

# Team Building Toolkit

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# Team Building Toolkit

Introduced by Mind Tools CEO, James Manktelow

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Welcome to the Mind Tools Team Building Toolkit!

We all know that individuals working together in teams can achieve much, much more than they can on their own.

But we also all know that there can be a huge difference between high-performing teams, and

those where “teamwork” seems to consume more energy than it delivers, or – worse – where team meetings seems little more than a forum for power struggles and conflict.

The tools in this Team Building Toolkit will help you to start moving your team towards a high-performance way of working.

Here’s to you and your team performing better, and achieving much more!

A handwritten signature in black ink that reads "James Manktelow". The signature is written in a cursive, flowing style.

James Manktelow, CEO,  
MindTools.com

# Forming, Storming, Norming and Performing

## Helping New Teams Perform Effectively, Quickly

Effective teamwork is essential in today's world, but as you'll know from the teams you have led or belonged to, you can't expect a new team to perform exceptionally from the very outset. Team formation takes time, and usually follows some easily recognizable stages, as the team journeys from being a group of strangers to becoming a united team with a common goal.

Whether your team is a temporary working group or a newly-formed, permanent team, by understanding these stages you will be able to help it quickly become productive.

### Understanding the Theory

Psychologist Bruce Tuckman first came up with the memorable phrase "forming, storming, norming and performing" back in 1965. He used it to describe the path to high-performance that most teams follow. Later, he added a fifth stage that he called "adjourning" (and others often call "mourning" – it rhymes better!)

Teams initially go through a "**forming**" stage in which members are positive and polite. Some members are anxious, as they haven't yet worked out exactly what work the team will involve. Others are simply excited about the task ahead. As leader, you play a dominant role at this stage: other members' roles and responsibilities are less clear.

This stage is usually fairly short, and may only last for the single meeting at which people are introduced to one-another. At this stage there may be discussions about how the team will work, which can be frustrating for some members who simply want to get on with the team task.

Soon, reality sets in and your team moves into a "**storming**" phase. Your authority may be challenged as others jockey for position and their roles are clarified. The ways of working start to be defined, and, as leader, you must be aware that some members may feel overwhelmed by how much there is to do, or

uncomfortable with the approach being used. Some may react by questioning how worthwhile the goal of the team is, and by resisting taking on tasks. This is the stage when many teams fail, and even those that stick with the task may feel that they are on an emotional roller coaster, as they try to focus on the job in hand without the support of established processes or relationships with their colleagues.

Gradually, the team moves into a "**norming**" stage, as a hierarchy is established. Team members come to respect your authority as a leader, and others show leadership in specific areas.

Now that team members know each other better, they may be socializing together, and they are able to ask each other for help and provide constructive criticism. The team develops a stronger commitment to the team goal, and you start to see good progress towards it.

There is often a prolonged overlap between storming and norming behavior: As new tasks come up, the team may lapse back into typical storming stage behavior, but this eventually dies out.

When the team reaches the "**performing**" stage, hard work leads directly to progress towards the shared vision of their goal, supported by the structures and processes that have been set up. Individual team members may join or leave the team without affecting the performing culture.

As leader, you are able to delegate much of the work and can concentrate on developing team members. Being part of the team at this stage feels "easy" compared with earlier on.

Project teams exist only for a fixed period, and even permanent teams may be disbanded through organizational restructuring. As team leader, your concern is both for the team's goal

and the team members. Breaking up a team can be stressful for all concerned and the "adjourning" or "mourning" stage is important in reaching both team goal and personal conclusions.

The break up of the team can be hard for members who like routine or who have developed close working relationships with other team members, particularly if their future roles or even jobs look uncertain.

### Using the Tool

As a team leader, your aim is to help your team reach and sustain high performance as soon as possible. To do this, you will need to change your approach at each stage. The steps below will help ensure you are doing the right thing at the right time.

1. Identify which stage of team development your team is at from the descriptions above.
2. Now consider what needs to be done to move towards the Performing stage, and what you can do to help the team do that effectively. The table below (Figure 1) helps you understand your role at each stage, and think about how to move the team forward.
3. Schedule regular reviews of where your teams are, and adjust your behavior and leadership approach to suit the stage your team has reached.

**Figure 1: Leadership Activities at Different Group Formation Stages**

Stage	Activity
Forming	Direct the team and establish objectives clearly. (A good way of doing this is to negotiate a <a href="#">team charter</a> .)
Storming	<p>Establish process and structure, and work to smooth conflict and build good relationships between team members.</p> <p>Generally provide support, especially to those team members who are less secure. Remain positive and firm in the face of challenges to your leadership or the team's goal.</p> <p>Perhaps explain the "forming, storming, norming and performing" idea so that people understand why conflict's occurring, and understand that things will get better in the future. And consider teaching <a href="#">assertiveness</a> and <a href="#">conflict resolution</a> skills where these are necessary.</p>
Norming	<p>Step back and help the team take responsibility for progress towards the goal.</p> <p>This is a good time to arrange a social, or a team-building event</p>
Performing	Delegate as far as you sensibly can. Once the team has achieved high performance, you should aim to have as "light a touch" as possible. You will now be able to start focusing on other goals and areas of work
Adjourning	When breaking up a team, take the time to celebrate its achievements. After all, you may well work with some of your people again, and this will be much easier if people view past experiences positively.

**Tip 1:**

Make sure that you leave plenty of time in your schedule to coach team members through the "Forming", "Storming" and "Norming" stages.

**Tip 2:**

Think about how much progress you should expect towards the goal and by when, and measure success against that. Remember that you've got to go through the "Forming", "Storming" and "Norming" stages before the team starts "Performing", and that there may not be much progress during this time. Communicating progress against appropriate targets is important if your team's members are to feel that what they're going through is worth while. Without such targets, they can feel that, "Three weeks have gone by and we've still not got anywhere".

**Tip 3:**

Not all teams and situations will behave in this way, however many will – use this approach, but don't try to force situations to fit it. And make sure that people don't use knowledge of the "storming" stage as a license for boorish behavior.

**Key Points**

Teams are formed because they can achieve far more than their individual members can on their own, and while being part of a high-performing team can be fun, it can take patience and professionalism to get to that stage.

Effective team leaders can accelerate that process and reduce the difficulties that team members experience by understanding what they need to do as their team moves through the stages from forming to storming, norming and, finally, performing.

## Team-Building Exercises

### Planning Activities that Actually Work

You've probably been involved in a team-building exercise at some point. Perhaps it was a weekend retreat, or an afternoon at the climbing gym learning to rely on one another, or a day on the golf course getting to know everyone.

But, whether or not you and your colleagues enjoyed the experience, what happened when your team members returned to the office? Did they go back to their usual behavior – perhaps arguing over small assignments, or refusing to cooperate with each other? The 'day of fun' may have been a nice break from business, but did your colleagues actually use any of the

lessons that they learned once they were back in the workplace?

Too often, managers plan an activity with no real thought or goal in mind. This tends to be a waste of time – and managers risk losing the team's respect when they plan an exercise that doesn't actually help those involved.

Team-building exercises can be a powerful way to unite a group, develop strengths, and address weaknesses – but only if the exercises are planned and carried out strategically. In other words, there has to be a real purpose behind your decision to do the exercise – for example, improving the team's problem-solving

or creativity skills – rather than because you felt like giving your people a nice day out of the office.

This article shows you what to consider when planning a team event, and we offer a variety of exercises to address different issues that teams commonly face.

## Team Building that Actually Builds Teams

The most important step when planning a team-building exercise comes at the very beginning: you must start by figuring out what challenges your team faces. Only then can you choose exercises that will be effective in helping them work through these issues.

Spend time thinking about your team's current strengths and weaknesses. Ask yourself these questions to identify the root of any problems:

- Are there conflicts between certain people that are creating divisions within the team?
- Do team members need to get to know one another?
- Do some members focus on their own success, and harm the group as a result?
- Does poor communication slow the group's progress?
- Do people need to learn how to work together, instead of individually?
- Are some members resistant to change, and does this affect the group's ability to move forward?
- Do members of the group need a boost to their morale?

If you'd like to test how well you and your team work together, try our [Team Effectiveness Assessment](#). Once you've identified the causes of your team's issues, you can plan exercises that will address these problems. This will help your team to derive real benefit from the event – and feel that it was worth their while.

## Examples of Team-Building Exercises

There are literally hundreds of team-building exercises that address a wide range of issues. We've separated just a few basic,

straightforward examples into sections that focus on the most common challenges for teams.

If you'd like to learn more about team building, read our [Bite-Sized Training session on Team Building](#).

Here are some basic exercises you could try, if you're faced with issues of communication, stereotyping, or trust in your team.

### Improving Communication

**Back-to-back drawing** – Divide your group into pairs, and have each pair sit on the floor back to back. Give one person in each pair a picture of a shape, and give the other person a pencil and pad of paper.

Ask the people holding the pictures to give verbal instructions to their partners on how to draw the shape – without actually telling the partners what the shape is. After they've finished, ask each pair to compare their original shape with the actual drawing, and consider the following questions:

- How well did the first person describe the shape?
- How well did the second person interpret the instructions?
- Were there problems with both the sending and receiving parts of the communication process?

**Survival scenario** – This exercise forces your group to communicate and agree to ensure their 'survival.' Tell your group that their airplane has just crashed in the ocean. There's a desert island nearby, and there's room on the lifeboat for every person – plus 12 items they'll need to survive on the island. Instruct the team to choose which items they want to take. How do they decide? How do they rank or rate each item?

### Eliminating Stereotypes and 'Labeling'

**Stereotype party** – This is a fun exercise for a medium-sized or large group. Write on nametags many different 'personality types' (see the list below), and pin or tape one tag to each



person's back. Don't show people which tag is on their back – they'll be able to see everyone else's tag, but not their own.

Now, ask each person to figure out which personality type is on his or her back by asking stereotype-based questions to other people – “Am I a man?” “Am I an athlete?” “Am I an entertainer?” and so on.

Allow group members to answer only yes or no, and encourage participants to ask questions to as many different people as possible. Here are some personality types you could consider:

- Auto mechanic.
- Olympic medalist.
- Professor.
- Fast-food restaurant worker.
- Postal worker.
- Movie star.

### Building Interdependence and Trust

**Human spring** – Ask group members to stand facing each other in pairs. Their elbows should be bent, with their palms facing toward each other. Instruct them to touch their palms together, and gradually start leaning toward each other, so that they eventually hold each other up. Then, instruct everyone to move their feet further and further back, so that they have to depend solely upon their partners to remain standing.

**Mine field** – This is a great exercise if you have a large room or outdoor field. Set up a 'mine field' using chairs, balls, cones, boxes, or any other object that could potentially be an obstacle and trip someone up. Leave enough space between the objects for someone to walk through.

Next, divide your group into pairs. Pay attention to who you match with whom. This is a perfect opportunity to work on relationships, so you might want to put together people who have trust issues with each other.

Blindfold one person, the 'mine walker' – this person is not allowed to talk. Ask his or her

partner to stay outside the mine field, and give verbal directions, helping the mine walker avoid the obstacles, and reach the other side of the area.

Before you begin, allow partners a few minutes to plan how they'll communicate. Then, make sure there are consequences when people hit an obstacle. For example, perhaps they have to start again from the beginning.

### What Not to Do

If you were a marathon runner, would you train just a few times a year for your next race? Of course not. You would run almost every day. Why? Because only through regular, continuous training and exercise would you have a chance of succeeding.

Team building works on the same principle. Most managers plan one or two events per year, and that's it. There's rarely any regular 'training' or follow-up, and this can hold back the group's long-term success.

Effective team building needs to happen continuously if you want your group to be successful. It needs to be part of the corporate culture.

If you lead a group, aim to incorporate team-building exercises into your weekly or monthly routine. This will help everyone address their different issues, and it will give them a chance to have fun, and learn to trust one another – more than just once or twice a year.

Finally, make sure that your team-building exercises aren't competitive. Think about it – competition tends to make one person or team work against another. This probably isn't a good way to build team spirit and unity. More likely, it's a way to divide a group.

Many companies use sports for team-building activities. Yes, baseball and soccer can be fun, and some people will enjoy it. But these activities can do far more harm than good if they focus just on competing, and they can really de-motivate people who are not particularly good at these sports. Plan an event that makes people truly depend on others to

succeed, and stay away from competition and 'winning.'

### Key Points

For team building to be effective, leaders must first identify the issues their group is facing. Then they can plan activities to address these

challenges directly – and make sure that the team will actually gain some benefits from the event. Keep competition out of the exercises, and aim to make team building part of the daily corporate culture, instead of a once-a-year event.

## Team Charters

### Getting Your Teams Off to a Great Start

Working in teams can be fantastic – if team members work well together. However, if people are pulling in different directions, the experience can be awful. What's worse is that without sufficient direction, teams can focus on the wrong objectives, can fail to use important resources, can be torn apart with avoidable infighting, and can fail, with sometimes dire consequences for the organization.

Team Charters are documents that define the purpose of the team, how it will work, and what the expected outcomes are. They are "roadmaps" that the team and its sponsors create at the beginning of the journey to make sure that all involved are clear about where they're heading, and to give direction when times get tough.

For teams to get off "on the right foot", Team Charters should be drawn up when the team is formed. This helps to make sure that everyone is focused on the right things from the start. However, drawing up a team charter can also be useful if a team is in trouble and people need to regain their view of the "big picture".

The precise format of team charters varies from situation to situation and from team to team. And while the actual charter can take on many forms, much of the value of the Charter comes from thinking through and agreeing the various elements.

#### Tip:

At the start of a project, all is momentum and excitement, and people are eager to start work right away. This is where it's tempting to charge in to productive work. However, "failing to plan is planning to fail", as is failing to set objectives clearly. Time taken agreeing a team charter will be repaid many times over as the project progresses.

In particular, it will speed the process of [forming, storming, norming and performing](#), meaning that the team becomes effective much more quickly.

Adapt the following elements to your team's situation.

1. Context.
2. Mission and Objectives.
3. Composition and Roles.
4. Authority and Boundaries.
5. Resources and Support.
6. Operations.
7. Negotiation and Agreement.

#### Context:

This is the introduction to the charter. It sets out why the team was formed, the problem it's trying to solve, how this problem fits in with the broader objectives of the organization, and the consequences of the problem going unchecked.

- What problem is being addressed?
- What result or delivery is expected?
- Why is this important?

**Example:**

The team has been formed to increase cooperation and cohesion between a multinational company's business units in different countries.

The historic lack of cooperation between country business units has meant that they have ended up selling different parts of the company's product portfolio. This has undermined the company's ability to achieve economies of scale in manufacturing, and has led to the R&D budget being frittered away across many different business areas. These are key reasons why the company has been losing out to competitors.

**Mission and Objectives:**

This section is at the heart of the Charter. By defining a mission, the team knows what it has to achieve. Without a clear mission, individuals can too easily pursue their own agendas independently of, and sometimes irrespective of, the overarching goal.

**Example:**

The mission of this team is to develop a plan that increases cohesion between country business units so that, within three years, they are selling a common product range.

The next stage is to take the mission, and turn it into measurable goals and objectives. These are the critical targets and milestones that will keep the team on track.

When writing goals and objectives, consider using the [SMART](#) framework (SMART usually stands for Specific, Measurable, Attainable, Relevant, and Time-bound). The key here is to make sure each objective can be measured, so that success can be monitored.

**Example Goals:**

- To interview country managers and product managers to identify why they think countries are not working together. Survey to be completed and presented to the CEO by 31 March.
- To prepare first draft proposals, and present to CEO by 15 April.
- To refine proposals, and present to regional management meeting on 25 April.
- To present the costed plan to the CEO by 15 May.

**Composition and Roles:**

Teams are most effective when:

- They have members with the skills and experience needed to do the job.
- Team members can bring experience and approaches from a range of different backgrounds.
- They have enough people to do the job, but not so many that people get bogged down in communication (7 is an ideal number of people).
- They have representation from involved functions, departments, units, or other relevant category of stakeholder (possibly including the team's client, and senior management.)

Look to your mission and objectives to determine who is needed on the team to make sure its goals can be accomplished.

Once you know who should be on the team, you need to look at what each person will do to support the team in its mission. While this may seem like overkill at the very beginning of team formation, it will help you

- Match team members to roles.
- Spot gaps in skills and abilities that are necessary for the team to reach its goals.

The best way to go about this is to list each team member and define the roles and responsibilities of each.

- Who will be the team leader?

- Who is the liaison between the team and the other stakeholders?
- Who is responsible for what duties and outcomes?

**Example:**

The team will be made up of senior representatives from each of the four global regions, HR, the information systems department, the organizational structuring committee, and the finance team. This range of skills and knowledge will enable the team to understand the issues relating to individual countries, as well as developing solutions to the problems outstanding.

Sally Vickers will take the role of Team Leader. In that role she is responsible for:

- Ensuring this Team Charter is abided by.
- Managing the day to day operations of the team and the team's deliverables.
- Managing the budget.
- Providing support and assistance to individual team members.
- Providing status reports to the CEO on a weekly basis.

**Authority and Empowerment:**

With the roles defined, you now need to look at what team members can and can't do to achieve the mission:

- How much time should team members allocate to the team mission, and what priority do team activities have relative to other ongoing activities?
- How should team members resolve any conflicts between their day jobs and the team mission?
- What budget is available, in terms of time and money?
- Can the team recruit new team members?
- What can the team do, what can it not do, and what does it need prior approval to do?

**Example:**

Sally, as team leader, has the authority to direct and control the team's work, and team members are allocated full time to this project, for its duration.

**Resources and Support Available:**

This section lists the resources available to the team to accomplish its goals. This includes budgets, time, equipment, and people. In conjunction with the performance assessments, changes to the resources required should be monitored regularly.

As well as this, it details the training and coaching support available to the team to help it to do its job.

**Example:**

A budget of US\$75,000 is available to cover travel and subsistence. This will fund travel for two team members to interview senior managers in major countries, with other interviews being conducted by teleconference.

The CEO will meet with Sally Vickers at 4:30pm every Monday afternoon for a progress update and to provide support and coaching appropriately.

**Operations:**

This section outlines how the team will operate on a day-to-day basis. This can be as detailed or as minimal as the situation warrants. It may be comprehensive and detailed for a long-duration team, or limited to a few bullet points in a team that is expected to have a short life.

**Example: Team Meetings**

- The first team meeting will be on Monday, 28 February at 2:00pm.
- The team will meet every Monday afternoon from 2:00pm to 3:30pm for the duration of the project.
- Each member is expected to present a short status report for the aspect of the project they are working on.
- If a member is unable to attend, a notification must be sent to the team leader and someone else designated to report on the status and communicate further expectations.
- A summary of each meeting will be prepared by Jim and emailed to all members by the morning following the meeting.

**Negotiation and Agreement:**

A good Team Charter emerges naturally through a process of negotiation. The team's client establishes the Context and Mission. Objectives, composition, roles, boundaries and resources ideally emerge through negotiation between the sponsor, the team leader, the team, and other stakeholders.

**Tip:**

We're using the word "negotiation" here, although it may not seem to be that way! Three things are key to success here:

- Discussion within the team and with the team leader to make sure that the mission and team charter are credible.
- Assertive negotiation between the sponsor and the team leader to ensure that the mission is achievable, and that sufficient resources are deployed.
- Support from the sponsor to ensure that these resources actually are made available.

While these may appear to be polite discussions between bosses and subordinates, negotiation is actually taking place in a very real way. Ultimately, the team needs to believe that the mission is achievable, and commit to it.

Last, but not least, comes approval. This is where all members of the team sign off on the Charter, and commit to the principles it contains and the roles and responsibilities detailed.

This is a symbolic gesture that communicates full commitment to the mission and objectives. It also helps to create accountability to one another and to the organization.

**Key Points**

By negotiating a Team Charter at the outset of a project, you set up team projects for success. You ensure that everyone understands why the project needs to be carried out, knows what the objectives and measures of success are, and knows who is doing what, with what resources.

More than this, by negotiating the Charter assertively, all parties can shape the project so that it stands a good chance of success. They can then and commit wholeheartedly to the project's success.

Negotiating a Team Charter can also be useful as a way of sorting out a dysfunctional team. Objectives can be confirmed, goals structured and agreed, roles aligned, and resources can be recommitted. Finally, after fair negotiation, people can be asked to commit to the Team Charter, and can be managed appropriately.

## Belbin's Team Roles

### How Understanding Team Roles Can Improve Team Performance

When a team is performing at its best, you'll usually find that each team member has clear responsibilities. Just as importantly, you'll see that every role needed to achieve the team's goal is being performed fully and well.

But often, despite clear roles and responsibilities, a team will fall short of its full potential.

How often does this happen in the teams you work with? Perhaps some team members don't complete what you expect them to do. Perhaps others are not quite flexible enough, so things 'fall between the cracks'. Maybe someone who is valued for their expert input fails to see the wider picture, and so misses out tasks or steps that others would expect. Or perhaps one team member becomes frustrated because he or she disagrees with the approach of another team members.

Dr Meredith Belbin studied team-work for many years, and he famously observed that people in teams tend to assume different "team roles". He defined a team role as "a tendency to behave, contribute and interrelate with others in a particular way" and named nine such team roles that underlie team success.

#### Creating More Balanced Teams

Belbin suggests that, by understanding your role within a particular team, you can develop your strengths and manage your weaknesses as a team member, and so improve how you contribute to the team.

Team leaders and team development practitioners often use the Belbin model to help create more balanced teams.

Teams can become unbalanced if all team members have similar styles of behavior or team roles. If team members have similar weakness, the team as a whole may tend to have that weakness. If team members have similar team-work strengths, they may tend to

compete (rather than co-operate) for the team tasks and responsibilities that best suit their natural styles.

Knowing this, you can use the model with your team to help ensure that necessary team roles are covered, and that potential behavioral tensions or weaknesses among the team member are addressed.

#### Tip 1:

Belbin's "team-roles" are based on observed behavior and interpersonal styles.

Whilst Belbin suggests that people tend to adopt a particular team-role, bear in mind that your behavior and interpersonal style within a team is to some extent dependent on the situation: it relates not only to your own natural working style, but also to your interrelationships with others, and the work being done.

Be careful: you, and the people you work with, may behave and interact quite differently in different teams or when the membership or work of the team changes.

Also, be aware that there are other approaches in use, some of which complement this model, some of which conflict with it. By all means use this approach as a guide, however do not put too much reliance on it, and temper any conclusions with common sense.

#### Understanding Belbin's Team Roles Model

Belbin identified nine team roles and he categorized those roles into three groups: Action Oriented, People Oriented, and Thought Oriented. Each team role is associated with typical behavioral and interpersonal strengths.

Belbin also defined characteristic weaknesses that tend to accompany each team-role. He

called the characteristic weaknesses of team-roles the "allowable" weaknesses; as for any behavioral weakness, these are areas to be aware of and potentially improve.

The nine team-roles are:

#### **Action Oriented Roles:**

##### **Shapers (SH)**

Shapers are people who challenge the team to improve. They are dynamic and usually extroverted people who enjoy stimulating others, questioning norms, and finding the best approaches for solving problems. The Shaper is the one who shakes things up to make sure that all possibilities are considered and that the team does not become complacent.

Shapers often see obstacles as exciting challenges and they tend to have the courage to push on when others feel like quitting.

Their potential weaknesses may be that they're argumentative, and that they may offend people's feelings.

##### **Implementer (IMP)**

Implementers are the people who get things done. They turn the team's ideas and concepts into practical actions and plans. They are typically conservative, disciplined people who work systematically and efficiently and are very well organized. These are the people who you can count on to get the job done.

On the downside, Implementers may be inflexible, and can be somewhat resistant to change.

##### **Completer-Finisher (CF)**

Completer-Finishers are the people who see that projects are completed thoroughly. They ensure there have been no errors or omissions, and they pay attention to the smallest of details. They are very concerned with deadlines, and will push the team to make sure the job is completed on time. They are described as perfectionists who are orderly, conscientious, and anxious.

However, a Completer-Finisher may worry unnecessarily, and may find it hard to delegate.

#### **People Oriented Roles:**

##### **Coordinator (CO)**

Coordinators are the ones who take on the traditional team-leader role and have also been referred to as the chairmen. They guide the team to what they perceive are the objectives. They are often excellent listeners, and they are naturally able to recognize the value that each team member brings to the table. They are calm and good-natured and delegate tasks very effectively.

Their potential weaknesses are that they may delegate away too much personal responsibility, and may tend to be manipulative.

##### **Team Worker (TW)**

Team Workers are the people who provide support and make sure that people within the team are working together effectively. These people fill the role of negotiators within the team and they are flexible, diplomatic, and perceptive. These tend to be popular people who are very capable in their own right, but who prioritize team cohesion and helping people getting along.

Their weaknesses may be a tendency to be indecisive, and to maintain uncommitted positions during discussions and decision-making.

##### **Resource Investigator (RI)**

Resource Investigators are innovative and curious. They explore available options, develop contacts, and negotiate for resources on behalf of the team. They are enthusiastic team members, who identify and work with external stakeholders to help the team accomplish its objective. They are outgoing and are often extroverted, meaning that others are often receptive to them and their ideas.

On the downside, they may lose enthusiasm quickly, and are often overly optimistic.

**Thought Oriented Roles:****Plant (PL)**

The Plant is the creative innovator who comes up with new ideas and approaches. They thrive on praise but criticism is especially hard for them to deal with. Plants are often introverted and prefer to work apart from the team. Because their ideas are so novel, they can be impractical at times. They may also be poor communicators, and can tend to ignore given parameters and constraints.

**Monitor-Evaluator (ME)**

Monitor-Evaluators are best at analyzing and evaluating ideas that other people (often Plants) come up with. These people are shrewd and objective and they carefully weigh the pros and cons of all the options before coming to a decision.

Monitor-Evaluators are critical thinkers and very strategic in their approach. They are often perceived as detached or unemotional. Sometimes they are poor motivators, who react to events rather than instigating them

**Specialist (SP)**

Specialists are people who have specialized knowledge that is needed to get the job done. They pride themselves on their skills and abilities, and they work to maintain their professional status. Their job within the team is to be an expert in the area, and they commit themselves fully to their field of expertise.

This may limit their contribution, and lead to a preoccupation with technicalities at the expense of the bigger picture.

**Figure 1: Belbin's Team Roles**

Action Oriented Roles	Shaper	Challenges the team to improve.
	Implementer	Puts ideas into action.
	Completer Finisher	Ensures thorough, timely completion.
People Oriented Roles	Coordinator	Acts as a chairperson.
	Team Worker	Encourages cooperation.
	Resource Investigator	Explores outside opportunities.
Thought Oriented Roles	Plant	Presents new ideas and approaches.
	Monitor-Evaluator	Analyzes the options.
	Specialist	Provides specialized skills.

To find out which team roles you naturally adopt, or to profile your team, visit [www.belbin.com](http://www.belbin.com).

**How to Use the Tool:**

The Belbin Team Roles Model can be used in

several ways: you can use it to think about team balance before a project starts, you can use it to highlight and so manage interpersonal differences within an existing team, and you can use it to develop yourself as a team player.



The tool below helps you analyze team membership, using the Belbin team roles as checks for potential strengths and weakness within your team.

1. Over a period of time, observe the individual members of your team, and see how they behave, contribute and behave within the team.
2. Now list the members of the team, and for each person write down the key strengths and characteristics you have observed. (You may also want to note down any observed weaknesses).

**Tip 2: Prevalent team roles:**

Among teams of people that do the same job, a small number of team roles can prevail. For example, within a research department, the team roles of Specialist and Plant may be most common. A team of business consultants may mainly comprise Team Workers and Shapers. Such teams may be unbalanced, in that they may be missing key approaches and outlooks.

If the team is unbalanced, first identify any team weakness that is not naturally covered by any of the team members. Then identify any potential areas of conflict. For example, too many Shapers can weaken a team if each Shaper wants to pull the team in a different direction.

**Tip 3:**

Remember not to depend too heavily on this idea when structuring your team – this is only one of many, many factors that are important in getting a team to perform at its best.

That said, just knowing about the Belbin Team Roles model can bring more harmony to your team, as team members learn that there are different approaches that are important in different circumstances and that no one approach is best all of the time.

3. Compare each person's listed strengths and weakness with the Belbin's descriptions of team-roles, and note the role that most accurately describes that person.
4. Once you have done this for each team member, consider the following questions:
  - Which team roles are missing from your team? And from this, ask yourself which strengths are likely to be missing from the team overall?
  - Is there are prevalent team role that many of the team members share?
5. Once you have identified potential weakness, areas of conflict and missing strengths, consider the options you have to improve and change this. Consider:
  - Whether an existing team member could compensate by purposefully adopting different a team role. With awareness and intention, this is sometimes possible.
  - Whether one or more team members could improve how they work together and with others to avoid potential conflict of their natural styles.
  - Whether new skills need to brought onto the team to cover weaknesses.

## Benne and Sheats' Group Roles

### Identifying Both Positive and Negative Group Behavior Roles

A team is made up of all sorts of people. How these people interact and relate to one another is a key factor in determining how successful the team will be at achieving its mission. So, how do people behave in the teams that you work with?

The way that people behave in teams varies. Some people are helpful and supportive, others are more concerned with getting the work done, and still others can cause friction, disharmony or discord within the team.

You've probably worked in some teams that are effective and some that aren't. While there is no magic elixir, knowing what moves teams forward and what limits their progress can be helpful whenever you are working in a group or team.

Two influential theorists on group behavior were Kenneth Benne and Paul Sheats, who wrote an respected article titled "Functional Roles of Group Members" back in the 1940s. In it, they defined 26 different group roles that can be played by one or more people within a group. Their work influenced other early research and thinking on group functions. And whilst more recent research has refined many of these ideas, Benne and Sheats' Group Roles remains a useful and interesting way of looking at group behavior.

Benne and Sheats defined three categories of group roles: task roles, personal and social roles, and dysfunctional or individualistic roles.

#### Task Roles

These are the roles that relate to getting the work done. They represent the different roles needed to take a project step-by-step from initial conception through to action. (Individuals may fulfill many of these roles during the life of a project.)

- **Initiator/Contributor** – Proposes original ideas or different ways of approaching group problems or goals. This role initiates discussions and moves groups into new areas of exploration.
- **Information Seeker** – Requests clarification of comments in terms of their factual adequacy. Seeks expert information or facts relevant to the problem. Determines what information is missing, and needs to be found before moving forward.
- **Information Giver** – Provides factual information to the group. Is seen as an authority on the subject and relates own experience when relevant.
- **Opinion Seeker** – Asks for clarification of the values, attitudes, and opinions of group members. Checks to make sure different perspectives are given.
- **Opinion Giver** – Expresses his or her own opinions and beliefs about the subject 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, relevant facts and data. Also looks at the consequences of proposed ideas and actions.
- **Co-ordinator** – Identifies and explains the relationships between ideas. May pull together a few different ideas and make them cohesive.
- **Orienter** – Reviews and clarifies the group's position. Provides a summary of what has been accomplished, notes where the group has veered off course, and suggests how to get back on target.
- **Evaluator/Critic** – Evaluates proposals against a predetermined or objective standard. Assesses the reasonableness of a proposal, and looks at whether it is fact-based and manageable as a solution.
- **Energizer** – Concentrates the group's energy on forward movement. Challenges

and stimulates the group to take further action.

- **Procedural Technician** – Facilitates group discussion by taking care of logistical concerns like where meetings are to take place and what supplies are needed for each meeting.
- **Recorder** – Acts as the secretary or minute-keeper. Records ideas and keeps track of what goes on at each meeting.

### Personal and/or Social Roles

These roles contribute to the positive functioning of the group.

- **Encourager** – Affirms, supports and praises the efforts of fellow group members. Demonstrates warmth and provides a positive attitude in meetings.
- **Harmonizer** – Conciliates differences between individuals. Seeks ways to reduce tension and diffuse a situation by providing further explanations or using humor.
- **Compromiser** – Offers to change his or her position for the good of the group. Willing to yield position or meet others half way.
- **Gatekeeper/Expediter** – Regulates the flow of communication. Makes sure all members have a chance to express themselves by encouraging the shy and quiet members to contribute their ideas. Limits those who dominate the conversation, and may suggest group rules or standards that ensure everyone gets a chance to speak up.
- **Observer/Commentator** – Provides feedback to the group about how it is functioning. Often seen when a group wants to set, evaluate, or change its standards and processes.
- **Follower** – Accepts what others say and decide even though he or she has not contributed to the decision or expressed own thoughts. Seen as a listener not a contributor.

### Dysfunctional and/or Individualistic Roles

These roles disrupt group progress and weaken its cohesion.

- **Aggressor** – Makes personal attacks using belittling and insulting comments, for example, "That's the most ridiculous idea I've ever heard." Actions are usually an attempt to decrease another member's status.
- **Blocker** – Opposes every idea or opinion that is put forward and yet refuses to make own suggestions, for example, "That's not a good idea." The result is that the group stalls because it can't get past the resistance.
- **Recognition Seeker** – Uses group meetings to draw personal attention to him or herself. May brag about past accomplishments or relay irrelevant stories that paint him or her in a positive light. Sometimes pulls crazy stunts to attract attention like acting silly, making excess noise, or otherwise directing members away from the task at hand.
- **Self-confessor** – Uses the group meetings as an avenue to disclose personal feelings and issues. Tries to slip these comments in under the guise of relevance, such as "That reminds me of a time when." May relate group actions to his or her personal life. For example, if two others are disagreeing about something, the Self-confessor may say, "You guys fight just like me and my wife."
- **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 reading unrelated material.
- **Dominator** – Tries to control the conversation and dictate what people should be doing. Often exaggerates his or her knowledge and will monopolize any conversation claiming to know more about the situation and have better solutions than anybody else.
- **Help Seeker** – Actively looks for sympathy by expressing feelings of inadequacy. Acts helpless, self

deprecating and unable to contribute, e.g. "I can't help you, I'm too confused and useless with this stuff."

- **Special Interest Pleader** – Makes suggestions based on what others would think or feel. Avoids revealing his or her own biases or opinions by using a stereotypical position instead, for example, "The people over in Admin sure wouldn't like that idea." or "You know how cheap our suppliers are, they won't go for that."

### Using Benne and Sheats' Theory

Benne and Sheats' work did not actually prescribe any application of their theory; they simply identified the roles. However, we can use the theory to look at and improve group effectiveness and harmony, by asking what roles are being filled, which additional ones might be required, and which may need to be eliminated.

Benne and Sheats noted that the roles required in a group can vary depending on the stage of group development and the tasks in hand. And it's useful to consider how your group is developing and how the task may vary when reviewing your group's roles.

Follow these steps to use Benne and Sheats' theory to consider the roles in your group:

**Step 1:** Determine what stage or function your group is at, based on what you are working on or discussing. Here are some common group stages/functions:

- Forming.
- Discussing tasks and roles.
- Setting out expectations.
- Goal setting.
- Brainstorming ideas.
- Discussing alternatives.
- Completing tasks and duties.
- Making a decision.
- Implementing the solution.
- Evaluating performance.

**Step 2:** Determine which roles are most suitable and helpful for the current stage/function. Here are some examples:

- When first forming your group, you will not necessarily need anyone in the Evaluator/Critic or Orienter roles. You will, however, need Energizers, Procedural Technicians, and a Reporter.
- When discussing alternatives, it is important to have representation in as many Social/Personal roles as possible. Benne and Sheats suggested that the more group members playing Task and Social roles, the more successful the group would be.

**Step 3:** Recruit and/or develop the missing roles within your group.

Help the group understand where there are gaps in the functions being represented and discuss how filling these roles would help the group's success. Benne and Sheats also said that the more flexible the group members are, the better; meaning that group members should be able to adapt their roles depending on the group's need. With a flexible group structure like this, members each use a wide range of talents, and provide maximum contribution to the team.

**Step 4:** Identify any dysfunctional roles being played within the group.

Make a plan to eliminate this behavior either through increased awareness, coaching, or feedback. These self-serving roles really must be minimized or eliminated for effective group work to emerge. By making the whole group aware of these maladaptive behaviors, individuals can monitor the behavior and put a name to it when it occurs. This alone should decrease much of the disruptive behavior.

**Tip :**

This is an important and particularly useful part of this theory: These behaviors are disruptive and damaging. By spotting these behaviors and coaching people out of them, you can significantly improve your group process.

**Step 5:** Re-evaluate regularly.

Groups are constantly changing their function and purpose. Make sure you continuously evaluate what is going on within the group and take action to maximize effectiveness.

**Tip:**

Benne and Sheats' work is based on their observations, but there is no clear evidence to support the notion that you need to have all of these roles represented or to suggest what combination is the most effective. As such, don't depend too heavily on this theory when structuring your team.

That said, just knowing about Benne and Sheats' Team Roles can bring more harmony to your team, as it helps members appreciate the breadth of roles that can contribute to the work of a team and its social harmony, as well as the behaviors which will obstruct it's path.

**Key Points**

There are many different explanations of group roles and functions. Each takes a slightly different perspective. However, the consensus seems to be that an effective group has a wide representation of positive roles. Groups need to be able to adapt to the changes from outside and within the group itself. People change, opinions change, conflicts occur; all of these require group flexibility and social understanding.

Benne and Sheats' role definitions are useful for looking at specific behaviors that occur within a group. By using the definitions given and evaluating the current function and needs of the group, you can plan to encourage the sorts of behaviors you need and discourage those that you don't. These definitions also provide a guide for team member development, as the more positive behaviors each person can display, the better able the whole group will be to respond to the demands put on it.

## Building the Trust of Your New Team

### Getting Real and Living the "We" in Team

When you're a new team leader, it can often be difficult to get your team to trust you. You have no history, and people don't know if they can rely on you or not. However, if you start the relationship off properly, you can build trust steadily and surely. And, if you've faltered a bit in your trustworthiness, you can use the basics of trust building to regain your credibility and move forward.

No matter what brings you to want to build trust, it is imperative you take on the challenge.

When you have trust, you have the basis of a high performing team. Without it, people won't accept your leadership, and they'll spend so much time covering their backs that you'll find it difficult to get anything done.

Under a layer of mistrust no amount of team building or recognition will motivate people to work together. Without trust there is no "we", and with no "we" there is no team.

As Peter Drucker said,  
*"The leaders who work most effectively, it seems to me, never say "I." And that's not because they have trained themselves not to say "I." They don't think "I." They think "we"; they think "team." They understand their job to be to make the team function. They accept responsibility and don't sidestep it, but "we" gets the credit. This is what creates trust, what enables you to get the task done."*

To create a high performing team you have to prove yourself trustworthy. Your team must believe in you as a person and as a leader. From there, they will work hard to get the job done, because they know you wouldn't lead them astray.

Here are some steps you can take to become a trustworthy leader.

#### **Start with self-disclosure**

People trust people they know and understand. As a team leader you can't afford to be mysterious.

When you first start with a team, make sure you share your background with your co-workers. And more than that, share who you really are. Create a mini-bio that reveals something more than your work persona.

The better people get to know each other, the easier it is to trust one another. Use this as an exercise for all of the team members, and encourage everyone to share information about themselves.

People are curious by nature, and if you don't give them information they will fill in the blanks for themselves. Many of the judgments people make about you become facts to them. Thwart these false assumptions upfront by giving people what they want.

Make sure you have enough opportunities for you and your team to socialize and get to know one another. Although your purpose is to work, your work will be much more effective if you make time for fun too.

As new people join your team and organization, consider circulating a short bio of them. Include facts and information that will help his/her colleagues relate to him/her better. Do make sure to have the bio approved by the incoming worker before sending it out, though!

#### **Do what you say and say what you do**

In other words, only make promises you can keep. The surest way to lose trust is to go back on your word. When you fail to follow through you cause disappointment and frustration.

When you are not sure if you can deliver something, say so – your honesty is much more important than your prowess. People would much rather follow the person they can trust over the person who boasts about what he/she can do.

When you make a commitment, take full responsibility for seeing it through. This might mean saying "no" to some requests. That's acceptable because it is better than under delivering on a promise. Make sure you know what you are capable of and what your limitations are before committing to anything.

When you first join a team, a great way to build trust is to establish a quick win. Proving your capability goes a long way toward proving you can be trusted to lead a team. Make sure your accomplishment is relevant and significant. And be sure to share credit where credit is due. (However, be careful that you don't fall flat on your face with this first, high profile project!)

Tied into this concept of doing what you say, is great communication. When you keep your team informed, you send a clear message that you trust them. Trust is a two way street and when you give trust you get it back even more so.

#### **Be a role model**

When it comes to trust, people respond to those who inspire them. We trust people who consistently demonstrate high quality

behaviors. Some high quality behaviors you should aim for include:

- **Honesty** – only speak the truth, and practice transparency.
- **Integrity** – establish a solid moral code and use it unfailingly.
- **Respect** – never ask anyone to do something you wouldn't do yourself.
- **Loyalty** – stand behind your people and your decisions.
- **Fairness** – treat all your team members the same, using similar standards, measures and expectations.
- **Authenticity** – be yourself. If you try to fake it you will be found out eventually, and in the meantime, there will always be something "not quite right" about you. Getting trust from others starts with a firm belief in the person you are.

If you're a newly-appointed manager or team leader, be a model of respectful behavior right from the start. Stay away from unflattering assumptions or judgments about your predecessor.

And don't come in ready to change everything either. What worked in your last team or organization may not work here. This team and its previous leader worked hard to establish their systems and routines: Respect their work and make sure you work with your new team, not against it, to set your relationship on the right track.

### **Be accountable no matter what**

Take ownership of your actions and decisions. This is easy when things are going well. When something goes wrong, don't look to lay blame or find a scapegoat. A trustworthy leader steps up and accepts responsibility.

It's a good idea to encourage this level of accountability in every member of the team. Do this through a team charter or other type of formal recognition process. When the individuals in a team are all clear that they can't hide behind the team, you'll start to get trustworthy behavior from everyone.

Remember to trust your team members too. Avoid micromanaging and over controlling behaviors. When your team knows that you trust them, they're more likely to trust you.

### **Be present**

In order to trust you, your team needs to know you are there for them.

- Listen to your people, and really hear what they are saying. If you don't understand a problem or a situation, don't stop asking questions until you do.
- Step out from behind email and memos. Meet with individual members of your team regularly. Talk to them in person, and one-on-one, ideally every week.
- Give lots of praise and encouragement. Make sure your team knows how much you appreciate what they do everyday.
- Use body language effectively to ensure you don't "say" things you don't mean.

Get to know what makes everyone on your team tick. Find out what motivates them, what they think is working well, and what needs fixing. When your team feels your genuine care and concern they will trust that you have their best interests in mind.

### **Give credit**

To build trust, be less concerned about your own profile and more about your team's. When your team enjoys a win, let them share in the credit and glory. Take a back seat and allow the individuals their time to shine.

Remember that a great leader is a humble one. If you are in it for the right reasons, then knowing you did a great job and allowing your team mates to reap their rewards is all the reward you need for yourself.

### **Establish credibility**

When you first start with a new team, individual members of the team will know much more about their jobs, the organization and the situation than you do.

Have the humility to learn what people do, and how they do it. Find out from them what works, and what doesn't, and fix problems for people where you can. Learn as much as you can as quickly as you can, and you'll soon establish credibility and respect.

### **Key Points**

Gaining your team's trust starts and ends with you. You have to set up a trusting relationship right from the start and continue to nurture it. Being selfless and adopting a true team mentality are the foundations of building team

trust, along with sharing who you are and what you stand for — and then walking this talk on a daily basis.

A trusted leader is one who is confident in his/her own abilities and doesn't need the accolades of others. When you are comfortable with yourself, it's easy to step back and allow others to shine. That's the real meaning of "we" and it's what signals that trust is alive and well in your team.



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