



explore, engage, execute, evaluate

# Understanding Team Roles

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## Dr Meredith Belbin's Team Roles

Raymond Meredith Belbin was born in 1926. He took both his first and second degrees, Classics and then Psychology at Clare College, Cambridge. His first appointment after his doctorate was as a research fellow at Cranfield College (now Cranfield School of Management at Cranfield University). His early research focused mainly on older workers in industry. He returned to Cambridge and joined the Industrial Training Research Unit (ITRU) where his wife Eunice was director and he subsequently became chairman. Belbin combined this job with acting as OECD consultant running successful demonstration projects in Sweden, Austria, UK and the United States.

It was while at ITRU, in the late 1960s, that Belbin was invited to carry out research at what was then called the Administrative Staff College at Henley-on-Thames. The work which formed the basis of his 1981 classic took several years and, after publication, it was some time before its real importance was recognised. Having an interest in group as well as individual behaviour, but with no particular theories about teams, Belbin enlisted the aid of three other scholars: Bill Hartston, mathematician and international chess master; Jeanne Fisher, an anthropologist who had studied Kenyan tribes; and Roger Mottram, an occupational psychologist. Together they began what was to be a seven-year task. Three business games a year, with eight teams in each game, and then in meeting after meeting, observing, categorising and recording all the different kinds of contribution from team members.

In 1988, Belbin established, with his son Nigel, Belbin Associates to publish and promote his research.

## Belbin's research

Belbin's 1981 book *Management Teams* presented conclusions from his work studying how members of teams interacted during business games run at Henley Management College. Amongst his key conclusions was the proposition that an effective team has members that cover eight (later nine) key roles in managing the team and how it carries out its work. This may be separate from the role each team member has in carrying out the work of the team.

**Plant:** A creative, imaginative, unorthodox team-member who solves difficult problems. Although they sometimes situate themselves far from the other team members, they always come back to present their brilliant idea.

**Resource Investigator:** The "Resource Investigator" is the networker for the group. Whatever the team needs, the Resource Investigator is likely to have someone in their address book that can either provide it or know someone else who can provide it. This may be physical, financial or human resources, political support, information or ideas. Being highly driven to make connections with people, the Resource Investigator may appear to be flighty and inconstant, but their ability to call on their

connections is highly useful to the team. Explores opportunities, make contacts, shares external information; negotiates with outsiders; responds well to challenges.

Chairman (1981) / Co-ordinator (1988): The "Chairman/Co-ordinator" ensures that all members of the team are able to contribute to discussions and decisions of the team. Their concern is for fairness and equity among team members. Those who want to make decisions quickly, or unilaterally, may feel frustrated by their insistence on consulting with all members, but this can often improve the quality of decisions made by the team. Clarifies goals; helps allocate roles, responsibilities, and duties; articulates group conclusions.

Shaper: A dynamic team-member who loves a challenge and thrives on pressure. This member possesses the drive and courage required to overcome obstacles. Seeks patterns in group work; pushes group toward agreement and decisions; challenges others.

Monitor-Evaluator: A sober, strategic and discerning member, who tries to see all options and judge accurately. This member contributes a measured and dispassionate analysis and, through objectivity, stops the team committing itself to a misguided task. Analyses problems and complex issues; monitors progress and prevents mistakes; assesses the contributions of others; sees all options; judges accurately.

Team Worker: The "Team Worker" is concerned to ensure that interpersonal relationships within the team are maintained. They are sensitive to atmospheres and may be the first to approach another team member who feels slighted, excluded or otherwise attacked but has not expressed their discomfort. The Team Worker's concern with people factors can frustrate those who are keen to move quickly, but their skills ensure long-term cohesion within the team. Gives personal support and help to others; socially oriented and sensitive to others; resolves conflicts; calms the waters; serves as an in-group diplomat.

Company Worker (1981) / Implementer (1988): The "Implementer" is the practical thinker who can create systems and processes that will produce what the team wants. Taking a problem and working out how it can be practically addressed is their strength. Being strongly rooted in the real world, they may frustrate other team members by their perceived lack of enthusiasm for inspiring visions and radical thinking, but their ability to turn those radical ideas into workable solutions is important.

Completer Finisher: The "Completer Finisher" is the detail person within the team. They have a great eye for spotting flaws and gaps and for knowing exactly where the team is in relation to its schedule. Team members who have less preference for detail work may be frustrated by their analytical and meticulous approach, but the work of the Completer Finisher ensures the quality and timeliness of the output of the team. Emphasizes the need for meeting schedules, deadlines, and completing tasks; searches out errors.

Specialist (1988): Belbin later added a ninth role, the "Specialist", who brings 'specialist' knowledge to the team. Single-minded, self-starting, dedicated; provides unique or rare expertise and skills

## Practical implications

Based on Belbin's model of nine team roles, managers or organisations building working teams would be advised to ensure that each of the roles can be performed by a team member. Some roles are compatible and can be more easily fulfilled by the same person; some are less compatible and are likely to be done well by people with different behavioural clusters. This means that a team need not be as many as nine people, but perhaps should be at least three or four.

While comparisons can be drawn between Belbin's behavioural team roles and personality types, the roles represent tasks and functions in the self-management of the team's activities. Tests exist to identify ideal team roles, but this does not preclude an extravert from being a Completer Finisher, nor an introvert from being a Resource Investigator.

## Criticisms of the model

While Belbin's model has become well known and is taught as a standard part of much management training, there are many criticisms of both the model itself and the way it is sometimes erroneously used.

The research which identified these roles was conducted on established executives studying at the Administrative Staff College at Henley (now renamed Henley Management College); they were selected for the prestigious course by their firms who had identified them as high-fliers expected to go on to senior management. The sample was therefore already highly selective. Belbin himself points out in his book that many people that might otherwise have made excellent managers might have de-selected themselves from attending the programme.

The exercises given consisted of a game designed to simulate business decision-making with an emphasis on generating profit in a fictitious company, and a version of Monopoly specially adapted to remove the chance elements and enable groups to play in teams against other teams.

While Belbin draws on examples from real organisations, the development of the model is based on the behaviour of subjects in the artificial environment of the business school exercise.

Some people teach that all eight/nine roles must be present for a team to function well. Belbin himself acknowledges that some teams consisting of one Shaper and a group of "yes" men perform well, especially where predictability was high. His book identifies a number of combinations that performed well in the exercises, especially where the teams were aware of "missing" roles within their ranks.

Some people attempt to match Belbin's roles with Carl Jung's eight personality types, with the nine types of the Enneagram of Personality or another personality type classification. Belbin is at pains to point out that the team roles are not personality types. He regards them as clusters of characteristics, of which psychological preference is but one dimension.

Automated Belbin reports, available from some management training companies should not, therefore, be used as the basis for recruitment or promotion decisions. The weakness of the shaper is that they might become bad tempered/bad humoured when getting things done. The weakness of an Implementer is that they are sometimes slow to relinquish their plans in positive manner. A finisher can put too much detail into one section and not follow a specified time frame. A Co-ordinator can be considered overly enthusiastic at times. Team worker may find it difficult to make decisions on own. Resource investigator may forget to follow a lead.

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A more detailed description of each of the nine team roles is given on the following pages.

## CO-ORDINATOR

Traits: *Stable, dominant, extrovert.*

He/she is the one who presides over the team and co-ordinates its efforts to meet external goals and targets. They are distinguished by their preoccupation with objectives. You would expect them to be at least normally intelligent, but not in any sense brilliant and not an outstanding creative thinker; it is rare for any of the good ideas to originate with them. They are much more remarkable for what used to be called "character". They have a high degree of self-discipline. They often have what is called "charisma" but it is perhaps easier to think of it as authority. They are dominant, but in a relaxed and unassertive way - they are not domineering. They have an instinct to trust people unless there is very strong evidence that they are untrustworthy, and they are singularly free from jealousy.

He/she sees most clearly which member of the team is strong or weak in each area of the team's function, and they focus people on what they do best. They are conscious of the need to use the team's combined human resources as effectively as possible. This means they are the one who establishes the roles and work boundaries of the others and also who sees gaps and takes steps to fill them.

He/she talks easily and is easy to talk to; a good communicator in the two-way sense, neither a compulsive talker nor a 'person of few words', but certainly a good listener.

It is the Co-ordinator who clarifies the group's objectives and sets its agenda; he/she selects the problems for the teams' consideration and establishes priorities, but does not attempt to dominate the discussion. Their own early contributions are more likely to take the form of questions than assertions or proposals. They listen, they sum up group feeling and articulate group verdicts, and if a decision has to be taken, they take it firmly after everyone has had their say.

## SHAPER

Traits: *Anxious, dominant, extrovert*

Some observers of teams in action have suggested that a team needs a 'social leader', who is the permanent head of the group, and a separate 'task leader', who is in charge of a specific and defined project - much in the way that a nation needs both a Head of State, who is permanent, and a Head of Government, with a specific job to do. If so, the Shaper is the task leader and the Co-ordinator is the social leader. The Shaper is the most likely to be the actual leader of the team in those cases where there is no Co-ordinator or where the Co-ordinator is not, in fact, the leader.

The Shaper is full of nervous energy; he/she is outgoing and emotional, impulsive and impatient, sometimes edgy and easily frustrated. They are quick to challenge, and quick to respond to a challenge (which they enjoy and welcome). They often have rows, but they are quickly over and they do not harbour grudges. Of all the team, they are the most prone to paranoia, quick to sense a slight and the first to feel that there is a conspiracy afoot and they are the object or the victim of it.

The principal function of the Shaper is to give shape to the application of the team's efforts, often supplying more of their own personal input than the Co-ordinator does. They are always looking for a pattern to discussions, and trying to unite ideas, objectives and practical considerations into a single feasible project, which they seek to push forward urgently to decision and action.

The Shaper exudes self-confidence, which often belies strong self-doubts. Only results can reassure them. Their drive, which has a compulsive quality, is always directed at their objectives. They are usually the team's objectives too, but then the Shaper much more than the Co-ordinator, sees the team as an extension of their ego. They want action and they want it now. They are personally competitive, intolerant of woolliness, vagueness and muddled thinking, and people outside the team are likely to describe them as arrogant and abrasive. Even people inside the team are in danger of being steamrolled by them on occasions, and they can make the team uncomfortable; but they make things happen.

## PLANT

Traits: *Dominant, very high I.Q., introvert.*

The Plant originally received the name when it was found that one of the best ways to improve the performance of an ineffective and uninspired team was to 'plant' one of these team types in it. But you can also think of the Plant as the one who scatters the seeds which the others nourish until they bear fruit.

The Plant is the team's source of original ideas, suggestions and proposals: he/she is the ideas person. Of course others have ideas too, but what distinguishes the Plant's ideas is their originality and the radical-minded approach they bring to problems and obstacles. They are the most imaginative as well as the most intelligent member of the team and the most likely to start searching for a completely new approach to a problem if the team starts getting bogged down, or to bring a new insight to a line of action already agreed. They are much more concerned with major issues and fundamentals than with details, and indeed they are liable to miss out on details and make careless mistakes. They are 'thrustful' and uninhibited in a way that is fairly uncharacteristic of an introvert. They can also be prickly and cause offence to other members of the team, particularly when criticising their ideas. Their criticisms are usually designed to clear the ground for their ideas and are usually followed by their counter-proposals.

The danger with the Plant is that they will devote too much of their creative energy to ideas which may catch their fancy but do not fall in with the team's needs or contribute to its objectives. They may be bad at accepting criticism of their own ideas and quick to take offence and sulk if their ideas are dissected or rejected; indeed, they may switch off and refuse to make any further contribution. It can take quite a lot of careful handling and judicious flattery (usually by the Co-ordinator) to get the best out of them. But for all their faults, it is the Plant who provides the vital spark.

## MONITOR EVALUATOR

Traits: *High I.Q., stable, introvert.*

In a balanced team it is only the Plant, Monitor Evaluator and Specialist who need a high I.Q., but by contrast with the Plant, the Monitor Evaluator is a bit of a cold fish. By temperament they are likely to be serious and very dour. Their contribution lies in measured and dispassionate analysis rather than creative ideas, and while they are unlikely to come up with an original proposal, they are the most likely to stop the team from committing itself to a misguided project.

Although they are by nature a critic rather than a creator, they do not usually criticise just for the sake of it, but only if they can see a flaw in the plan or the argument. They take a serious and sober view on life; enthusiasm and euphoria simply are not part of their make-up. This, however, has the compensating advantage that ego-involvement does not cloud or distort their judgement. He/she is slow to make up his mind, and likes to be given time to mull things over, but theirs is the most objective mind in the team.

One of their most valuable skills is in assimilating, interpreting and evaluating large volumes of complex written material, analysing problems and assessing the judgements and contributions of the others.

Sometimes they can do this tactlessly and disparagingly, which does not ease their popularity, and they can lower the team's morale by being too much of a damper at the wrong time. Whilst they take an inert approach to most situations, they can be competitive, especially with those whose skills overlap with their own, which means in most cases with the Co-ordinator or the Plant.

It is important for the Monitor Evaluator to be fair minded and open to change; there is a danger that they will turn into an opposing force and allow their critical powers to out-weigh their receptiveness to new ideas.

Although they are solid and dependable, they can lack jollity, warmth, imagination and spontaneity. Nevertheless they have one quality, which makes them indispensable to the team; their judgement is hardly ever wrong.

## IMPLEMENTER

Traits: *Stable and Controlled.*

The Implementer is the practical organiser. He/she is the one who turns decisions and strategies into defined and manageable tasks that people can actually get on with. They are concerned with what is feasible, and their chief contribution is to convert the team's plans into a feasible form. They sort out objectives and pursue them logically.

Like the Co-ordinator, they too have strength of character and a disciplined approach. They are notable for their sincerity, their integrity and their trust of their colleagues, and they are not easily deflated or discouraged; it is only a sudden change of plan that is likely to upset them, because they are liable to flounder in unstable, quickly changing situations.

Because they need stable structures, they are always trying to build them. Give them a decision and they will produce a schedule; give them a group of people and an objective and they will produce an organisation chart. They work efficiently, systematically and methodically, but sometimes a little inflexibly, and they are unresponsive to speculative 'airy-fairy' ideas that do not have a visible immediate bearing on the task in hand. At the same time they are usually perfectly willing to trim and adapt their schedules and proposals to fit into agreed plans and established systems.

The Implementer can be over-competitive for team status, which can be damaging if it expresses itself in the form of negative, unconstructive criticism of suggestions put forward by other members of the team. Normally, however, they are close to the team's point of balance. If anyone does not know what on earth has been decided and what they are supposed to be doing they will go to the Implementer first to find out.

## RESOURCE INVESTIGATOR

Traits: *Stable, dominant, extrovert.*

The Resource Investigator is probably the most immediately likeable member of the team. He/she is relaxed, sociable and gregarious, with an interest that is easily aroused. Their responses tend to be positive and enthusiastic, though they are prone to put things down as quickly as they take them up.

The Resource Investigator is the member of the team who goes outside the group and brings information, ideas and developments back to it. They make friends easily and have masses of outside contacts. They are rarely in their office, and when they are, they are probably on the telephone. Their ability to stimulate ideas and encourage innovation by this activity would lead most people to mistake them for an ideas person, but they do not have the radical originality that distinguishes the Plant; for all that, they are quick to see the relevance of new ideas.

Without the stimulus of others, for example in a solitary job, the Resource Investigator can easily become bored, demoralised and ineffective. Within the team, however, they are a good improviser, active under pressure, but can over-relax when it eases. They can fail to follow up tasks they have undertaken in one of their frequent bursts of short-lived enthusiasm. Their range and variety of outside interests can lead them, like the Plant, to spend too much time on irrelevancies that interest them; nevertheless theirs is the most important team role to preserve the team from stagnation, fossilisation and losing touch with reality.

## TEAM WORKER

Traits: *Stable, extrovert, low in dominance.*

The Team Worker is the most sensitive of the team - he/she is the most aware of individual's needs and worries, and the one who perceives most clearly the emotional undercurrents within the group. They also know most about the private lives and family affairs of the rest of the team. They are the most active internal communicator; likeable, popular, unassertive, the cement of the team. They are loyal to the team as a unit (though this does not mean they cannot take sides when there is split) and support all the others. If someone produces an idea, their instinct is to build on it, rather than demolish it or produce a rival idea.

They are good and willing listeners and communicate freely and well within the team, and also help and encourage others to do the same. As a promoter of unity and harmony, they counter-balance the friction and discord that can be caused by the Shaper and the Plant, and occasionally by the Monitor Evaluator. They particularly dislike personal confrontation and tend to try and avoid it themselves and cool it down in others.

When the team is under pressure or in difficulties, the Team Worker's sympathy, understanding, loyalty and support are especially valued. Their 'uncompetitiveness' and dislike of friction may make them seem a bit soft and indecisive, but also makes them a permanent force operating against division and disruption in the team. They are exemplary team members and though in normal times the value of their individual contribution may not be as immediately visible as most of the other team roles, the effect is very noticeable indeed when they are not there, especially in times of stress and pressure.

## COMPLETER FINISHER

Traits: *Anxious, introvert.*

The Finisher worries about what might go wrong. He/she is never at ease until they have personally checked every detail and made sure that everything has been done and nothing has been over-looked. It is not that they are overtly or irritatingly fussy; their obsession is an expression of anxiety.

The Finisher is not an assertive member of the team, but they maintain a permanent sense of urgency, which they communicate to others to galvanise them into activity. They have self-control and strength of character, and are impatient of and intolerant towards the more casual and slaphappy members of the team.

If the Finisher has one major preoccupation, it is order; they are compulsive at meeting deadlines and a fulfiller of schedules. If they are not careful they can be a morale-lowering worrier with a depressing effect on the rest of the team, and they can too easily lose sight of the overall objective by getting bogged down in small details. Nevertheless their relentless follow-through is an important asset.

## SPECIALISTS

Traits: *Very high I.Q., introvert, passive, single-minded.*

Specialists are dedicated individuals who pride themselves on acquiring technical skills and specialised knowledge. Their priorities centre on maintaining professional standards and on furthering and defending their own field. While they show great pride in their own subject, they usually lack interest in the subjects of others. Eventually, the Specialist becomes the expert by sheer commitment along a narrow front. There are few people who have either the single-mindedness, or the aptitude, to become a first-class Specialist.

Specialists have an indispensable part to play in some teams, for they provide the rare skill upon which the firm's service or product is based. As a manager, they command support because they know more about their subject than anyone else, and can usually be called upon to make decisions based on their in-depth experience.