

# CASE STUDY

USING THE CHECKPOINT 360<sup>°</sup>™  
TO BUILD LEADERSHIP AND  
EMBRACE GROWTH



Retail Industry

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## CheckPoint 360<sup>o</sup>™

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### AT A GLANCE

Assessments of managers against expanded roles uncovered specific skills gaps and enabled a targeted development solution to be created.



### KEY TAKEAWAY

Pre-hire assessments help to improve hiring decisions and reduce employee turnover.

### Background

This company marked a milestone this year, completing the merger with what had been its largest rival. The newly merged company employs 20,000 team members and operates more than 500 locations in the United States and Canada. These “one-stop shops” provide an array of sundries, from food and fuel to bathroom facilities and electronics – and restaurants are integrated into all of the operations.

In preparing for the merger, the company’s learning and development (L&D) organization recognized a need to prepare multi-unit supervisors for a substantial increase in the size and scope of their responsibilities. The team also recognized that, while company leaders were happy to support and invest in a special training event, the approach would need to be focused, efficient and cost-effective to align with a financially focused corporate culture.

The solution developed is a two-and-a-half-day Human Resource Planning (HRP) workshop for selected multi-unit managers. The workshop, held at the company’s Corporate University spotlights how the multi-unit managers’ jobs are changing and the shift in skill sets needed. It also produces a learning plan for each participant, and it uses Profiles International’s CheckPoint 360<sup>o</sup>™ assessment tool to guide the way.<sup>1</sup>

### Getting started with the tool

The company’s L&D team leader considered several assessment vendors before choosing Profiles International. In the end, she felt that the competencies measured by the CheckPoint 360<sup>o</sup>™ aligned most closely with the competencies that the company values. She liked the graphics that assessment reports incorporate, making reports easier to understand. In addition, she appreciated the support that Profiles offers to make the tool easier to administer. Alignment, ease of use and support are among the factors any organization should consider in selecting an assessment tool.

<sup>1</sup> The CheckPoint 360<sup>o</sup>™ is a tool that assesses an employee in terms of 18 competencies, using feedback from peers, supervisors and direct reports, as well as the subject himself. Find more information on this tool and others at [www.profilesinternational.com](http://www.profilesinternational.com).

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### KEY TAKEAWAY

Using a third-party provider to administer 360° feedback ensured anonymity for sources of feedback, which encourages candor.



### BEST PRACTICE

The participants, boss, boss's boss and an HR representative collaborate directly on a learning plan that takes assessment results into account.

For example, Profiles largely handles the process of collecting feedback on each workshop participant from up to 19 subordinates, peers and supervisors. Learning leaders simply provide the names and email addresses for all sources of feedback — and Profiles takes it from there, keeping the company informed of progress and flagging any sources of delay, such as out-of-date contact information. This kind of separation between the company and the vendor during the data-collection process is generally considered a best practice. By relying on a third party, companies help to assure anonymity for sources of feedback and encourage candor.

#### ► Before the workshop: Laying a foundation of understanding

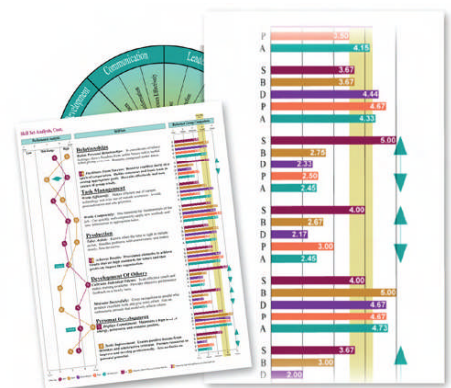
As mentioned, each multi-unit manager who is invited to participate in an HRP workshop goes through a CheckPoint 360™ assessment in advance. That means that up to 19 of the manager's subordinates, peers and supervisors provide feedback on the manager's performance with regard to 18 competencies.

Next, the manager receives a generic CheckPoint 360™ report to show the kinds of information that the assessment will generate. With the sample in hand, the manager views a webinar that Profiles International has created to explain the assessment process and how to interpret results.

It's worth noting that these efforts at orientation and explanation come before the manager receives his or her own results. The delay is intentional, aimed at ensuring that managers focus on understanding the assessment objectively *before* personal information enters the picture.

#### ► During the workshop: Using results to plan development

Individual results are delivered to the hotel at which participants stay during the workshop, on the day before group activities begin. This allows participants to have an evening to review the feedback alone. Also, initial workshop activities focus more generally on job descriptions, skill sets and how they are changing, allowing a bit more time before workshop participants are asked to discuss their results.



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## KEY TAKEAWAY

The training and assessment aim to encourage and enhance continued good performance, to the benefit of both the company and the managers themselves.

“It took (us) having one-on-one live conversations with the first group of attendees, saying, ‘This is not a bad thing. You’ve been selected because you’re good!’ ... But once they came through, and other region managers and field support started seeing what was happening, the tide really changed. Now, people really do want to come.”

Meanwhile, several other key people receive and review each workshop participant’s assessment results. This group includes the L&D team leader and the HR vice president, as well as the participant’s boss, his/her boss’s boss and HR representative. Later in the workshop, the L&D team leader conducts a session on using feedback to realize leadership potential. Then the aforementioned boss, boss’s boss and HR representative join the workshop to collaborate directly with the participant on a learning plan that takes assessment results and other aspects of the workshop curriculum into account.

### ► After the workshop: Following through

Much effort goes into ensuring that lessons learned during the workshop don’t, as the learning team leader put it, “die a quick death.” Follow-up measures help reinforce instruction and help workshop graduates continue to pursue their goals after they return to the field.

For example, 30 days and 60 days after the workshop, the L&D team leader conducts conference calls with participants to check on progress and identify any unmet support needs. Separately, each participant’s boss and HR representative also touch base with him/her. Also, attendees form their own peer accountability group and hold calls once or twice a month to help one another stay on track.

As an additional follow-up measure, L&D leaders hold quarterly webinars for all workshop graduates. The L&D team has developed worksheets and study guides to accompany these webinars.

## A change management challenge

As you consider this company’s experience with the CheckPoint 360<sup>®</sup>, it’s worth noting a change management challenge that the company overcame – helping employees get comfortable with the idea of being rated by their colleagues.

Multi-rater assessment tools (often referred to generally as 360s) can be unsettling in some organizations because of how they have been used in the past. Too often, leaders pull out 360s only to support decisions already made about employees who are falling short of expectations and may be fired. When asked to be the subject of a 360, even top performers might experience a moment of fear as they wonder, *Am I on my way out?*

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“I do believe that the (assessment) and the feedback that workshop participants got, and the awareness that was brought to each and every one of them, has helped to prepare them for going on to bigger and better roles.”

This learning leaders' plan was much more in line with Profiles International's intention for the CheckPoint 360™; it was designed to guide leadership development, not to validate poor performance or block career paths. Managers chosen to participate in HRP workshops are already considered promotable up-and-comers. The training and assessment aim to encourage and enhance continued good performance, to the benefit of both the company and the managers themselves.

The learning and development team leader recalled: “It took (us) having one-on-one live conversations with the first group of attendees, saying, ‘This is not a bad thing. You’ve been selected because you’re good!’ ... But once they came through, and other region managers and field support started seeing what was happening, the tide really changed. Now, people really do want to come.”

## Results and next steps

The company held its first HRP workshop for managers in September 2009. Of the first group of 17 participants, roughly 35 percent are currently in the running for promotions. L&D leaders don't suggest the workshop deserves full credit for this — the participants were strong performers from an operational standpoint before the workshop was even created. But growing eagerness among other managers to go through the workshop and general enthusiasm regarding the effort suggest its value is clear among its target audience.

So far, that target audience has been regional managers, and by year's end a total of about 70 will have participated in five workshop events. Upcoming events are also starting to include selected individuals from the company's headquarters, such as a corporate attorney. Employees brought into the company through the merger may be among the next in line. Learning leaders hope that as participation grows, workshops can help promote a culture where self-awareness and continuous development efforts are second nature.

The L&D team leader said, “I do believe that the (assessment) and the feedback that workshop participants got, and the awareness that was brought to each and every one of them, has helped to prepare them for going on to bigger and better roles.”