

360-degree Strategic Leadership Team Alignment: Profile of an Intervention Program

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Abstract

This paper summarizes a 360-degree strategic consultation designed to align and develop the Facilities Management (FM) department executive team at a business university. The two-year program presented here defines specific tools and the process used. The authors are the facilitator and the executive team leader. We combined customized, qualitative methods with a quantitatively scored and normed survey instrument. Results showed that (1) the methodology and assessments were effective; (2) most team members improved targeted leadership capabilities; and, (3) issues identified here must be resolved before the goal of team alignment is achieved. We discuss what worked, remaining issues to be solved, and offer recommendations for using a 360-degree program as a strategic leadership alignment tool.

1. Introduction: the consultation as developmental alignment, our roles and report

Aligning top-level teams remains a challenge for leaders particularly in IT and in other businesses as well. [1] Two of the top five management concerns of technology leaders and other executives are IT and business alignment and IT strategic planning.[2]

A study reported in the Harvard Business Review [3] concluded that the average team achieves only 63% of the objectives of their strategic plans. Key issues underlying this finding include (1) How well the team communicates, (2) aligns around top initiatives, and (3) creates short-term and long-term plans. A

description of one of the authors' main arguments in that study noted that, "More than your strategy, your marketing plan, you're IT system or an entire finance department full of spreadsheets, management information and predictions, people is the key to your success. To transform your business, transform your people." [4]

Our experience suggests that strategic team alignment is neither quick nor easy. One method that has produced promising results is a 360-degree evaluation accompanied by customized facilitation and training. We describe this program designed to align a 5-member top level Facilities Management team at a business university.

The authors of this paper collaborated on the project. The first author is an experienced consultant and professor and the facilitator of this project. The second author is the Director of the FM department and the team leader. The role of the first author is consultant and to a lesser extent active participant observer. The role of the second author is participant and team leader; as such, the second author collaborated with the first author in the process, evaluation, and reporting on outcomes.

While this paper is a result of the sixteen-month consultancy, it also provides a window into the literature on 360-degree interventions as process and outcomes. To that end, we envisioned our roles, in part, as participant observers in the tradition of Glaser and Jorgenson [5]. Lessons from the study also offer insights into the use of the 360-degree intervention as a strategic leadership alignment tool in university settings and for organizations in general.

In the following sections, we define and summarize issues in the literature on 360-degree evaluations. We then present the methodology and results of the consultancy, and end by offering comparisons of our

findings with selected themes in the literature. We close with lessons and recommendations that may apply to IT and business leaders and practitioners.

1.1. 360-degree interventions: advantages, limitations, and issues

The 360-degree instrument is a survey in which peers, direct reports, and bosses evaluate each member of a designated team. The tool is one response to the flattening of organizations and growing importance of teams. Corporations and organizations have used the 360-degree management evaluation tool across industries since the 1980s. It has become one of the most popular tools in the history of management. [6] While there are a variety of 360-degree instruments, we refer to these as one category in this paper. The evaluations are used for a number of purposes, including professional development, performance evaluations, and competency based surveys. Many 360-degree evaluations begin with the top-level team and cascade down an organization. The individual's boss, peers, and direct reports answer the same items for the individual—thus a “360-degree” view. Advantages of the instrument are that different organizational members evaluate professionals instead of one boss. The instrument also provides a common vocabulary and quantitative measurement. Additional advantages are found in these references.[7]

Limitations and criticisms [8] of the 360-degree evaluation include: (1) Survey items capture raters' *judgments* rather objective descriptions of behaviors; (2) Instruments mix performance with development assessments that have conflicting goals, thus confusing and confounding results; and (3) Raters biases corrupt the findings. For example, “self” scores have been argued to be less objective than other raters' scores of an individual. [9] However, Kets de Vries et al (2004) note that Comparing ‘self’ scores with those of ‘observers’ “...can be the beginning of a life-changing journey of self-discovery. Self-exploration matters: not only does it have a profound effect on one's own behaviour, but also it affects the lives of others. In the case of senior executives, whose decisions impact on thousands, it affects overall organizational functioning.” [10]

Other observations and issues in the 360-degree literature relate to gender and age. With regard to gender, it is argued that “... male observers judge female subjects to be less accomplished in the dimensions of ‘Envisioning’ and ‘Team-building’ judge women to be more accomplished in the dimension of ‘Rewarding and feedback’. Female

observers also rate female subjects to be less effective in the dimension of ‘Envisioning’ and more sensitive to stress. Unlike male observers, female observers consider female subjects more effective at ‘Team-building.’ [11] With regard to age, researchers found significant differences between a more experienced executive group and MBAs (higher for the former group) in the dimensions of ‘Envisioning’, ‘Empowering’, ‘Designing’, ‘Team-building’ and ‘Outside orientation.’ However, on dimensions of ‘Life balance’ and ‘Resilience to stress’, significant differences appeared that favored a younger MBA group.[12] The instrument we used did not include some of these dimensions. We can compare our qualitative observations on envisioning, team building, and empowering—with the caveat that we did not design a formal study in our consultation. We note that even with these limitations, the 360-degree evaluation remains one of the most popular instruments used with corporations in the U.S.

1.2. The facilities management group

Facilities Management (FM) is a service organization with a mission to (1) be an innovative leader in evolving technology, (2) fully satisfy customer-driven requirements balancing quality and cost, and (3) excel in dedicated service through continuous and measurable improvement. Facilities Management implements energy conservation initiatives, upgrades infrastructure, and contributes towards sustainable facilities.

Five units of FM manage, operate and maintain the physical assets, grounds, and appearance of the university. The senior member of the executive team, Peter, is also a university top-level team officer. The Executive Director of the department, Jake, and three Assistant Directors (Finance & Administration, Dina; Facilities Operations, Tim; and Buildings & Services, Wally) were the major participants in the alignment. Appendix 1 shows the entire FM organization. The five-member team in this study can be located on the chart in Appendix 1. [See Appendix 1]

Five members of the executive team started the 360-degree alignment in 2005 and completed a follow-up phase in 2007. The university's human resource executive director suggested this intervention.

The Executive Director of Facilities Management, whom we refer to as Jake, administers 100 full time trade union and 22 non-union staff, 46 buildings, and a budget of approximately \$28 million dollars.

The Assistant Director of Facilities Operations, whom we refer to as Tim, (and who joined the team in

2003) provides cost effective and responsive services for the operation and maintenance of all buildings, structures, and infrastructure located on the Campus.

The Assistant Director of Building Services, whom we refer to as Wally, has been with the team since 1984. He provides pest control, grounds, cleaning and moving services to all campus facilities. He is responsible for emergency call response 24 hours a day, seven days a week.

The Assistant Director of Finance/Administrative Services, whom we refer to as Dina, joined the team in 2004, and is responsible for the annual operating, capital budget development, forecasting functions, all financial and administrative issues.

The last few years have been among the most challenging for this team since the university's largest one-time building program occurred; the president of the university also left two years ago.

2. Methodology: the 360-degree approach

The 360-degree approach used here is based on the "Strategic Leadership Development" program, developed by the MRG (Management Resources Group, Portland, Maine). All programs require expert facilitation and certification. The assessments have been validated with over 350,000 executives and professionals over 35-years. NASA, Pfizer, Harvard University, and Microsoft have successfully used this program. The 22 strategic behaviors of this assessment are listed under five categories, as shown in figure 1. *Behaviors* are the basis of this assessment since they are observable and can be changed. Interpreting the interrelationships among each participant's scores is beyond the scope of this paper.

Note that in Figure 1 most of the twenty-two behaviors are relatively self-explanatory with the exception of the following that are summarized in abbreviated form here. Number 1: *conservative* indicates reinforcing the status quo; 3 *technical* refers to using expertise and specialized knowledge; 4 *self* indicates making decisions independently; 14 *control* shows monitoring the progress of activities to ensure completion; 16 *management focus* indicates taking charge by leading and directing; and 21 *authority* refers to showing loyalty to the organization.

Figure 1. 360-degree 22 leadership behavior



Figure 2. Strategic Leadership Development



Source: Management Resources Group

The first step in this formal 360-degree program, as depicted in figure 2, requires members of the team to independently take the "Strategic Directions" assessment—see first box in figure 2. This is a 22-item survey that members of a team independently take and then work with the facilitator to define the top eight to ten behaviors by which they choose to benchmark their team and department.

The second phase requires each team member (their boss, direct reports, and peers) to complete the 360-degree survey that includes the 22 behaviors shown above. Figure 3 is a shortened form showing how a person (self), his/her direct reports, peers, and boss all score the person on the 22 items. Averages of peers and direct reports are shown on the final summary

sheet. A certified facilitator interprets and discusses the results with each participant.

Following this assessment, the facilitator leads the team through the third phase (see third frame on right-hand side of figure 2) which involves the team assessing organizational implications and developing best practices from previous survey results taken. During the fourth phase, “Develop Strategic Individual-Team-Organization” (in figure 2), customized programs help address gaps and build team strengths. Six months to a year later, the team can reassess its members by taking the 360-degree assessments again.

We did not follow the exact sequence of this approach nor did we use all of the assessments shown in figure 2. We were unable, for example, to start with the president of the university and his team. These were decisions made at the top.

Nevertheless five of the primary leaders started the program with an introduction and overview of the goals and objectives of the 360-degree assessments. In order to attract the attention and involvement of the assistant directors, we began with the individual 360-degree assessments first. Each person then had one-on-one feedback sessions with the facilitator. The team met and benchmarked the behaviors they selected for their department and team. Two customized meetings enabled each team member to apply his/her learning from the assessments to their particular role and work assignments.

Sixteen months later, two rounds of customized qualitative assessments were given in two half-day meetings. We present a very broad overview of the results of all assessments next.

3. Intervention findings

In this particular program, alignment of individuals to the team and the team to the university’s mission for the FM department were the goals of this consultation. Developing individuals in their professional roles and behaviors within the team was an integral part of this process.

Figure 3. 360-degrees leadership assessment

	Low			Low-Mid			Mid-Range			High-Mid			High						
	10	15	20	25	30	35	40	45	50	55	60	65	70	75	80	85	90	95	96+
Creating a Vision																			
Conservative																			
Innovative																			
Technical																			
Self																			
Strategic				<input type="checkbox"/>															
Developing Followership																			
Persuasive																			
Outgoing																			
Excitement																			
Restraint																			
Implementing the Vision																			
Structuring																			
Tactical																			
Communication																			
Delegation																			
Following Through																			
Control																			
Feedback																			
Achieving Results																			
Management Focus																			
Dominant Production																			
Team Playing																			
Cooperation																			
Consensual Authority																			
Empathy																			

O= Self; = Bosses; Δ = Peers; +=Direct Reports;

The program is developmental in nature and is designed to build on strengths, not to emphasize “low” scores. The overall goal is to provide insights to the leader and team members to excel at performing to achieve alignment in order to meet their mission and work expectations.

3.1. Team leaders’ 360-degree scores

Peter, a top-level office holder at the university, helped set the tone and culture of the department and to a lesser extent the team. He did not participate in all the sessions and did not include his boss or peers in the evaluation.

Figure 4.A shows both Peter’s “high and high-mid” and “low and low-mid” behaviors on the 360-degree instrument. In addition the arrows depict the gaps between how Peter scored himself and how his direct reports scored him.

Figure 4. Senior leaders: Self, Boss, Direct Report Gaps
Figure 4A. Officer

Peter	Self	Peers	Direct Reports	Boss
High-Hi-Mid	excitement, restraint, tactical, feedback, management focus, authority		strategic, outgoing, tactical, delegation, cooperation	
Low; Low-Mid	strategic, conservative, technical, outgoing, structuring, communication, Empathy, cooperation		management focus, conservative, communication	

An in-depth conference with each leader and team member was held where all scores and score combinations were discussed, questioned, and explored within the context of their work and judgment. This summary includes some of those insights.

Peter sees himself as highly innovative, but weaker on strategic and cooperative. He shows a strong management focus, is hands-on (tactical), and sees himself as excelling at giving feedback. His direct reports evaluate him as not showing management focus, but being strategic and cooperative. His direct reports and he agree that he is not an effective communicator. The results also suggest improvement is needed in communication between Peter and his direct reports.

Based on the overall results of this evaluation, Peter could benefit from coaching in communication, empathy, and how to effectively influence culture and communication processes in the department. His innovative influence appears strong.

The **Executive Director**, Jake, is the enacted leader of this team. He is a respected member of the university community and is admired by the team he leads. Figure 4.B is an abbreviated version of more lengthy in-depth interpretations with Jake and team members of his quantitative results. His peers were not included at Jake's request.

Jake's self and direct report scores show that he is direct, innovative, persuasive, gives feedback, excites, and emphasizes making decisions independently.

Figure 4B. Executive Director

Exec Dir: Jake	Self	Peers	Direct Reports	Boss
High-Hi-Mid	Innovative, self, excitement, technical, outgoing, persuasive, tactical, feedback, management focus, empathy (mid-range)		Innovative, persuasive, excitement, control, feedback, management focus	Innovative, Self, excitement, delegation, control, feedback, management focus, dominant, production
Low; Low-Mid	Strategic, control, Conservative, technical, communication, delegation, consensual, restraint		Conservative, restraint, cooperation, communication, consensual, empathy	Strategic, restrain, technical, communication, consensual, empathy

All observers (including Jake) score his communication and restraint low. Note that Jake's boss agrees with him (Jake) on his need to improve his strategic behavior, showing specialized knowledge, and valuing the ideas of others. Jake's leadership challenge has been to learn, develop, and model the behaviors in his low to low-mid range scores, especially communication, consensual, delegation, restraint, structuring, and control. His hands-on style (tactical) style can sometime overwhelm his strategic ability. He is developing his restraint. Jake is dedicated to leading change and learning. He has begun developing all the behaviors, which will improve his leadership influence on the FM culture.

3.2. Assistant director profiles: Wally

Wally, who is in charge of Building Services and has the longest tenure with FM, scored himself low on strategic, specialized knowledge, innovative, hands-on strategies, communication, feedback, and consensual behaviors—not a strong leadership profile. He scored himself in the mid-range on delegation, independent thinking, dominant, and high on persuasive, outgoing, excitement, structuring, production, empathy. His peers and boss agreed with his low self-scores on low communication, strategic, and innovative. His boss (Jake) scored Wally low on structuring, strategic, production, and control (monitoring work to complete projects on schedule); Wally scored himself high on control.

Wally's 360-degree scores suggest that he needs to stop being "pals" with his direct reports and become more assertive in his communication with boss and peers included. He also needs long-term strategic planning skills. Wally immediately agreed with these findings and is learning and practicing new behaviors.

3.3. Dina: Finance & administration Director

Dina's 360-degree scores indicate lack of independent thinking, cooperation, empathy, excitement, and effective communication. Her boss agreed with many of her self-evaluations. However, there were large gaps between her and all observers on her behaviors of "following through:" her direct reports and peers scored her very low on monitoring and completing projects on time; she scored herself very high. Her peers agreed with her on the low behavioral dimensions of excitement, delegation, and independent thinking behaviors. Jake (her boss) scored her high in specialized knowledge, strategic, persuasive, organizing work, achieving results, taking charge, valuing others' ideas, and empathy; however, he evaluated her low in hands-on tactical behaviors, excitement, restraint, communication, feedback, pushing to complete work, and cooperation. These scores indicate that Dina needs to develop her communication, people skills, self-confidence, and independent thinking in order to be an effective leader.

3.4. Tim, Assistant director of operations

Tim evaluated himself as high on innovative, excitement, hands-on tactical behaviors, communication, controlling work assignments, feedback, taking charge, pushing to achieve results at high levels. He scored himself low on being outgoing, showing restraint, cooperation, and empathy. All observers agreed with his self-assessment on lack of showing restraint and empathy. His direct reports scored him low on communication, being an independent thinker, and feedback. Jake (his boss) scored him very high on innovation, persuasive, outgoing, excitement, being hands-on, and pushing for results. All observers scored him very high on his loyalty to the organization and relying on precedents before charging forward. Tim's leadership development depends on his increasing restraint and increasing his skills in assertiveness and effective communication. He also needs to enhance his cooperativeness, empathy, and consensual decision-making capabilities. His loyalty to the department, hard working style, and excitement serve him well since he was helping push the department forward in its building expansion.

3.5. Benchmarking the department's strategic behaviors

The second round of assessments enabled the team to benchmark the organization. Each team member independently scored their view of what the strategic direction of the facilities department on the same 22 behaviors of the 360-degree evaluation should be. The composite (average) scores showed the following:

High: Innovative, strategic, excitement, communication, delegation, management focus, and production

Low/low-mid: Independent thinking, outgoing, and cooperation

Mid-range: Specialized, knowledge, persuasive, hands-on, empathy, controlling work, and feedback

We convened a meeting that reviewed the philosophy, mission, and objectives of the organization. Discussion and dialog were used to negotiate and reach consensus on the top nine behaviors that would benchmark team members' developmental activities, training, and performance. These nine behaviors are the benchmarks going forward:

- | | |
|-------------------------|----------------------------|
| 1) Innovation | 6) Feedback |
| 2) Strategic | 7) Management focus |
| 3) Excitement | 8) Production |
| 4) Communication | 9) Cooperation |
| 5) Delegation | |

For the first time in the department's history, identification and agreement on behavioral benchmarks was accomplished. Jake, the Executive Director, now had a set of quantitative and qualitative guidelines as the team leader. Each member also had their 360-degree summary to compare these benchmarks.

3.6. "Connecting the dots": Individual 360 scores and organizational benchmarks

Several one-on-one and team meetings with the facilitator helped individuals and the team interpret their scores and compare these to the benchmarked behaviors. The result of the 2005 meetings indicated an increase in self-improvement insights on specific behaviors; a renewed interest in team cohesiveness; and excitement about improving morale in the team. In the aftermath of these meetings, the three empowered Assistant Directors met independently without Jake. Jake and his three Assistant Directors reported satisfaction with the alignment results of the 360-degree program.

3.7. Fast-forward to 2007: Reconvening the team

At two meetings scheduled sixteen months later, facilitation assignments evaluated changes in the team's alignment: "What was working; what wasn't? What had changed? What had not?" The results were mixed. First, the team had stopped their independent meetings. Strong resentment between two team members and the Director led to an emotional outburst in the 2007 sessions. All reported that the Department still lacked alignment on cooperation, communication, feedback, prioritizing strategies, and delivering results on schedule. On the positive side, Wally and Tim reported an improved performance in empathy, strategic, innovation, and achieving results. Dina reported improvement on work control and strategic behaviors. Jake's innovation and hands-on approach excelled; however, lack of restraint, poor communication, cooperation, and prioritizing strategic issues at the department level were evident. Ironically, the cultural alignment of the team reflected weaknesses that mirrored individual members' 360-degree earlier results: low communication, low cooperation, low restraint, low feedback, and low strategic.

The team as a whole has remained highly productive and effective in meeting university and departmental goals. The department ranks as one of the most innovative among its industry rated peers. Innovation, productivity, hands-on management (tactical) and extensive use of technology continues to define the effectiveness of the team. The 360-degree program confirmed and reinforced these behaviors.

3.8. What worked from the intervention?

The program has also been effective in providing a comprehensive framework to implement behavioral awareness and change. Benchmarks are in place; 360-degree results have been coached and accepted. Positive developmental changes have occurred with individual members, but not as a team. The program has enabled hidden interpersonal conflicts to surface. How these issues are resolved will determine the type of culture that will define the organization. Presently, the team is at another turning point. By recently confronting these issues, Jake observes that the commitment to change has resulted in his and others developing more restraint. By actively reviewing their 360-results, team members have begun to improve communication within the department. More developmental work is needed.

3.9. What has not worked and why?

The cultural and interpersonal alignment of the team suffers from a lack of continuous, effective communication, feedback, structuring, control, and cooperation, from the leaders down. Contributing factors to the lapse in wider team alignment from 2005 to 2007 include: 1). No go-ahead decision to fund and continue the program with this team or direct report teams; 2). Little consistent follow-up, feedback, and reinforcement using the 360 degree results and action plans after the formal facilitation was completed in 2005. Modest gains in feedback, control and cooperation using evaluations and group reporting have occurred, according to Jake; 3). There was also insufficient top-level university organizational participation in the program. Jake's priority is to embrace the development of communication with the resources he has. As a respected and admired leader with this team and in the department at large, he realizes the importance of his role in leading cultural change in his department.

4. Conclusion: addressing literature & alignment issues with recommendations

This section addresses lessons from our interventions compared with issues in the literature discussed earlier. We also offer observations for others embarking on 360-degree interventions. First, we summarize our findings relative to recent arguments in the 360-degree assessment literature: (1) We are not in agreement with Toegel and Conger's recommendation (2003: 297) that different 360-degree assessments are needed, one for *management development* and one for *performance feedback* in order to avoid confusion over goals and outcomes. We found that the 360-degree instrument used here combined with our execution strategy could be used for development *and* performance feedback. We experienced no confusion over the instrument's goal or outcomes, but with embedding our program results into the team and culture; (2) We do agree with Toegel and Conger (2003: 121) regarding the importance of organizational culture as a success factor: namely, that "multisource feedback cannot initiate leadership development in organizations that lack a climate of trust." (3) We agree and support the findings of Kets de Vries and others (2004: 475) who state that "Research clearly indicates that 360-degree feedback systems give a much more accurate picture than self-assessment of what executives really do and how executives actually

behave.” The team leader agreed with this finding, and the team accepted the 360-degree results and agreed that changing their culture and behaviors are now the major challenges; (4) With regard to age and experience of team members [12], we found that individuals’ tenure with the university and team were more inhibitors of behavioral change not assets. Lagging in skill improvement, education, and technology is less a function of a professional’s age or ability, and more a result of habit and mindset; (5) With regard to gender, it is argued that male observers evaluate female subjects as less accomplished in ‘envisioning’ and ‘team-building,’ and more accomplished in ‘rewarding and feedback’ [11]. Our results suggest the opposite. We found that skills (perceived and observed) trump gender in our study; (6) Overall, all members of the team experienced the 360-degree experience and outcomes as a transformative learning experience as well insightful to work, job, and organizational roles. [9]

Specific recommendations for designing 360-degree assessments that offer guidelines for qualitative interventions, and that separate assessments aimed at performance evaluations from those based on developmental goals are offered by Toegel and Conger (2003).[6]

4.1. Alignment lessons & recommendations

We summarize ‘lessons learned’ from our 360-degree consultancy through the perspectives of organizational alignment and change. With regard to organizational alignment, we found that a systems framework helps consultants and clients understand the need for behavioral change within the context of related organizational dimensions. The 7-S framework [13] illustrates the interconnections of organizations and teams and the importance of aligning strategy, structure, systems, and leadership styles with the culture and shared values in order to work effectively. We also found that leadership and culture are the key processes necessary to influence organizational effectiveness. In our intervention, the team worked well with its strategy, structure, and systems, but was less effective in sharing values (culture), and in adopting different styles of leadership behaviors, as identified earlier.

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Our first recommendation, based on this lesson, is that 360-degree interventions can benefit by starting with an alignment system framework, like the 7-S, or a version of the balanced scorecard.[14] These frameworks reinforce the interconnectedness and importance of leadership behaviors with culture and other organizational dimensions. This consultancy also demonstrated that the alignment of organizational teams depends on a cohesive, synergistic department culture. Stated another way, the relationship and integration between so-called “soft” skills and behaviors (communication, cooperation, empathy) and “hard” ones (project and work control, task measurement and monitoring) is necessary.

The second significant lesson is that team and organizational change begins and excels with strategic *and* tactical leadership behaviors. In our intervention, thinking strategically over the long-term and taking charge are necessary behaviors to lead change in Facilities Management projects. Creating a sense of urgency, communicating the vision of complex projects, empowering employees (direct reports and peers), and generating short-term wins are important strategic leadership behaviors for change leaders. [15] Without a strategic mindset and behaviors that are valued and shared by the leadership team, complex change tasks will fail to be executed effectively. Culture counts.

Our recommendation based on this lesson is that consultants should be able to influence in coaching and training leaders in follow-up work with clients after a 360-degree program. Team leaders must, in turn be willing and able to learn and model the necessary behaviors before they can expect their team members, peers, and direct reports to do so.

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