

# Your Journey as a Blue 360 Administrator

## Encouraging Engagement

# ❖ Agenda

- **Engaging your Participants**

- Subject Management for Participants
- Participant Rater Selection process
- Enhancing the User Experience to Encourage Engagement
  - Self-Enrollment and Opt-out
  - Combining known and unknown respondents
  - Adding Additional Context to your Surveys

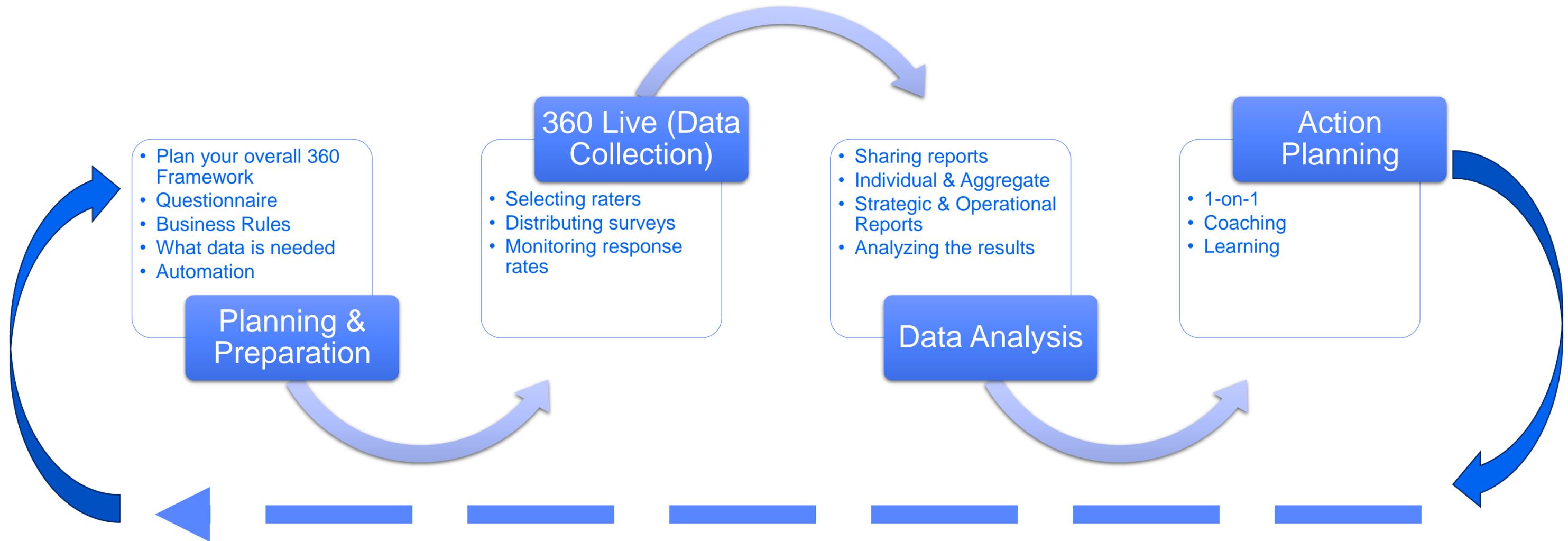
- **Communication to Action**

- Customizing email notifications

- **Managing the Process**

- Task Management

# ❖ Journey of the 360 Initiative



**Encouraging participation in a 360-degree feedback process is essential for gathering comprehensive, reliable, and balanced data that can inform individual and organizational development. It promotes fairness, self-awareness, and continuous improvement while enhancing communication and trust within the organization.**

# ❖ Engaging your Participants



# ❖ Polling Time!

YES

NO

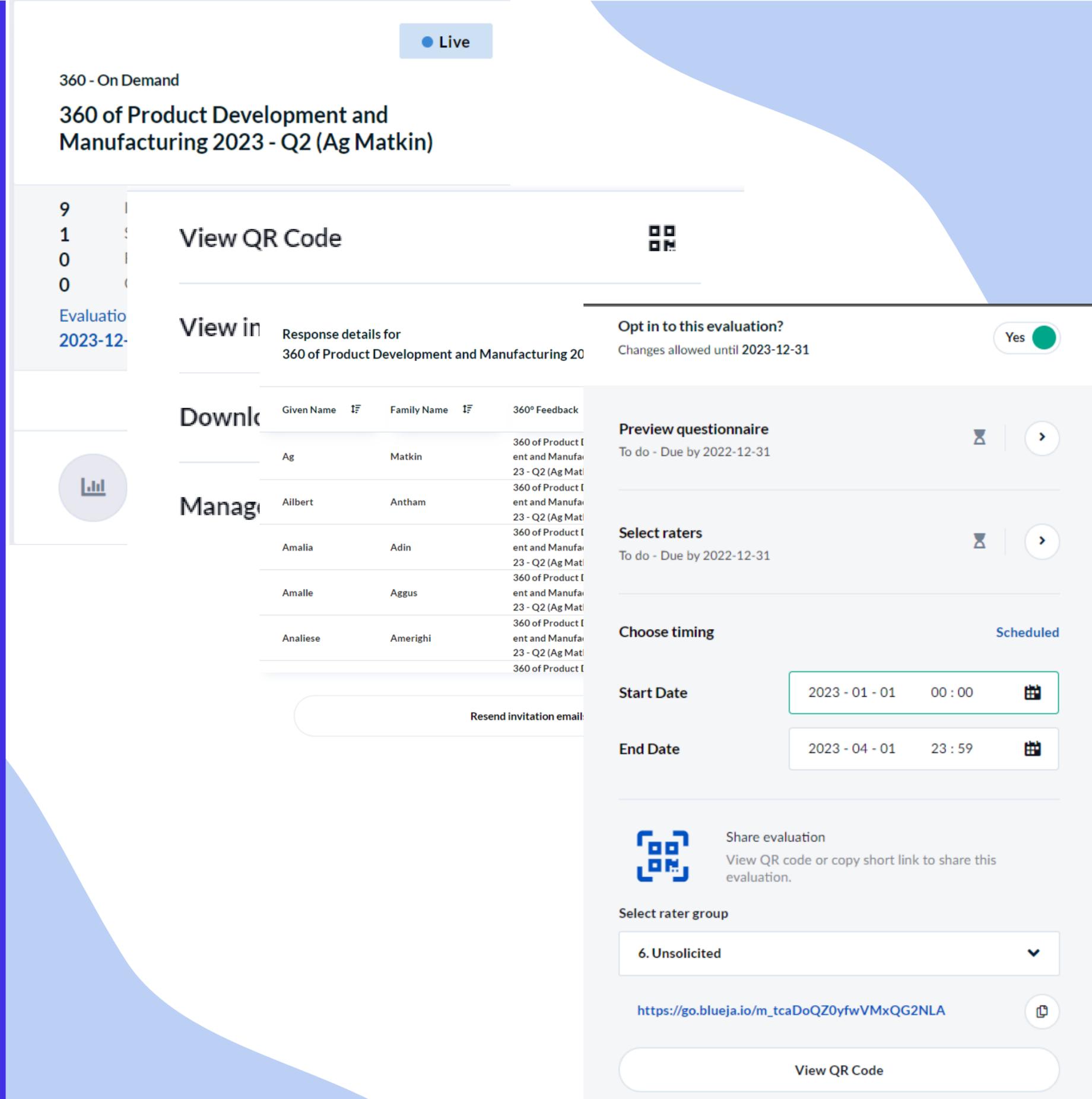
**Do you use the Subject Management Task to engage your participants and allow them to manage their 360s?**

# ❖ Subject Management

Allows the participant control over managing their 360 process with governance from the project administrator. This task allows the participant to manage the following aspects of the evaluations.

- Opt-In or Out of participation
- Create personalize questions for goal setting
- Access to rater selection
- View Response Rates and rater network completion status
- Set an evaluation window
- Access to participant evaluation short links and QR codes
- Resend the Invitation to those who are not complete.

*Note: these options are configurable and governed by the administrator.*



The screenshot displays the 'Subject Management' interface for a 360 evaluation. At the top, it shows '360 - On Demand' and '360 of Product Development and Manufacturing 2023 - Q2 (Ag Matkin)'. A 'Live' indicator is present in the top right. The interface is divided into several sections:

- View QR Code:** A section with a QR code icon for quick access.
- View in:** A section titled 'Response details for 360 of Product Development and Manufacturing 2023 - Q2 (Ag Matkin)'. It includes a 'Download' button and a table of rater details.
- Manage:** A section with a 'Resend invitation email' button.
- Opt in to this evaluation?:** A toggle switch set to 'Yes', with a note 'Changes allowed until 2023-12-31'.
- Preview questionnaire:** A section with a timer and a right arrow, labeled 'To do - Due by 2022-12-31'.
- Select raters:** A section with a timer and a right arrow, labeled 'To do - Due by 2022-12-31'.
- Choose timing:** A section with a 'Scheduled' status and date/time pickers for 'Start Date' (2023-01-01 00:00) and 'End Date' (2023-04-01 23:59).
- Share evaluation:** A section with a QR code icon and text: 'Share evaluation. View QR code or copy short link to share this evaluation.' Below this is a 'Select rater group' dropdown menu set to '6. Unsolicited' and a short link: [https://go.blueja.io/m\\_tcaDoQZ0yfwVMxQG2NLA](https://go.blueja.io/m_tcaDoQZ0yfwVMxQG2NLA).
- View QR Code:** A large button at the bottom right.

# ❖ Participant Rater Selection

Rater Selection allows the delegation of building the rater network to the participant. With governance determined by the task settings, the participant can choose who they would like to evaluate them.

The project administrator can set the following rules.

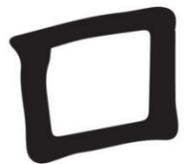
- Min/Max participants per group.
- Who is required to be part of the participants rater network.
- If raters are selected from a list, or manually entered by the participant.
- Set the maximum number of times each rater can be invited

The screenshot displays a user interface for selecting raters, organized into four distinct sections:

- 1. Self**: Minimum: 1 | Maximum: ∞. A single rater, Arleen Ridgewood, is listed with a lock icon.
- 2. Managers**: Minimum: 0 | Maximum: ∞. A single rater, Hank Canedo, is listed with a lock icon.
- 3. Peers**: Minimum: 3 | Maximum: 8. A "Select" button is present. A list of eight potential raters is shown, each with a close icon (⊗): Agustin Hucker, Alain Harriskine, Aldin Brixey, Alexandro Eldin, Alisander Gainfort, Aloysius Broose, Ame Bullman, and Ania Brownlie.
- 4. Direct Reports**: Minimum: 3 | Maximum: 8. A "Select" button is present. A list of eight potential raters is shown, each with a close icon (⊗): Abbey Molineux, Belinda Leckey, Beulah Southway, Beverley McKeurton, Brannon Dowgill, Clem Turfitt, Donielle Iley, and Donnell Brave.

# ❖ Polling Time!

YES



NO



**Do you set the maximum number of times each rater can be invited?**

# ❖ User Experience to Encourage Engagement

The flexibility in Blue allows the task owner control over their participation level. When participants have the choice to provide unsolicited feedback or the option to opt out of evaluating others, the feedback they provide is more likely to be constructive and thoughtful, rather than perfunctory or insincere. This can lead to more meaningful and actionable feedback for those who do participate.

It's important to strike a balance between offering these options and ensuring that the 360-degree serves its intended purpose. Some organizations may choose to encourage participation without making it mandatory. Ultimately, the success of such initiatives depends on clear communication, and a supportive organizational culture that values feedback and development.

## 360 - On Demand

Hi Ag Matkin, you have been invited to provide feedback for the following evaluations.

+ Add 360° Feedback

Aleen Kinsett (Product)

In Progress Ends on: 2023-12-24

Continue

Opt out

Amandie Tomkins (Product)

Open Ends on: 2023-12-30

Start now

Opt out

Anni Wallicker (Product)

Open Ends on: 2023-12-30

Start now

Opt out

Ag Matkin (Product)

In Progress Ends on: 2023-12-31

Continue

Opt out

### Add 360° Feedback

Close

amalee

(10 Available)

360° Feedback

+ Add

360 of Benefit 2022 - Q3 / Amalee O'Regan

+ Add

360 of Benefit 2022 - Q4 / Amalee O'Regan

+ Add

360 of Benefit 2023 - Q1 / Amalee O'Regan

✓ Added

360 of Benefit 2023 - Q2 / Amalee O'Regan

# ❖ Polling Time!

YES

NO

**Would you use the self-enrolment approach?**

# ❖ Survey Piping to Enhance Participants Experience

Use field mapping symbols in various areas of Blue to bring in (pipe) data from the Blue database, such as Blue task emails, questionnaires, report blocks, welcome messages, and error messages.

Using piping symbols and field mapping variables provides customized information and purpose to the experience, which leads to increase response rates by providing a more relevant context for the users.

## Resources

[Default piping/field mapping symbols](#)

[Advanced field mapping symbols](#)

[Create custom field mapping symbols](#)

## Evaluation for Anni Wallicker (Product)

Dear Ag,

You have been invited to complete a 360 degree feedback review.

You are reviewing: **Anni Wallicker**

You belong to the group: **4. Direct Reports**

You are among **8** in this group

### Empowering\*

Empowerment is the process of enabling or authorizing an individual to think, behave, take action, and control work and decision making in autonomous ways.

	Expertise					
	Emerging	Basic	Intermediate	Advanced	Expert	Unable to Rate
Encourages and values initiative <i>You previously answered: Expert</i>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Takes into consideration suggestions from other colleagues <i>You previously answered: Intermediate</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Includes colleagues in decisions that involve them <i>You previously answered: Advanced</i>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transmits energy and encourages others to go beyond <i>You previously answered: Advanced</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

# ❖ Polling Time!

YES

NO

**Would you use any piping?**

# ❖ Communication to Action

COMMUNICATION ACTION IN ACTION

The image features the text 'COMMUNICATION ACTION IN ACTION' in a large, bold, sans-serif font. The word 'COMMUNICATION' is in black, 'ACTION' is in red, 'IN' is in black, and the second 'ACTION' is in blue. A vertical line separates the two 'ACTION' words. Silhouettes of people in various active poses are placed on top of the letters: a person at a whiteboard on 'C', a runner on 'O', a person with a briefcase on 'M', a person walking on 'M', a person walking on 'U', a person walking on 'N', a person walking on 'I', two people high-fiving on 'C', a person jumping on 'A', a person jumping on 'T', a person jumping on 'I', a person jumping on 'O', a person jumping on 'N', a person jumping on 'I', a person jumping on 'N', a person on a phone on 'A', a group of three people on 'C', a person jumping on 'T', a person jumping on 'I', a person jumping on 'O', and a person jumping on 'N'.

# ❖ Building Communication Touchpoints

Improving engagement with 360 users hinges on effective communication throughout the feedback project. Essential to this is proactively notifying users about their pending tasks, which is pivotal in maintaining project efficiency. Within the project's lifecycle, Blue Administrators may find several instances necessitating user communication.

Here are several ways to building an effective communication strategy.

- Include branding within your communication touchpoints.
- Set expectations and tailor the email message based on the recipient on what is required from them.
- Add piping to customize the email making it more personable.
- Leverage email reminders and completion email to reinforce pending action is still required, or when they are done.
- Stagger reminders cadence and timing within the period the surveys are open to the recipient.

explorance  
Corporation



**Dear Ag Matkin**

You are requested to provide your 360 feedback. In this process, you will be able to highlight strengths as well as help underscore areas of improvement for each person you are invited to evaluate. Here are a list of people you need to provide feedback for:

- Arleen Ridewood
- Amalee O'Regan
- Afton Schreiner
- Byrom Perigo

Thank you in advance for your participation.

[Complete the 360](#)

Your feedback will be instrumental in helping colleagues seek improvement.

The Explorance team



# ❖ Managing the Process



# ❖ Project Management

Project Management allows you the flexibility to monitor and control the project after it has been published.

- Quickly view the status of tasks and notifications
- Modify the fillout task start and end dates for the completion of questionnaires by a selected rater, as well as stop, delete, resubmit or unsubmit a questionnaire
- Add or modify the subjects of this project
- Export responses
- Analyze comment responses
- Manage the individual reports

The screenshot displays the Explorance Project Management interface. At the top, there is a navigation bar with tabs for Tasks, Subjects, Responses, Fields, Text Analytics, Project Links, and Report Management. The main content area is divided into two sections: a summary on the left and a task list on the right.

**Summary Section (Left):**

- Tasks:** A donut chart shows the status of tasks: 88.6% (red) and 11.4% (green).
- Filters:** A dropdown menu is set to "All".
- Status Legend:**

Status	Percentage	Count	Action
Completed	11.4%	(4)	✓
Expired	88.6%	(31)	⌚
Was In Progress	8.6%	(3)	⏸
Was Not Completed	80.0%	(28)	⏸
In Progress	0.0%	(0)	🔄
Not Completed	0.0%	(0)	⏸
Not Ready	0.0%	(0)	⚠
Opted-out	0.0%	(0)	🚫

**Task List Section (Right):**

- Task List:** A table of tasks with columns for search, field, filters, task actions, and sort options. The total number of tasks is 35.
- Task 1: Fillout for Bobbi Daniels**
  - Status: Completed (Green checkmark)
  - Self: Bobbi Daniels (Started)
  - Start Date: 2021-02-17 12:51
  - End Date: 2021-02-27 12:51
  - Schedule: Fill Out
  - Enrollment type: System
- Task 2: Fillout for Maurice Ryder**
  - Status: Expired (Was Not Completed) (Red clock icon)
  - Self: Maurice Ryder (Started)
  - Start Date: 2021-02-17 12:51
  - End Date: 2021-02-27 12:51
  - Schedule: Fill Out
  - Enrollment type: System
- Task 3: Fillout for Linda Daniels**
  - Status: Expired (Was Not Completed) (Red clock icon)
  - Self: Linda Daniels (Started)
  - Start Date: 2021-02-17 12:51
  - End Date: 2021-02-27 12:51
  - Schedule: Fill Out
  - Enrollment type: System

Q&A



# ❖ Upcoming 360 Webinars

## Your Journey as a Blue 360 Administrator (Episode 3 of 3): Automation and Management

- December 12, 9pm Eastern time zone, mainly for customers in the APAC regions
- December 13, 8am Eastern time zone, mainly for customers in the Europe/Africa/Middle East regions
- December 13, 2pm Eastern time zone, mainly for customers in Americas regions

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