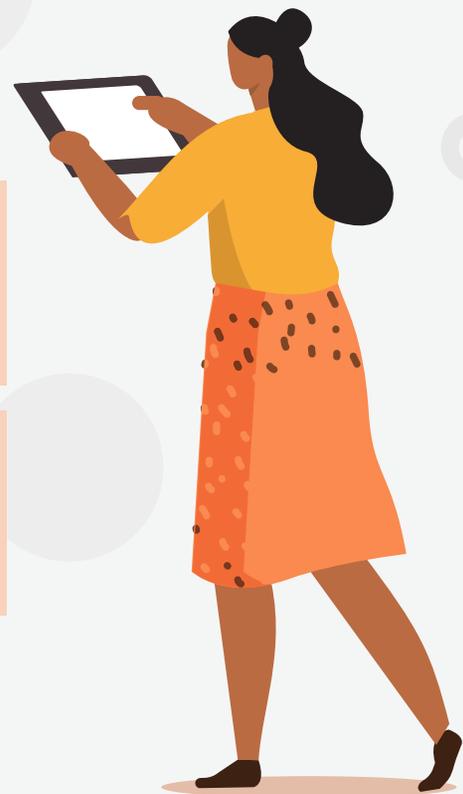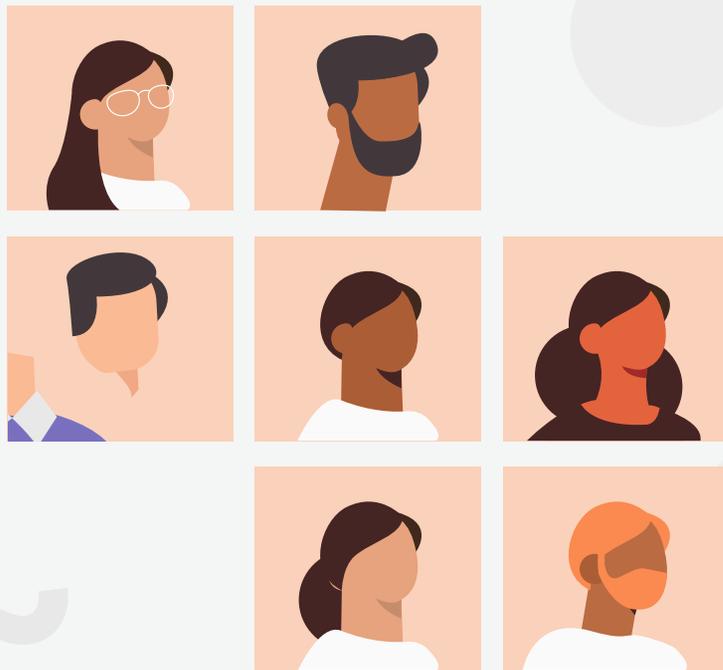# Skillbook

Understanding Team Roles and Behaviors

Team Management
Skills

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Understanding Team Roles and Behaviors
Skillbook

If you have any queries, please contact us at
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Contents

1. Introduction

I t can be creative and exhilarating to be part of a successful team. But it can be frustrating and unproductive to work in a dysfunctional one.

So, what makes the difference between a team that achieves terrific results and one that fails?

One of the characteristics that makes a great team great is that everyone involved understands what they are responsible for. But, even when this is the case, things can still go badly wrong. So, why does this happen?

It often comes down to the different **behavioral** roles that people assume. One member of your team might, for instance, be the "detail" person, who makes sure the figures add up correctly, but gets stuck on perfecting the grammar. Another might be the visionary, who loves to come up with ideas, but struggles to implement them.

Team projects and meetings work best when each person plays to his or her individual strengths, and when there is a balance of different, complementary roles. But things can go wrong when these roles conflict, rather than work in harmony.

In this **Skillbook**, we'll help you to:

- Explore the role you've assumed in your own team and analyze those of others using two different models – Belbin's Team Roles and Benne and Sheat's Group Roles.
- Analyze the strengths and weaknesses within your team, and what you can do to improve or mitigate these.
- Create a more balanced team.

Finally, we take you through a couple of scenarios, so you can check your learning and begin to put it into practice.

2.   Belbin's Team Roles

E ven the most highly-talented team can fail to live up to its potential, especially if the spread of roles within the team is not well balanced.

There's a risk that contrasting roles can clash or that team leaders fall into the trap of picking "clones" of themselves. While this may be a good way to choose friends, it's not a sound basis for creating a team.

A successful team relies on members with diverse ideas and skills, who know that they can work together and get things done.

When you don't have the right mix, skills gaps may occur which can hamper progress, conflict can arise, or projects can stall! This can often result in frustration, unhappiness and even task failure.

One method you can use to assess the balance of roles in your team is by using Dr Meredith Belbin's Team Roles theory.

He studied groups for many years, and formalized what we all know intuitively: people assume particular roles in group settings that they demonstrate through predictable behaviors.

From his observations, Belbin identified nine team roles, which he sorted into three key categories. These are:

1.   Action-oriented roles.
2.   People-oriented roles.
3.   Thought-oriented roles.

Each role has its own strengths and weaknesses, which we'll explore in further detail in this chapter.

Action-Oriented Roles

Shapers

Shapers are often extroverted, dynamic people who love to challenge and stimulate others. They question habits and norms, and love to find the best approaches for dealing with problems.

Strengths:

- Shapers encourage the team to consider all possibilities and tend to view problems as exciting challenges that should be met head-on.
- They have the courage to push others on, even when they feel like quitting.

Weaknesses:

- Their determination can make them headstrong and argumentative, which can cause them to offend other people.

Implementers

These are the practical people on a team. They're the ones who pick up the group's ideas and make them happen.

Strengths:

- You can count on implementers to get things done.
- They're often disciplined, efficient, and extremely well-organized.

Weaknesses:

- Implements can be inflexible, which can make them rigid and resistant to change.

Completer-Finishers

Completer-Finishers are obssessed with detail, and spend time making sure that everything is correct and right.

Strengths:

- Their attention to detail means that their work is often highly accomplished.
- They are able to work at a high level and on complex projects.

Weaknesses:

- They can struggle with perfectionism and tend to worry unnecessarily. This can also cause them to miss deadlines.
- They demand a lot of other people to get tasks completed properly.
- They find it hard to delegate tasks, and often believe that they can do things better than other people.

People-Oriented Roles

Coordinators

Coordinators fulfill the traditional team leader role. They enjoy guiding the team towards achieving its objectives. They're often calm and good-natured, and they keep things on an even keel.

Strengths:

- Coordinators recognize the value of each member's contribution.
- They recognize the power of delegation, and aren't afraid to use it.

Weaknesses:

- The can sometimes over-delegate and pass on responsibilities that they should handle themselves.
- They can, in some cases, be manipulative.

Team Workers

Team Workers are the negotiators of the group. They tend to be the best listeners on the team and work hard to make sure that everyone is "on the same page."

Strengths:

- Team workers are flexible, diplomatic and perceptive, which makes them popular individuals.
- They're great at bringing people together and are always ready to help.

Weaknesses:

- Although they're capable of independent work, they tend to place team cohesion above their own priorities.
- They are sometimes indecisive and often don't commit to any, singular position when a decision needs to be made.

Resource Investigators

Resource Investigators are the curious people within a team. They enjoy exploring options, developing contacts, and acquiring resources for the team.

Strengths:

- They love to work as part of a team and connect with external stakeholders to help the group accomplish its objectives.
- They tend to be outgoing and extroverted, making them great communicators. This means that other people are often receptive to them and their ideas.

Weaknesses:

- They can lose enthusiasm quickly or, in contrast, can be too optimistic.
- Their extrovert behavior can result in them dominating meetings, and overshadowing other people's ideas and opinions.

Thought-Oriented Roles

Plants

Plants are the deep thinkers and creative innovators of the team.

Strengths:

- They are able to see problems and challenges from new and different perspectives.
- They are often introverted and enjoy working independently.
- Their creativity and ability to "think outside the box" means that they have a lot to offer in the way of new ideas and approaches.

Weaknesses:

- Because they are introverted, they tend to have poor communication skills and find it hard to deal with criticism.
- They have a tendency to ignore the limitations of projects.
- Sometimes their creative ideas can become complex and unworkable.

Monitor-Evaluators

Monitor-Evaluators are great at analyzing the ideas that other people (often Plants) generate. They are shrewd and objective, and they weigh up the pros and cons of all the options before they reach a decision.

Strengths:

- They're critical thinkers and take a measured, risk-based approach to work.
- They are great strategists, who can clearly see the business benefits or disadvantages of a new idea.

Weaknesses:

- Other people often see Monitor-Evaluators as detached and unemotional.
- In some cases, they're poor motivators who react to events rather than drive them.

Specialists

These people possess expert knowledge in a specific area, and tend to commit themselves fully to their area of expertise. This can mean they may not get involved in the general, day-to-day tasks that the team are responsible for.

Strengths:

- They take great pride in their skills and abilities, and they work hard to maintain their professional status.

Weaknesses:

- Their contribution may be limited, because they can become preoccupied with technicalities at the expense of the bigger picture.

Action:

Look at the summary of Belbin's Team Roles in the box below. Write down your top two roles or responsibilities in the table on page 7. Then think about which of Belbin's Team Roles they best align to, and tick the role groups that they fit into (e.g. Action-Oriented, People-Oriented or Thought-Oriented). Then do the same for the other members of your teams using the space provided.

Here's a summary of Belbin's Team Roles:

Role Group	Team Role	Main Characteristic
Action-Oriented Roles	**Shaper**	Challenges the team to improve.
	Implementer	Put ideas into action.
	Completer-Finisher	Ensures work is completed properly, sparing no attention to detail.
People-Oriented Roles	**Coordinator**	Guides and leads the team to complete its objectives.
	Team Worker	Encourages cooperation.
	Resource Investigator	Explores outside opportunities and external networks.
Thought-Oriented Roles	**Plant**	Generates new ideas and creative approaches.
	Monitor-Evaluator	Analyzes options and strategizes based on findings.
	Specialist	Provides expertise and specialist skills.

Team Member	Top Two Roles/Responsibilities	Belbin's Team Role (e.g. Shaper, Coordinator, Specialist, etc.)	Action-Oriented	People-Oriented	Thought-Oriented
Me					

Analyzing your role and those of your team members using the Belbin model should help you to pinpoint areas that your team are strong in and areas of weakness.

For example, you might have a lot of people who are action-oriented. This means that you're team are great at implementing ideas. But a lack of people-oriented team members can result in poor team cohesion. While a lack of thought-oriented people can mean that you find it difficult to generate new ideas, problem solve or strategize effectively.

If you do identify skills gaps in your team, think about how you can overcome these and create a more balanced team. Can you recruit new people? Or use a Training Needs Assessment to identify specific skills and training that team members require?

Tip:

Remember that people can fit none, one or more of the roles defined by Belbin's model, depending on their role and the situation, so use your judgment carefully.

3.   Benne and Sheat's Group Roles

G roups are made up of people with a variety of different needs and objectives. The aim of any team leader is to help them to work in harmony.

Think about how people behave in your team. Some people will likely be supportive and helpful. Others are just interesting in getting things done. You may even find that some cause friction, disharmony and tension.

While there is no magic elixir for creating a perfect team, knowing what moves a team forward to success and what limits progress can be helpful when working in a team or group setup.

So in this chapter, we're looking at another model, called Benne and Sheat's Group Roles, which is based on findings from Kenneth Benne and Paul Sheat's paper "Functional Roles of Group Members," first published in the 1940s.

In it, they defined 26 different roles that can be played by one or more people within a group. Based on their observations, Benne and Sheats put group roles into three main categories:

1.   Task roles.
2.   Personal/social roles.
3.   Dysfunctional/individualistic roles.

Similar to Belbin's model, Benne and Sheats' findings can be used to analyze the strengths and weaknesses of your team or organization.

However, it differs slightly by focusing on group behavior rather than the roles and tasks that people fulfill within a team. In fact, the model continues to remain a useful and interesting way of looking at people's interactions and behavior in a group setting.

> **Tip:**
>
> While you should aim for a good balance within your team, you don't need to include all the roles listed by Benne and Sheat. Also there's no ideal combination of roles to aim for.

Now let's look at each category, and the roles within them:

Task Roles

These are the roles that relate to getting the work done. They represent the roles needed to take a project through from initial conception to action. (An individual may fulfill one or more of these roles during the life of a project.)

Roles	Characteristics
Initiator/Contributor	Proposes original ideas or different ways of approaching group problems or goals. Initiaties discussions and moves groups into new areas of exploration.
Information Seeker	Seeks expert information or facts relevant to a problem or query. Determines what information is missing and needs to be found before moving forward.
Information Giver	Provides factual information and research to the group, and is seen as an authoritative voice.
Opinion Seeker	Clarifies the values, attitudes and opinions of group members, and weighs up the differences in these.
Opinion Giver	Expresses their opinions and beliefs about subjects being discussed. Often states opinions in terms of what the group "should" do.
Elaborator	Takes other people's initial ideas and builds on them with examples, facts and data. Also analyzes the consequences of proposed ideas and actions.
Coordinator	Identifies and explains the relationship between ideas, and pulls together different ideas to make them cohesive.
Orienter	Regularly reviews, summarizes and clarifies the group's position - what it needs to accomplish, whether it's veered off course and how it can get back on track.
Evaluator/Critic	Evaluates proposals against objective standards. Assesses the reasonableness of a proposal and looks at whether it is a fact-based and manageable as a solution.
Energizer	Breathes life into the group dynamics, and challenges and stimulates the group to move forward and take action.
Procedural Technician	Takes care of logistical concerns within the group like where meetings are to take place and what supplies are needed.
Recorder	Acts as the secretary or minute-keeper. Records ideas and keeps track of the group's progress.

Personal and/or Social Roles

These roles contribute to the positive functioning and harmony of the group.

Roles	Characteristics
Encourager	Affirms, supports and praises the efforts of other group members. Demonstrates warmth and provides a positive attitude in meetings.
Harmonizer	Conciliates differences between individuals. Seeks ways to reduce tension and disharmony.
Compromiser	Offers to change their position for the good of the group. Willing to yield position to meet others halfway.
Gatekeeper/Expediter	Regulates the flow of communication and ensures that all group members get to have their say.
Observer/Commentator	Provides feedback to the group about how it is functioning. Often useful when a group wants to set, evaluate or change its standards or processes.
Follower	Accepts whats other people in the team say or decide even though they have not contributed to the decision or expresses their own thoughts. Seen as a listener, not a contributor.

Dysfunctional and/or Individualistic Roles

These roles can disrupt a group's progress and weaken its cohesion.

Role	Characteristics
Aggressor	Makes personal attacks using belittling and insulting language. Actions are usually an attempt to decrease another member's status.
Blocker	Opposes every idea or opinion that is put forward but refuses to make their own suggestions. This can stall a group's progress because it can't overcome this resistance.
Recognition Seeker	Uses group meetings to draw attention to themself. May brag about past accomplishments or relay irrelevant stories that pain them in a positive light. Sometimes pulls crazy stunts to attract attention like acting silly, making excessive noise or otherwise directing people's attention away from the task at hand.
Self-Confessor	Uses group meetings as an avenue to disclose personal feelings and issues. Tries to slip these comments in under the guise of relevance. May relate group actions to their personal life.
Disrupter/Playboy or Playgirl	Uses group meetings as fun time and a way to get out of real work. Distracts other people by telling jokes, playing pranks or even focusing on unrelated material.
Dominator	Tries to control the conversation and dictate what people should be doing. Often exaggerates their own knowledge and will monopolize conversations by claiming to know more about the situation and have better solutions than other people.
Help Seeker	Actively looks for sympathy by constantly expressing feelings of inadequacy. Acts helpless, self-deprecating and unable to contribute.
Special Interest Pleader	Makes suggestions based on what others would think or feel. Avoids revealing their own biases or opinions by focusing on a stereotypical posiion instead. For example, "The people over in tech sure won't like that," or "You know how cheap our suppliers are. They won't go for that."

Using Benne and Sheats' Theory

Benne and Sheats did not actually prescribe any application of their theory; they simply identified the roles. However, we recommend that you use the theory in a practical way to analyze and improve group effectiveness.

Although it' s useful to identify which of the Task and Personal/Social Roles have been filled within a group, and what other roles you might need, the main benefit of Benne and Sheats' theory is that you can use it to identify and address any harmful dysfunctional roles.

Naturally, the last person you want on any team is someone who sabotages its efforts, whether consciously or subconsciously, so it's important to spot them. Then you can make a plan to reduce or eliminate the behavior through coaching, feedback or performance management.

You can also harness the skills of the more positive members of the group to support you. Make them aware of potential dysfunctional behaviors so they can help catch and neutralize them as they occur. After all, they'll want the team to succeed as much as you do, and will contribute in any way they can. Just be sure not to create additional conflict by setting group members against each other!

4.   Scenarios

I n this chapter we'll look at two different scenarios where a team isn't working as well as it should be.

As you read each one, make a note of your observations, then complete the exercise on the following page.

Scenario One: Amy's New Project

Amy has recently held several meetings with a group of colleagues to kick off a new project. To succeed, she'll need input from several different departments within her organization. But she's not happy with the results so far, and she feels that progress is being blocked by the group's composition. So let's take a closer look at the different players in this scenario:

- **Ted From Marketing** – Ted has loads of ideas and is happy to share them with everyone. But he also likes to regularly remind people of his experience and knowledge, and often implies that his ideas are better than anyone else's.
- **Dan the Technical Expert** – Dan has lots of experience. But he's lost patience with Ted on a number of occasions. He's quiet about it, but is rapidly losing interest in the project. From the way he rolls his eyes and taps his pencil, it's clear he feels things are going nowhere. Similarly, when Dan goes into the technical details of the project, Ted loses patience, and protests about getting bogged down in unimportant details.
- **Sally From Sales** – she has no patience for Ted, either. She's remarked several times that Ted's ideas are inconsistent with the project objectives, and has told him that he needs to focus on practical solutions. Ted has taken offense at her bluntness, though this hasn't stopped him from dominating conversations.
- **Ellie From Shipping** – Amy has done her best to manage the tense interactions, and has received support and encouragement from **Ellie**. Ellie has praised the efforts of all team members, and always says positive things, no matter what.
- **John From Assembly** – John has also supported Amy and has politely interrupted Ted several times (much to Ted's annoyance), in an attempt to give everyone an opportunity to express their opinions.

Read through Scenario One and then try to assign Amy and each of her team members a role using Benne and Sheat's Group Roles model. Then in the column on the right, list what (if anything) Amy could do to manage herself and each person more effectively, create more team harmony and get her project back on track.

Team Member	Group Role (according to Benne and Sheat's Theory)	Actions Amy Can Take to Improve Team Harmony
Amy		
Ted		
Dan		
Sally		
Ellie		
John		

Scenario Two: Jack's Program Overhaul

Jack has been asked to overhaul the quality-control program in his organization. He's put a team together to draw up a plan for implementation, but it's been slow-going because one key member of the group doesn't fully support the new program.

Let's take a closer look at each player in this scenario:

- **Constance** – sees nothing wrong with the old quality-control program, and thinks it simply needs a few minor changes.
- **Richard** – sees things very differently. He says that things need to be "shaken up," and that the current program is "outmoded and outdated." Jack has seen that Constance gets annoyed, and her body language becomes rigid, when Richard takes the floor, and talks about all the ideas and possibilities they could explore. Polite, but strained, arguments have broken out between the two of them.
- **Charles** – the ongoing conflict has annoyed and upset Charles. He sees the deadline getting closer and closer, without any clear progress being made. He has worked hard to ensure that he has delivered his parts of the project to specification and on time. But he thinks that Constance and Richard don't feel any sense of urgency to accomplish the project as a whole. This upsets him even more.

Jack knows he has a problem on his hands, and believes that the way forward is to involve other people on the team to help achieve a better balance of members, and get the project back on track.

Action:

Write down the roles that Jack and each member of his team fill according to Belbin's theory (see Chapter Two) in the table on the following page. Then jot down the pros and cons of each role.

Team Member	Role (according to Belbin's Team Roles)	Pros	Cons
Jack			
Constance			
Richard			
Charles			

Action:

Jack knows he needs to involve other people on the project. What team roles (according to Belbin's classification) should he involve and why? Think about the positive influence could these roles have on the current team dynamic and how they could help to create more balance and push the team to achieve its objectives.

Team Roles to Add:	Positive Benefit on Team and Objectives

5.   Suggested Solutions

Scenario One: Amy's New Project

Team Member	Group Role (according to Benne and Sheat's Theory)	Actions Amy Can Take to Improve Team Harmony
Amy	Information Seeker/ Opinion Seeker/Procedural Technician	Amy's job is to seek out ideas and opinions from the group and coordinate their efforts to meet the group's objectives. She could help the group dynamics by taking on the role of Encourager/Harmonizer. She also needs to give everyone their say by taking on the roles of Gatekeeper and Commentator.
Ted	Dominator/Aggressor	Ted monopolizes conversations, and attempts to trivialize Dan's contributions. The easiest solution for Amy would be to replace Ted with another person. But this may not be possible She could instead improve the situation by talking to Ted directly, giving him some constructive feedback and explaining to him, politely, that other people need to get heard too and that he should respect this. It may be difficult to control a person like Ted, but it's Amy's job as project manager to take control of the situation and set limits on people's behavior, particularly when it has a negative impact on other people.
Dan	Information Giver	Dan is not happy about the way Ted acts and is most concerned with the facts and figures involved in the project. His world view is diammetrically opposite to Ted, who believes he is the "big picture" person. Dan is losing motivation because of the dynamic. Amy needs to do more to address this, to keep team morale high.
Sally	Evaluator/Critic	Sally believes Ted's ideas have little or no relevance to the project. She wants solutions based on fact, rather than abstract ideas. While it's important that the team does analyze the facts, it also needs to explore new ideas. Amy needs to explain this to the group, and make sure that everyone's gets their voice heard.

Table continued.

| Team Member	Group Role (according to Benne and Sheat's Theory)	Actions Amy Can Take to Improve Team Harmony
Ellie	Encourager	She's found something positive to say about each of the team members. Ellie is a helpful member of the team and Amy could use her inate positivity to improve team morale and push the team to meet its objectives.
John	Gatekeeper/Expediter	John wants everyone to have their say. He's already tried to achieve this several times by interrupting Ted when he's dominating a conversation. Amy could use John's mediating skills at team meetings. Perhaps she could even give him some control over how the meetings are run.

Scenario Two: Jack's Program Overhaul

Exercise One:

Team Member	Role (according to Belbin's Team Roles)	Pros	Cons
Jack	Coordinator	Coordinators guide their teams to their objectives, are excellent listeners, and values the contribution of each team member. They are calm, good-natured and excellent delegators. Jack needs to do more to pull his team together so that they can achieve their objectives.	Jack seems to be slightly indecisive. He needs to show stronger leadership and take control. He's already demonstrating some leadership skills by exploring options to expand his team.
Constance	Implementer	Constance is a practical person who is concerned with efficiency and getting things done.	Constance is already showing some of the negative attributes associated with Implementers. She's rigid and resistant to change, which is demonstrated by her hostility to Richard's suggestions.
Richard	Shaper	Richard is an extrovert who loves to generate new ideas and "shake up" the status quo.	Richard's confidence in his ideas can offend people. He really hurt Constance's feelings when he referred to the current program as "outmoded and outdated."
Charles	Completer-Finisher	Charles is detail oriented. He wants to see the project through to the end leaving "no stone unturned." Deadlines are of paramount importance to him.	Charles's focus on the deadline has seen him get increasingly annoyed by Richard and Constance's arguing. But he may find it difficult to raise these concerns with Jack, resulting in him growing quietly annoyed and resentful.

Exercise Two:

Team Roles to Add:	Positive Benefit on Team and Objectives
Team Worker	Jack might find it useful to add a Team Worker to the group. This person could help mediate the conflict between Richard and Constance in a smooth and diplomatic manner, which could help to bring them together and understand each other's points of view better.
Monitor-Evaluator	Monitor-Evaluators are great at looking at ideas objectively. It's likely that Constance would respect a Monitor-Evaluator's opinion because it will be grounded in fact – which could make her more open to Richard's ideas, even they're proven to be effective. At the same time the Monitor-Evaluator could reality check Richard's "flights of fancy" and could convince him to stick to ideas that will help the team to meet its objectives.
Coordinator	Jack would be classified as the typical Coordinator or "team lead" in this scenario. It's obvious that he's a good listener and a good judge of the roles within his team. But he needs to step away from his faciliator role to impose more discipline on the brewing situation between Constance and Richard. This will help to avoid any further conflict in the team and should help people to focus more on the group's objectives.
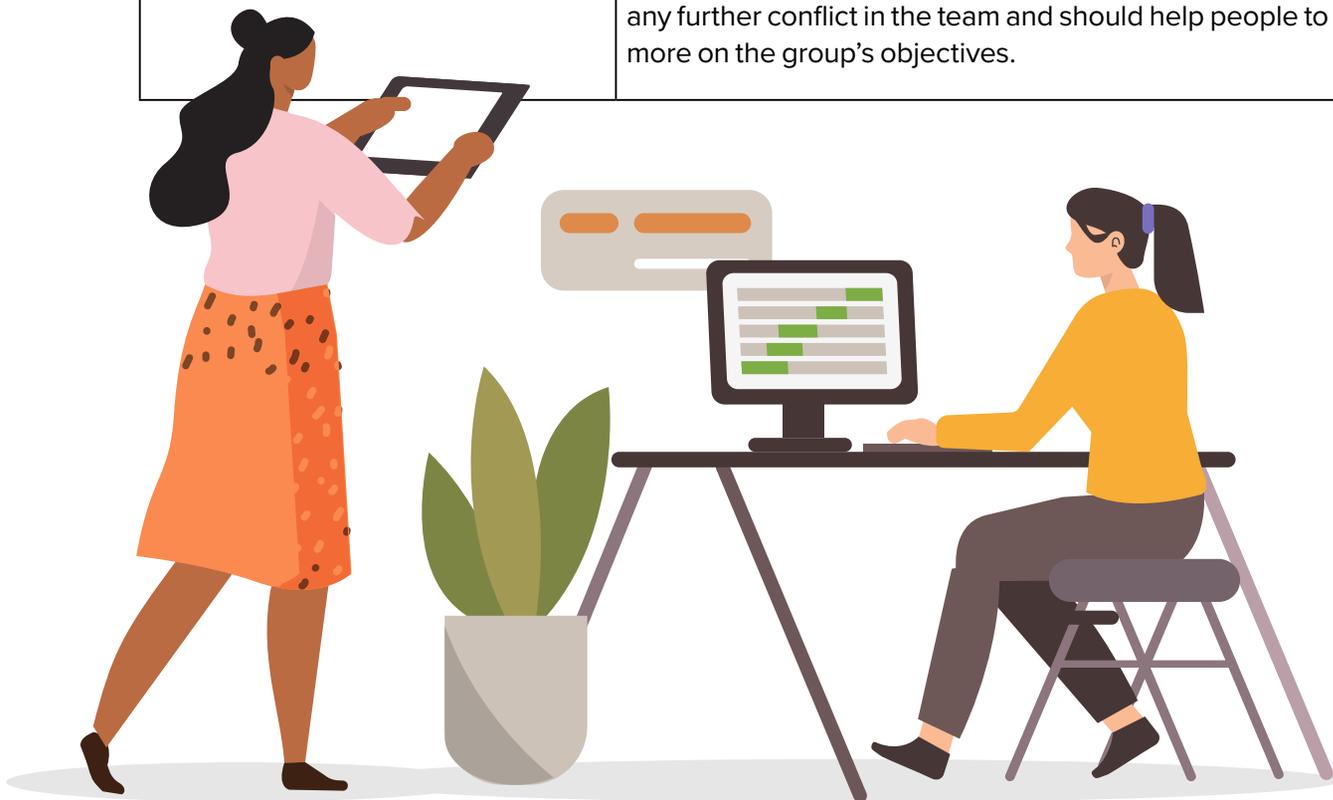
6.   Key Points

What makes a good team?

There's no one-size-fits-all solution to this question. But the general consensus is that teams work best when there's a mix of people that can offer different perspectives, fulfill different roles and contribute different ideas.

Most of all, effective teams are made up of people who can contribute in a positive way, whether by their great organization, people skills, or creativity.

In this Skillbook, we've looked at two different models that seek to define the different roles that people might play in a team:

1.   Belbin's Team Roles
2.   Benne and Sheat's Group Roles

These models can be useful by helping you to assess the strengths and weaknesses of your team and its different players. They can also help you to clarify roles and functions, stop conflict from arising, and create a team that is able to work productively and harmoniously, rather than at cross purposes.