

# **A GUIDE TO TEAM ROLES**

**How to increase personal and  
team effectiveness**

Kevin Carson  
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**BELBIN** North America

# ***A Guide to Team Roles***

Courtesy of **Belbin North America**

Belbin North America is a division of 3Circle Partners, a 15-year-old consulting firm with a history of helping organizations leverage the diversity of individuals to accelerate team and leadership performance in a predictable and measurable way.

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# Table of Contents

<b>Introduction .....</b>	<b>1</b>
<b>Chapter 1 Belbin’s Research:</b>	
<b>Discovering team roles .....</b>	<b>5</b>
Phase 1: Teams of high intelligence.....	5
Phase 2: Teams of like personalities.....	6
Phase 3: Searching for balance .....	7
Validation of the Belbin Model.....	12
<b>Chapter 2 Applications of Belbin’s Insights .....</b>	<b>15</b>
Developing Team Role Profiles.....	15
Team Applications .....	18
Roles needed during project phases .....	19
Interpreting Balance and Imbalance .....	20
Individual Applications .....	28
Does Belbin knowledge really make a difference? .....	32
Conclusion.....	36
<b>APPENDIX 1: Team Roles Quick Reference Guide</b>	<b>37</b>
Plant.....	38
Monitor Evaluator .....	40
Specialist .....	42
Shaper.....	44
Implementer.....	46
Completer Finisher .....	48
Resource Investigator.....	50
Team Worker .....	52
Coordinator.....	54

**Appendix 2: Interpreting a Belbin Report**

Page 1: Overall Summary .....	58
Page 2: Pie Charts .....	60
Page 3: Your Relative Self-Perception Scores .....	62
Page 4: Positive vs. Negative Weighting .....	64
Page 5: Counseling Report .....	66
Page 6: Observer Responses .....	68

# Introduction

*Irene, Carlos, Sandy, and Roger have been brought together in a development team charged with designing a new mortgage service for their bank. Irene, as the bank manager, is serving as the team leader and has selected the other members. She picked Carlos because he knows the most about mortgages, Sandy because she is an experienced loan officer, and Roger because he was involved in several service design projects in the past.*

*Everything goes well for about a month. The team has lively discussions around setting goals and holds very productive meetings with customers to identify critical needs. But then things go awry. Irene, Carlos, and Roger have come up with several potential service designs, but can't seem to finalize the definition. They keep thinking of more and more different options to build into the service. Sandy, on the other hand, sees time slipping by, but doesn't feel like she can stand up to the other team members to enforce deadlines.*

If your company is like this bank, the selection of team members is a straightforward process conducted by a manager or executive. Like Irene, your managers or executives chose teams based on common criteria such as subject matter expertise, possession of relevant skills or knowledge,

availability, a personal stake in the outcome of the project, and position within the company.

But is that really the best approach? You've probably seen teams like this one that perform great for a while but then get bogged down—or ones that never seem to get out of the project design phase. The failure of many teams makes it clear that perhaps we should consider whether something else is going on; that perhaps we need to consider whether a given *collection* of individuals will work well together.

In fact, this latter approach does provide insights into what exactly makes an effective team. The study of team composition began back in the 1970s when Meredith Belbin, a researcher in the United Kingdom, spent nine years intensively researching the factors that made teams either effective or ineffective. The outcome of this research is his seminal work on Team Role Theory, which explains why it is the *mix* of different team skills within the team that is the primary determinant of team effectiveness. In research trials, Belbin and his colleagues were able to accurately predict which teams of executives would do well in management simulations and which would falter. The findings have since been applied worldwide to real-life business situations.

For our purposes here, the critical outcome from Belbin's research is that the criteria his research revealed as being crucial to team success bear little to no resemblance to standard team-selection criteria, such as those listed above. More importantly, while the criteria in widespread use have little to no correlation to team success, Belbin's Team Role Theory has great predictive power. And it shares the virtue

of being relatively easy to implement in the real world.

In this section, we will quickly recap Belbin's research then explore its application to you as an individual and to your teams. We'll also explore the experience of Irene's mortgage team in more depth. But first some background.



# CHAPTER 1

## **Belbin's Research: Discovering team roles**

Belbin's research was a cooperative effort between Cambridge University and Henley College. Henley had been largely unsuccessful in forming teams that were routinely successful in business simulation games run during executive education seminars. The college contacted Meredith Belbin and commissioned him to undertake a study of what made some teams more successful than others. Over a period of nine years, Belbin studied participants assigned to small teams which competed against each other in a management simulation.

### ***Phase 1: Teams of high intelligence***

An early hypothesis was that the success of these *teams* would be highly correlated to the *individual* excellence of team members (that is, the teams with the smartest people would finish highest). As a matter of course, Belbin administered standardized intelligence tests to the students. Based on the information he had on all individuals attending the

workshops, he intentionally put those with the highest scores together in teams (dubbed “Apollo” teams after the American space program’s rocket scientists).

It may not surprise you that when the results of the simulation games came back, the Apollo teams typically finished close to last or dead last! They were difficult to manage, prone to destructive and unresolved debates, and often more internally competitive than collaborative. In many cases, one individual’s actions would intentionally or unintentionally undermine those of another team member.

There were a few successful Apollo teams. Like all Apollo teams, their members were highly intelligent (the definition of an Apollo team), but the people on the successful Apollos tended to be less assertive and there was a dynamic chairman (we’d call him a team leader nowadays) who was able to corral the talents of the team members and also counteract any tendency for members to sit back and be passive. In addition, the successful Apollo teams had explicit conversations about how to compensate for such a uniformly intellectual group. With these factors and strategies in place, they managed to develop and execute effective strategies without devolving into internal squabbling.

### ***Phase 2: Teams of like personalities***

The rare successful exceptions to the Apollo pattern became the basis for a shift away from purely intellect-based hypotheses towards ones that incorporated more behavioral

elements. As part of his research, Belbin administered personality tests in addition to intelligence tests. “Pure teams” were formed of individuals with like personalities to see if there was any advantage to certain personality profiles.

While there were slight performance differences among the various pure teams, none of them was seen to be universally effective. Rather, their personalities tended to make them well-suited to certain types of tasks and ill-suited to others. That means that during the multi-day management simulation, each of the pure teams’ weak points were exposed at some point, and overall the teams were deemed to be less-than-optimal performers.

### ***Phase 3: Searching for balance***

The focus of Belbin’s investigation now turned to achieving balanced teams that could combine the best attributes of the different “pure teams” without suffering from their inevitable shortcomings in specific instances or activities. Here the challenge was to isolate what attributes were significant contributors to enhanced team performance.

Because the results of the teams were measurable and the composition of team members was known from the standpoint of individual test scores on personality, intelligence and other tests, the researchers were able to analyze what combinations were present in successful teams and absent in failed teams. As the study progressed, Belbin and his team developed descriptions for nine different **team roles**, skills

that proved useful on teams. Here is a quick recap of what Belbin discovered about team roles:

One of the first critical attributes to emerge in the research was **creativity**, which was fulfilled by two distinct types of people:

- Highly creative individuals came to be called **Plants** by Belbin because he intentionally “planted” them into teams. When these individuals were given the opportunity by the team to be creative, the team’s performance consistently improved. In other cases, the Plant was suppressed or overlooked, and the team failed to harness the power of their creativity.
- A second category associated with new ideas is **Resource Investigator**. The differentiation is that while Plants rely on their own internal thinking to come up with ideas, Resource Investigators talk to other people (often outside the team) to collect new ideas or discover opportunities that the team could incorporate into their strategies and actions.

Whether or not a team is able to capture ideas supplied by Plants or Resource Investigators seems to hinge on how it is managed by its leader or chairman. Again, Belbin found this role being filled by two different types of people for two very different reasons:

- The more successful chairmen had a specific set of attributes that were later embodied in a role called **Coordinator**. These individuals are seen to be trusting and accepting of others, dominant, committed to goals, as well as calm in a crisis. These traits allow them to guide and facilitate the group effectively, as well as to orchestrate the assignment of tasks to the best-suited individuals.

- Another role that emerged during this phase, that of **Monitor Evaluator**, proved to be a vital contributor to team success. People with this capability are serious-minded and largely immune to infectious enthusiasm. They prefer to thoroughly think matters through issues before coming to a decision. They are often the only ones able to hold their ground against a Plant. The Monitor Evaluator can discover hidden flaws in an argument, enabling them to convince Plants to change their minds.

Another key role that emerged were the people who made sure that things got done. The **Implementer** is practical, realistic, and self-sacrificing, ensuring that necessary tasks are performed. They are disciplined, orderly, and skilled at planning. Their presence on a team ensured that decisions made would be turned into results.

Another style of leadership that Belbin identified only after his research became more widely known has been dubbed **Shaper**, a role that is in many ways the opposite of the collaborative Coordinators. Shapers are direct, argumentative, challenging, and prone to aggression, yet they are good humored about it all and seem to relish the conflict itself. Shapers are seen to be the cure for lackadaisical teams but could be a disruptive force within otherwise harmonious teams.

The presence of decidedly different personalities and styles in a team inevitably leads to interpersonal conflicts, in some cases so extreme that two individuals are “toxic opposites”

and cannot work together. In other cases, some individuals get overlooked or shut out. The antidote to these pitfalls rests in a role called the **Team Worker**, who would often make a timely intervention to restore balance to the team process. Team Workers are socially and politically adept, but not dominant. They have a lubricating effect on teams, maintaining morale and rapport within the team.

Two final roles that emerged are:

- **Completer Finisher:** Detail-oriented by nature, these people have a desire to see things through to the end. They serve to ensure both the completion of tasks and that quality standards are met.
- **Specialist:** While not a significant factor in the management simulation game, the role of Specialist was of critical significance when Belbin began applying the theory to real-world settings. In real situations, there is often a need for specialized, expert-level knowledge, without which the team would certainly fail. By nature, the Specialist relentlessly pursues additional knowledge on a narrow front until they have mastered the subject.

The descriptions of these nine roles are summarized in Table 1.A (next page). In addition, there is a quick reference guide to all nine roles at the end of this section.

Table 1.A: Summary of Teams Roles

<b>Role</b>	<b>Contribution</b>
<b>Plant (PL)</b>	Creative, imaginative, unorthodox. Solves difficult problems.
<b>Resource Investigator (RI)</b>	Extroverted, enthusiastic, communicative. Explores opportunities. Develops contacts.
<b>Coordinator (CO)</b>	Mature, confident, a good chairperson. Clarifies goals, promotes decision-making, delegates well.
<b>Shaper (SH)</b>	Challenging, dynamic, thrives on pressure. Has the drive and courage to overcome obstacles.
<b>Monitor / Evaluator (ME)</b>	Sober, strategic and discerning. Sees all options. Judges accurately.
<b>Team Worker (TW)</b>	Cooperative, mild, perceptive and diplomatic. Listens, builds, averts friction, calms the waters.
<b>Implementer (IMP)</b>	Disciplined, reliable, conservative and efficient. Turns ideas into practical actions.
<b>Completer / Finisher (CF)</b>	Painstaking, conscientious. Searches out errors and omissions. Delivers on time.
<b>Specialist (SP)</b>	Single-minded, self-starting, dedicated. Provides knowledge and skills in rare supply.

### **Team Roles vs. Team Size**

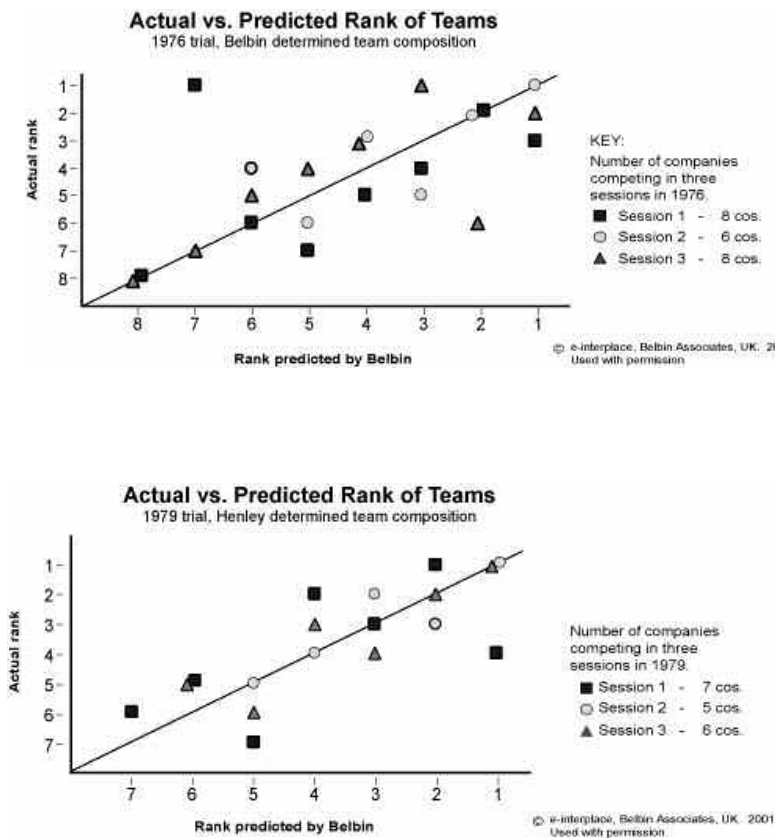
Belbin's rule does NOT mean that a team must be composed of nine individuals, each playing one role. As noted above, most of us are capable of being effective at more than one role. For the sake of simplicity, let us assume that an individual can play three of the nine roles very well (this capability is not unusual). It would be theoretically possible then to have a balanced team with as few as three people.

**However, in practice the optimal size is from five to seven individuals.** With less than five people, a team is likely to have voids, or unfilled team roles. With more than seven, the roles are usually all covered, but surpluses become commonplace. (We will cover the problems associated with voids and surpluses in greater detail in Chapter 2.) Furthermore in teams that have more than seven members, the sense of team tends to break down. Often once a team reaches around ten people, "inner circles" tend to form as team members naturally gravitate back to a more functional size.

### ***Validation of the Belbin Model***

The proof of a theory is its reliability and predictive capability. Belbin's theory that a team composed in a balanced fashion will generally outperform an imbalanced one was tested in multiple iterations of the management simulation. The results of two series of trials—the first in 1976 and the second in 1979—are shown in the graphs on the next page.

Figure 1.1: Results of Belbin's Research



The comparison between these graphs is interesting because in 1976, Belbin himself selected the teams based on the results of his research, while in 1979, he made the predictions *after* the teams were already selected by others. As you can see, Belbin's predictions were remarkably accurate. There isn't a perfect correlation between the prediction and

actual results in either case, but in most cases, teams finished within one or two ranks of the prediction. Furthermore, in the cases of discrepancies, anecdotal evidence gathered in interviews indicated that while the team was balanced “on paper,” they were not so in practice. One of the critical roles that an individual should have been playing was in fact not performed, either because of the way the team organized itself or because the individual chose to contribute in some other way.

Belbin’s Team Role Theory gives a company much more predictive power (and thus control) over team effectiveness than is possible with other methods. These results established Belbin as a world leader in behavioral science research.

## CHAPTER 2

# Applications of Belbin's Insights

Because Belbin's research was focused on teams, our major application of his theory will reside at that level. However, we have found that the ideas that help individuals best contribute to teams also have profound implications to their daily jobs. As a result, we will divide our application discussions into team and individual topics. We'll talk first about how to analyze the team role strengths for individual team members, then how teams and individuals can apply that information.

### Developing Team Role Profiles

The analysis of where a team is strong or weak starts by having each member do a **Team Role analysis**, which is a combination of ratings they give themselves and that others give them on skills related to the nine roles. Each person completes a questionnaire that asks about how they deal with different situations; four to six others (called Observers by Belbin) also evaluate that person on what behaviors they see the person displaying in the workplace. A software

package analyzes the results, and gives a report showing the rank order of team role skills exhibited by that person. Figure 2.1 shows one such report.

**Figure 2.1: Belbin Team Role Profile**

	Team Roles in Rank Order								
	1	2	3	4	5	6	7	8	9
Self-perception	ME	CF	IMP	SH	SP	CO	PL	RI	TW
Observer #1	ME	CF	PL	IMP	CO	SP	TW	RI	SH
Observer #2	CF	IMP	PL	ME	CO	SP	SH	TW	RI
Observer #3	CF	ME	CO	SP	IMP	PL	TW	SH	RI
Observer #4	CF	PL	TW	SP	CO	ME	SH	IMP	RI
OVERALL RANKING	CF	ME	PL	IMP	SP	CO	SH	TW	RI

The answers to the self-ratings showed that this person thought they were strongest as a Monitor Evaluator. Only one of the four Observers also rated that person high on ME skills; another rated them highly enough in that category that it ended up second overall. Everyone agreed this person did not show strong skill as a Resource Investigator (it fell 8<sup>th</sup> or 9<sup>th</sup> on each ranking). The overall ranking of skills for this person is shown at the bottom.

The relative strengths of roles varies from person to person. We have seen Team Role analyses of individuals that show just one very strong role and every other role being very weak. This is unusual but, clearly, not impossible. Most often, there are several roles that a person and his observers agree are very prominent, and several roles that emerge as

being rather weak, leaving a middle group in which the person is not exceptionally strong or weak. As we examine the composition of teams we often find it convenient to divide the nine roles into three groupings in the following manner:

- The top three ranked skills for any person are considered their strengths or **preferred roles**. These behaviors come most easily or naturally to the person and are what they will be best at. The preferred roles for the person shown in Figure 2.1, for example, are Completer Finisher, Monitor Evaluator, and Plant.
- The middle three skills (overall ranking of four through six) are called **manageable**: although performing those skills or behaviors doesn't come quite as naturally as preferred skills, the person can often fulfill those roles competently, especially on a short-term or situational basis. For the person in Figure 2.1, they would not naturally show Implementer, Specialist, or Coordinator skills very often if left to their own inclinations, but could do so if the situation called for those skills.
- The bottom three roles are tasks that the person is weakest in and are called **least preferred roles**. Asking a person to perform behaviors associated with least preferred roles will put them under great stress. The person in Figure 2.1 would have a very hard time acting as a Shaper, Team Worker, or Resource Investigator, and probably would not perform very well in those roles.

Note, as stated above, the division into sets of three must be checked carefully. Some people may have only one or two preferred roles, with more manageable or least preferred roles making up the difference.

### **The flipside of strengths: Allowable weaknesses**

The factors that determine a person's strengths also lead to inherent weaknesses that are unlikely to be changeable in the short or even medium term. Where roles are heavily influenced by personality (e.g., Resource Investigators typically are somewhat to very extroverted), attempts to fix a weakness often serve to destroy the associated strength while having only a slight beneficial impact on the weakness being targeted. Thus attempting to rein in a highly extroverted RI would probably place a strain on that person and would probably harm their ability to network and do the things RI's are good at. We'll talk more about dealing with allowable weaknesses later in this chapter.

## **Team Applications**

The Belbin methodology can be used either proactively (to help shape team composition) or reactively (as a diagnostic tool when problems arise). There are many situations in which there is very little opportunity to actually change team composition. In these cases the Belbin approach can be extremely effective in bringing about an awareness of the


imbalances that exist. Once recognized, a team can develop effective strategies to address team imbalances.

### ***Roles needed during project phases***

Different team roles take on additional significance during different phases of a project. As shown in Table 2.A for example:

- Shapers and Coordinators are particularly important when a team is working on confirming customer needs and goals for the team
- Plants and Resource Investigators are critical when coming up with the creative ideas for meeting those needs
- When a team needs to develop plans, the skills of Monitor/Evaluators and Specialists are in greatest demand
- If team success relies on making connections outside the team, the team should call on its Resource Investigators and Team Workers
- Keeping the team organized and on track is best done by Implementers and/or Coordinators
- To make sure that all plans are carried through to the last detail, the team needs the skills of Completer/Finishers and Implementers

Table 2.A: Importance of Roles Varies by Project Phase

Needs	SH 	CO 
Ideas	PL 	RI 
Plans	ME 	SP 
Contacts	RI 	TW 
Organization	IMP 	CO 
Follow Through	CF 	IMP 

Teams that aren't aware of how to match different needs with different team roles often muddle through calling on anyone in the team to do any kind of work. At best, that approach is inefficient. At worst, it can spell increased stress and disaster as people are called on to perform tasks to which they are ill-suited.

### ***Interpreting Balance and Imbalance***

The other main application of team role knowledge is dealing with imbalances in team composition. Belbin proved that balanced teams perform better over the long run than imbalanced ones. Specifically, what is required is that each of the nine roles is represented on a team. Table 2.A explains why: while at any given point a team's tasks may not require that all nine roles be present, every role *is* need-

ed over the long haul as a team's needs change. (The potential for temporary success of imbalanced teams was borne out by Belbin's imbalanced "pure teams" which did quite well at selected tasks, but which failed over the longer run.)

Teams may be imbalanced in two ways:

- A role may not be represented on the team (a **team role void**): The consequence of a team role void is that at some point, the absent role will be in demand and there will be no one filling it. This team's struggles will be quite predictable: For example, if the team lacks a Shaper, it may be slow to action. If it lacks a strong Plant, it may not develop the best possible strategies.
- A team may be over-represented (a role **surplus**): This situation carries its own pitfalls. These teams will often devolve into internal competition as the members who are strong in the same roles try to outdo one another in the same role. A team filled with Plants, for example, is likely to become immersed in ideas at the expense of addressing practical realities. Plants tend to feel significant ownership of their own ideas and this can often lead to "idea competition" which hampers convergence in thought and subsequent conversion of the ideas into action. Shaper-heavy teams will argue over goals, and power struggles will quickly break out. Members on surplused-teams tend to overindulge the activities that line up with the surplus role. In a Plant team, brainstorming is fun for the team members, so they continue to do it long after the point of diminishing returns. These teams often take on the worst characteristics of the role that is in surplus.

*Analyzing a team's balance*

To tell whether there are voids or surpluses, the team needs to create a map that compiles the rankings for each team member by filling in a form like that shown in Figure 2.2.

**Figure 2.2 Format for Team Role Map**

Team Role		Team Member A	Team Member B	Team Member C	Team Member D
Thinking	Monitor Evaluator				
	Plant				
	Specialist				
Action	Shaper				
	Implementer				
	Completer Finisher				
People	Coordinator				
	Team Worker				
	Resource Investigator				

The results are then analyzed by comparing the ranks of various roles across all team members. One example is shown on the next page (Figure 2.3), along with the conclusions that can be drawn from it.

Figure 2.3: Map of Team Role Rankings

	Person A	Person B	Person C	Person D	Person E	Person F
PL	7	7	2	4	9	8
ME	4	2	4	1	4	2
SP	5	3	5	5	8	1
SH	3	1	1	2	7	3
IMP	8	4	9	8	2	5
CF	1	9	6	7	6	6
RI	6	5	8	9	5	7
TW	2	6	7	6	1	9
CO	9	8	3	3	3	4

This team map shows the Belbin results for a team of six people (labeled a to f in the figure). Person A, for example, had a strong preference for being a Completer Finisher, Team Worker, and Shaper as shown by the rankings 1, 2, 3 in that column; that person was weakest in Plant, Implementer, and Coordinator capabilities, as shown by the rankings of 7, 8, 9. Ideally, you want to have at least one 1, 2, or 3 in each of the roles (showing that the role will be represented well on the team)—but not too many high numbers for any role.

As can be seen in the map above, there are many 1s, 2s, and 3s in the Shaper role meaning this team has a surplus of those capabilities. Conversely, there are only scores of 5 and lower in the Resource Investigator role; this a void. Left to its own devices, the team would probably have a great deal of Shaper-induced conflict: arguing over direction and goals, struggles amongst the Shapers to lead the meetings

and the team, etc. The lack of Resource Investigators could also pose problems in that the team would not have an outward focus, possibly becoming insular and/or failing to communicate or manage their external contacts effectively.

The other roles seem to be fine, with the possible exceptions of Coordinator (CO) and Monitor Evaluator (ME), both of which have borderline team role surpluses. The ME concentration is more problematic than that of CO, due to the higher ranking of the preferred roles (ranks are 1,2, and 2 for ME versus 3,3, and 3 for CO). Also, the fact that the lowest ranking for anyone in the ME role is #4 can cause issues. A team with an ME surplus would tend toward over-analysis, potentially leading to paralysis by analysis. In this particular team, paralysis is probably unlikely to occur because the Shapers would quickly become impatient for results.

### *Dealing with imbalances*

Only about 10% of teams will be balanced perfectly (no voids, no surpluses, each role having at least one high rank), assuming that they are made up of six randomly chosen members.

The good news is that the remaining 90% of the teams that are formed without considering role balance and which have some structural issues can almost all be made effective. There are a few cases (roughly 5% of the time), where the team is so imbalanced that a change in membership may be the only way to adequately restore balance in the team.

**Addressing voids:** Determine which team member has the missing role as a manageable one (that is, it ranks 4, 5 or 6 in the assessment). Thereafter, when that role is needed the individual will have to make a team role sacrifice away from their preferred roles and into the scarce one. This should be sustainable, provided that role is not required to be played on a continual basis. Normally in project teams this will not be an issue as the team will meet infrequently, and the person making the sacrifice will have ample opportunity outside of these meetings to revert to more preferred roles. A key success factor in this strategy is that the rest of the team recognize the need for the sacrifice and be supportive of the team member making the sacrifice: allow them to consciously focus on filling the scarce team role by taking on some of the workload, etc.

**Dealing with surpluses:** Surpluses are more difficult to deal with than voids. In some cases, it will be sufficient for the team members with a preference for the surplus role to merely throttle back their attempts to play it. This will often work in situations where the team members are not deeply emotionally involved in the debate. However, this is often difficult as the preferred role feels good or fun; as a result it is very hard to not indulge it. A more commonly successful strategy is for the team to firmly establish one or two of the members who will play the lead role for the surplus team role. It will then be necessary for the others with that preferred role to consciously avoid it completely, often by focusing on another preferred or manageable team role. It may also be necessary for the team to empower one member of the team who does not have the sur-

plus role as a preferred role to be the monitor of team activity and to “raise the flag” when the team has inadvertently devolved into unproductive indulgence of that role.

### *Balancing in action*

*Irene’s mortgage service design team had their Belbin profiles developed. They discovered that three of the members—Irene, Carlos, and Roger—all have Plant as a preferred role while Sandy is a strong Completer/Finisher. Irene is also a strong Resource Investigator; Carlos and Roger are both specialists (though in different areas, fortunately). None on the team are strong in Shaper tendencies.*

*Given this profile, it is not surprising that the team bogged down in the design phase, when the **surplus of Plant** tendencies dominated. The three most assertive members of the team were unwilling to leave behind the creative phase. This problem was exacerbated by the **void of a Shaper**, which meant there was no one who would plunge a stake in the ground and say “let’s just do it.”*

*It was impractical to add new people to the team at this point, so the team discussed other options for getting past the problem areas. To get out of the churn from having too many Plants, Irene did her best to act like a Shaper when required, pushing the team towards action. (It was difficult for her because she didn’t relish conflict as*

*most Shapers do.) Roger also focused on his Implementer strengths, helping them get them out of the design phase and into planning.*

*To reduce the stress on team members who were required to play their manageable or even least-preferred roles, the team set up a ground rule that acknowledged which roles were missing on the team, encouraging them all to try to notice when that role was needed and step in to fill it as necessary.*

The situation faced by this team is typical of what you'll encounter on your own teams. There will likely be too many people strong in a few roles and not enough who are strong in other roles. In some cases, the best recourse is to change team membership so that all roles are represented, but as noted above that is not always possible or even necessary.

The best strategy overall is to acknowledge what roles are missing and decide who will fill those voids. Look first at people for whom the roles are manageable; as a last resort turn to someone for whom the role falls into the least preferred category.

Often, just the awareness of having a surplus of one role will help deal with the issue of having too many team members making similar contributions. Having a number of Plants, for instance, may not be a problem if there is an explicit plan to deal with the idea competitiveness on the team that is often present when there is a surplus of Plants. Our experience suggests that teams need to make sure their vigilance

against the offending behavior must be maintained or it may subtly creep back as individuals revert to their usual patterns of behavior.

## **Individual Applications**

There are several ramifications of Belbin's research for individuals as well as teams. The three primary impacts for the individual lie in self-management:

- **Role playing:** what role to play in a certain setting
- **Coherence:** making sure that how you see yourself matches how others see you
- **Allowable weaknesses:** how to handle the weaknesses that are the flipside of strengths

### *Role playing*

Role-playing is a situational exercise conducted at the individual level. As we saw from the team mapping discussion above, there are certain situations in which it may be advisable or even essential for the individual to shift away from their preferred roles. However, Belbin's advice to individuals is that this should be the exception rather than the rule. The general rule is to play to your strengths (preferred roles should be sought out), and avoid your weaknesses (least preferred roles should be delegated to others).

The reasoning behind this advice is that, to a great degree, an individual's preferred team roles are rooted in deeply

embedded behavior patterns. While the need for various roles on the team will change over time and team members will have to shift between their preferred (and perhaps even manageable) roles, the reality is that at any point in time a person is most likely to be successful if they are engaged in activities that play to their strengths and make their weaknesses irrelevant.

What typically occurs when we stray into our least preferred roles is that we set ourselves up for failure or at the very least a great deal of stress with mediocre results. Attempts to play the weaker roles often come across poorly to the rest of the team as well, leading to lowered trust and increased interpersonal conflict. Stress is a feeling of anxiety based in being unable to cope with a situation. This definition seems to line up nicely with what Belbin's least preferred roles represent. Asking a non-Plant to be creative and unorthodox will be unlikely to generate much creativity but will almost certainly put that individual on the spot and under quite a bit of stress.

Once you know your own team role profile, it is your responsibility to actively seek out opportunities where your strengths will be valued contributions, and manage situations so that you are not requested or required to act in areas where you are weak. (The basic formula suggested by Belbin's research maximizes both an individual's contribution to team success and the individual's own personal success.)

It is also your responsibility to be alert for situations when you need to shift between roles. In our mortgage team, for

example, Irene realized that she had to temporarily abandon one of her preferred roles, that of Plant, in order to allow the team to make progress. Roger did the same thing, focusing on where he could contribute in an Implementer role and suppressing his natural Plant capabilities.

### *Coherence*

Coherence is the degree to which you see yourself as others see you. This attribute is almost universally present in people identified as great leaders. It is embodied in adjectives commonly used to describe admired leaders like genuine, authentic, transparent, self-aware, mature, consistent. Coherence more strongly correlates with effective leadership than any of the nine team roles—meaning that role which a person plays is less important than how well that person knows and plays to their strengths and manages their weaknesses.

Having coherence makes it very easy to accurately place a person into suitable tasks; no guessing is required. Also, coherent individuals are generally viewed as easy to deal with because they are predictable and consistent. At an interpersonal level, coherence allows other people to more quickly understand who we are and avoid inadvertently offending us because our true nature is more quickly and consistently visible.

The benefit to an individual of becoming more coherent is that more of the time in the workplace will be spent on tasks

to which they are well-suited. This will naturally allow them to shine more frequently and garner rewards and recognition. On the other side, they will more often avoid tasks to which they are ill-suited, thereby avoiding career or reputation damaging incidents.

### *Allowable Weaknesses*

That weaknesses exists is obvious; what may be less obvious is whether the weakness is “allowable” in the sense that the team or individual should just accept the weakness and find ways to counteract it through other roles on the team, or if it is “disallowable” and the person has to find a way to change that behavior.

Judging this issue relies on what impact the weakness will have on the team and whether compensations can be made for it. The absent-mindedness that may accompany creativity in the Plant role can be compensated for by other roles' strengths, for instance the detail-oriented CF. It is a matter of degrees: if the Plant forgets to come to a meeting that would be disallowable, but merely becoming lost in thought and distracted during a meeting would usually be permissible.

Generally, the weaknesses attached to preferred team roles should be accepted, but consciously managed by the person so that they do not become disallowable. The worst approach is often to try to fix or eliminate them completely; this merely kills the flowers along with the weeds. Often the best way to manage a weakness will involve seeking out a complementary role in another person that inherently off-

sets the weakness and trying to work collaboratively with that person so that the weakness never comes to the forefront.

### ***Does Belbin knowledge really make a difference?***

Quite often, the insights gained from a Belbin analysis have a profound effect on people. As proof, we offer the following real-life case studies (names of people and companies have been changed for privacy reasons):

#### ***Case #1: Nick***

Nick was a middle-aged manager who had a lot of experience in project management and a very successful career. Though he had good people skills in general, he had noticed over the years that there were occasional disconnects within the teams he led. By profession he was an accountant, which required him to be very detail oriented and very focused (though by career path, he was now a manager, required to be very strategic in his thinking).

Team members sometimes thought of Nick as micro-managing because he'd try to take over anything analytical. He'd often take on a lot of tasks because he was "the boss." At the same time, the team knew he wasn't the greatest at following through on details, so sometimes tasks would not get done on time.

Nick's perception of himself was as a "super" Monitor Evaluator, always thinking strategically, looking at options, making shrewd judgments about how to get work done. He thought that one of his weakest skills was at the creative end, in what Belbin classifies as a Plant.

To his surprise, other people's perceptions were almost the exact opposite: they rated him as mediocre or moderate at best in Monitor Evaluator skills and very high in the Plant abilities. (Everything else in his profile aligned between his self-perception and the perception of others; the difference in ME and PL scoring was the only glaring discordance.)

This was an "a ha" moment for Nick. The more he thought about it, the more he realized that other people's perceptions were more accurate than his own. He really wasn't that good at the kind of patience and attention required to be a good Monitor Evaluator. And conversely, he really enjoyed the divergent thinking that comes naturally to Plants.

Over the next year, Nick focused very deliberately on developing his creative side. At first, he even asked his teammates to tell him when he was being creative so he could start to recognize his own Plant-ness (so to speak). Coupled with his good people skills, it turned out his true strengths were Plant, Resource Investigator, and Coordinator. So he would come up with creative ideas, not only on his own but also by making connections with many other people, as is typical of an RI. His Coordinator skills were very useful in the early stages of a project, when it was critical that the team get organized around what it needed to accomplish.

Nick learned that he really needed to be paired with Completer Finishers and Implementers if anything was going to get done well and on time! He also became adept at switching roles: serving on a team that happened to have a lot of Coordinators and Plants, he would even slip into his fourth strongest role, Team Worker—meaning he would not try to take control as much as make sure that everyone got a chance to contribute.

As the year passed, Nick realized that his teams were working together better than ever before, achieving better results with greater contributions from all involved. Nick also found that his workday was much less stressful. And he's never looked back from there.

### *Case #2: June*

In some ways, June's story is the opposite of Nick's. When she went through the Belbin analysis, it turned out she had a very coherent profile: that the way she perceived herself was the same way that others perceived her—as a good Implementer. There was one slight difference however: other people also recognized that her strong people skills would make her a good Coordinator, but that wasn't something June had ever thought she could do. Coordinators are often leaders within a group, whether formally or informally, and have a certain confidence that allows them to fulfill that role well.

As June thought about this more, she realized that her contentment with being an Implementer was limiting her career. In order to grow professionally and personally, she

decided she would muscle up the nerve to try being a Coordinator. She began being more deliberate and assertive in making sure the pieces of her teams meshed well together. She flourished in this new role, taking on more and more leadership responsibilities over time.

### ***Case #3: Pete***

Pete had a meteoric career in sales, quickly rising to the top and staying there for a number of years. Another company recognized his success by offering him the chance to manage sales in one of its divisions. Pete jumped at the chance for career advancement. He approached his new job with enthusiasm, eager to prove himself an able leader.

Unfortunately, things didn't go well at first. After a few months, his division had fallen to having the worst sales performance of any in the company. Because Pete's total compensation was heavily tied to the division's sales performance, he was now making less than half of his previous income at his previous employer. The future was looking quite bleak when Pete had the chance to attend a Belbin seminar. That's when the light bulbs began coming on.

He realized that he had been equating "leadership" with what Belbin called the Coordinator role—which was one of his weakest areas. He had far too short an attention span, did not really enjoy detailed follow-up, and tended to dominate meetings. That was why his team was constantly behind and people felt they weren't given a chance to contribute.

One of Pete's first moves when he returned to the office was to hire a strong Coordinator as his second-in-command. With that person in place and playing the CO role, Pete focused more on what he did well, connecting with resources and opportunistically pursuing new leads (the RI role). In a remarkably short timeframe, his team's performance made a complete turnaround, becoming the most successful division in the company. Pete returned to a happier worklife and his income more than tripled from its low point.

## **Conclusion**

As you've just seen, knowledge of Belbin strengths and weaknesses can have a huge effect on both your own personal and professional development and the success of your teams.

Initiating a project without consideration of team composition is a classic failure mode seen throughout companies today. The Belbin Team Role Theory can be applied to both diagnose existing teams and to design new ones from scratch. It is the diagnosis and identification of countermeasures that lies at the heart of consistently successful project teams and project leaders. It has been our experience that projects can be shortened by the judicious use of team composition techniques because it eliminates wasted effort or indecision—to say nothing of improved quality of results or the more positive experiences of the team members.

# **Appendix 1**

## **Team Roles**

### **Quick Reference Guide**

## **Plant**

### ***Characteristics***

Plants are innovators and inventors and can be highly creative. They provide the seeds and ideas from which major developments spring. Usually they prefer to operate by themselves at some distance from the other members of the team, using their imagination and often working in an unorthodox manner. They tend to be introverted and react strongly to criticism and praise. Their ideas may often be radical and may overlook practicalities.

They are independent, clever and original. They may be weak in communicating with other people, especially those operating on a different wavelength.

### ***Role on a Team***

The main contribution of a Plant is to generate new proposals and to solve complex problems. Plants are often needed in the initial stages of a project or when a project is failing to progress. They are prone to divergent or tangential lines of reasoning which can be counterproductive in some settings.

### ***A Plant in action***

#### ***Showing strengths***

During a product strategy meeting, Norma sits and listens as two vice presidents argue over which of two products to have the sales force focus on selling. One VP supports Product A because of its greater initial profitability. The other supports Product B because early marketing reports show a lot of potential though its costs are expected to be higher. The two argue back and forth for some time. Norma appears indifferent, doodling on her notepad.

Finally one of the VPs addresses her. “Norma, are you paying attention? What do you think?”

Norma puts down her pen. “Yes, I’ve been listening. And it occurs to me that maybe we’re missing something,” she says. “I think if we reconfigured our production lines, we could redistribute our overhead costs and sell both product A and B more profitably without overburdening our sales force. The three dive into the numbers and production strategies more deeply and realize that Norma is right.

*COMMENT: This is typical Plant behavior, listening closely to data and arguments (even if it doesn’t look like they are!), and thinking through the issues carefully before coming up with a new idea that hadn’t occurred to anyone else.*

### ***Showing a weakness***

At a later meeting, Norma and the two vice presidents are presenting their recommendation to the president of their division. He starts peppering Norma with questions: “What timeframe are we looking at to make these changes? What will it take to get it done? Is this really practical?”

Norma can’t answer any of those questions. She loves the creative work, but loses interest once the talk focuses on how to get something done.

*COMMENT: Though some Plants also have Implementer tendencies, most don’t pay much attention to practical issues of feasibility or deadlines. That’s allowable as long as you have someone on the team who does care about those issues. You might also need to develop ways to regularly remind a Plant of deadlines or other practical matters.*

## **Monitor Evaluator**

### ***Characteristics***

Monitor Evaluators are serious-minded, prudent individuals with a built-in immunity from being over-enthusiastic. They are slow to make decisions, preferring to think things over fully. Usually they have a high critical-thinking ability. They have a capacity for shrewd judgments that take all factors into consideration. A good Monitor Evaluator is seldom wrong.

To many outsiders, the Monitor Evaluator may appear as dry, boring or even overly critical. Many occupy strategic posts and thrive in high-level positions. In some jobs, success or failure hinges on a relatively small number of crunch decisions; this is ideal territory for a Monitor Evaluator.

### ***Role on a Team***

Monitor Evaluators are best suited to analyzing problems and evaluating ideas and suggestions. They are very good at weighing the pros and cons of different options. They are often slow to act or speak and may be quieter than other members of the team, so care must be taken to pull them into lively debates.

### ***A Monitor Evaluator in action***

#### ***Showing strengths***

A strategic team is discussing the idea of consolidating office locations. Three of the participants are very enthusiastic, seeing a wealth of possibilities for saving on overhead and achieving other efficiencies. The plans are well underway when Marty speaks up.

“Hold on everybody,” he says, “I think we’re getting way ahead of ourselves.” There’s sudden quiet in the room and the energy level drops precipitously. “It seems like you’re gung-ho on closing the Sullivan office, but that’s also the home of our biggest customer and we have those tax incentives from the city. I don’t think they’re going to be too happy about that. We really need to explore some more options here before making a decision.”

The rest of the team immediately saw that Marty was right in his assessment. Though disappointed at having to regroup their focus, they realized it was good thing he’d stopped them before they got too far down the line.

*COMMENT: Monitor Evaluators always have an eye towards the larger strategic picture surrounding decisions, and want to get a lot of information before making a final call.*

### *Showing a weakness*

At the next meeting of this team, one of the Resource Investigators on the team reports that she’s talked to the customer and moving the office wouldn’t be a big deal to them. But Marty shows them data on the impact of losing the tax incentive for those operations, and its much bigger than anyone anticipated. Still, the team decides to go ahead with the consolidation. Marty’s reaction, “when this goes bust, don’t blame me.”

*COMMENT: Monitor Evaluators have a tendency to sound skeptical (if not cynical). Marty’s team had learned to appreciate his strategic insights and ignore his occasional negative attitude.*

## Specialist

### ***Characteristics***

Specialists are dedicated individuals who pride themselves on acquiring technical skills and specialized knowledge. Their priorities focus on maintaining professional standards and on furthering and defending their own field. Eventually, the Specialist becomes the expert by sheer commitment along a narrow front.

As managers, they command support because they know more about their subject than anyone else and can usually be called upon to make decisions based on in-depth experience. While they show great pride in their own subject, they may lack interest in other people's subjects.

### ***Role on a Team***

Specialists have an indispensable part to play in some teams, for they provide the rare skill or knowledge that is key to fixing the problem being addressed.

### ***A Specialist in action***

#### ***Showing strengths***

The site review council at a dialysis clinic is reviewing data on patient performance over the past months. The nurses are telling the team about problems that some patients are having with the traditional "ports" used to access arm veins for the dialysis treatment.

At that point, Lee pipes up: "I just saw a report in the latest nursing journals where they were testing a new device for accessing veins through the chest. I did more research and it appears this new device is legit. Maybe we should

invite one of the reps here and see if it would work for those patients.”

*COMMENT: Specialists pride themselves in being expert in an area of their choosing. Though not always focused on the immediate needs, they must be allowed time to explore their discipline because someday that knowledge will come in handy.*

### *Showing a weakness*

After a presentation by the company rep for the new device, Lee has become a strong advocate. When the rest of the team wants to proceed cautiously and even visit other clinics where the device is being used, she thinks that extra effort is a waste of time. “I know what I’m talking about here,” she complains. “Why don’t you trust me?”

*COMMENT: Specialists tend to view the world through their narrow lens of expertise. They can sometimes get so enamored of what they’re doing that they fail to see the larger picture.*

## Shaper

### ***Characteristics***

Shapers are highly motivated people with a lot of nervous energy and a strong need for achievement. Usually, they are aggressive extroverts and possess strong drive.

Shapers like to lead from the front and to push others into action. If obstacles arise, they will find a way around them. Headstrong and assertive, they tend to show strong emotional response to any form of disappointment or frustration.

Shapers generally make good managers because they generate action and thrive under pressure. Shapers are thick-skinned and argumentative and may lack interpersonal understanding. They are the most competitive team role, with a strong desire to win.

### ***Role on a Team***

They are probably the most effective members of a team in guaranteeing positive action. Shapers are excellent at sparking life into a team and are very useful in groups where political complications are apt to slow things down. As the name implies, they try to impose some shape or pattern (often their own) on group discussion or activities. Care must be taken to ensure their goals are aligned with those of the team as a whole.

### ***A Shaper in action***

#### ***Showing strengths***

Bill leads the acquisition department in a financial services firm. He was becoming frustrated with his team. A new deal was in the works, but the advisory team couldn't seem to come to a decision. Norm was still manning the

phones, surfacing alternative acquisition targets for the team to explore. Ellen was trying to map out the proposed acquisition in excruciating detail.

Bill stepped in to call a halt to all of the meandering. He knew the company had to grow or they would be gobbled up themselves. In the next two days after this intervention, Bill had lined up all the financing, gotten corporate approval, and was ready to take the plunge.

*COMMENT: Shapers are fearless and action-oriented. Their energy can be just what some teams need.*

### ***Showing a weakness***

The acquisition looks like it's a go, but in the final meeting, Ellen kept raising practical issues for the team to explore. "Given the other three deals we have in the pipeline, I just want to make sure this is the best use of our resources," she says.

This is the last straw for Bill. "I'm really losing patience with this!," he yelled. "We have looked at this acquisition every which way from Sunday. Stop dinking around, Ellen. We would have this deal done by now if it weren't for you."

*COMMENT: Shapers are often impatient, and can be abrasive since they don't fear controversy. It's allowable that they act this way, but that doesn't give them license to ride roughshod over others. In fact, in this case, Bill later apologized to Ellen and the rest of the team, explaining that his anxiety around getting the deal done had gotten the better of him. He acknowledged that Ellen had some good points around resource usage, and the team had some productive discussions on that issue.*

## Implementer

### ***Characteristics***

Implementers have practical common sense and a good deal of self-control and discipline. They favor hard work and tackle problems in a systematic fashion. On a wider front the Implementer is typically a person whose loyalty and interests lie with the company and who is less concerned with the pursuit of self-interest. Implementers are useful to an organization because of their reliability and capacity for applied action.

Good Implementers often progress to high management positions by virtue of strong organizational skills and competency in tackling necessary tasks. They succeed because they are efficient and because they have a sense of what is feasible and relevant. However, they may lack spontaneity and show signs of rigidity.

### ***Role on a Team***

An Implementer will do what needs to be done. They are especially good at establishing project plans and anticipating barriers that need to be addressed. Once such plans are established, they may be reluctant to deviate from the set pathway.

### ***An Implementer in action***

#### ***Showing strengths***

Maxwell Accounting Systems is considering the purchase of a major new contact management software. The CFO has already made the decision to go ahead with the purchase and is meeting with the head IT guy and Carlotta, who will be in charge of the conversion project. At the beginning of the meeting, Carlotta points out a potential

roadblock to the others. “Did you realize that you set the purchase date just two months ahead of when we’re moving the offices?” she asked. Juan, the CFO, chimed in. “I’m not clear why that’s a problem. Two months is plenty of time to get the new system up and running, and it won’t be affected by the move.”

“You’re right,” answers Carlotta, “but I’ve seen the master moving plan and about half the people in every department are going to be tied up a good 6 to 8 weeks before the move—and those are the same people we need to support the software upgrade. I think it will overlap too much.”

*COMMENT: Implementers always have an eye on the practical aspects of any decision, “what will it take to make this work?”*

### *Showing a weakness*

Juan, Carlotta, and the IT head honcho decided to move the purchase date for the new contact management program until two weeks after the big move. As they begin fleshing out the details of the changeover, it’s clear that Carlotta is increasingly uncomfortable. “You know,” she says, “we’ve been using Lotus Notes for about seven years now and it seems to work fine. Are you sure the change will help us?”

*COMMENT: Implementers can be a little inflexible at times, preferring the comfort of the known to the uncertainty and risk of trying something new. Some reluctance is allowable, and the team just needs to be patient to make sure the Implementer understands the full logic and reasoning behind a decision. What becomes unallowable is when an Implementer gets so entrenched in their own comfort zone that they sabotage progress on important issues.*

## **Completer Finisher**

### ***Characteristics***

Completer Finishers have a great capacity for follow-through and attention to detail. They are unlikely to start anything that they cannot finish. They are motivated by internal anxiety, yet outwardly they may appear unruffled. Typically, they are introverted and require little in the way of external stimulus or incentive. Completer Finishers can be intolerant of those with a casual disposition. They are not often keen on delegating, preferring to tackle all tasks themselves.

In management they excel by the high standards to which they aspire, and by their concern for precision, attention to detail and follow-through.

### ***Role on a Team***

Completer Finishers are invaluable where tasks demand close concentration and a high degree of accuracy. They foster a sense of urgency within a team and are good at meeting schedules.

### ***A Completer Finisher in action***

#### ***Showing strengths***

The product design team couldn't survive without Peter. His attention to detail was famous companywide. He would test and re-test and test again each product feature. While this sometimes slowed down development, it was well known that any product he had touched would launch perfectly. Everybody wants Peter on their team because they know they can rely on him to get his assignments done completely.

*COMMENT: Completer Finishers are essential to any team that actually wants to see results from its decisions. They are the people that will execute plans to the tiniest detail, meeting high standards of performance at every step.*

### *Showing a weakness*

During the development of one product, new information came to light that affected the design of a feature that Peter was responsible for. The requested change really put him back. “But we’ve already tested everything and it works perfectly. We can’t change things now. It would mess up everything.” The team leader suggests that if Peter doesn’t want to handle the change, perhaps someone else on the team could step in. “No way,” says Peter. “This is my baby. I know how this works better than anyone else.”

*COMMENT: Some degree of perfectionism is not only expected but desirable in Completer Finishers. It’s that attention to detail that everyone comes to rely on. But they can sometimes move towards obsession and can be very uncomfortable with change.*

## **Resource Investigators**

### ***Characteristics***

Resource Investigators are often enthusiastic, extroverted, and quick to act. They are good at communicating with people both inside and outside the company. Although not necessarily a great source of original ideas, the Resource Investigator is effective when it comes to picking up other people's ideas and developing them. As the name suggests, they are skilled at finding out what is available and what can be done. Resource Investigators have relaxed personalities and are highly inquisitive. They are quick to see the possibilities in anything new and act opportunistically. Resource Investigators are commonly found in outward-looking positions such as sales and marketing.

### ***Role on a Team***

Resource Investigators are good at exploring and reporting back on ideas, developments or resources outside the team. They have an ability to think on their feet and to probe others for information. However, unless they remain stimulated by others, their enthusiasm rapidly fades.

### ***A Resource Investigator in action***

#### ***Showing strengths***

The accounts payable team was really on the hot spot. Customer complaints about invoice and payment problems had been rising for months, and nothing they'd tried had worked. They'd upgraded their training, redesigned some software interface screens, but to little effect. Then one day Jamal came in very excited. "I was at a Rotary meeting last night and ran into Mark, one of the guys over at Maxwell Accounting. I was chatting with him about our low ratings and asked if he had any insights he could

offer. He said our recent changes in product codes were causing lots of headaches at their end. Orders were getting messed up, which meant they had to ask for return authorizations and credit vouchers.

“On my way in this morning,” continued Jamal, “I stopped by Derek’s office and got his input on the code changes, then asked him to come talk to the whole team. I think we can brainstorm some ways to make our internal changes completely invisible to the customer.”

*COMMENT: Resource Investigators are the ultimate networkers. They just naturally foster connections with lots of people, and will use those connections to help identify solutions to problems, to draw in expertise when the team needs it. They are the people most likely to make sure that viewpoints from stakeholders outside the team are represented during discussions and decision making.*

### *Showing a weakness*

When Jamal got back to his desk after the meeting with Derek and his team, he got a call from a colleague in another department. “Where’s that report you promised me this morning?” asked the colleague. “It slipped my mind,” confessed Jamal. “I got this great insight for solving this complaint problem we’ve been having and spent the morning working on that.”

*COMMENT: It’s not unusual for Resource Investigators to forget some commitments when they get caught up in something that sparks their enthusiasm—especially when the latter requires them to talk to a lot of people. While this is allowable to some degree, the RI should find ways to get reminders about less-exciting commitments (like doing reports) so they don’t let down customers or coworkers who may be depending on their work to make their own deadlines.*

## Team Worker

### ***Characteristics***

Team Workers have a great capacity for flexibility and for adapting to different situations and people. They are perceptive and diplomatic. They are good listeners and are generally popular members of a group. They operate with sensitivity at work, but may be indecisive in crunch situations.

Team Workers are mild, sociable and concerned about others. It is not uncommon for Team Workers to become senior managers especially if divisional management is dominated by Shapers. This creates a climate in which their diplomatic and perceptive skills become real assets. As managers, they are seen as a threat to no one and therefore the most accepted and favored people to serve under.

### ***Role on a Team***

Team Workers have a lubricating effect on teams. Morale is better and people seem to cooperate better when they are around. Their role is to prevent interpersonal problems from arising within a team and thus allow all team members to contribute effectively. Not liking friction, they will go to great lengths to avoid it.

### ***A Team Worker in action***

#### ***Showing strengths***

Gerry and Helen were really going at it. Gerry thought Helen was ignoring customer data by suggesting the team go with an option for using a cheaper material in the product design. Helen thought Gerry was being naïve about what the company could afford in product cost. Each was on the verge of stalking out of the meeting when Keith stepped in. "You know, I think you both have some good

points here. Gerry's right that we have to be careful not to go with a cheaper material if it's going to harm the structural integrity. But Helen's right that we have very firm price targets for this product and our profit margins will be too low if we spend too much on materials. I think there's a way we could go with the more expensive material without harming potential profit margin ."

*COMMENT: As the name implies, Team Workers are inherently concerned that the team survive and work well as a unit. They will always be looking for ways to soothe over tense situations while making sure that all viewpoints are acknowledged.*

### ***Showing a weakness***

Keith was glad that his suggestions for moving beyond the conflict between Helen and Gerry was accepted by the team. He clearly remembered a meeting not long ago when something similar happened, only this time Helen put him on the spot, asking him to choose sides between two alternatives suggested for the design of another element. He was extremely uncomfortable, not wanting to offend anyone's feelings, and hemmed and hawed until Helen gave up trying to make him take a stance.

*COMMENT: Team Workers can be uncomfortable with conflict or being placed in a position where they are expected to do something that could be perceived as "taking sides" (pitting one group against another). Obviously, that feeds into their strength in wanting to seek harmony, but it isn't allowable as a mechanism to avoid dealing with the source of the conflict. Doing so blocks progress because the issues go underground and are never addressed.*

## Coordinator

### ***Characteristics***

Coordinators are quick to spot individual talents and to use them in the pursuit of group objectives. Coordinators are well placed when put in charge of a team of people with diverse skills and personal characteristics. Their motto might well be “consultation with control” and they usually believe in tackling problems calmly. Mature, trusting and confident, they delegate readily. In some organizations, Coordinators are inclined to clash with Shapers due to their contrasting management styles.

### ***Role on a Team***

The distinguishing feature of Coordinators is the ability to cause others to work towards shared goals. While not necessarily the cleverest members of a team, they have a broad outlook and generally command respect.

### ***A Coordinator in action***

#### *Showing strengths*

The HR team at a small company had the potential to be fractious. One member had been with the company for 15 years and was happy with the way things were. Another member was new to the company and brimming with suggestions of ways to do things differently.

Oscar, the HR manager and team leader, knew it was his job to make sure everyone had a chance to contribute. He established a ground rule for the team that they would always be open to hearing new ideas, and that the team would always strive for consensus around major decisions. During meetings, he'd occasionally rein in the enthusiasm of the new guy, while at the same time mak-

ing sure the most senior employee got her say. By maintaining an impartiality, he was able to steer the team towards effective decisions without appearing to take sides. He also kept on top of when the team would need other resources, such as experts in the various areas of benefits (healthcare, retirement plans, vacation, etc.), and always made sure that the right people were in the room together.

*COMMENT: Coordinators are very skilled at building synergy on a team. They don't usually try to persuade people directly, but rather shape the meeting or discussion process so consensus emerges over time and people convince themselves of what the best options are. They are good at managing resources and coordinating actions so that handoffs between people work seamlessly.*

### ***Showing a weakness***

When it came time to draft a new retirement plan, Oscar let Tim, the new guy, take the lead, asking him to work with an external retirement plan specialist to develop a draft proposal for the whole team to review. He intended to check in with Tim a few times a week, but often got distracted by all other tasks. Then he got a call one day from the external specialist, "Listen, Oscar, you know I'm happy to help out, but I think Tim is asking me to make decisions that really you should be making. I think you'd be happier with the result if you were more involved at this stage."

*COMMENT: Coordinators are often so busy coordinating that they can lose track of what's going on with the details of all their projects. It can reach a point where other team members may perceive them as abdicating responsibility, though that is rarely their intent. The Coordinator should help clarify expectations up front about their ongoing involvement and make sure others know they can call them in as necessary.*



# **Appendix 2**

## **Interpreting a Belbin Report**

<b>BELBIN</b>	<b>ASSESSMENT RESULTS IN RANK ORDER</b>
	<b>Name</b> Kevin Carson <b>Organisation</b> 3Circle Partners <b>Department</b>

Assessment by	Team Roles in Rank Order									
	1	2	3	4	5	6	7	8	9	
Self-Perception	①	PL	ME	SP	TW	RI	SH	CO	CF	IMP
Bill Kastle								CO	PL	TW
Walt Mores								PL	ME	CO
Anton McBurnie								PL	SP	ME
Pam Altizer								PL	TW	CO
Max Isaac								PL	ME	RI
<b>OVERALL RANKING</b>								③	PL	ME
										CO
										TW
										SP
										RI
										CF
										IMP
										SH
										Ⓐ

## **Page 1: Overall Summary**

### *How to Read This Page*

Lists the nine roles in rank order from 1 = strongest to 9 = weakest in three groupings:

**SELF** (Area 1) - The top line is based only on your own responses to the self-assessment form.

**OBSERVERS** (Area 2) - The following lines translate each observer's responses into the roles they see you playing. Observer names have been included to provide context for the results, but the raw data of their responses is hidden from you. (You cannot tell if they said you were "professional," "aggressive," fussy," etc.)

**OVERALL** (Area 3) - The overall ranking is basically a weighted average of all the lines above as calculated by very complex formulas within the Belbin software system. It is over-weighted towards the observers on the premise that they are more accurate than you may be yourself.

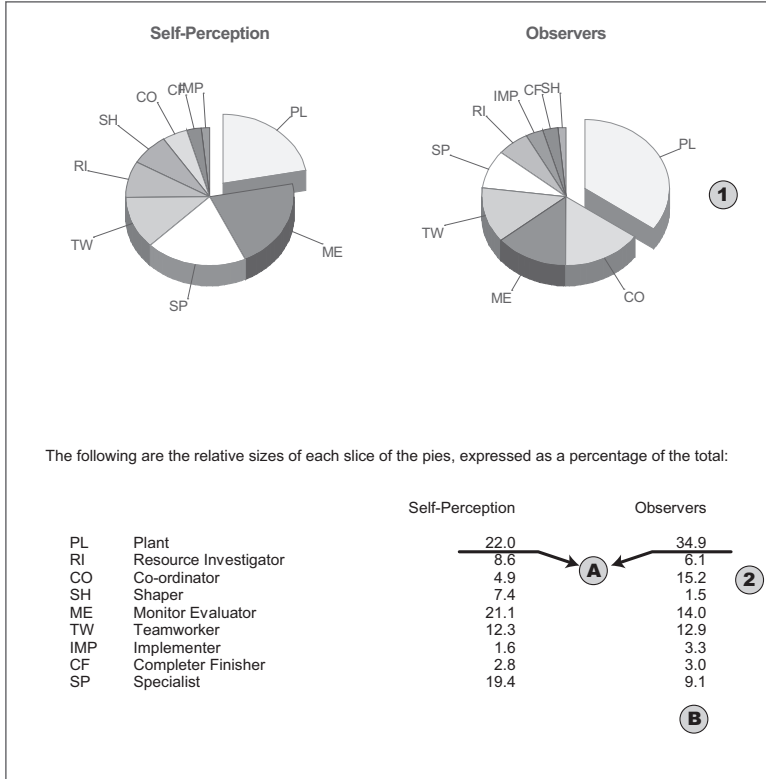
### *Areas to Investigate*

Concentrate on the top two or three roles from the overall ranking (last line, area A). Look at where these roles fall for each observer. Generally, it is preferable for the top roles to always fall in the top half for all the observers, as this indicates consistency in behavior. The greater the agreement across and among the observers, the more consistently your behavior is being perceived.

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### Pie Chart of SPI versus Observer Data

Name Kevin Carson  
 Organisation 3Circle Partners  
 Department



## Page 2: Pie Charts

### *How to Read This Page*

This page compares the SELF and OBSERVER perceptions of what roles the report subject is playing.

The top section (Area 1) displays the scores for the nine roles in a pie chart format, self-perception on the left and a composite of observers' reactions on the right.

The bottom section (Area 2) expresses the results numerically, with the totals of each column equaling 100. These numbers correspond to the sizes of the pie slices above.

### *Areas to Investigate*

Test for coherence by comparing the two columns of figures at the bottom of the page. If you notice any differences of 10.0 or more (in either direction), these are “disconnects” and indicate a potential lack of coherence (meaning you see yourself differently from how others see you). *In the example at left, the roles PL (see comparison “A”), CO and SP have difference of 10 or more points.*

Test for how distinct your role-playing is by examining the Observer data at the bottom of the page (labeled “B”). Clear strengths and weaknesses will show up as a mix of some higher numbers (16.0 or higher) and some lower scores (less than 5.0). If all the scores are relatively equal to each other, this may indicate that the observers are not getting a clear picture of what your preferred roles are.



## Page 3: Your Relative Self-Perception Scores

### *How to Read This Page*

This page is based *only* on the SELF assessment responses; no observer data has been used. It converts your responses into a score for each role on a scale from 0 to 100.

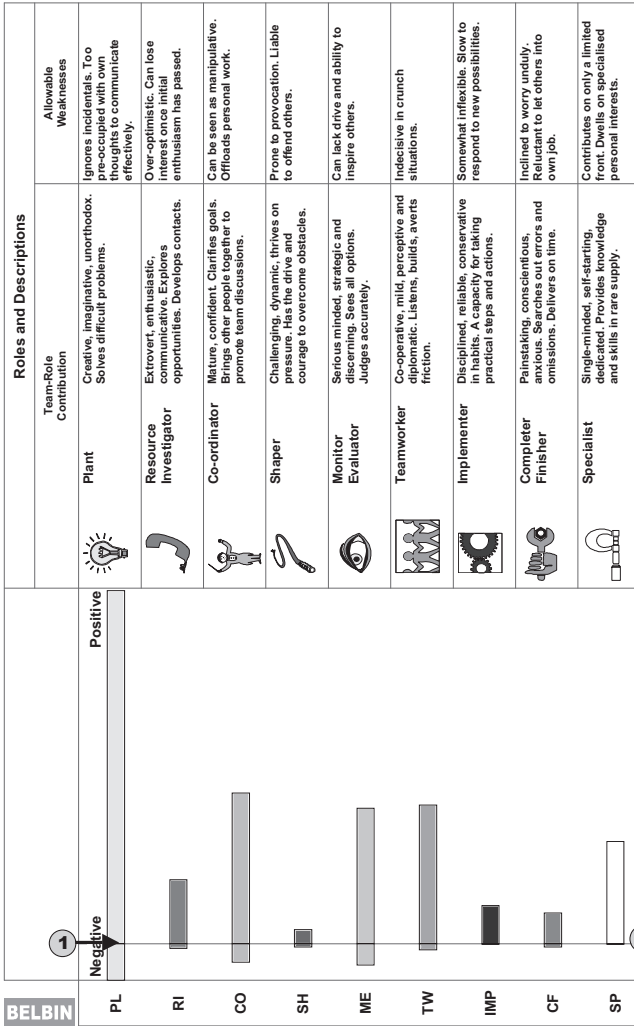
The scale is based on how your responses compare to those of everyone else in the Belbin software database. A score of 100 would indicate that you gave yourself more points for that role than anyone else in the database, a score of 0 would indicate that no one else was lower than you.

The page is divided somewhat arbitrarily into three sections which correspond to preferred, manageable, and least preferred roles. It is generally preferable to have a few roles in each of the three sections. Profiles which have all nine roles clustered right down the middle may indicate that you have an indistinct view of your strengths and weaknesses from a Belbin Team Role standpoint.










**Note:** The role descriptions on the right-hand side of this page are a handy reference for remembering what each role means.

BAR GRAPH OF OBSERVER WORDS

Name Kevin Carson  
 Organisation 3Circle Partners  
 Department



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Roles and Descriptions		Allowable Weaknesses
	<b>Plant</b> Creative, imaginative, unorthodox. Solves difficult problems.	Ignores incidents. Too pre-occupied with own thoughts to communicate effectively.
	<b>Resource Investigator</b> Extrovert, enthusiastic, communicative. Explores opportunities. Develops contacts.	Over-optimistic. Can lose interest once initial enthusiasm has passed.
	<b>Co-ordinator</b> Mature, confident. Clarifies goals. Brings other people together to promote team discussions.	Can be seen as manipulative. Offloads personal work.
	<b>Shaper</b> Challenging, dynamic, thrives on pressure. Has the drive and courage to overcome obstacles.	Prone to provocation. Liable to offend others.
	<b>Monitor Evaluator</b> Serious minded, strategic and discerning. Sees all options. Judges accurately.	Can lack drive and ability to inspire others.
	<b>Teamworker</b> Co-operative, mild, perceptive and diplomatic. Listens, builds, averts friction.	Indecisive in crunch situations.
	<b>Implementer</b> Disciplined, reliable, conservative in habits. A capacity for taking practical steps and actions.	Somewhat inflexible. Slow to respond to new possibilities.
	<b>Completer Finisher</b> Painstaking, conscientious, anxious. Searches out errors and omissions. Delivers on time.	Inclined to worry unduly. Reluctant to let others into own job.
	<b>Specialist</b> Single-minded, self-starting, energetic. Specialist knowledge and skills in core supply.	Contributes on only a limited range of specialised personal interests.

## Page 4: Positive vs. Negative Weighting

### *How to Read This Page*

This page is based *only* on the OBSERVER responses. The report totals up all of the observer responses which correspond to the various roles and displays the results as a series of bar graphs.

Each bar is composed of a positive and a negative component. If you look at the page horizontally, positive attributes are shown to the right of the line indicated by the line labeled “1,” negatives to the left of it.

The overall length of any given bar (both the positive and negative components) represents the extent to which you are seen to play that role. It shows *how much* the role is seen to be played. The ratio of positive to negative components within any given bar represents how adept you are at playing that role. It shows *how well* the role is being played.

### *Areas to Investigate*

Test for disallowable weaknesses by examining the ratio of positive to negative in each bar (area 1). If the ratio is less than 5:1, it is an indication that the role is not being well-received by the observers. The simplest strategy to correct this is to reduce the extent to which the role is played (do it less), which usually restores the ratio to an acceptable level. *In this sample report, there are no disallowable weaknesses.*

**Note:** You should not try to correct or eliminate the negative portions of the bars *unless* they are disallowable. Tolerate them because they are linked to the strengths you see.

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**COUNSELLING REPORT**

**Name** Kevin Carson  
**Organisation** 3Circle Partners  
**Department**

**Please note that this report is based on the complete profile.**

Your profile shows that you are a strong thinking type. One of your assets is your ability to weigh up the options and choose the best course of action. With your independent outlook you are also well placed to come up with new and original ideas. This means that you are most likely to make your mark in an area where the problems are complex and difficult. The ideal situation could be a planning, design or trouble-shooting function. When you work with busy executives, however, there is some risk that you will be seen as standing for all thought and no action. Do not be tempted into a general debate that can lead to "paralysis by analysis." Avoid working with too many thinking type colleagues. Choose practical subordinates who work on issues that may be important but which you are likely to find tedious.

Unless you are able to function as an independent person, the relationship with your boss will be an all important issue. It is likely that you will work best for someone who excels at interpersonal communications and who appreciates advice. Where others are concerned try to exercise your influence on a one-to-one basis and on the broader front let others do any missionary work on your behalf.

Your operating style is closest to that of strategic leadership, which is usually available only at senior positions. However, before such an opportunity could present itself, you are likely to need credibility at the operational level. That might pose problems in your case. Possibly, you would be well advised to make a team-role sacrifice by dealing as effectively as you can with issues that don't excite you. That may be the necessary prelude to reaching the position to which in the long run you are best suited. The good news is that the longer you survive, the more likely you are to become a valued contribution and to gain the greatest sense of personal fulfilment.

Your own perception of your top team role is supported by the views of others.

On a final note, you need to take account of the role for which you are least suited. You do not appear to have the characteristics of the hard-driving executive who obtains results by power and pressure. If you can work in harmony with someone who has these complementary qualities, your own performance is likely to improve.

---

## **Page 5: Counseling Report**

### *How to Read This Page*

This page is based on the complete profile. The statements it contains have been compiled based on interviews with numerous people who have Belbin profiles similar to yours. As a result, you will likely find many items of interest to you about where you can be most successful or where you should exercise caution.

The descriptions contained in this narrative are based on the overall rankings from the bottom of the first page. Specifically, it is based on the top two roles and the very last role (thus roles number 1, 2, and 9 on the last line of page 1).

**Note:** The descriptions on this page are directionally correct, not “gospel.” The accuracy of this page typically improves once a consistent and coherent profile emerges.

<b>BELBIN</b>	<b>MOST HIGHLY RATED OBSERVER RESPONSES</b>	
	Name	Kevin Carson
	Organisation	3Circle Partners
	Department	

This list shows words from Observers Assessments and their scores in descending order of popularity.

clever	9	challenging	1
broad in outlook	8	easily bored	1
analytical	8	forgetful	1
knowledgeable	8	provocative	1
co-operative	7	reluctant to delegate	1
innovative	6	outgoing	1
creative	6	well organised	1
consultative	6	tough	0
laid back	6	perfectionist	0
original	5	single-minded	0
imaginative	5	shrewd	0
observant	5	hard driving	0
calm & confident	5	erratic	0
impartial	4	frightened of failure	0
technically skilful	4	inflexible	0
unorthodox	4	insular	0
diplomatic	4	manipulative	0
caring	4	outspoken	0
adaptable	3	over-sensitive	0
encouraging of others	3	territorial	0
realistic	3	good at follow through	0
logical	3	self-reliant	0
loyal	3	persistent	0
professionally dedicated	3	disciplined	0
enterprising	2	conscious of priorities	0
sceptical	2	efficient	0
inquisitive	2	fearful of conflict	0
practical	2	fussy	0
accurate	2	impulsive	0
persuasive	2	resistant to change	0
up-in-the-clouds	2	competitive	0
critical	2	aggressive	0
slow-moving	2	not interested in others	0
conscientious	2	unadventurous	0
indecisive	2	empire building	0
opportunistic	1	impatient	0

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## Page 6: Observer Responses

### *How to Read This Page*

This page lists the actual words checked off by the observers on their assessment forms. All of the individual observers' responses have been added together to create this summary. This page represents the detail behind the bar charts represented on page 4 of the report.

Each observer was given instructions to check any phrases which are representative of you, and to “double check” a few phrases which are very, very much typical of what they see you doing. Thus, the maximum score for any phrase on this sheet is twice the number of observers. *Since this person had 5 observers, the maximum score would be 10.*

### *Areas to Investigate*

Break the report into three sections. Section A represents the “unanimous” attributes. The cutoff score for this section will be equal to the number of observers you had (anything above 5 in this example).

Section B consists of scores from 1 to the cutoff above. This represents attributes occasionally seen.

Section C is comprised of attributes never seen; they have scores of 0.

## **For More Information**

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