

Understanding Team Roles

Preparation

Review Reference Manual

Equipment, Materials, Supplies

- Newsprint, Easel, Markers, Masking Tape

Exercise Preparation

- Review *Exercise 1: Team Role Analysis*
 - Prepare newsprint to demonstrate how to score each page.

Room Arrangements

Participants should be seated at tables with enough room to work individually.

Overview

Purpose

The purpose of this module is to develop participants' ability to identify formal, or assigned, roles in a team, and to encourage a team to have members adopt support roles suited to their personalities.

Objectives

At the end of this module participants will be able to:

- Discuss individual roles within a team: team leader, team member, timekeeper, recorder, and coach as facilitator and trainer.
- Identify team support roles and the contributions each makes to a team.

<i>Content</i>	<i>Time</i>
Introduction	5 minutes
Individual Team Roles	10 minutes
Team Support Roles	45 minutes
	Total Time: 60 minutes

Time/Materials	Content/Activities
<p>Introduction <i>5 minutes</i></p>	<p>Introduce this session by presenting the purpose, objectives, and overview of the content.</p>
<p><i>Slide 1</i></p>	<p>Purpose</p> <p>TELL participants The purpose of this module is to develop participants' ability to identify formal, or assigned, roles in a team, and to encourage a team to have members adopt support roles suited to their personalities..</p>
<p><i>Slide 2</i></p>	<p>Objectives</p> <p>PREVIEW the objectives from the reference manual.</p>
<p><i>Slide 3</i></p>	<p>Overview</p> <p>PREVIEW module contents</p> <p>TELL participants that in this session we will review formal individual team roles (assignments) and discuss team support roles (personal behaviors).</p>
<p>Individual Team Roles</p>	<p>REVIEW the formal roles and responsibilities of team members and ask participants if they have any questions or concerns.</p>
<p><i>10 minutes</i></p>	<p>REVIEW the relationship between the coach and team leader and ask participants if they have any questions or concerns.</p>
<p><i>Slide 4</i></p>	
<p>(you may want slides from Module 1 about the roles, and Module 2 about the coach-team leader relationship)</p>	
<p>Team Support Roles</p>	<p>DISCUSS the fact that people act according to their personalities, and understanding how different personalities support team goals will help a coach to encourage a team to develop a variety of support roles.</p>
<p><i>45 minutes</i></p>	<p>Team Role Analysis Questionnaire</p>
<p>Exercise 1: Team Role Analysis</p>	<p>INTRODUCE the activity</p> <ul style="list-style-type: none"> TELL participants the purpose of this activity is to learn about the various team support roles team members may take and to appreciate the contributions each member makes to the team.
<p>Newsprint to demonstrate</p>	

**demonstrate
scoring**

- **TELL** participants another purpose is to find out how each person expresses his / her personality on a current team.
- **TELL** participants to turn to *Exercise 1: Team Role Analysis*
- **DEMONSTRATE** how to fill in the scoring sheet for each trait.

CONDUCT the activity

- **FOLLOW** the exercise directions. **HELP** participants correctly total and enter scores.

SUMMARIZE the activity

Slides 5-7

- **TELL** participants to read the description of their top scores
- **ASK** if they agree with this finding
- **EXPLAIN** that a member can assume a role that is NOT his/her top score, if he/she is aware of the need to do so and able to modify their behavior. This is easiest with roles that are second or third highest in score, especially when the scores are close together.
- **EXPLAIN** that a team needs to have representatives from all these roles to help the team develop, and a team that knows that roles its members have may see a “missing” role. In that case, someone with that role as a second or third score could take it on.
- **DESCRIBE** that in prior uses of this scale, we have found teams that lack process managers don’t have efficient meetings; that teams that have many harmonizers don’t use critical thinking and accept the opinion of the leader as truth; that some teams of healthcare workers have many harmonizers and technical experts, but few output drivers or politicians (might this explain why healthcare workers sometimes don’t accomplish tasks, or are not very persuasive?)
- **ASK** if they are willing to share their results – consider posting a summary sheet to see what the characteristics of the group are, ask them what they need to do to balance the roles.
- **TELL** participants that they may wish to use this exercise with the teams they are working with.
- **IF THESE TEAMS ARE GOING TO STAY TOGETHER TO DO QA WORK, ASK THEM WHAT THE IMPLICATIONS OF THESE RESULTS ARE FOR FUTURE WORK.** (Perhaps they have well balanced roles, perhaps not – they may need to encourage some members to “put on” alternative behaviors).

Transition

REVIEW module goals and link them to the next module.

Exercise 1: Team Role Analysis Questionnaire

Instructions

The questionnaire has five sections, each of which focuses on a different team behavior. Each section is allocated ten points and you will allocate the ten points among the statements in that section. Think of a team in which you are currently a member. The number of points that you assign to each statement should reflect your perception of your behavior at the present time. The more strongly that you believe you demonstrate a particular behavior, the more points you should allocate to that item. Be sure to allocate ten points only to each section, no more and no less.

Section One: Decision Making

When a decision is being made in my team, I...

Points	
	1. State my opinion as a specialist in my own discipline.
	2. Explore the full implications of all ideas suggested.
	3. Take an independent viewpoint by considering every aspect.
	4. Evaluate the impact of possible decisions on other groups.
	5. Persuade the team to accept my point of view.
	6. Foster an open atmosphere so that people can say what they really think.
	7. Offer radical suggestions that no one else has considered.
	8. Structure the discussion so that each member understands their options.
	9. Make sure that the team adheres to a strict timetable for decision making.
	10. Help the other team members to clarify their views.

Total points must equal 10

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Section Two: Creativity

In a team brainstorming or creativity session, I...

Points	
	11. Can be relied on to come up with unexpected ideas.
	12. Stand back and comment on what others say.
	13. Quickly choose the best idea and encourage others to adopt my viewpoint.
	14. Contribute to the session if I believe that I can add something of value.
	15. Organize the team so that the brainstorming process is executed properly.
	16. Build on the ideas of others.
	17. Contribute ideas that are relevant to my professional or technical training.
	18. Create the right climate for a productive, creative session.
	19. Bring in ideas from outside the team.
	20. Make sure that the team maintains a strict schedule so that the session is productive.

Total points must equal 10

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Section Three: Planning

When the team is planning what needs to done, I...

Points	
	21. Assign actions and priorities to others.
	22. Consider the possible implications of our plans on other teams.
	23. Make sure that effective planning methods are used.
	24. Pull together proposals and develop comprehensive plans.
	25. Contribute ideas pertaining to those subjects in which I have expertise.
	26. Make sure that a clear timetable for action is developed.
	27. Help to motivate my team members.
	28. Assist the team in whatever ways seem helpful.
	29. Consider each aspect of the plan to ensure that is realistic.
	30. Invent unexpected ways to use resources.

Total points must equal 10

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Section Four: Team Effectiveness

When the team is reviewing its effectiveness, I...

Points	
	31. Make sure that the views of each team member are considered.
	32. Present my opinions and ideas when they would be helpful.
	33. Get the opinions of people outside the team.
	34. Question the fundamental team's effectiveness of the team and suggest radical changes.
	35. Summarize every viewpoint and evaluate the team's overall strengths and weaknesses.
	36. Contribute as a functional specialist.
	37. Record all of the useful points and establish a timetable for improvement.
	38. Take an impartial attitude in order to evaluate the team objectively.
	39. Decide what needs to be done and convince others to accept my views.
	40. Stimulate open communication among team members.

Total points must equal 10.

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Section Five: Valuing Contributions

Others value my work in teams because I...

Points	
	41. Work hard to create a positive climate.
	42. Think of innovative ideas.
	43. Am flexible.
	44. Contribute specialized knowledge and expertise.
	45. Make sure that thing get done.
	46. Build positive links with other teams.
	47. Bring structure to team meetings.
	48. Provide leadership.
	49. Build on other people's ideas.
	50. Provide an impartial assessment of the team's activities.

Total points must equal 10.

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Team Roles Analysis Questionnaire Scoring Sheet

Instructions

Transfer your scores from the questionnaire items to the appropriate boxes below. Then add the items in each horizontal row of scores and record your total in blank box provided.

Item Number					Your Totals	Team Roles
8	15	23	31	47		Process Manager
2	16	24	35	49		Concept Developer
7	11	30	34	42		Radical
6	18	27	40	41		Harmonizer
1	17	25	36	44		Technical Expert
9	20	26	37	45		Output Driver
3	12	29	38	50		Critic
10	14	28	32	43		Cooperator
5	13	21	39	48		Politician
4	19	22	33	46		Promoter

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Team Roles Analysis Questionnaire Interpretation Sheet

Process Manager

Process management comprises a set of skills that should be acquired by all leaders of teams. The process manager channels human resources to get things done. He or she forms teams, identifies team members' strengths, clarifies objectives, structures meetings, explores issues, allocates roles, and maintains momentum. The process manager brings structure to the team and ensures that goals are set. He or she has the skills of a good chairperson, control, self-confidence, calmness, and the ability to communicate well with others.

Key contribution: Ability to chair meetings

Concept Developer

The concept developer ensures that ideas are developed and evaluated. This person helps to identify possibilities and transform them into practical proposals. The concept developer has the ability to see the potential merits and drawbacks of ideas. When someone suggests an idea, the concept developer is creative and excels in envisioning, imagining, thinking logically, and understanding.

Key contribution: Vision

Radical

The radical presents new ideas by considering problems and opportunities from unexplored angles. This person sees new possibilities, adopts unconventional approaches, has insights, and produces novel proposals. The radical often is strongly intuitive. Radicals look at situations with a fresh perspective, prefer to think things through independently, and refuse to accept "conventional wisdom." The radical is a free spirit.

Key contribution: Conceptualizing

Harmonizer

The harmonizer builds team morale by energizing, supporting, and encouraging others and by resolving interpersonal conflicts. The harmonizer believes that team efficiency is based on positive interpersonal relationships. He or she encourages commitment and cooperation and, thereby, good performance. The predominant impression that others have of the harmonizer is that he or she is a caring person. The harmonizer tries to ensure that team members value one another and gain something significant from their membership in the team.

Key contribution: Supporting

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Technical Expert

The technical expert is a subject matter specialist. The technical expert contributes an expert or professional viewpoint to the team, making the team the beneficiary of his or her extensive training and experience in a particular area.

Key contribution: Specialized know-how

Output Driver

The output driver makes sure that tasks are completed. He or she sets time limits and targets and follows through on assignments. The output driver pushes to get things done and maintains standards. He or she checks to see whether things could go wrong at the last minute and is a creative tactician and planner.

Key contribution: Pushing

Critic

The team member who takes the role of the critic must be intellectually capable, temperamentally inclined, and appropriately skilled. The critic takes a mental step back from the team to judge, to consider possibilities to look for possible pitfalls, to sound notes of caution, and to question and challenge ideas. He or she confronts the team with objective observations and carefully weighted opinions. The critic's commentary should be objective, not negative or positive.

Key contribution: Impartial evaluation

Cooperator

The cooperator is an industrious team member who assists in whatever way is needed by working hard and by being adaptable. The cooperator is sensitive to other's needs and is willing to tackle unpleasant jobs without complaint. To succeed as a cooperator, a person must have well developed observation skills, a sense of altruism, enthusiasm, and a variety of capabilities. The cooperator's key contribution to the team is flexibility.

Key contribution: Flexibility

Politician

Because politicians believe that they know the right thing to do, they try influence other people to support their opinions. They mold the team views, build alliances, and guide others. Politicians are results orientated, influential, power conscious, and persuasive. Such people are dogged and resolute; they bounce back after setbacks. The role of politician has been described as that of a "shaper," as the politician shapes opinions and objectives.

Key contribution: Drive

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Promoter

The promoter is an extrovert with a set of appropriate skills. The promoter gathers useful contacts and makes connections outside the team. He or she is open minded, socially skilled, and cooperative. This person links the team to others with his or her outgoing and sociable nature and ability to build relationships, to investigate resources and to check out ideas and possibilities. Promoters are "fixers" who enable things to get done.

Key contribution: Linking

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