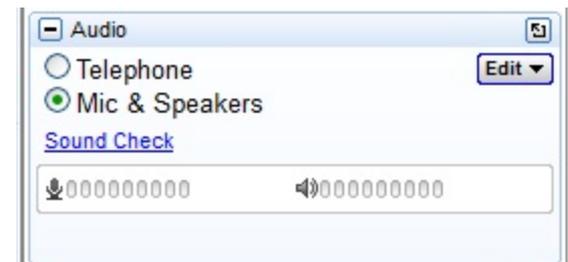


Welcome to the webinar... We will begin shortly

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Host

Mimi Golding

Operations Manager Endorsed Education Provider
and Certification programs
IIBA

- Mimi Golding, is an experienced information management professional.
- As Operations manager for the Endorsed Education Provider and Certification programs, Mimi is accountable to business analysts by assuring that there are career development opportunities through validation of alignment of courses to the IIBA *Business Analysis Body of Knowledge*[®] (*BABOK*[®] *Guide*). Mimi also oversees operational recertification activities.



Harnessing the Strengths Within Your Team Using Belbin Team Roles

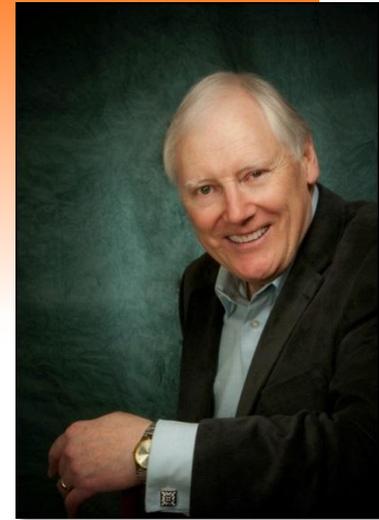
Max Isaac, CEO, 3Circle Partners

October 21, 2014

Speaker

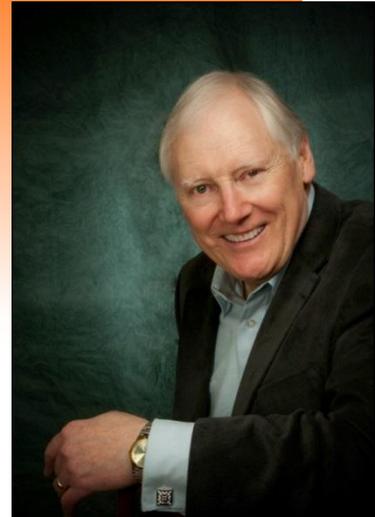
Max Isaac

- Max is the CEO of 3Circle Partners, a global consulting firm that specializes in implementing team-based management systems in major corporations. He contributes over 30 years of general management and consulting experience in North America, England, Europe and Asia. He is a leading expert in the field of leadership and organizational behavior.
- Co-author of **The Third Circle – Interactions That Drive Results, Setting Teams Up for Success, and A Guide to Team Roles**. He is also the contributing author of the “Team Leadership” sections of Mike George’s books **Lean Six Sigma** published in May 2002 and **Lean Six Sigma for Service** published in June 2003.



Question and Answer

- Use the Question box to ask questions
- Selected questions will be answered at the end, but you can ask at any time.
- Short, specific questions, please!





3Circle Partners
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Harnessing the Strengths Within Your Team Using Belbin Team Roles



Goals

In this webinar we will be discussing the nine Team Roles and techniques that can be used to implement their use in your teams. The key learnings you will leave with are:

- A thorough understanding of Team Role Theory, explaining the nine roles and providing insights into their use in teams.
- A knowledge of how teams have used the report , aided by an examination of mini-case studies
- Actions you can take to implement Belbin Team Roles in your team





High Performance Teams & Team Roles

The formation of effective teams is more by good fortune than good judgment....it doesn't have to be that way!

Rapid, high quality team performance is not an accident.

It requires discipline & effective interaction skills:

- ③C **Balanced, diverse team**
- ③C **Effective process**
- ③C **Relevant experience**





Belbin Team Roles



Dr. Meredith Belbin from Cambridge University devoted over 10 years of research into team effectiveness. What emerged:

- ③ **9 distinct and identifiable clusters of behavior – (or areas of contribution).**
- ③ **When all 9 of these areas of contribution were present in a balanced way, the team had higher predictability for success.**
- ③ **These nine predictable behavior patterns became known as the Belbin Team Roles.**

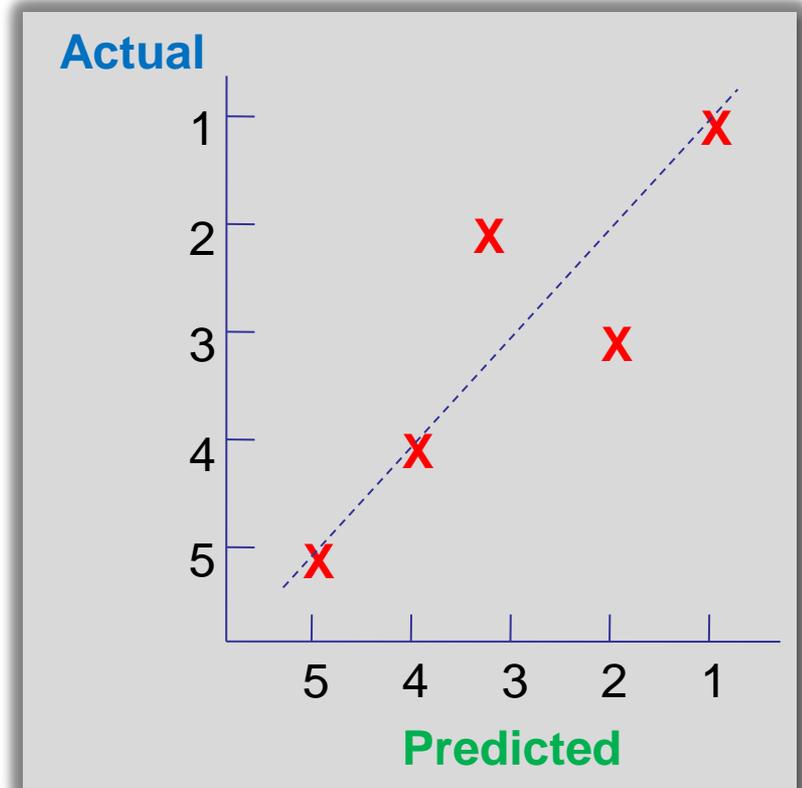
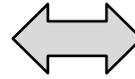
He demonstrated that with a careful balance of technical skills and the optimal behavior patterns, we can select and develop teams with a predictably higher degree of success.



Predicting Team Performance

A typical example of Belbin's ability to predict the order of finish of teams in the Henley Management Simulations.

| Predicted Order of Finish | Actual Order of Finish |
|---------------------------|------------------------|
| 1 | 1 |
| 2 | 3 |
| 3 | 2 |
| 4 | 4 |
| 5 | 5 |



The **red X's** on the graph represent the different teams participating in the simulation.

Red X's on the diagonal line represent where Belbin's predictions and the team's performance matched exactly.



What is a Team Role?

A tendency to behave, contribute, and interrelate with others in a particular way -- when working in a team



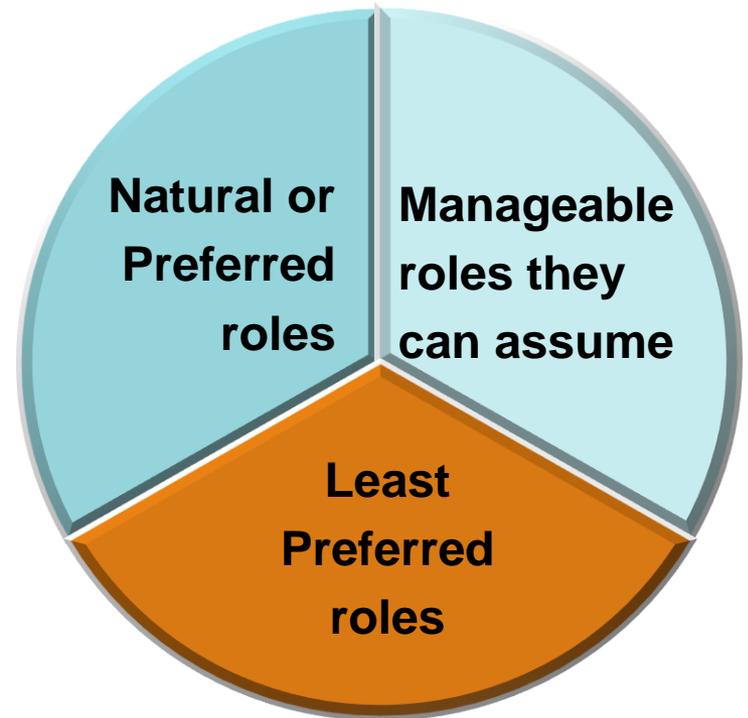
(versus a “Functional Role,” which refers to the job demands that a person has to meet by supplying the requisite technical skills and operational knowledge)



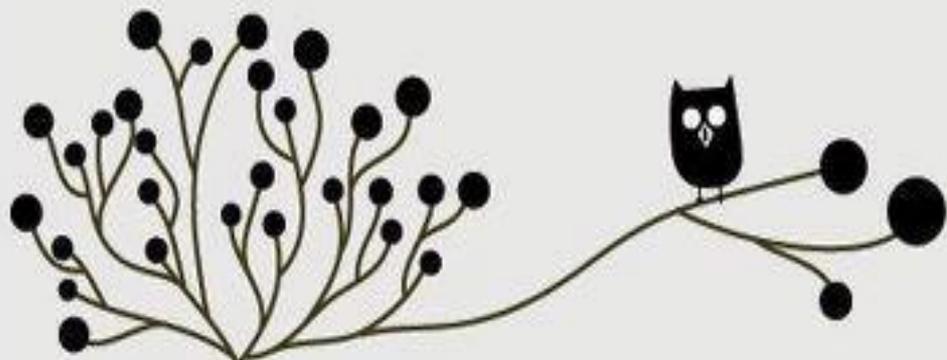
Team Roles

③ Nine Roles Identified

③ The team roles for fall into three categories for each person:



③ As individuals differ greatly in personality & behavior, so too will their team role compositions vary.



Everyone is a genius.

But if you judge a fish
on its ability to climb a tree,
it will live its whole life believing it is stupid.

~ Albert Einstein





The Nine Team Roles

Team Role Contribution

Allowable Weakness

Thinking

| | | | | |
|-------------------|-----------|---|--|---|
| Plant | PL |  | <i>Creative, imaginative, free-thinking. Generates ideas & solves hard problems.</i> | <i>Ignores incidentals. Too pre-occupied to fully communicate.</i> |
| Monitor Evaluator | ME |  | <i>Sober, strategic and discerning. Sees all options and judges accurately.</i> | <i>Lacks drive and ability to inspire others. Can be overly critical.</i> |
| Specialist | SP |  | <i>Single-minded, self-starting, dedicated. Provides rare knowledge and skills.</i> | <i>Contributes only on a narrow front. Dwells on technicalities.</i> |

Action

| | | | | |
|--------------------|------------|--|--|---|
| Shaper | SH |  | <i>Challenging, dynamic, thrives on pressure. Has drive to overcome obstacles.</i> | <i>Prone to provocation. Offends people's feelings.</i> |
| Implementer | IMP |  | <i>Practical, reliable, efficient. Turns ideas into actions and organizes tasks.</i> | <i>Somewhat inflexible. Slow to respond to new possibilities.</i> |
| Completer Finisher | CF |  | <i>Painstaking, conscientious, anxious. Finds errors. Polishes and perfects.</i> | <i>Inclined to worry unduly. Reluctant to delegate.</i> |

People

| | | | | |
|-----------------------|-----------|---|---|---|
| Coordinator | CO |  | <i>Mature, confident, identifies talent. Clarifies goals. Delegates effectively.</i> | <i>Can be seen as manipulative. Offloads own share of the work.</i> |
| Team Worker | TW |  | <i>Co-operative, perceptive and diplomatic. Listens and averts friction.</i> | <i>Indecisive in crunch situations. Avoids confrontation.</i> |
| Resource Investigator | RI |  | <i>Outgoing, enthusiastic, communicative. Explores opportunities, develops contacts</i> | <i>Over-optimistic. Loses interest once initial enthusiasm expires.</i> |



PLANT (PL)

Individual Characteristics

- ✓ Creative
- ✓ Imaginative
- ✓ Unorthodox

Contribution to the Team

- ✓ Problem solving
- ✓ Lateral thinking
- ✓ Innovation
- ✓ Generates new ideas





PLANT (PL) WEAKNESSES

Allowable

- ✓ Out of touch with reality
- ✓ Ignores incidentals

Non-Allowable

- ✗ Strong ownership of ideas when cooperation would yield better results
- ✗ Discounts other peoples ideas



MONITOR EVALUATOR (ME)

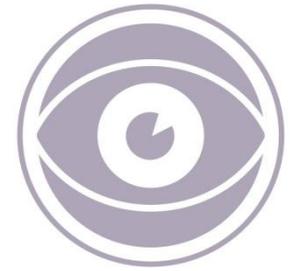
Individual Characteristics

- ✓ Discerning, objective
- ✓ Questioning
- ✓ Sees all options

Contribution to the Team

- ✓ Defuses over-enthusiasm
- ✓ Applies reason
- ✓ Identifies problems





MONITOR EVALUATOR (ME) WEAKNESSES

| Allowable | Non-Allowable |
|---|--|
| <ul style="list-style-type: none">✓ Uninspiring✓ Sceptical | <ul style="list-style-type: none">✗ Cynical without logic✗ Overly pessimistic |



SPECIALIST (SP)

Individual Characteristics

- ✓ Has rare skills or knowledge
- ✓ Dedicated and professional
- ✓ Single-minded

Contribution to the Team

- ✓ Ignores factors outside own areas of competence
- ✓ Keeps up to date
- ✓ Accurate information
- ✓ Aware of new developments





SPECIALIST (SP) WEAKNESSES

| Allowable | Non-Allowable |
|--|--|
| <ul style="list-style-type: none">✓ Contributes on only a limited front✓ Dwells on specialized personal interests | <ul style="list-style-type: none">✗ Ignores factors outside own areas of competence✗ Doesn't acknowledge wider company objectives |



SHAPER (SH)

Individual Characteristics

- ✓ Challenging
- ✓ Driving and dynamic
- ✓ Thrives on pressure
- ✓ Effective delegator

Contribution to the Team

- ✓ Leads in difficult situations
- ✓ Takes hard decisions
- ✓ Overcomes obstacles





SHAPER (SH) WEAKNESSES

Allowable

- ✓ Provocative
- ✓ Aggressive
- ✓ Too task-focused

Non-Allowable

- ✗ Inability to recover situation through humor or apology
- ✗ Always think they're right!



IMPLEMENTER (IMP)

Individual Characteristics

- ✓ Disciplined
- ✓ Efficient and organised
- ✓ Reliable

Contribution to the Team

- ✓ Practical solutions from ideas
- ✓ Follows procedures
- ✓ Turns concept into reality





IMPLEMENTER (IMP) WEAKNESSES

Allowable

- ✓ Slow to see possibilities
- ✓ Somewhat inflexible

Non-Allowable

- ✗ Obstructs change for no good reason
- ✗ A barrier to progress



COMPLETER FINISHER (CF)

Individual Characteristics

- ✓ Conscientious
- ✓ Attention to detail
- ✓ Delivers results

Contribution to the Team

- ✓ Perfects existing systems
- ✓ Eradicates errors
- ✓ Crosses the t's, dots the i's





COMPLETER FINISHER (CF) WEAKNESSES

| Allowable | Non-Allowable |
|---|--|
| <ul style="list-style-type: none">✓ Anxious✓ Reluctant to delegate | <ul style="list-style-type: none">✗ Unreasonably obsessive behavior✗ Produces a Rolls-Royce instead of a Mini |



COORDINATOR (CO)

Individual Characteristics

- ✓ Strong sense of objectives
- ✓ Promotes decision-making
- ✓ Delegates readily
- ✓ Good chairman

Contribution to the Team

- ✓ Leads through empowerment
- ✓ Chairs meetings
- ✓ Promotes team contribution





COORDINATOR (CO) WEAKNESSES

| Allowable | Non-Allowable |
|---|---|
| <ul style="list-style-type: none">✓ Manipulates within reason✓ Delegates personal workload | <ul style="list-style-type: none">✗ Takes credit for the efforts of others✗ Over-reliance on team work |



TEAMWORKER (TW)



Individual Characteristics

- ✓ Cooperative and supportive
- ✓ Diplomatic
- ✓ Averts friction
- ✓ Good listener

Contribution to the Team

- ✓ Promotes team spirit
- ✓ Builds peer relationships
- ✓ Facilitates communications



TEAMWORKER (TW) WEAKNESSES

| Allowable | Non-Allowable |
|---|---|
| <ul style="list-style-type: none">✓ Indecisive✓ Discourages conflict | <ul style="list-style-type: none">✗ Avoids pressure situations✗ No focus on task |



RESOURCE INVESTIGATOR (RI)



Individual Characteristics

- ✓ Excellent communicator
- ✓ Recognises opportunities
- ✓ Extroverted
- ✓ Enthusiastic

Contribution to the Team

- ✓ Develops contacts
- ✓ Explores opportunities
- ✓ Negotiates
- ✓ Makes external links



RESOURCE INVESTIGATOR (RI) WEAKNESSES

| Allowable | Non-Allowable |
|--|---|
| <ul style="list-style-type: none">✓ Can be over-optimistic✓ Loses interest after initial stages | <ul style="list-style-type: none">✗ Lets clients down by not following through✗ Too externally focused |



Belbin Team Roles

Key Concepts

Focus on what you do best

- ③ Understand and excel in your natural, preferred roles
- ③ Be aware of and **manage** your Allowable Weaknesses





Team Roles Key Concepts – Individual

Be aware of and manage your Allowable Weaknesses

- ③ This is the price to be paid for being good in your preferred roles, e.g., a strong Shaper is going to hurt some peoples feelings as they forge ahead

- ③ Ensure that Allowable Weakness does not become “Disallowable”:
 - *Lose a Plant’s attention during a meeting because they are dreaming up a creative solution = OK*

 - *Plant forgets to come to meeting because they are thinking about something else = NOT OK!*



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INDIVIDUAL BELBIN REPORTS



Accelerating results



Analysis of your Team Role Composition

This report is based on your Self-Perception plus 6 Observer Assessments.

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|------------------------------------|----|----|----|----|----|----|-----|-----|-----|
| Anton McBurnie's Self-Perception | RI | PL | SH | CO | SP | ME | TW | CF | IMP |
| Observers: | | | | | | | | | |
| | PL | RI | SH | ME | TW | CO | SP | CF | IMP |
| | RI | PL | SH | SP | CF | ME | CO | IMP | TW |
| | RI | PL | SH | ME | CO | TW | SP | CF | IMP |
| | RI | SH | CO | ME | PL | SP | TW | CF | IMP |
| | CO | TW | RI | PL | SP | CF | ME | IMP | SH |
| | CO | RI | ME | PL | TW | SP | IMP | CF | SH |
| Observers' Overall Views | RI | PL | CO | SH | ME | TW | SP | CF | IMP |
| Your Overall Team Role Composition | RI | PL | CO | SH | ME | SP | TW | CF | IMP |

What are my Top Roles ?

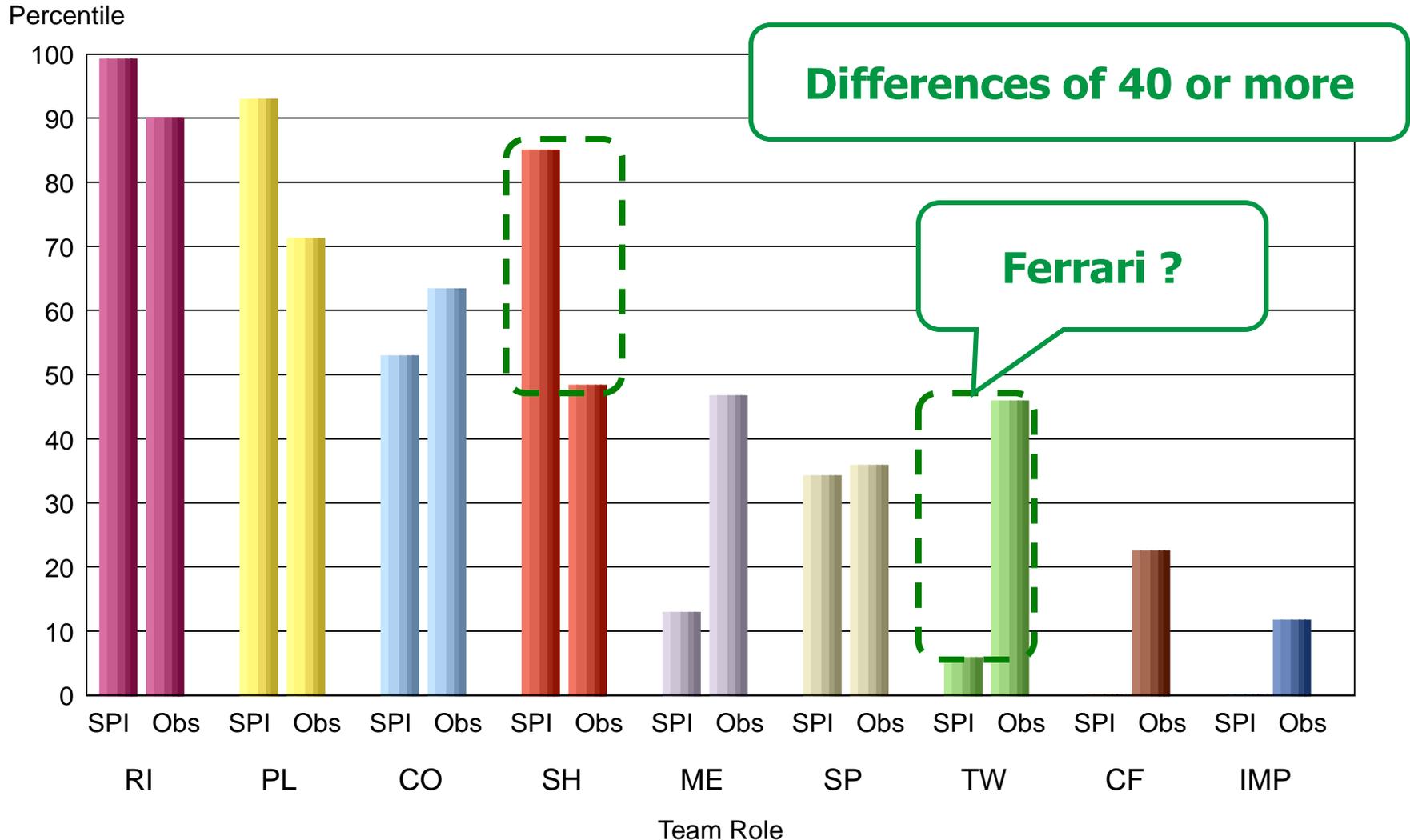


Example Report



Anton McBurnie

Comparing Self & Observer Perceptions





A FERRARI IN MY GARAGE?

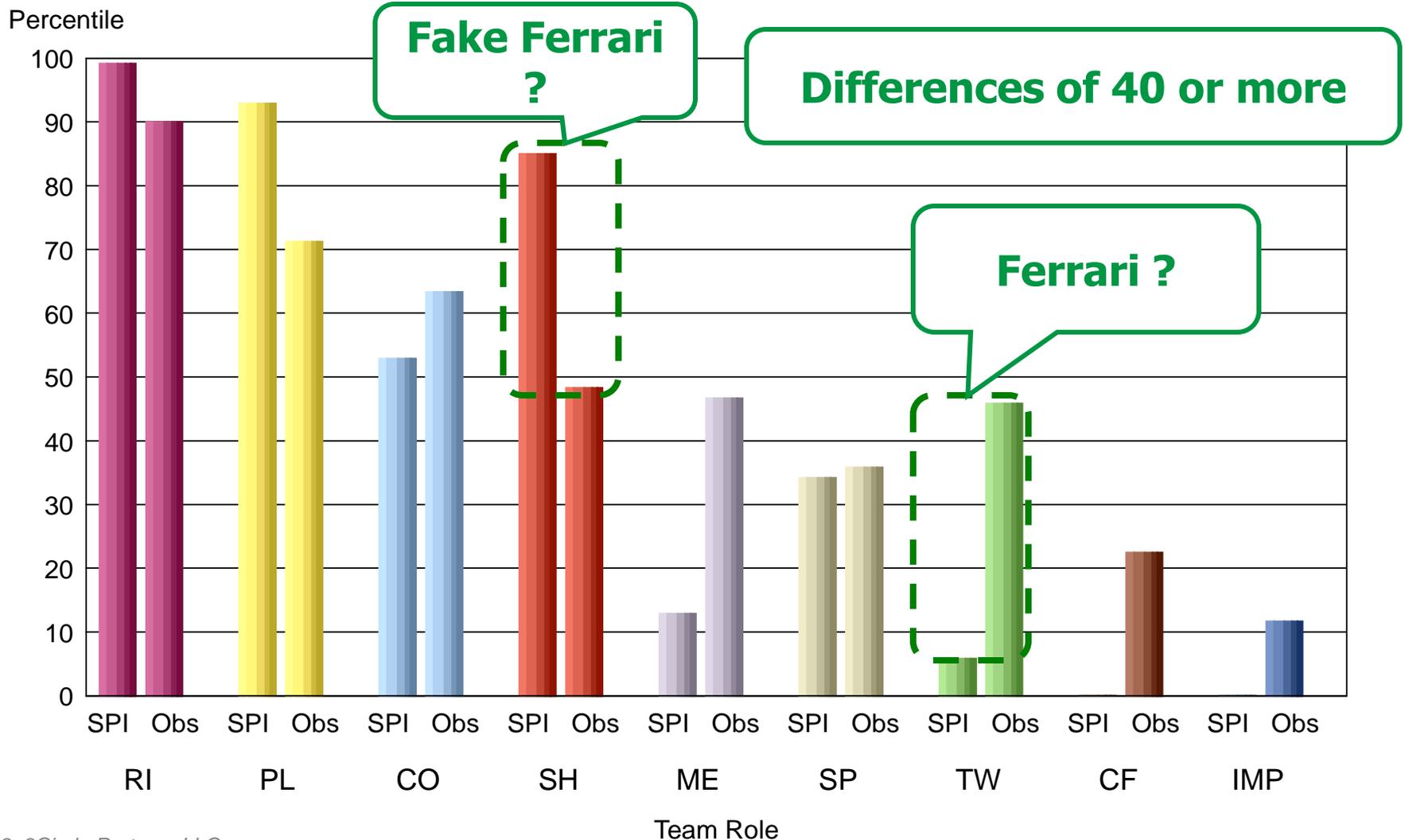


**Hidden strengths,
potential assets
going to waste**



An Example

Comparing Self & Observer Perceptions





OR A FAKE FERRARI?

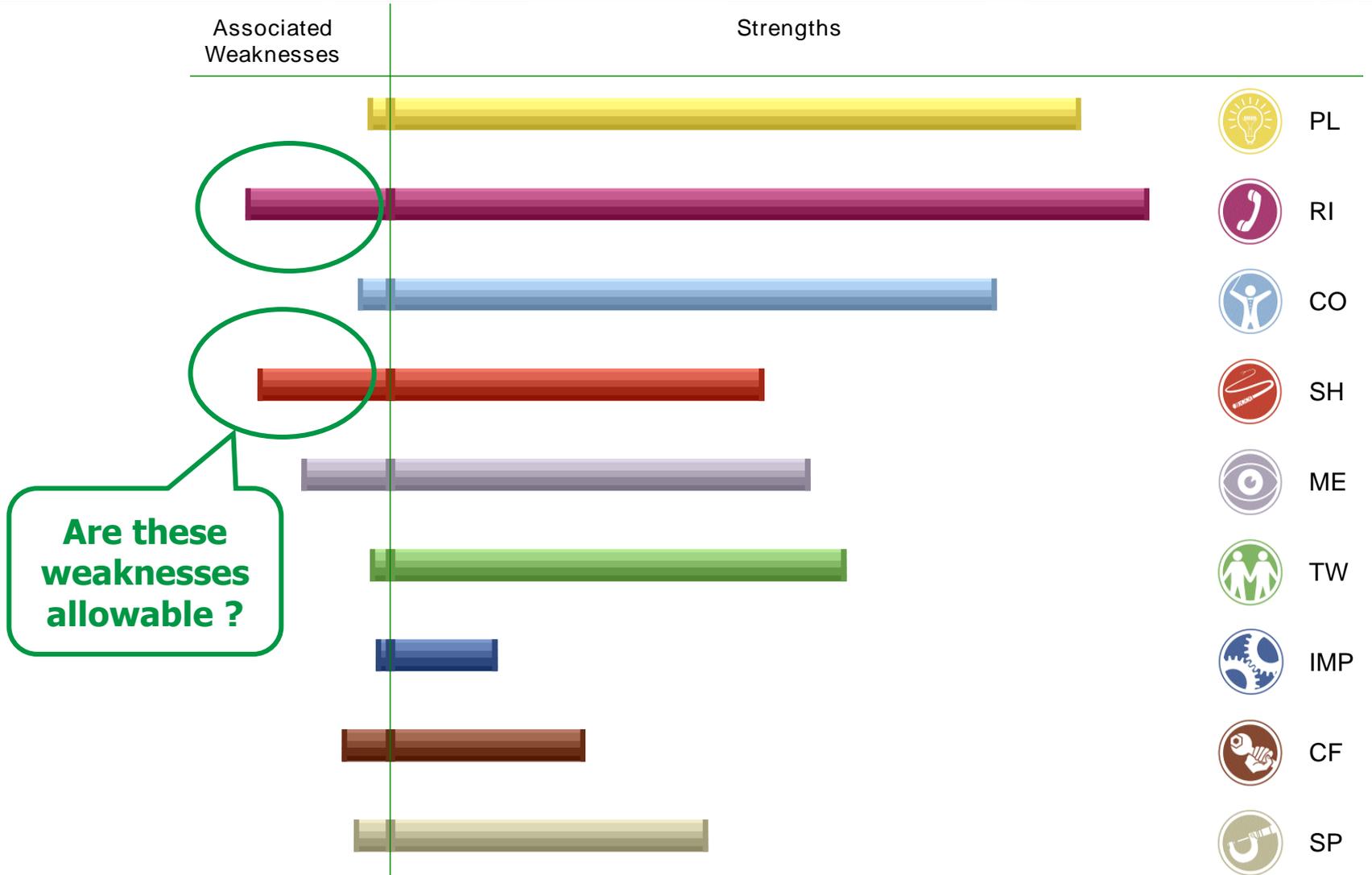
Where I think I am strong in a given area....those working with me either do not see it or don't agree it is a strength.





An Example

Observed Team Role Strengths and Weaknesses





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TEAM ROLE MAPPING

Accelerating results



Team Role Mapping Exercise

This report is based on your Self-Perception plus 5 Observer Assessments.

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 |
|------------------------------------|----|----|----|----|----|-----|-----|-----|-----|
| Max Isaac's Self-Perception | TW | CO | RI | SP | PL | CF | SH | ME | IMP |
| Observers: | | | | | | | | | |
| Melody Archer | RI | CO | PL | ME | SH | TW | SP | IMP | CF |
| Anton McBurnie | SP | RI | TW | PL | CO | CF | SH | ME | IMP |
| Andy Piotrowski | CO | RI | PL | TW | CF | IMP | SH | ME | SP |
| Maggie Carveth | PL | RI | CO | TW | SH | SP | ME | IMP | CF |
| DeeDee Lynch | PL | RI | SP | CO | SH | TW | IMP | CF | ME |
| Observers' Overall Views | RI | PL | CO | TW | SP | SH | ME | IMP | CF |
| Your Overall Team Role Composition | RI | CO | TW | PL | SP | SH | ME | IMP | CF |

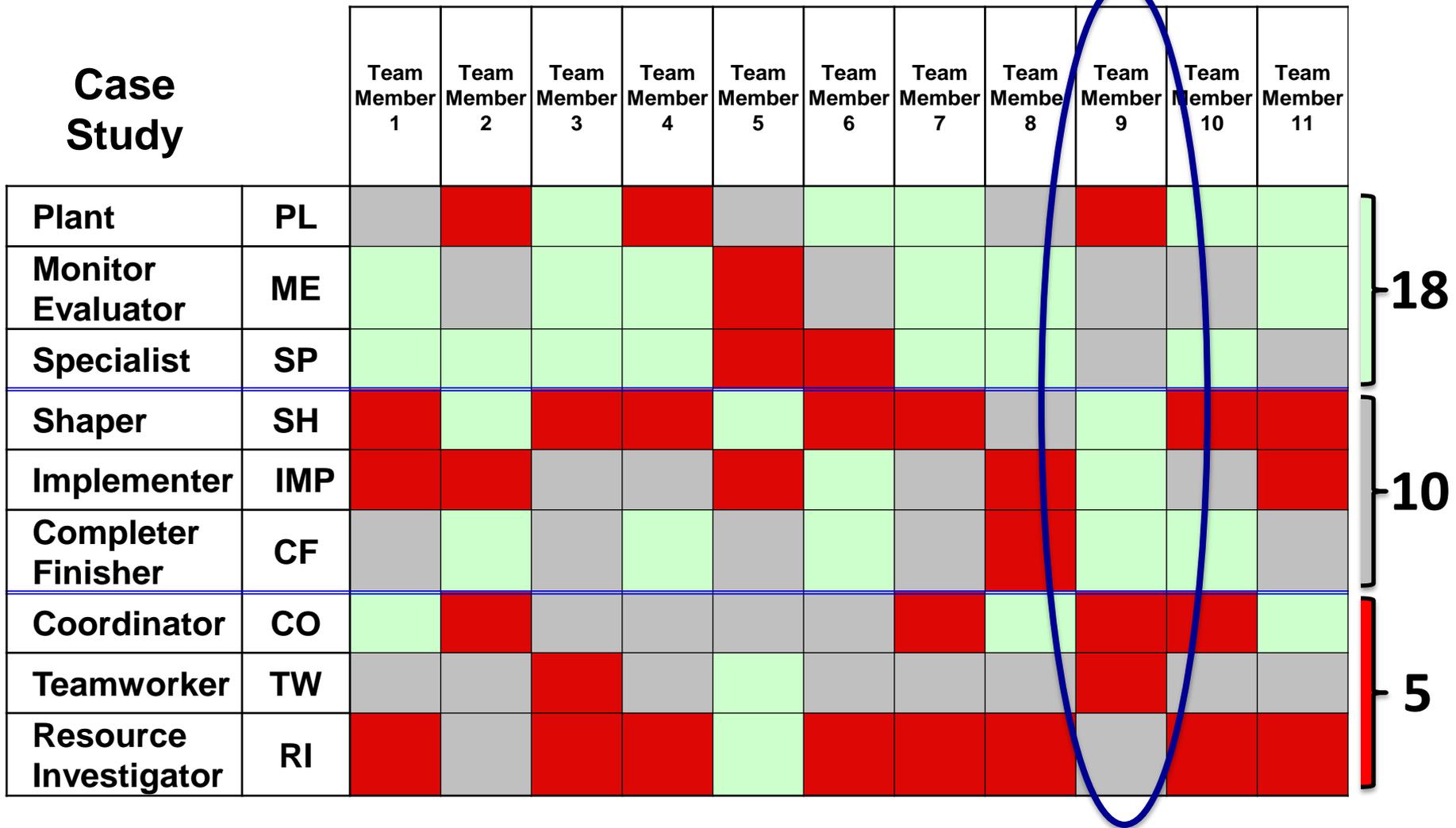
Use the OVERALL ranking (see page 3 of your report)

| | Mike | Susan | Tim | John | Beth | Raj | Denise |
|----------|------|-------|-----|------|------|-----|--------|
| Thinking | | | | | | | |
| PL | | x | ● | ● | ● | | ● |
| ME | x | x | ● | | x | | x |
| SP | | ● | | ● | | ● | x |
| Action | | | | | | | |
| SH | | | x | x | x | x | |
| CF | x | ● | | | ● | x | |
| IMP | x | | ● | x | | x | ● |
| People | | | | | | | |
| CO | ● | x | x | | | ● | |
| TW | ● | | x | ● | x | ● | x |
| RI | ● | ● | | x | ● | | ● |

For each Team Role:

- Surplus ?
- Void ?
- Tendencies?
- What adjustments will be required ?

Case Study



Insight 1: The team had an overabundance of thinking skills.

Insight 2: The team was weak in the “people” skills.

Insight 3: The project manager was the most action-oriented team member.





THANK YOU!

For more information contact:

www.3Circlepartners.com

Or, give me a call



Background

Max Isaac

Max is the CEO of 3Circle Partners, a global consulting firm that specializes in implementing team-based management systems in major corporations. He contributes over 30 years of general management and consulting experience in North America, England, Europe and Asia. He is a leading expert in the field of leadership and organizational behavior.



Max Isaac

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He has assisted CEOs and senior leaders within client organizations with the design and implementation of team based organizational development programs, Six Sigma initiatives and high performance team development.

Max is the co-author of *The Third Circle – Interactions That Drive Results*, *Setting Teams Up for Success* and *A Guide to Team Roles*. He is also the contributing author of the Team Leadership sections of Mike George's books *Lean Six Sigma* published in May 2002 and *Lean Six Sigma for Service* published in June 2003.

Prior to moving into the field of organizational development, Max was the CFO for the Retail Division within The Molson's Organization, where he took a lead role in growing the business to over \$1 billion in revenues, doubling its size in four years through acquisitions and internal growth.

Max was educated at Witwatersrand University in South Africa where he earned a B.Com Degree and obtained a Chartered Accountant designation. He is a member of the Institute of Chartered Accountants of Ontario, Canada.



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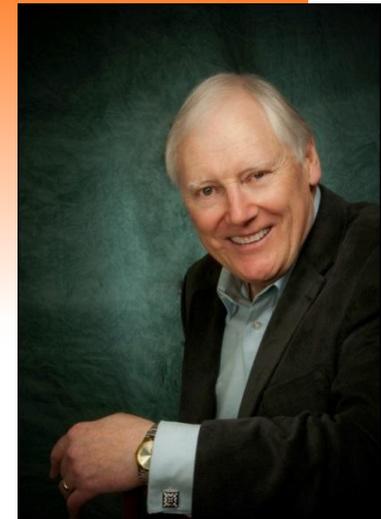
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Accelerating results

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