized “to-do” list for the next day. Use this task list to help keep you focused on what’s most important.
- Identify the most challenging goal for your team to accomplish over the next year. Review your progress periodically and make adjustments as needed.
- Select an important project and set a goal of either completing it ahead of schedule or at a quality level that will exceed expectations.

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Focus on obtaining results, not just on working longer hours.

- Avoid procrastination. On big assignments that may seem difficult, make a list of the small, easy tasks that are required and do those first.
- Stick with tasks until they are completed. An occasional break is good to clear the head, but then get right back to it.
- Set aside a specific window of time for working on an assignment. During this time, avoid interruptions and distractions to the extent possible.
- If you hit a roadblock that you can’t seem to get past, ask for help. It’s likely that one of your peers has experienced a similar issue and might have some advice for getting back on track.
- Think of the times you’ve made slow (or no) progress on an assignment. Consider the causes for this: Lack of required knowledge? Lack of focus? Too many competing demands? Use this information to help you better manage future assignments.
Individual Development Plan
Appendix includes thought questions and template for capturing next steps

Receiving Feedback and Preparing an Individual Development Plan (IDP)

- What was/were the most important “learning(s)” gathered from your direct report feedback?
- What are the largest discrepancies in perception between yourself and others? Why do you suppose these discrepancies exist?
- Is there any single “learning” that emerges as most important?

Including Your Personal Objectives
As you use your feedback to identify development areas, reflect on your own personal objectives as a leader. Ask yourself:

- Where would you like to go in your career? Over what time frame?
- What can I do in my current role/job to develop?
- What specific accomplishments will indicate that I am on the right track?

Reviewing Your Capabilities
Based on your review of your assessment against the leader competencies, discuss with your manager and your own views, list your greatest strengths and qualities most in need of improvement as a future leader:

1. What are your greatest strengths?

2. How can you best leverage your greatest strengths moving forward?

3. What areas are most in need of development?

Selecting Your Individual Development Plan Target Areas

Once you have thoroughly reviewed your feedback reports and identified themes for development, you should prioritize your areas for improvement in the context of your own personal objectives and capabilities. Remember to keep the areas that you are targeting for improvement to a manageable number. Identify the top three items that you think need attention, that you really care about changing, and that you think will have the greatest long-term impact. Three should be a sufficient number and will enable you to maintain focus and momentum.

Your formal Individual Development Plan is a document to be shared with your manager. Your manager will collaborate with you to support your plan. It will serve as the framework for action related to your development as a leader.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Timeframe for Completion</th>
<th>Measure of Success</th>
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<tbody>
<tr>
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Delivering 360 Feedback

- 360 feedback may be delivered via one-on-one or group feedback sessions
  - One-on-one sessions focus on processing participant specific data and outcomes
  - Group sessions equip attendees with an understanding of how to read their reports and what to do with the results
- It is often more efficient to use a group approach with large populations of individual contributors and front line managers
- Executive teams may require one-on-one debrief sessions, then a facilitated executive team meeting to identify high-level strengths and opportunities within the team *with implications for succession planning*
### 360 Assessment Process
*Project work steps and timing are flexible based on business needs*

<table>
<thead>
<tr>
<th><strong>Design</strong></th>
<th><strong>Collect</strong></th>
<th><strong>Deliver</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>• Determine 360 survey strategy and outcomes (e.g., purpose, messaging)</td>
<td>• Launch and monitor 360 survey; provide proactive updates and user support throughout campaign</td>
<td>• Deliver individual assessment feedback to leaders</td>
</tr>
<tr>
<td>• Establish project work steps and timing</td>
<td>• Send survey completion email reminders</td>
<td>• Facilitate leadership team meeting to discuss aggregate results</td>
</tr>
<tr>
<td>• Confirm 360 survey elements (e.g., rating scale, reporting content)</td>
<td>• Close survey and generate 360 reports</td>
<td>• Conduct working session with project Sponsors to explore implications for talent management and succession planning</td>
</tr>
<tr>
<td>• Gather participant emails</td>
<td>• Review reports with project sponsors to identify themes</td>
<td></td>
</tr>
<tr>
<td>• Test survey site</td>
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<td></td>
</tr>
</tbody>
</table>
360 Assessment Process
Survey implementation may include other components based on the assessment strategy

- 360 feedback is supplemented with behavioral event-based interviews and/or personality inventory (e.g., Hogan)
- Mercer consultant delivers one-on-one 360 survey feedback providing coaching/recommendations for development
- Conduct a live session with managers of participants to build development coaching skills
- Incorporate 360 data as a first step in building a succession plan
- Periodic re-assessment to measure performance change against individual and group goals
- Assessment for individuals on international assignment
Case Example #1

**Company overview:** International law-firm with 1,000+ attorneys representing over 82% of the Fortune 100.

**Assessment need:**
A practice Co-Chairman requested Mercer’s assistance in assessing both Chairs along with the effectiveness of the Co-Chair structure. The Co-Chair structure was put in place one year ago. The intention was to ensure the ongoing success of the leadership structure and incumbents in the role.

**Survey design:**
- Client co-branded survey and reports
- Ten competencies comprised of 58 items blending content from both Mercer and the client
- Five-point rating and competency importance scales
- Because participants shared the leadership role, ratings were averaged in a group report to show a collective score
- Comment fields included for each competency as well as two open-ended questions at the end of the survey to capture strengths and development opportunities
- Raters were pre-loaded
- Comparisons were made across self, business unit heads, practice group heads, office heads, management committee members, and executive support
- Survey and reports were produced in English
- Supplemented Mercer’s standard report sections with additional custom sections
- Development suggestions from Mercer’s library were linked to participants’ top development needs

**Project outcomes:**
The 360 assessment took 3 weeks during which the survey campaign was open for 1.5 weeks. Of the raters loaded in the system, 74% completed the survey. On average, each co-chair had approximately thirty-three raters with which self scores were compared. Mercer combined the 360 results with feedback from 8-10 executive interviews to paint a more complete picture of both the incumbents and leadership structure. Assessment themes such as the need for greater focus on strategy were a key input to a subsequent partner retreat.
Case Example #1 - Sample Report Detail

Overall Results for Competency by Role

Graphical Item Results

Case Example #1 - Sample Report Detail

BUH - Business Unit Head
PGH - Practice Group Head
OH - Office Heads
MCM - Management Committee Members
ES - Executive Support
Case Example #2

**Company overview:** Asian Regional Bank with 2,400 employees and a capital base of $165 billion.

**Assessment need:**
The bank partnered with Mercer to conduct an assessment and development center for seventeen leaders within the organization. Prior to attending the center, leaders participated in a 360 assessment to gauge strengths and opportunities for development.

**Survey design:**
- Based on custom client content involving eight competencies and 44 items
- Five-point rating scale anchored by frequency of observation regarding item
- Two comment fields were included at the end of the survey to capture strengths and development opportunities
- Raters were pre-loaded
- Feedback was gathered from manager, peer, client and direct reports though only comparisons between self and other were displayed in the report
- Competency importance ratings were not collected
- Survey and reports were produced in English
- Supplemental report sections were selected to provide a graphical comparison of Self and Others by item
- Top strengths and top development needs were displayed at the competency level (3 each)
- Development suggestions were not utilized

**Project outcomes:**
The 360 assessment took 4 weeks during which the survey campaign was open for 3 weeks. Of the raters loaded in the system, 89% completed the survey. On average, each participant had approximately eight raters with which self scores were compared.
Case Example #2 - Sample Report Detail

Overall Results for Competency

Graphical Item Results

<table>
<thead>
<tr>
<th>Rating scale and point values:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - Does not do this</td>
</tr>
<tr>
<td>2 - Seldom does this or not too well</td>
</tr>
<tr>
<td>3 - Sometimes does this</td>
</tr>
<tr>
<td>4 - Does this quite often and well</td>
</tr>
<tr>
<td>5 - Does this very well all the time</td>
</tr>
</tbody>
</table>

Client Orientation

<table>
<thead>
<tr>
<th>Rating</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>Avg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
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</table>

Overall Results

<table>
<thead>
<tr>
<th>Rating</th>
<th>1</th>
<th>2</th>
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<th>4</th>
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<td>Self</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others</td>
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</table>

Key: ▲ Current rating given, ● Your current self rating.