

THE SEARCH FOR BALANCE : TEAM MEMBER EFFECTIVENESS

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Working with Larry Wilson at the Pecos River Conference Center in Santa Fe provided a wealth of insight and learning around personal and organizational transformation. The challenge of helping clients take the new "possibility attitudes" back to the "old culture" provided the key learning for what's needed in organizational change.

Tom is working with Dr. Meredith Belbin, Cambridge University, to cultivate the awareness of his research of management teams and the profiling system called Interplace.

ABSTRACT

This paper provides a contextual overview of the need for effectiveness in Value Analysis (VA) teams, insights into our current knowledge levels of teams, and concludes with a summary of some exceptional research in team roles, a high leverage concept for high performing teams.

THE NEED FOR TEAMS: "More with less"

American business is not business as usual. We are experiencing the Third Wave of change. Our world is rapidly emerging from the clash of new values and technologies, new geographical relationships, new life-styles and modes of communication. We cannot cram the world of tomorrow into the yesterday's cubbyholes of conventional wisdom.

Global market competition is causing us to learn to respond quicker with less cost and higher quality. Those organizations who learn to become adaptable to the rapid and unpredictable levels of change will be more likely to survive in the next century. The decision making processes and hierarchical structures of the past cannot do the job.

What is essential, even critical, to our success in business and as a nation, is the ability to learn how to cooperate internally to compete externally.

The Customer-Driven VA is an example of a team-problem-solving process to affect high quality-low cost products and processes. The ideal VA Team comprises five experts, each from a different discipline including design, operations, finance, and marketing.¹

The team should be composed of the highest qualified persons available to solve the problems and implement the solutions. They should be decision makers in the organization.

Balance and compatibility are key ingredients to the success of this team. Balance by function is not enough to assure success, however. Compatibility needs to be equalized with suitability. Suitability identifies the distinctive behaviors that provide the interpersonal chemistry within the team's particular work situation.

TEAMS: What Do We Know?

Teams are not a new phenomenon. Procter & Gamble has been using the team concept in more than 18 plants. Their results are equal to 30 to 40 percent higher productivity than non-team plants.

Xerox, Tektronix, GM, and General Mills all use work teams to improve productivity. In Thriving On Chaos³, Tom Peters says that "the self-managing team should become the basic organizational building block"⁶ if we are to be competitive in a global economy.

Production teams can be categorized into four broad categories: (a) advice and involvement, (b) production and

service, (c) projects and development, and (d) action and negotiation. Each team needs to be understood in the context of its external surroundings and internal processes. Each component of a high performance team is interdependent with the other components, providing a holistic effect on team effectiveness.⁴

Collective values and norms and shared expectations (eg quality, service, innovation, and customer focus) provide insight into an organization's culture that support or hinder team effectiveness. Task design, communications, and technology play a key role in the viability of team member relationships.

Other major wide angle issues of mission, autonomy, feedback, rewards and recognition, training and consultation, and the physical environment make important contributions to team performance. No single effort to improve the process of any of these issues can be achieved effectively without impacting all the others.

Teams need to be clear about their mission in relationship to organizational goals and expectations. Teams can be differentiated through exclusive membership, life span, or exclusive access to facilities. Integration with customers and suppliers may take longer to create, but can pay off with higher quality communications and relationship building based on a foundation of mutual trust.

Team development is a critical process to understand. Learning about the process will facilitate team member and leader expectations, and can help the team through times of conflict and chaos. There are patterns of team development that are predictable and if proper analysis is used, the team can mature faster and perform at higher levels of productivity.

Four general phases of development are experienced by any team that works together. Four phases of development can be identified as FORMING, STORMING, NORMING, and PERFORMING.⁵

Teams in the FORMING phase come together and begin to ask the questions "why are we here?". Individuals seek membership and acceptance into the team. A period of dependency is created, usually on a leader, or on another team member, or members. There is some initial level of belief that the team (collection of members) can perform at a higher level than the sum of the individual members separately.

Trust building is a natural step in the FORMING phase. Questions about expectations, understanding each other's motivations, and levels of confidentiality are present, but seldom explicitly discussed. Without trust, the flow of information on the task, goals, processes, and means is diminished. Trust building is a team's foundation.

The transition to team effectiveness is the second phase of the process called STORMING. Its label provides a clue to the nature of this phase in a team's development.

STORMING occurs during the process of clarifying goals, roles, and the accepted decision making process for the team. There are usually diverse viewpoints, often in conflict. Ideas are challenged, criticized, and often shot down.

The irony about this phase of development is that team members tend to avoid the painful conflict in exchange for compromise. Unless teams learn the value of principled negotiation during this phase of development, a form of passive resistance and compliance is likely to result.

Successful teams have learned how to deal with the diversity among team members and to assimilate new members into the team. Unsuccessful teams have become more divided, creating small alliances of like interests, and are more likely to become internally competitive.

As teams emerge from their STORMING phase they have learned from their experience of dealing with each other. Guidelines for resolving conflict, decision making, interpersonal communications, project management and meeting management have been established. The team is also learning the value of informality among team members as they appreciate more of their personal values and family lives in addition to their work lives.

INTEGRATED planning, assigning tasks, and executing the plans creates the effective implementation phase of team development. A key concern is the sequence of the work and committing to a schedule. The team's challenge becomes integrating a collection of related tasks into a smooth operation, balancing sequence, timing, and systems integration toward team goals.

Lack of a well organized approach will predictably result in missed deadlines, confusion, conflict, and frustration. In addition, creative activity tends to occur when the team has exhausted its options. Too much structure may cause lack of flexibility to needed changes in the system. The most productive teams are those in which everyone has a clear picture of the overall process and knows how his or her part fits into the sequence.

This NORMING phase is a place where many teams choose to stay. It is a level of performance that tends to be acceptable and which minimal effort is required to maintain it. Task initiatives become routine and communication systems have been efficiently developed.

Those teams that choose to go beyond the level of acceptability may find incredible performance and a higher sense of personal fulfillment. The next phase of PERFORMING tends to unleash the team's creativity and ability to deal with almost any type of problem presented to them. Both the internal process for on going development and the external results take quantum leaps of progress.

Synergy, or one-plus-one-equals-three, is becoming reality to the team during this phase. High performance is not a child of logic. Boundaries and individual limits are often broken during this stage. Everything clicks. People feel like "we've got it!". The team is usually willing to assess its own performance and make mid course corrections. Team confidence is demonstrated by requests for more challenges.

TEAM ROLES: High Leverage For High Performance

A major challenge for organizations today is to match the right person for the right job. Insufficient, inaccurate, or ignored data often lies at the root of poor selection or promotions.

Cadbury Schweppes is one organization that has designed a sophisticated system to cope with the complexities of assessing personnel and matching the right person to the right job. They developed two language systems, one based on competence, the other based on team role analysis.

Capability, the measure of overall capacity, intellect, and potential of an individual is combined with eligibility which examines the technical and professional skill base. Suitability measures the distinctive behavior that provides the interpersonal chemistry for the individual.

Team roles can be compared to the composition of a football team. Each member contributes from a "natural" strength for his

position. The 11 roles in football have been found to be individually and collectively the best combination to produce the best winning results on the gridiron.

Most managers are expected to play a number of roles during the "game" of business. When put into teams, there is a natural tendency for each one to play all the roles. It would be like everyone wanting to play quarterback, fullback and wide receiver at the same time.

Dr. R. Meredith Belbin of the Industrial Training Research Unit of Cambridge University (England) has studied management teams for more than 20 years. His crucial perception is that all members of a team play a dual role. The functional role contributes to a team's performance because of the need for specific expertise (eg. engineering, finance, marketing, service, sales, production, and research). It's the second role, an individual's team role, that is less obvious and yet plays a critical part in a team performance. Indeed, understanding this basic concept is essential to answering the question: why are some teams more successful than others?

We see the concept of team roles every day when Tom is always coming up with bright ideas, Dick wants to get the decisions finished, and Harry tends to challenge any new idea that comes up. It's a natural pattern that we see in these behaviors and they'll be observed regardless of what team that Tom, Dick, and Harry are on. It's these enduring characteristics, these team roles, that have been the subject of Dr. Belbin's research.⁶

Over a seven year period, Dr. Belbin and his research team studied more than 120 management teams during competitive business simulations. Great volumes of data were collected observing every meeting and recording a variety of contributions from different team members. Each participant was profiled with psychometric tests that measured psychological traits. The categorization of team role patterns emerged when the team members were observed having certain preferred, or natural role contribution, secondary, or able to assume roles, and least preferred, or best avoided roles during the simulations.

The initial research produced eight team role patterns that are unique in their characteristics. Since the original research was completed, a ninth role has emerged as an important contribution to team performance.

The nine team roles are briefly described as follows:

PLANT. Originally receiving the name when this type was "planted" into uninspiring teams and is the source of original ideas, suggestions, and proposals. As most people have ideas, the distinguishing factor is the radical-minded approach he/she brings to problems and solutions.

The Plant is typically more concerned with broad scope issues than with details, and indeed is liable to make careless mistakes as part of his/her pattern. This is part of what Dr. Belbin refers to as allowable weaknesses.

The main contributing role of a Plant is to generate new proposals and solve complex problems. They are often effective in the initial stages of a project, or when a project is failing to progress.

RESOURCE INVESTIGATOR. Usually the most immediately likeable person on the team. Sociable, gregarious and enthusiastic, the Resource Investigator is the member who goes outside the team and brings back information, ideas, and resources from contacts and networks outside the team.

His/her ability to stimulate ideas through networks provides the team with objective thinking not usually available inside the team.

Resource Investigators tend to be the best negotiators and have the ability to think on their feet and probe others for information. Without the stimulus of others, he/she can become easily bored.

COORDINATOR. Distinguished by a preoccupation with team objectives, the Coordinator role tends to be more disciplined in the use of team resources.

A good listener, easy to talk with, the contributions of the Coordinator tend to take the form of good questions while clarifying the team's agenda and priorities. This makes for good process leadership.

Possessing a broad outlook, they perform better with colleagues with a similar organizational level directing the efforts of junior ranking subordinates. With an unhurried and consultative style, their motto might be "consultation with control"

SHAPER. Where the Coordinator would be considered a "social leader", the Shaper's theme is "task leader", much like a nation's Head of State.

Outgoing, impulsive, impatient, the Shaper is full of nervous energy. Quick to challenge and respond to challenges, he/she creates a strong sense of urgency into the team's objectives.

If obstacles arise, their best role is to find a way around, or over them. They demonstrate courage of their convictions and tend to be more rational in their decision making. There is a competitive team role generating action and thriving under pressure.

MONITOR EVALUATOR. Very serious and lacking emotional enthusiasm, their contribution lies in measured dispassionate analysis rather than creative ideas.

By nature a critic, they tend to be able to see flaws in plans before they become misguided projects. Slow to make up their minds, their major contribution is to provide the team with objective and unemotional reasoning after assimilating complex data from a variety of resources.

Monitor Evaluators are best suited for analyzing complex problems and weighing pros and cons of many options.

TEAM WORKER. The most sensitive member of a team they are very perceptive of individual needs and concerns, and about the emotional undercurrents within the team.

They are willing and good listeners and encourage other team members to do likewise. Their strength is to promote harmony within the team. Their social and diplomatic contributions help prevent interpersonal problems from getting out of hand.

When the team is under pressure, the Team Worker's sympathy, understanding, loyalty and support are especially valued. They are not seen as a threat and provide a lubricating effect to the team.

IMPLEMENTER. The practical organizer, he/she sorts out objectives and pursues them in a logical fashion. Noted for a sincere and disciplined approach, he/she is valued for insuring movement toward the team's goals.

The main contribution of the Implementer is to convert the team's plan into a feasible form and carry them out in a structured manner. Producing schedules, organization charts, and systems are their greatest strengths.

A lack of flexibility is an allowable weakness for the Implementer. They are not a strong proponent of change and tend to be less adaptable than other team members.

COMPLETER-FINISHER. Not an assertive member of the team, they maintain a permanent sense of urgency through self control and a compelling desire to follow through and insure all the details are taken care of.

They are unlikely to start anything they cannot finish. Motivated by internal anxiety, they require little in the way of external motivation or stimulation.

They can also be intolerant of others who exhibit a casual disposition. While not keen on delegating, Completer-Finishers prefer to tackle the task themselves. Finishers are invaluable when team needs a high degree of accuracy and meeting schedule demands.

SPECIALIST. Specialists are dedicated individuals who pride themselves on acquiring technical skills and specialized knowledge. Their priorities center on maintaining professional standards and furthering their own field. While they show great pride in their own subject, they tend to lack shared enthusiasm in other people's interests.

Specialists are committed to a narrow front, becoming expert in areas of singular focus. In some teams the Specialist is indispensable as they provide a critical expertise toward a team's objective and special project.

Each team role, while contributing a valuable strength to any team composition, also carries the "weight" of what Dr. Belbin refers to as an "allowable weakness". Although each role brings a natural strength, it also has its "opposite number" (eg strong original ideas-Plant, is perceived as not interested in details and is up in the clouds). It's the shape of a person's profile that provides the unique contribution to the team.

There is a danger in attempting to remedy the weakness, you dilute the person's strength. Team members should be encouraged to learn control and tolerance of each other's weaknesses, while focusing on balancing their complementing strengths.

Every person's team role is a unique fingerprint - a particular combination of roles - not just a single role contribution. For example, a person with the natural strength of PL/RI would have an "exploring" shape that both creates ideas and expands on them through outside networks. A TW/SP would be a supporting shape that contributes a certain expertise in a manner that's helpful to the team.

In reality, any team member can and sometimes probably has, played each team role while contributing to the objectives of a workteam. The question becomes: does each member contribute from his/her natural team role strengths?

A BALANCING ACT: the challenge of designing teams for high performance.

High performance seems to happen in one of two ways. In a crisis, a team often rises to the occasion. Whether it is a team saving lives in an emergency room, or a community coming together after a devastating earthquake, their performance level tends to be sustained for a short period, the length of the emergency.

The second way is through mastering the phases of team development, particularly the FORMING and STORMING phases. Although few teams consciously follow this process, we do find certain characteristics common to long term performance. There is a chemistry of members contributing from their individual strengths. Activities are well coordinated and focused on team goals. The systems are balanced.⁷

Balanced roles in teams increase the likelihood for greater contribution from individual members, less destructive conflict among members, and most important, an adaptability to changing and unpredictable circumstances.

TEAM ROLES IN ACTION: From theory to practice.

For existing teams the use of team role assessment provides value in recognizing, acknowledging, and taking advantage of the different contributions from team members. Sharing both natural role contributions and those least preferred with the team will identify the areas of balance and imbalance, thereby pinpointing team gaps in roles and preventing future conflicts.

Assigning tasks to members most suited and most compatible by team role, and coaching for secondary role development are additional applications for existing teams.

Selection of new team members for team role balance is truly a unique opportunity using this method. Balanced teams can now be designed for success, insuring the right mix of natural role composition is in the team.

Redeploying team members after a merger or acquisition is

also a valid use for team roles. These unfavorable situations can provide a unique opportunity to create balanced teams, designed for success.

No individual can provide all the necessary roles for team performance. No individual is perfect . . . but a balanced team can be.

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