

Customer Service Excellence (Intermediate)

***For Supervisors, Managers,
Decision Makers***

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The Four Energies of Customers

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Customers' Learning Styles

4Mat System

This system formats your presentation to customers and makes it understandable to the broadest percentage of the population based on study of the 4 learning styles by Bernice McCarthy in 1970, which is in turn taken from Kolb's learning styles study

<u>Why (Introvert)</u> <ul style="list-style-type: none"> • Discuss reasons/benefits • Sharing universal experiences • Why it is worth buying from your company • Why bother to use it / to ship with you • Reasons for taking actions before actually doing it 	<u>What (extrovert)</u> <ul style="list-style-type: none"> • Giving information about what you will do/say • Teaching your company story • For people who are the what type plenty of handouts and information about what you do • Figures, examples, statistics • Value of company lies in the thickness of the brochure
<u>How (feeler)</u> <ul style="list-style-type: none"> • People learn by doing • Describe the feeling. What will they experience when shipping with your company. Let them fill the AWB on line with you. 	<u>What if (thinkers)</u> <ul style="list-style-type: none"> • Like to experiment • Self-discovery • Encourage them asking questions

In any particular communication with a customer, you will have people in all four learning categories. If you start communicating by giving all customers a lot of “**what**” on your topic, you will find the “**why**” type learner-customers won't actually assimilate the information because no reason is explained.

***The Nature
Of
Problems
With Customers***

Different Nature of Problems

The causes of problem solving failure in organizations, were due to some numbers of factors.

Factors causing failure	Extent of cause of failure %
Human error	12
Poor control *	8
Failure to define needs*	16
Lack of system*	30
Ill-defined measurement*	15
Inadequate planning*	14
other	5

Individuals tried to muddle through, in attempting to address problems & make decisions. They don't have control over their destiny: they say *"I am being pulled in different directions by different people"*

The reason is that people rarely use a structured approach to define problems so they are always fire fighting and they like it!!

In management, sometimes we need to tackle several problems at the same time. Some problems are related to each other. Some are operational and others are strategic in their nature

Depending on personality, people still prefer to go to action & stay away from a structured approach to planning & organizing. People think still, that strategic planning is the job of the seniors only, or the strategic planners.

Open & Closed Problems

Problems can be categorized in two folds: open and closed. Open problems are different in nature from closed ones, and are not easy to define. They are presented in broad terms and open to interpretations. For example we hear people saying: *the problem here is “morale” or we need to improve our turnover or “the problem is the competition”*.

All this states the feel for the overall nature of problems, but do little to clarify the details of issues such as where does the problem exist and how should it be tackled?

For open problems, there is no commonly accepted way of addressing the problem. A number of actions might be taken internally or externally even.

The boundaries separating problems from each other in the case of open problems are often unclear and hazy.

Closed problems are very specific & the problem is easy to define and there are few options to consider. Example: *setting up a meeting room before a meeting, or arranging a business trip*

Open problems	Closed problems
Problem is not clearly defined	Problem can be defined
No right answer – there may be many answers	Unique or few answers
Unclear method for solving the problem	Recognized steps for solving the problem
Cannot be disentangled from context	Can be treated as discrete or separate issue
Boundaries are unclear	Terms of reference or parameters can be defined

Closed Problem Analysis

Here we consider two techniques which are appropriate. One technique probes in asking why a particular problem exists & keep probing until possible solutions start emerging. Like young children wanting to learn by asking a lot of why's!! So pick a topic and keep asking why.

The Fishbone Method The below example is the exact illustration in the way it works. The layout is shown here below

For deciding on the plausibility of the solution emerging from the fishbone technique, we use another technique called **Lewin's Method or Force Field analysis.** This will focus on the forces that drive decision makers into selecting one solution over another, depending on the forces pulling with or against that solution on the two sides. Of course this could be done once the causes of a problem are found and need to be eradicated and possible solutions are presented as options

Before using any of the techniques mentioned above we need to **formulate the problem** and clearly **define our vision** (As if the problem does not exist)

Problem Formulation

We often have to resort to what we call **7 Ms**.

Market : Competition, customers, suppliers etc.

Man power: People issues

Machines : Equipment

Materials : Consumables or raw components

Methods : Ways of doing things, systems

Money : Financial matters

Minutes : Time constraints

Whenever we deal with complexity, the **7Ms** Framework helps us structure our thinking. But don't let this system limit you

In Relation to...	Problem Information Known	Problem Information Unknown
Market		
Manpower		
Machines		
Materials		
Methods		
Money		
Minutes		

Understanding Perspective

Usually when we are exploring a problem, we do so from one perspective. But there are other stakeholders sometimes. They have viewpoints to be considered. We need to take that into perspective.

How we as service team see the problem...	How SMSA sees the problem...	How customer sees the problem...

Sometimes perspective of people who are not present also can be taken into consideration, when solving problems. All stakeholders see things differently, based on their experience, interest, occupation, training, and prejudices. For perspective understanding ask the following questions:

- Who is the final customer? (External or internal)
- Which functions and individuals will contribute successfully to the project?
- Which external contacts could have a bearing on the outcome?

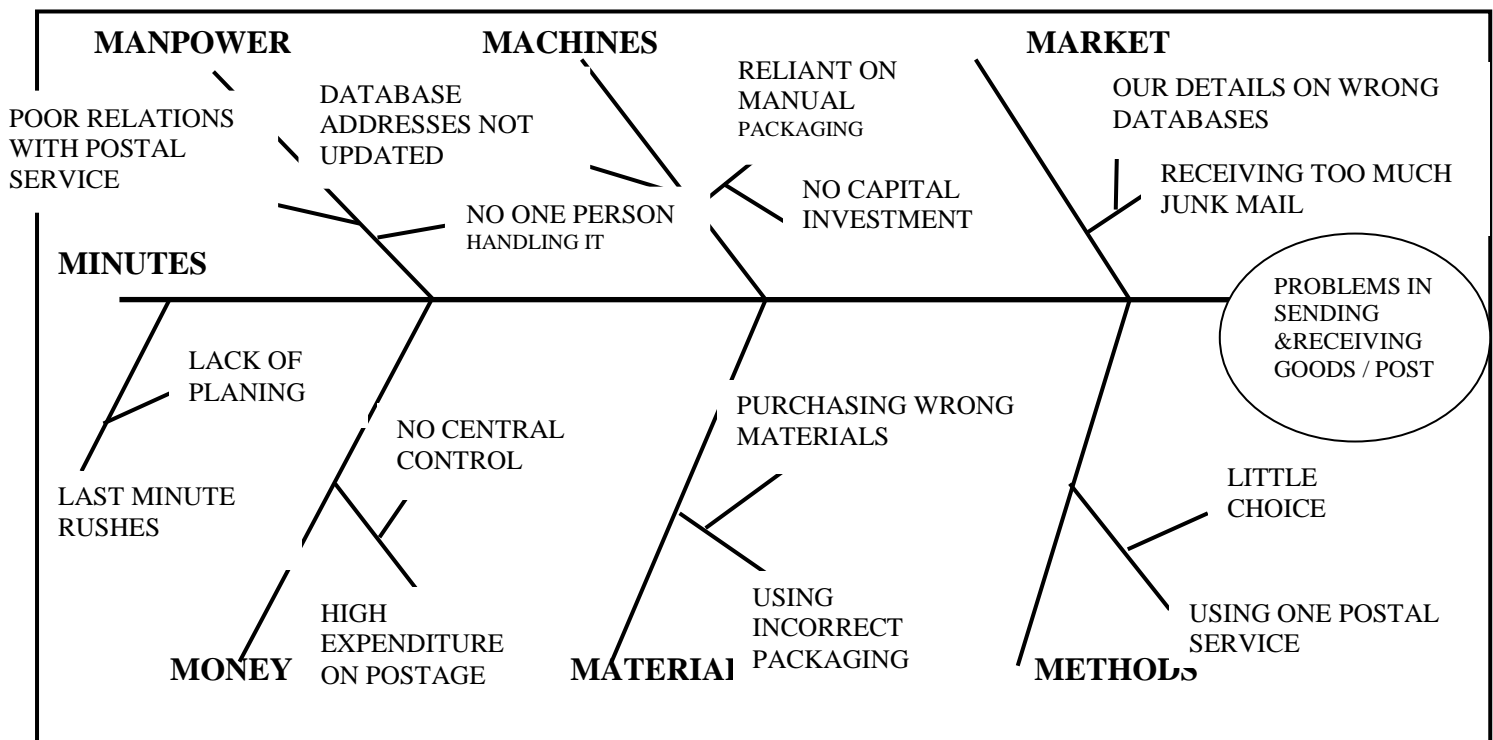
Problem Analysis

The Fishbone Analysis

It works in a similar way to the why-why analysis, but the main difference is how the group will lay out their ideas on a flip chart.

The problem (effect) is on the right-side (head of fish) and by asking why this exists, we can draw the bones of the fish on the left side. We can use here again the **7 Ms** system for causes. We continue until problems' solution ideas are identified through root causes.

Extract of the Fishbone Analysis

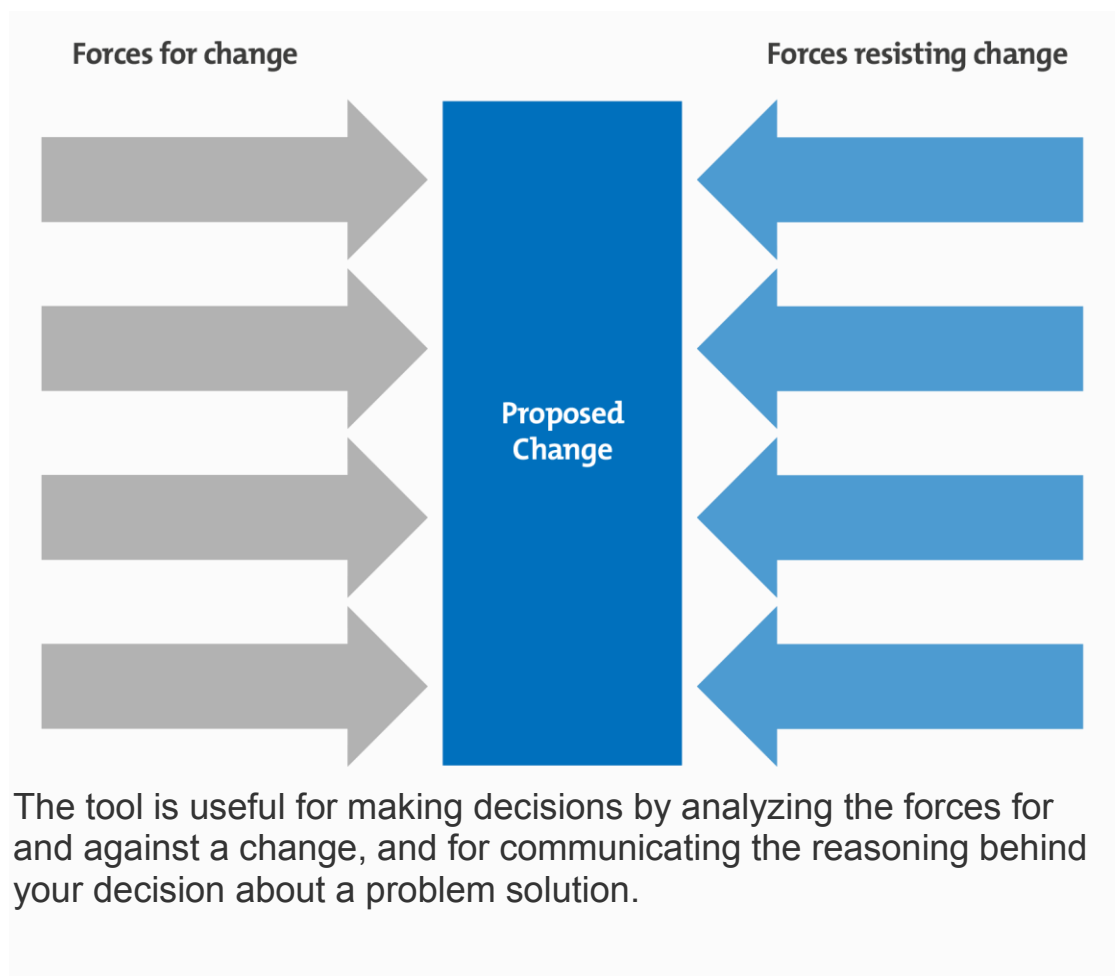


Decision Making

The Force Field Technique

When you're making difficult or challenging decisions, it pays to use an effective, structured decision-making technique that will improve the quality of your decisions and increase your chances of success. Force Field Analysis is one such technique and, in this article and in the video, we'll explore what it is and how you can use it.

The idea behind Force Field Analysis is that situations are maintained by an equilibrium between forces that drive solutions or change situations and others that resist change, as shown in figure 1, below. For a solution to a problem to be implemented and eventually for change to happen, the driving forces must be strengthened or the resisting forces weakened.



The tool is useful for making decisions by analyzing the forces for and against a change, and for communicating the reasoning behind your decision about a problem solution.

My Notes

***The Importance
Of
Team Trust
While Serving
Customers***

The Speed of Trust

There is one thing that is common to every individual, relationship, team, family, organization, nation, economy and civilization throughout the world – one thing which, if removed, will destroy the most powerful government, the most successful business, the most thriving economy, the most influential leadership, the greatest friendship, the strongest character, and the deepest love.

On the other hand, if developed and leveraged, that one thing has the potential to create unparalleled success and prosperity in every dimension of life.

That one thing is **TRUST**

Inspiring Trust

Trust is a whole life choice, and until you are actually in a front-line situation, you will not even see the full power of the Cores and Behaviors on speed, cost and trust. Look immediately for ways to apply them and find opportunities to teach them to others.

You may still be hesitant or fearful when it comes to actually extending trust, but leaders who extend trust become mentors, models and heroes. ***Inspiring trust is the prime differentiator between a manager and a leader, and the prime motivator of successful enterprises and relationships***

Companies that choose to extend trust to their employees become great places to work at. Most people respond well to trust and do not abuse it. We are born with a propensity to trust and choosing to retain or restore that propensity is key to our ability to forgive. We have countless opportunities to extend and inspire trust to others, but it also makes a difference in our own lives. Trust is reciprocal.

Extending ‘Smart Trust’

Have you ever trusted someone and gotten “burned”? Have you ever failed to trust someone and missed significant opportunities?

Extending trust can bring great dividends. It also creates the possibility of significant risk.

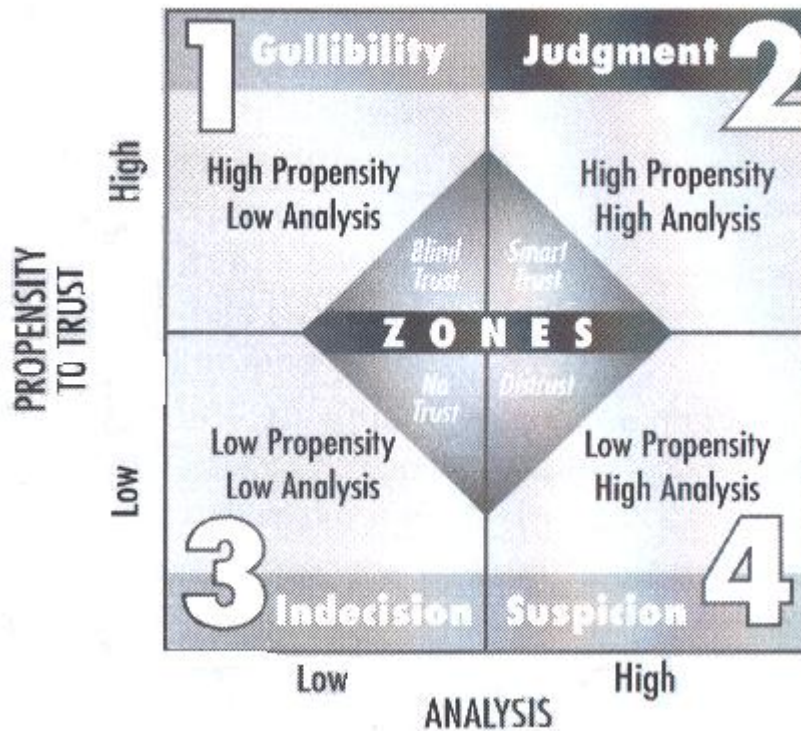
Zone1: Blind Trust zone of gullibility. The suckers sure to fall for scams

Zone2: Smart Trust zone of judgment. Good business judgment and good people judgment combine to enhance instinct and intuition

Zone3: No trust zone of indecision. Those who don’t even trust themselves and are immobilized by insecurity and protectiveness

Zone4: Distrust zone of suspicion. Those who rarely extend trust beyond themselves

Inspiring Trust



Zone 1 (gullibility) and 3 (indecision) are definitely high risk, but people might think Zone 4 (suspicion) is the lowest risk zone because it is where you analyze and calculate and consider issues by yourself. Actually, it is high risk, because high suspicion leads you to validate and analyze everything to death, decreasing speed and increasing cost.

Managers in Zone 4 miss opportunities, cut off collaboration and analysis from others. They incur low trust taxes including bureaucracy, politics, disengagement and turnover, and they lose high-trust dividends such as innovation, collaboration and partnering.

The lowest risk and highest return occur in Smart Trust Zone 2 (judgment), where risk is wisely moderated and managed and you can carefully evaluate and consider issues. Your propensity to trust releases encourages and generates synergy.

Inspiring Trust

It is not necessary to extend Smart Trust automatically. You can extend limited trust or no trust at all in Zone 2, just as you might do in Zone 4.

Managers who don't become leaders don't know how to extend Smart Trust. They operate in Zone 4. They delegate tasks without parameters or extend fake trust, but they don't fully entrust people with stewardships that engages genuine ownership and accountability. Inspire trust by starting with yourself and your own credibility, and then consistently behave in trust-building ways with other people. You should also think about the way your style is perceived, so people do not misunderstand you.

Inspiring Trust

Restoring Lost Trust

The idea that trust cannot be restored once it is lost is a myth. Though it may be difficult, in most cases, lost trust can be restored and often even enhanced.

Societal Trust

Restoring trust on the societal level means rebuilding trust in countries, institutions, industries, professions and in other people generally.

In the republic of Ireland, leaders over the past 30 years have changed the nation's focus from inward to outward. They have moved the nation from economic independence to interdependence from overhauling an archaic educational system to making Ireland one of the world's undisputed education leaders.

Market Trust

In the 1990s, Nike was criticized by activists for not being socially responsible, based on the conditions in some of the plants of their foreign manufacturing partners.

Chairman Phil Knight acknowledged the company's 'bumpy original response' to criticism, however, and Nike's actions and behavior over the ensuing years has demonstrated tangible results. In 2005 they were listed as #13 on the 'Best Corporate Citizens' list.

Organizational Trust

Restoring trust within an organization may seem difficult; however, the fact that **high-trust organizations outperform low-trust organizations by three times** provides a strong incentive to **make the effort**.

Inspiring Trust

Relationship Trust

If you're a customer of a company that violated your trust, you may not give them a chance to restore it. That's a transactional thing. But if a family member violates your trust, it's not transactional. One area that creates huge trust issues in personal relationships is money.

Money problems are a key cause of divorce. Two people coming into a relationship are often scripted in different ways by family experience – one may come from a background of spenders, while the other comes from a background of thrift.

Even in difficult situations in close, personal relationship, trust can be restored. And the very effort of restoring it can make it even stronger than before.

Self-Trust

Often the most difficult trust to restore is trust in ourselves. When we violate a promise we've made to ourselves, our self-trust can really take a dive. Restoring self-trust gives another dimension – a powerful dimension – to the Cores and behaviors

Broken Trust – A Beginning

If you've broken trust with someone else, it's an opportunity to get your own act together, to improve your character and competence, to behave in ways that inspire trust. Hopefully, this will influence the offended party to restore trust in you.

If someone has broken trust with you, it's an opportunity for you to grow in your ability to forgive, to learn how to extend Smart Trust, and to maximize whatever dividends are possible in the relationship.

Stages of Team Development

Stages of Team Development

Forming

The composition of the Team is very important. People come in after being recruited, transferred and people leave because of sickness, retirement and other reasons. Your team is undergoing continuous alteration and is influenced positively or negatively each time a member is added or subtracted.

In the beginning of the process of forming, team members get to know each other. A lot of uneasiness, uncertainty as most of them are not sure they will stay around (example – probation period in a company given to an employee). Others may be sure they will stick around but not sure of their role.

Old timers will get a feel of newcomers to see if they are going to be an added value or a threat to their own positions. From the outset and on the surface, most people are cordial and friendly but internally a lot of unanswered questions are causing doubt and stress!

Forming

- Individuals oriented to team
- Interpersonal relationships, goals, norms constantly examined

Team member questions

- ✓ Who are these other people?
- ✓ What is going to happen?
- ✓ What is expected of me?
- ✓ Where are we headed and why?
- ✓ Who is the leader?
- ✓ What are our goals?
- ✓ How do I fit in?
- ✓ How much work will this involve?

Stages of Team Development

Interpersonal relationships

- ✓ Silence (feels risky to speak out or ask questions)
- ✓ Self-consciousness (do not demonstrate their emotions to others)
- ✓ Dependence (most communication is targeted at leader)
- ✓ Superficiality (interaction tends to be formal and guarded)
- ✓ Reactivity and Uncertainty (self-protection)

Effective leader behavior

- ✓ Introduce team members
- ✓ Answer questions (even unasked questions which are in the minds of team members)
- ✓ Build trust between yourself and the team members, and among the team members themselves
- ✓ Model expected behaviors
- ✓ Clarify goals, procedures, rules and expectation of the team

Stages of Team Development

Storming

It occurs when a group of individuals with various needs and insecurities start more closely to interact and compete with each other. It occurs a few weeks closer to the performance time when a new task or project is on the table. Conflicts arise and clashes of personalities are inevitable. Poor work ethics and bad attitudes will then arise, also obviously when a new team member is added he comes in with an expectation of how things should go for him individually and for the team. Conflicts happen when all these expectations come into contact.

The Storming stage is important and necessary for team development and conflict should not be prevented rather channeled and handled towards individual and team development. Team members should know that not everyone will agree with and like each other 100% of the time. The key remains that the team will handle the inevitable conflict and try to look for consensus (a solution that all team members not necessarily like but at least can live with)

Storming

- Conflict and polarization regarding inter-personal issues
- Leadership and authority tested; some power asserted

Team member questions

- ✓ How can we make decisions when there is disagreement?
- ✓ How will we handle conflicts?
- ✓ How will we communicate negative information?
- ✓ Can the team be changed?
- ✓ Do we really need this leader?
- ✓ Do I want to stay in the team?

Stages of Team Development

Interpersonal relationships

- ✓ Polarization of team members
- ✓ Coalitions or cliques being formed
- ✓ Competition among team members
- ✓ Disagreement with the leader
- ✓ Disagreements amongst team members
- ✓ Violating team rules

Effective leader behavior

- ✓ Identify an external enemy to increase feelings of cohesion
- ✓ Reinforce the vision
- ✓ Generate commitment among team members
- ✓ Assign team members to teach others (Learn-apply-teach-inspect)
- ✓ Provide individual and team recognition
- ✓ Encourage win/win thinking

Norming

This stage begins when the team begins to settle on a set of rules and standards as to how things will be done. It relates to team standards in training, mental training and setting ground rules and guidelines that everyone will abide by.

The norms, standards and rules of the team members' attitudes and work ethics have tremendous impact on successful teams. It is important that these norms reflects a good healthy environment and not a "Thank God it's Friday" environment or "Do just enough to get by".

Stages of Team Development

Norming

- Team goals, norms, role relationship redefined
- A sense of cohesiveness and trust established

Team member questions

- ✓ What are the norms and expectations?
- ✓ How much should I conform?
- ✓ Will I be supported?
- ✓ Where are we headed?
- ✓ How much should I invest and commit?

Interpersonal relationships

- ✓ Cooperativeness
- ✓ Ignoring disagreements
- ✓ Conformity to standards and expectations
- ✓ Obedience to leader directions
- ✓ Heightened interpersonal attraction
- ✓ Commitment to a team vision

Effective leader behavior

- ✓ Help different roles between team members
- ✓ Show support to team members
- ✓ Provide feedback (how they are doing as individuals and how the team is doing as a unit)
- ✓ Communicate a vision of the future for the team

Stages of Team Development

Performing

It is the eventual goal of all teams. It occurs only if effective standards are in place and firmly embraced. Here everybody begins performing in a confident and cohesive way. Comfort, trust and ease of work are now prevailing because they know each other and know what to expect from each other.

However, it is not a guaranteed stage, if your team members do not handle conflict of the storming stage very well. You must overcome conflict and established effective rules and standards in the Norming stage to be able to reach the Performing stage and remain there.

Teams should use the stages of team development as a guide to facilitate progression through all of them. Problems may arise when we expect a team to reach the Performing stage too soon. A team can go back and forth between stages from Norming back to storming sometimes.

Performing

- Members work towards task completion
- Decisions made, evaluated and re-evaluated

Team member questions

- ✓ How can we continuously improve?
- ✓ How can we encourage innovation and creativity?
- ✓ How can we build our core competencies?
- ✓ What further improvements can be made to our processes?
- ✓ How can we maintain a high level of energy and contribution to the team?

Stages of Team Development

Interpersonal relationships

- ✓ High mutual trust
- ✓ Unconditional commitment to the team
- ✓ Multifaceted relationships among team members
- ✓ Experimentation, trial-and-error learning, discussions of new possibilities
- ✓ Initiative
- ✓ Autonomy

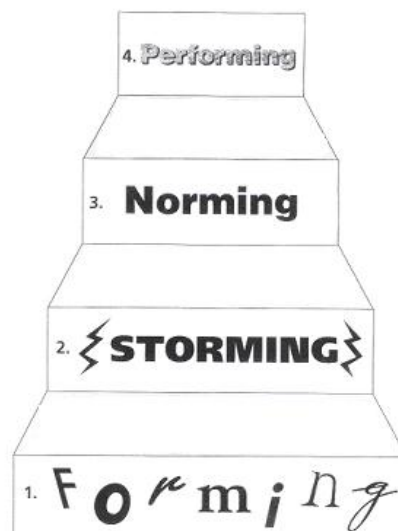
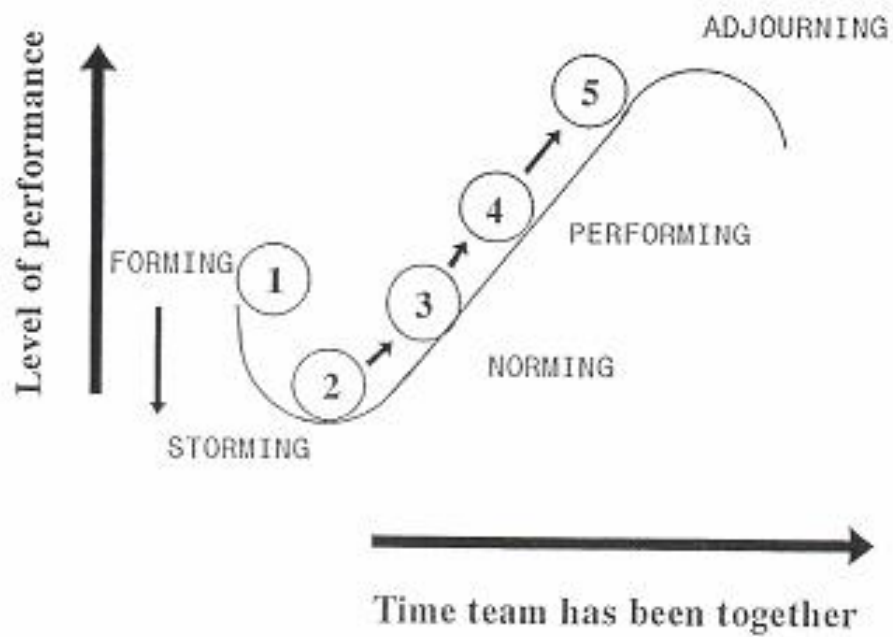
Effective leader behavior

- ✓ Encourage innovation and continuous improvement simultaneously
- ✓ Reinforce the quality culture of the team
- ✓ Provide regular feedback on team performance (Communicate, communicate, communicate)
- ✓ Obtain resources, remove obstacles
- ✓ Facilitate development of team members
- ✓ Integrate suggestions of team members
- ✓ Help the team avoid reverting back to earlier stages

Adjourning / Mourning

This is the stage when a team member decides to leave the team for another job opportunity or because he was made redundant. It could also be that the team was temporarily put together for a certain project and now that the project has been accomplished, the team has to be dismantled.

Team Development Cycle



Stages of Team Development

Common areas of problems

Teams getting stuck in a storming stage is not very uncommon as conflicts keep on flaring up as individuals do not succeed in solving their differences. Attention needs to be given in order for this not to take too long as it can hinder the Team advancement and growth. Sometimes teams make their way through the Norming stage but don't succeed in putting strong and effective Norms to be used as a base for the Performing stage. The result being an eventual downfall to the storming stage. Those typical encounters can be a hindrance to the team's success if everyone thinks as follows:

- **"I do enough to get by"**
- **"Every person for himself"**
- **Team Leaders play favorite"**

Notes

The Seven Pillars of Team Building

The Seven Pillars of Team Building

The seven pillars of team development are crucial for building a team which will demonstrate teamwork in service of presenting “Excellence in Customer Service”

1. **C**ommon Goals
2. **C**ommitment to a Common Goal
3. **C**omplementary Roles
4. **C**ommunication
5. **C**onstructive Conflict
6. **C**ohesion
7. **C**redible Directing

Notes & Activities

Belbin Roles

BELBIN'S TEAM ROLES

*Helping us understand our role and that
of others in the team*

Belbin's Team-Roles

In the early 1970s Professor Meredith Belbin started to investigate what made a management team successful – as opposed to what made an individual manager successful. Over the next 9 years he carried out detailed research with teams in work simulated situations; and related the results to real management teams in a variety of organizations in both the public and private sector.

His research is continuing today, but in 1981 he published the initial results. These are contained in:

"Management teams – Why They Succeed or Fail"

R. Meredith Belbin

These notes summarize some of the key points from his work.

What is a team role?

Belbin defined it as:

- The way in which members with characteristic personalities and abilities contribute to a team.

He established that there was a limited number of useful team-roles, and that a team's success depended on how well the individual roles were discharged and how they interlocked with each other.

Personality Traits

A lot of Belbin's research was backed up by personality measures used to give an insight into the individuals in the teams. Among the measures he used were:

- **Mental Ability / Intelligence**
- **Introversion / Extroversion**
- **Anxiety / Stability**

Later, these basic measures were extended to consider other factors such as creativity, dominance, and trust in others.

Belbin's Team-Roles

The concept of team-roles

As the research continued, Belbin looked at more and more factors and gradually evolved the concept of team-roles: the idea that a successful team needs a variety of people within it and that, based on their characteristics and ability, each had a specific role.

1) Coordinator

This role is the one of presiding over the team and coordinating its efforts to meet external goals and targets. Focused on achieving the task goals, but doing so by knowing each member's strengths and weaknesses, and trying to use each member as effectively as possible in achieving the team's objectives. Coordinators encourage everyone to contribute and impart a sense of purpose to the team.

Coordinators are usually not outstandingly creative thinkers. They talk easily, and are easy to talk to and usually make good listeners. Will set the agenda and control group discussions but without being domineering. They will listen, sum-up group feelings, spell out group verdicts and, if a decision has to be taken, will take it firmly after everyone in the team has had a say.

Personality Traits

Stable, dominant, extrovert

2) Shaper

This role is one of concentrating on pushing the task through completion. This role is an alternative to the Coordinator type of leader, and a team always needs one or the other. Shapers are better than coordinators when a team needs a leader to push people into action, to galvanize them. Otherwise, the coordinator type will usually lead a team to produce better results.

Shapers are full of nervous energy: emotional, compulsive, impatient and easily frustrated. They enjoy and welcome challenges; are often argumentative can be quick to sense a slight, or feel there is a conspiracy against them. They will usually put forward more ideas than the coordinator and will try to unite ideas, objectives and practical considerations into a plan for decision and action. They want action, and want it now! They are often seen as arrogant and abrasive and have a tendency to steam-roll other members of the team. But they do make things happen.

Personality Traits

Anxious, dominant, extrovert

Belbin's Team-Roles

3) Plant

This role is a major creative one in the team; the source of ideas, suggestions, proposals – often distinguished by their originality. Effective Plants are likely to be the most intelligent and imaginative members of teams. They concentrate on major issues, seeking new lines of approach – but often miss out on detail and may make careless mistakes. They can be inhibited at times, prickly and may cause offense to other team members by the way they criticize the ideas of the others. Conversely, they are bad at accepting criticism themselves. They may also shoot off a tangent on ideas that catch their fancy, but that may not contribute to team objectives.

On the other hand, a good Plant has been known to “save the day” with some ingenious idea or other that no one else in the group could have thought of.

Personality Traits

High IQ (Particularly on critical thinking), not outgoing (reserved)

4) Monitor Evaluator

This role is one of the team's critics, carrying out a measured and dispassionate analysis of the team's ideas and proposals. Although unlikely to come up with a creative proposal, the Monitor-Evaluator is the one most likely to prevent the team from committing itself to misguided action.

Effective Monitor Evaluators are perceived to be high intelligence with skills in assimilating, interpreting and evaluating large volumes of complex materials. Sometimes their evaluations are delivered tactlessly and rudely which can dampen team members' morale making Monitor-Evaluators unpopular.

They are generally not ambitious, although they can be competitive, and typically lack warmth, imagination and spontaneity. However, they are solid, dependable and rarely wrong in their judgments.

Personality Traits

High IQ, stable, introverts.

Belbin's Team-Roles

5) Implementer

This is the role of turning decisions into defined and manageable tasks for people to do. The emphasis is on what is feasible: the logical extension of the objectives into an achievable plan. This is an essential role for team effectiveness.

Implementers are noted for their sincerity, integrity and tenacity. They have a disciplined approach to their tasks and work hard. What upsets them is the sudden change of plan because they like stable structures; they tend to flounder in quickly changing conditions. Sometimes they will be inflexible, but usually prepared to adapt their proposals to meet agreed plans and procedures. If anyone in the team does not know what has been agreed, or what is to be done it is the implementer that will be able to tell them ... that is, if they haven't already done it themselves!

Personality Traits

Stable and controlled

6) Team Worker

Probably the most supportive, helpful role in the team. A good listener who helps and encourages others; building on their ideas rather than demolishing them or producing rival ideas. They are usually "nice" by nature and generally well liked because of it.

Team workers are the cement of the team. They are sensitive to other people's needs and worries, perceive emotional undercurrents and strive to produce unity and harmony within the team. A team worker makes an excellent counterbalance to the friction sometimes cause by the Shaper or the Monitor Evaluator.

Not usually competitive, team workers would find it hard to make tough decisions and may even be seen as soft and indecisive. But they do have a noticeable effect in times of stress and pressure and can raise morale in a very short time.

Personality Traits

Stable, extrovert, low in dominance

Belbin's Team-Roles

7) Completer / Finisher

The one who is not content until every 'I' has been dotted and every 'T' crossed. Not at ease until a personal check on every detail has been made to make sure that everything has been done, nothing overlooked – a real perfectionist.

Completer / Finishers are not usually assertive, but maintain a sense of urgency that galvanizes others into activity. Self-controlled but apt to be impatient with more casual members of the team, who are not as compulsive about meeting deadlines and doing things properly.

Completers are important assets to a team in terms of quality and accuracy, provided they don't get bogged down in detail and lower the morale of other members of the team. They will often see details that other members of the team may have overlooked.

Personality Traits

Anxious, introvert

8) Resource Investigator

This is the role that liaises with those outside the team: collecting information and ideas, exploring new possibilities in the outside world. Stimulates ideas and innovation, but not with the same originality as the Plant.

Resource Investigators are probably the most likeable team members: relaxed, sociable with a positive, enthusiastic outlook. They are always on the go and if not in a meeting, will probably be on the telephone.

Their drawbacks are their tendency to lose interest and to spend too much time on irrelevancies. They can also become bored quickly. They must be included and motivated in order to be effective or they quickly become demoralized.

Personality Traits

Stable, extrovert

Belbin's Team-Roles

9) Specialist

Dedicated, professional and knowledgeable. Their priorities center on maintaining professional standards on furthering and defending their own field of expertise. A great asset to the team in dealing with complex specialized subjects or problems. Specialists tend to confine themselves to their known area of expertise and do not get involved in areas they feel do not relate to them. They will often lack interest in other's area of expertise and that may be obvious.

Specialists should be brought in at the planning and problem solving stages in order to make full use of their pool of knowledge and experience.

Typical Specialist:

IT person or Technical Person

Preferred team roles

The fact that there are 9 team-roles does not mean that there must be at least 9 people in a successful team! We can each fulfill more than one role and we can often switch to an alternative key role if someone else in the team is fulfilling our first preference role or if the job change requires it. The important thing is that all the key roles are being carried out adequately.

Belbin's Team-Roles

Winning Teams

Those teams that produce the best results have some characteristics in common:

- A good Coordinator in the 'chair', or a Shaper
- A very creative and clever Plant – preferably only one
- A fair spread of mental ability: Coordinator, Plant and perhaps one other such as Monitor-Evaluator
- A spread in personal attributes that give good coverage of the various team roles, with at least
 - 1 Completer /Finisher
 - 1 Implementer
 - 1 Resource Investigator
 - 1 Team Worker if the leader is a Shaper and probably 1 Extrovert and 1 Introvert
- A good match between an individual's attributed and team responsibilities
- A willingness to adjust roles according to the strengths and weaknesses of other team members
- Specialists with required knowledge, skills and experience to complete technical tasks, e.g. IT.

TYPE	SYMBOL	TYPICAL FEATURES	POSITIVE QUALITIES	ALLOWABLE WEAKNESS
Coordinator	CO	Calm, Self-confident, Controlled	A capacity for treating and welcoming all potential contributors on their merits and without prejudice. A strong sense of objectives.	Ordinary in terms of creative ability
Shaper	SH	Highly strung, out-going, dynamic	Drive and a readiness to challenge inertia, ineffectiveness, complacency or self-deception	Prone to provocation irritation and impatience
Plant	PL	Individualistic, serious minded, unorthodox	Genius, imagination, ideas, intellect, knowledge	Up in the clouds, inclined to overlook practical details or protocol
Monitor Evaluator	ME	Sober, Unemotional , prudent	Judgment, discretion, shrewd decision making	Lack inspiration or the ability to motivate others, hard headedness
Implementer	IMP	Conservative, dutiful, predictable	Organizing ability, practical common sense, hard-working, self-discipline	Lack of flexibility, unresponsive to unproven ideas
Resource Investigator	RI	Extroverted, enthusiastic, curios, communicative	A capacity for contacting people and exploring anything new. An ability to respond to challenge	Liable to lose interest once the initial fascination has passed
Team Worker	TW	Socially, oriented rather mild, sensitive	An ability to respond to people and to situations, promotes team spirit, and cooperation	Indecisive at moments of crisis
Completer / Finisher	CF	Painstaking, orderly, conscientious, anxious	A capacity for follow through , perfectionism	A tendency to worry about small things. A reluctance to "let go"
Specialist	SP	Self-assured on specialist area	Expertise, skills and knowledge in rare supply	Can confine themselves to known subjects and comfort zones

Questionnaire

Teamwork: What is your natural role?

INSTRUCTIONS

For each section of the questionnaire, you are asked to tick the one, two or three sentences most applicable to you. Your tick should be placed in the far left hand column.

Please do not tick more than three choices.

Once you have made your choice (s) you are asked to allocate 10 points between those sentences you have ticked. The allocation of points should indicate the relative extent to which each sentence applies to you.

For example, in section one you might feel that there are only two sentences that apply to you: one of which, you feel, sums you up well, while the other only applies to you some of the time. In this instance, you could give your first choice 7 points and the other choice would receive the remaining points. In some instances, you might decide that there are two sentences which apply to you equally – if this is case, award 5 points to each.

It is highly unlikely in any of the seven sections of this questionnaire that you will allocate all ten points to one choice.

In each section you must allocate all 10 points

In answering the questionnaire, please try and select the sentence or sentences that you think best describes your behavior. Do not answer by choosing those alternatives that describe behaviors you would like to have.

It should be stressed that there are no right or wrong sentences. All the choices are equally important.

Section 1: What I believe I can contribute to a team

- a. I think I can quickly see and take advantage of new opportunities
- b. I can work well with a very wide range of people
- c. Producing ideas is one of my natural talents
- d. My ability rests in being able to draw people out whenever I detect they have something of value to contribute to group objectives
- e. My capacity to follow through has much to do with my personal effectiveness
- f. I am ready to face temporary unpopularity if it ultimately leads to worthwhile results
- g. I can usually sense what is unrealistic and unlikely to work
- h. I can offer a reasoned case for an alternative course of action without introducing bias or prejudice

Section 2: If I have a shortcoming in teamwork, it could be that

- a. I am not at ease unless meetings are well structured, controlled and generally well conducted
- b. I am inclined to be too generous towards others who have a valid viewpoint that has not been given a proper airing
- c. I have a tendency to talk too much once the group gets on to new ideas
- d. My objective outlook makes it difficult for me to join in readily and enthusiastically with colleagues
- e. I am sometimes seen as forceful and authoritarian if there is a need to get something done
- f. I find it difficult to lead from the front, perhaps because I am over responsive to group atmosphere
- g. I am liable to get too caught up in ideas that occur to me and lose track of what is happening
- h. My colleagues tend to see me as worrying unnecessarily over detail and the possibility that things may go wrong.

Section 3: When involved in a project with other people

- a. I have an aptitude for influencing people without pressuring them
- b. My general vigilance prevents careless mistakes and omissions being made
- c. I am ready to press for action to make sure that the meeting does not waste time or lose sight of the main objective
- d. I can be counted on to contribute something original
- e. I am always ready to back a good suggestion in the common interest
- f. I am keen to look for the latest in new ideas and developments
- g. I believe my capacity for judgment can help to bring about the right decisions
- h. I can be relied upon to see that all essential work is organized

Section 4: My characteristic approach to group work is that

- a. I have a quiet interest in getting to know colleagues better
- b. I am not reluctant to challenge the views of others or to hold a minority view myself
- c. I can usually find a line of argument to refute unsound propositions
- d. I think I have a talent for making things work once a plan has to be put into operation
- e. I have a tendency to avoid the obvious and to propose the unexpected
- f. I bring a touch of perfectionism to any job I undertake
- g. I am ready to make use of contacts outside the group itself
- h. While I am interested in all views, I have no hesitation in making up my mind once a decision has to be made

Section 5: I derive satisfaction from a job because

- a. I enjoy analyzing situations and weighing up all the possible choices
- b. I am interested in finding practical solutions to problems
- c. I like to feel I am fostering good working relationships
- d. I can have strong influence on decisions
- e. I can meet people who may have something new to offer
- f. I can influence people to agree on a necessary course of action
- g. I feel in my element when I can give a task my full attention
- h. I like to find a field that stretches my imagination

Section 6: If I were suddenly given a difficult task with limited time and unfamiliar people

- a. I would feel like retiring to a corner to devise a way out of the impasse before developing a line
- b. I would be ready to work with the person who showed the most positive approach
- c. I would find some way of reducing the size of the task by establishing what different individuals might best contribute
- d. My natural sense of urgency would help to ensure that we did not fall behind schedule
- e. I would keep calm and maintain my capacity to think straight
- f. I would retain a steadiness of purpose despite the pressures
- g. I would be prepared to take a positive lead if I felt the group was making no progress
- h. I would open up a discussion with a view to stimulating new thoughts and initiating action

Section 7: With reference to the problem which I encounter when working in groups

- a. I tend to show impatience with those who are obstructing progress
- b. Others may criticize me for being too analytical and insufficiently intuitive
- c. My desire to ensure that work is properly done can hold up proceedings
- d. I tend to get bored rather easily and rely on one or two stimulating members to spark me off
- e. I find it difficult to motivate myself into action unless the goals are clear
- f. I am sometimes poor at explaining and clarifying complex points that occur to me
- g. I am conscious of demanding from others those things which I cannot do myself
- h. I am hesitant in expressing my viewpoint when I encounter serious opposition

TABLE 1: POINTS FOR SELF – PERCEPTION INVENTORY

Section	Item a	b	c	d	e	f	g	h
1								
2								
3								
4								
5								
6								
7								

TABLE 2: SELF-PERCEPTION INVENTORY ANALYSIS

Section		IM		CO		SH		PL		RI		ME		TW		CF
1	g		d		f		c		a		h		b		e	
2	a		b		e		g		c		d		f		h	
3	h		a		c		d		f		g		b		e	
4	d		h		b		e		g		c		a		f	
5	b		f		d		h		e		a		c		g	
6	f		c		g		a		h		e		b		d	
7	e		g		a		f		d		b		h		c	
Total																