QUICK START GUIDE:
Qualitative 360 Feedback Process

Leadership Reality Check®

Outside Platform

Kick off meeting

Process

Meet with your client to:
- Confirm survey questions
- Select feedback respondents
- Set clear confidentiality expectations

Best Practice Tips
- Include a well-rounded list of respondents who have known your client for 6+ months, such as their manager, direct reports, peers, board members, and customers.
- Include at least 3 respondents to ensure anonymity.

Client invites Respondents

Process
- Client emails their selected respondents to ask if they would be willing to participate in a feedback survey. Here's a sample email for your client to use.

Best Practice Tips
- This sample email helps respondents understand the process and expectations, while also ensuring successful email deliverability.

Inside Platform

Add Client

Process
- Click 'Add Client' on the homepage. Once saved, your client will appear in the Clients table on the homepage.
- Select your client to access their file and follow the 'Get Feedback' steps

Best Practice Tips
- When adding your client, ensure to enter their Title and Organization to have it automatically included in the feedback report.

GET FEEDBACK

1 Create Survey

Process
- Select 'Create Survey' and then choose from these options:
  - Start from scratch
  - Copy a past survey
  - Start from template

Once created, your survey will appear in 'Draft' status in the Survey Tracking table in your client's file. Click the survey name to edit your survey.

Best Practice Tips
- Ask open-ended questions to encourage respondents to freely share relevant information without limiting their thoughts.
- Include a 'confidential question' to allow respondents to share feedback confidentially with the coach, and not with the client.

2 Add Respondents

Process
- In the client's file, click 'Add Respondents' to add those who have agreed to provide feedback.

Note: You may change a respondent's 'Relationship' both before and after sending the survey.

Best Practice Tips
- Save time by selecting 'Email client to add their own respondents.' Your client will receive an email containing a link to a table for entering their respondents; don't worry, the client won't have access to your account.

3 Send Survey

Process
- In the client's file, select 'Send Survey' then 'Send Invite' to email the survey. The status will change to 'Active' in the Survey Tracking Table after sending.
- Select 'Send Reminder' for on-demand reminders.
- Survey status changes to 'Closed' when all respondents complete the survey, the auto-close date is reached, or when manually closed.

Best Practice Tips
- When sending invites, customize automated reminder emails by clicking the 'Automated Reminder Email' link in the pop-up window.
- Monitor survey interactions using 'Respondent Tracking' in the Survey Tracking table's 'Options' column.

4 Generate Report

Process
- Select 'Generate Report' to create a PDF 'Feedback Report for Client' in the Survey Tracking table.
- For surveys with a 'confidential question,' select 'Generate Confidential Coach Report' in the Options column to automatically generate a PDF version of your client's report, including confidential responses.

Best Practice Tips
- Quickly generate key themes and word clouds using the built-in AI.
- Ensure anonymity by having groups of at least three respondents.
- After completing your 'Feedback Report for Client,' you may return it to 'Draft' status to further customize by selecting 'Edit Client Report' in Options.

Debrief Feedback

Process
- When ready to review the feedback with your client, select 'Email Report to Client' in the Options column. This sends the 'Feedback Report for Client' to your client.

Please note that due to the strict confidentiality of responses to a 'confidential question', the system prevents emailing the 'Confidential Coach Report' to your client.

Best Practice Tips
- Send the report to your client during your debrief meeting, not before, to ensure they review it with you for a structured, supportive process.

Bonus Tips

- ✓ Automatically include your profile picture in your email signature when sending surveys. Select 'Profile' from the top-right menu and add your picture.
- ✓ After six months, assess your client's progress by reapplying the Get Feedback process using the Qualitative 360 Repeat survey template.