



CHAPTER TWO

The art of client management

TWO

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Understanding the key stages of the internal consulting process

In this chapter we outline the key stages and activities involved in managing successful projects. Our consulting process involves a systematic approach to managing projects or assignments. This ensures you not only deliver successful results but also enjoy strong and positive client relationships. The skills involved in managing projects can also be applied in lots of day-to-day working relationships in the corporate world. Making a successful transition from colleague to client requires the careful application of these consulting stages.

A consultancy project or assignment can be divided into four key stages that run throughout the duration of a project. These stages are shown in Figure 4 and involve:

- 1 Getting in and contracting with your client
- 2 Information gathering – understanding the client's problem
- 3 Presenting client feedback and action planning
- 4 Implementing, reviewing and exiting the project

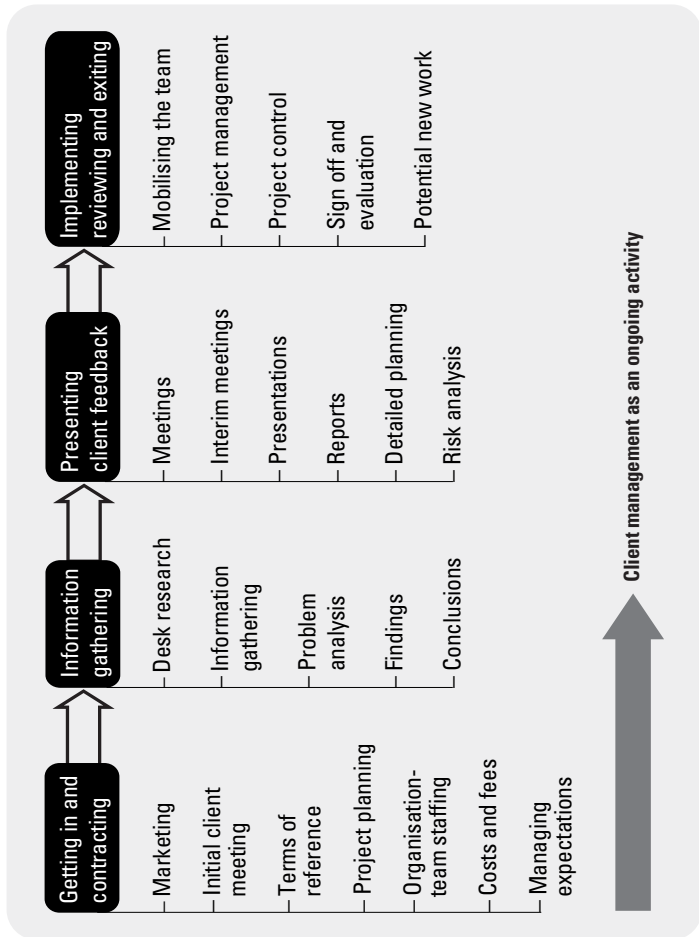


FIGURE 4: THE CLIENT MANAGEMENT PROCESS

As an internal consultant it is likely that in most cases you will be expected to get involved in all of these four stages. However, it is important to remember that on some assignments, your participation in the implementation phase might be reduced as your client decides to take on these responsibilities.

No two projects or assignments are ever the same and so we need to remain flexible and responsive to a client's specific needs and demands. Some clients will want to rely heavily on your services throughout the duration of a project. Others may want to reduce their dependency on you by absorbing much of the work involved in any action planning and implementation phases. As an internal consultant you need to be comfortable with both arrangements. Don't feel personally rejected if your client decides to reduce your involvement in this latter stage of a project, unless of course you have done something negative to justify your exclusion!

Getting in and contracting with your client

As an internal consultant you have to have a group of potential clients who recognise your expertise and are willing to involve you in projects or initiatives when suitable opportunities arise. Your ability to generate interest in your services is the first step to obtaining an invitation to meet with any potential clients. To succeed in this area you will have to market yourself and, where appropriate, your team or unit's services.

MARKETING INTERNAL CONSULTANCY

For the new or inexperienced consultant the prospect of having to go out into their organization and actively market or sell their services can come as a shock, but the fact is internal consultancy demands this approach. Indeed, if we think about it, everyone in the corporate world is in the business of selling. If your organization is unaware of who you are and what you can offer, the chances of you being asked to discuss problems and provide advice to clients will be remote. If you cannot rely on potential clients coming to you then marketing your services becomes essential to your survival. Developing a marketing approach represents a significant departure to the work of many traditional managers and sup-

port functions that have enjoyed a captive market for their services. To some it comes as a bit of a shock. Often the fear of selling in a competitive world puts many people off becoming independent external consultants. But the fact is that in today's environment we have to think about how we market ourselves and capabilities.

In our chapter on marketing we outline some of the specific actions needed to begin the marketing process in your organization. These include developing a simple marketing strategy and promoting your skills and services to senior management and other key stakeholder groups in the organization.

When your initial marketing efforts have been successful, a potential client will invite you to a meeting to discuss a particular issue or problem and to explore whether you might be able to provide some help. This is your selling opportunity and for most internal consultants the probability is that you will have worked for this person before. However, to succeed as an internal consultant you need to manage this person in a very different way to the past. This is where we need to start developing a very structured approach to managing client relationships.

INITIAL CLIENT MEETINGS

Initial client meetings represent the formal start of our client management process. It also begins the move from a colleague to client perspective in the working relationship.

The purpose of any initial client meeting is to begin understanding the client's business and problems. This involves jointly exploring their key challenges and concerns and establishing the possible basis for a project or assignment. At this initial stage you need to be prepared to start discussing provisional objectives, and timescales. You might also raise the possible involvement of the client's staff in the work and any requirements for specialist skills such as

finance, human resources, project management, production, engineering, logistics, information technology, etc. Clearly this requires some advance preparation and so is a very different approach to the colleague perspective of ‘I’ll just turn up and see what they have to say!’

As a new internal consultant there is often a real need to redefine past relationships with some of your clients. Clients may have viewed your past role as that of a subservient support function. If you are going to gain the respect and authority you need, you will have to shift any negative perceptions. It is critical that clients view you as an equal. As an internal consultant you want to have a strong and mutually respectful relationship with all your clients. In effect you have to develop a partnership relationship. But depending on your starting point this may take time. Patience will be needed in order to build up a range of positive successes to shift peoples’ attitudes. This process of influencing your clients’ perceptions and attitudes begins at the initial meeting stage.

DEVELOPING AN INITIAL TERMS OF REFERENCE

On the basis that both you and your client have had a satisfactory meeting and agreed in principle to start working together, an initial terms of reference has to be developed. Once submitted this draft document can be discussed and possibly agreed at your next client meeting. In many situations you may need to carry out some preliminary research to define the precise scope of the problem although for some simple and straightforward assignments it may be possible to agree the initial terms of reference at your initial client meeting.

Agreeing an initial terms of reference with your client before you begin any consulting work is a fundamental rule in managing all of your client relationships. The consultant and client must be absolutely clear about the scope and objectives of a project at the beginning. The process of agreeing an initial terms of reference ensures that a clear and mutual understanding has taken place. Many consultants have met with failure and ultimately faced an angry client because they ignored this basic rule. Assuming that a lack of clarity in understanding at the start of a project will not matter in the final stages of a project, is a fatal mistake. The fact is it matters a great deal. Clients and consultants can easily misunderstand or forget the details of initial discussions. This can be further exacerbated if any agreements are not documented. Establishing an initial written terms of reference is the means by which you establish a clear focus on what your client wants and agrees to. It is also a process that helps develop your client's thinking about their problem and what it is they exactly want from you. Very often a client's view of a problem can change significantly as a result of a consultant probing and challenging them at an initial meeting. So the process is intended to benefit both parties by ensuring that there is a clear understanding of the aims of a project. This helps prevent any surprises later on in a project.

Don't start work without a terms of reference – it's a powerful tool to help surface competing stakeholder objectives and deliverables. It really helps the client focus on questions such as, 'Do we really want to do this?' and 'What are we hoping to achieve?'

Tracey Norbury, Internal Training Advisor HSBC

As a project develops constantly review your terms of reference. When circumstances surrounding a project change you may well need to adjust the overall objectives. This is why we refer to an 'initial' terms of reference at the beginning of a project as it is very likely that it will change, especially where you become involved in complex implementation work that will require detailed planning schedules.

In developing your initial terms of reference you should include the following information:

- Background to the project.
- Project's objectives.
- Boundary of the project.
- Constraints involved.
- Assumptions you are making at this stage.
- Client's reporting requirements.
- Project deliverables and milestones.
- Show who and when things happen on an Activity Time chart (Gantt).
- Finance/resources required to carry out the project.

In most cases, to fully understand your client's problem, you will need to complete a brief but intensive period of fact finding. This may involve you interviewing a small cross section of people or conducting some form of desk research. Make sure that you understand the background to your client's problems so that you can provide an initial estimate of the resources and time you will need to complete the project. When your terms of reference are agreed with your client they in effect become your consulting contract. They also become the basis on which your eventual success or failure will be judged which is why they assume such significance in the client management process. Without a clearly agreed terms of reference you cannot hope to deliver effective consulting services.



Insight

Never lose focus of your terms of reference and keep them readily available throughout the course of any project. On complex or lengthy assignments it is very easy to lose sight of your original objectives and stray from your terms of reference. This can be very damaging either towards the end of an assignment or when you have to report back at key stages. You do not want your client to feel you have not delivered so keep asking yourself and your colleagues 'Have we done what we said we would do?'

On some projects, you will be required to bid for the work and compete with other groups, possibly external consultants. Preparing an initial terms of reference will not be enough as you will have to prepare a client proposal. This is a formal document that will include your initial terms of reference as well as:

- your consulting experience – document your experience and skills and that of the team; and
- methodology – describe your approach to executing the work.



Insight

Consultants always leave insufficient time for drafting and producing client reports. A useful guide in planning is to simply double the time you think you will need! You can never do enough drafting and editing of a final report.

Information gathering and understanding your client's problem

In the majority of assignments or projects, a detailed period of fact finding will be necessary to ensure that you are obtaining the right information to understand and accurately define your client's problem. This requires an inquisitive and open-minded approach throughout your investigation. Simply accepting what is said to you without challenging or questioning the issues may result in you developing erroneous findings and conclusions. A structured and analytical approach is needed to ensure that all the relevant facts and issues are established and understood. Having a clear understanding of the information gathered during the initial stages of your work, will also help you highlight additional areas which may require further investigation. Ultimately you must be able to develop valid conclusions and recommendations from all the gathered facts.

The main methods of gathering information are:

- Desk research that typically involves the review and examination of existing information or records (e.g. current reports, efficiency statistics, systems outputs, policies, operating procedures and sales or customer data, etc.).
- Interviews conducted on an individual basis.
- Group interviews.
- Questionnaires circulated to staff, customers, suppliers or other relevant parties.
- Process mapping of existing processes or systems.
- External case studies or data sources.

Most consultancy projects will involve a combination of all these methods. Interviews are of course always critical in gathering information and it is impossible to carry out consulting work without having to interview people. When conducting client interviews always aim to:

- Be professional, respectful and courteous to everyone.
- Have a checklist of the main questions and issues you want to discuss.
- Challenge and be a devil's advocate if some answers seem not to make sense.
- Remain impartial (never criticise client staff or others within the organization and never be drawn into making controversial statements).
- Distinguish clearly between information that is given to you 'on the record' and 'off the record'.
- Be discrete.

To be successful interviews need to be conducted in a relaxed and open atmosphere. There may also be moments when you need to maintain client confidentiality with regard to personal 'off the record' comments. You may need to protect people who share confidential information with you by giving assurances that you are only identifying broad themes and issues rather than attributing specific comments to individuals. Giving the impression that whatever is said will be quickly passed on to all interested parties is not likely to generate an atmosphere of trust.

CONTROLLING THE PROJECT

Once your project gets under way, your main responsibility is to ensure that the plan is implemented so that the objectives in your terms of reference are met. You have to therefore constantly focus on your project's objectives by:

- tracking the team's progress against the plan; and
- reviewing the plan to ensure that it remains current and viable.

Keeping track of your project against schedule is a key consulting discipline. The need to ensure that people are aware of their key targets and deliverables is vital. As is the need to maintain a strong level of communication across all aspects of the project team and the activities they are undertaking. People need to be aware of the bigger picture and it is the role of the project manager to ensure that people are kept up-to-date on developments and progress. Early warning mechanisms need to be in place in the event that delays or problems occur. So strict adherence to any project plan is vital to success.

Successful projects are best achieved by holding regular review meetings and ensuring that all key decisions are fully documented. Agreed action points should be circulated to everyone involved in the project. Structured client progress meetings also ensure your client is kept fully informed of the work being undertaken, and of the project's overall progress and development. It also means you can highlight any problem areas at an early stage. It is vital that you keep your client involved at all times, so as to manage the client's commitment throughout the implementation phase.

Finally, re-planning may need to take place after holding a review meeting. You need to record any new or changed tasks and also change your terms of reference if appropriate. In some cases there may be no need to revise your plan.

Alternatively, you may have to consider a number of management actions, such as increasing resources, reassigning people and tasks before rescheduling parts of your project in order to keep to the planned deliverables.

Presenting client feedback

Presenting client feedback is a phase of the consulting process that runs throughout the life-cycle of any project or assignment you are involved with. Client feedback has to take place regularly during any project to ensure that your client is kept up-to-date on progress and advised of any difficulties at an earlier, rather than later, stage. Any consultant who neglects this part of the consulting cycle is likely to run into real problems with regard to the client relationship. Remember to always take the initiative when communicating with your client. Never be in the position where your client is chasing you for information or progress updates. If you find yourself in such a situation it probably means that you have failed to pay sufficient attention to the feedback process in the client relationship. When it comes to feedback and progress reports, always stay one step ahead of your client. Never, ever, try to hide problems or delay giving bad news as it always makes the situation worse. Better to advise your client today rather than three weeks after a problem has occurred. The chances are that the problem will be and sound a lot worse in three weeks time.

Any project completion date ultimately results in some form of final report or client presentation. During this stage of the feedback process your client is looking to assess the quality and integrity of your work, and you in turn are looking to gauge their reactions. It is also the stage at which you will be aiming to further strengthen your client relationship by securing agreement to your findings, conclusions and recommendations.

The two major activities involved in presenting client feedback will involve you in writing reports and making formal presentations. They constitute two critical skill areas that must be mastered. Poor performances in either can seriously damage your client's confidence in your overall ability and competence.

WRITING CLIENT REPORTS

Any client report must be a clear statement of what you set out to do, what you did, your recommendations and where appropriate your proposed implementation plans. As an internal consultant, your report must be capable of being understood at a first reading by anyone who does not possess a detailed knowledge of the problem or issues under review.

Report writing is a complex and at times painful process but there is no escaping from the discipline that must be applied. All consultants experience difficulty at one time or another in writing reports, so you should not be too depressed when you find yourself struggling with a complex report. But you must recognise that there is a significant difference in the skills needed to analyse a complex problem and to then write a clear and logical report on the situation. However, both sets of skills are necessary to produce a report that is rigorous in analysis and clear in presentation. In many projects your final report is often the only way in which your client can, or will, judge your performance, so you have to display a high degree of skill and capability.

MAKING CLIENT PRESENTATIONS

Whilst your conclusions and recommendations should always be discussed with your client in advance of your final report being submitted, there invariably comes a time when you will be expected to make a formal presentation on your work.

Client presentations are one of the most important parts of an internal consultant's work. During the latter stages of a project they become critical as they provide you with the opportunity to explain issues in your report that might not be immediately clear and open to misinterpretation. When working on sensitive projects you should always personally present your report rather than send it to your client. This allows you to clarify any potentially contentious or difficult issues immediately. Following any client presentation, you may need to consider reviewing and possibly amending your final report in the light of the comments received during your presentation.

Like report writing client presentations can be extremely complex events and you can never plan or prepare enough for them. During any presentation you may have to deal with sensitive issues involving criticism of your client or other managers or departments. You may also have to safeguard confidential issues that emerged during your work. When issues such as these are present, you need to not only plan for them, but also how you will manage them during the actual presentation. As such you will need to be skilled in not only structuring presentations but also in planning around detailed process issues. For example, how to deal with the fact that attending your presentation might be two managers who you know to be extremely hostile to what you have to report? Dealing with this type of issue is an everyday challenge for the internal consultant. In our client presentation section we will outline some of the techniques that you can use to ensure that you manage such situations and secure your client's support and commitment at the feedback stage.

Implementation

Implementation is that stage of the consulting process that requires detailed plans for achieving the project's objectives. On some projects your involvement may end at this stage with your client taking over control. If your involvement in a project does end at this stage you must be aware that as far as your client is concerned the project is not finished. The completion of your review or the delivery of a report, frequently represents a beginning not an end for the client.

On very large and complex projects involving, for example, a major information systems implementation, your client will frequently have to manage a large workload and it may be necessary to involve a specialist project manager to carry out the detailed planning and monitoring activities. In such situations large numbers of people and resources will be involved and this demands a more disciplined and rigorous approach to project management. However, in the majority of consulting projects, the responsibility for carrying out the detailed planning and implementation management will lay with you as the internal consultant in charge of the project. So you have to be prepared to take on the role and develop some of the skills of a project manager.



Insight

Identify and involve all the appropriate people who will participate in the planning discussions. These are the people who will ultimately assume responsibility for any new systems or procedures and so their active involvement must be secured. As a minimum, these people will include your client, their management team and any other key people who will implement the system or changes.

The implementation phase involves the following steps:

- Assessing how much detailed planning you need to do.
- Reaffirming your terms of reference.
- Preparing a quick work programme.
- Carrying out a quick risk analysis.
- Presenting your plan to your client.
- Secure your client acceptance to the plan.

Reviewing and exiting projects

At the end of a project you will need to assess whether or not a successful outcome has been delivered and you have met the objectives set out in your original terms of reference. The most appropriate way to do this is to present your client with a review report of your project work and the final results. This review process can also involve identifying additional or further actions that might be required to achieve a project's final objectives. It might, in some circumstances, identify who should undertake any additional work and specify the timescales involved. The review process should always be undertaken in partnership with your client. This approach is a positive sign that shows the project was conducted in a mature and professional manner where both the client and consultant accepted their responsibilities for the outcome.

As a successful internal consultant your time will be at a premium. With many clients requesting your services, you will have to manage their expectations with regard to your future availability. If you allow your clients to believe that they have endless freedom to demand your services at any time, you will never be able to operate successfully. So, at the end of an assignment, you must inform your client that the project and your involvement has come to an end and that any additional work will have to be subject to a new agreement.

Project management – people and team management

The other major component in managing client projects involves the process of building, managing and leading teams. When it comes to people and relationships we enter a very different arena to that which involves defining critical paths and conducting risk and probability assessments. Applying project management tools and techniques is one thing, managing people is another. As we all know, managing people in the working environment for the most part involves a complex world where emotions such as ambition, motivation, competition, power, control, co-operation, trust and mistrust come into play.

Clearly no client assignment or project can be managed without the need to manage relationships. These will normally involve your project sponsor, their staff, stakeholders and your project team. Altogether this group presents a very challenging aspect of the internal consultant's role. Fail to manage people and we fail to manage projects. So for the vast majority of internal consultants, managing the client element is often the most demanding aspect of the role. In any project situation our people management experiences will almost certainly vary from one project to another, but the essential factors that we will need to cope with include:

- Managing the day-to-day client relationship – managing expectations, communicating progress and liaising on problem areas.
- Defining your project leadership role and style – deciding on the right amount of task control and relationship support provided to the team. Bringing out the best of individual talents and getting people to work towards a common goal.

- Managing the various group dynamics – this includes the roles and relationships between the various team members and other interested parties. In other words building the team.

SELECTING THE PROJECT TEAM

Based on the project you are undertaking you need to select the right balance of skills and competences. As well as considering the technical skills required, you will also need to think about the balance of your team in terms of personalities and basic project management disciplines. In such cases it might be helpful to consider using some form of team building instrument to help get the team started. Meredith Belbin's approach to team preferences is an excellent way to kick-off a project team and get people understanding the roles they might play in helping to build an effective team.

The benefit of Belbin's work is that it provides not only the project manager but also team members with a clear means of understanding the following:

- Our own individual contribution to the team.
- How other team members contribute.
- How best to allocate activities and tasks amongst the team.
- Where gaps in the team composition might exist and how best to manage them.

Figure 5 (overleaf) shows the eight classic types identified.

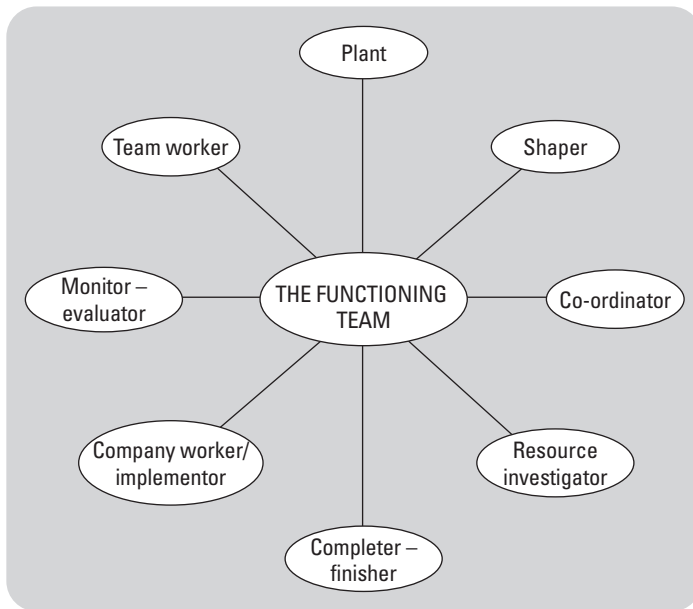


FIGURE 5: BELBIN'S TEAM TYPES

Once we understand our own team roles and their strengths and weaknesses as defined by Belbin, we have a mechanism by which we can, as internal consultants and project leaders, improve the balance of our teams and their overall effectiveness.

Belbin's team roles – questionnaire

Directions for completing the questionnaire:

For each section allocate a total of ten points among the sentences that you think best reflect or describe your behaviour. The points you allocate may be distributed among several sentences: in extreme cases they might be distributed among all the sentences or ten points may be given to a single sentence.

After having worked through the questionnaire enter your points into the table at the end. Then add up the scores vertically to obtain your scores for each of Belbin's types.

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 assets. ☐
- d) My ability rests in being able to draw people out whenever I detect they may 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 leads to worthwhile results in the end. ☐
- g) I am quick to sense what is likely to work in a situation with which I am familiar. ☐
- h) I can offer a reasoned case for alternative courses of action without introducing bias or prejudice. ☐

2 If I have a possible shortcoming in team work 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 hearing. ☐
- c) I have a tendency to talk a lot once the group gets onto 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 need to get something done. ☐
- f) I find it difficult to lead from the front, perhaps because I am over-responsive to the group atmosphere. ☐
- g) I am inclined to get too caught up in ideas that occur to me and so 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. ☐

3 When involved in a project with other people:

- a) I have an aptitude for influencing people without pressurising them. ☐
- b) My general vigilance prevents careless mistakes and omissions being made. ☐
- c) I am ready to press for action to make sure that meetings do not waste time or lose sight of the main objectives. ☐
- d) I can be counted on to produce 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 others appreciate my capacity for cool judgement. ☐
- h) I can be relied upon to see that all essential work is organized. ☐

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 come out with the unexpected. ☐
- f) I bring a touch of perfectionism to any team job I undertake. ☐
- g) I am ready to make 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. ☐

5 I gain satisfaction in a job because:

- a) I enjoy analysing situations and weighing up all the possible choices. ☐
- b) I am interested in finding practical solutions to any problems. ☐
- c) I like to feel that I am fostering good working relationships. ☐
- d) I can exert a strong influence on decisions. ☐
- e) I can meet people who may have something new to offer. ☐

- f) I can get people to agree on a new course of action. ☐
- g) I feel in my element where I can give a task my full attention. ☐
- h) I like to find a field that stretches my imagination. ☐

6 If I am 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 however difficult they may be. ☐
- 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 believe I would keep cool and maintain my capacity to think straight. ☐
- f) I would retain a steadiness of purpose in spite of 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 discussions with a view to stimulating new thoughts and getting something moving. ☐

7 With reference to the problems to which I am subject to in working in groups:

- a) I am apt to show my impatience with those who are obstructing progress. ☐
- b) Others may criticise 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 motivate and stimulate me. ☐
- e) I find it difficult to get started 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 the things I cannot do myself. ☐
- h) I hesitate to get my points across when I run up against real opposition. ☐

Interpretation of Scores

Allocate the scores from the above questions into the table below. Then add up the points in each column to give a total team-role distribution score.

Section	CW	CH	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	e	b
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								

Source: With permission from Dr Meredith Belbin 'Management Games' and publishers Butterworth Heinemann

Belbin originally identified eight types or preference for working in teams. More recently Belbin has updated his work and revised some of the names allocated to types. The Chairman has become the Co-ordinator whilst the Company Worker has become the Implementor. At the same time a new type has been introduced. The Specialist is someone who provides a very strong but narrow input; Specialists are good at providing specialist information and facts. They may not be so good at relating to other team members or detracting themselves from the narrow functional or specialist role. For the purpose of this work we have used the

former profiles adopted by Dr Belbin and simply highlighted the name changes that he has introduced. Readers wishing to familiarise themselves more with his work should review his books published by Butterworth Heinemann and in particular *Team Roles at Work* as they provide a more detailed explanation of his research and findings.

Listed below are some of the essential characteristics of each type:

- Company worker/implementor – CW
- Chair/co-ordinator – CH
- Shaper – SH
- Plant – PL
- Resource investigator – RI
- Monitor evaluator – ME
- Team worker – TM
- Completer finisher – CF

The company worker/implementor

ROLE:

- Translates general ideas and plans into practical working objectives.
- Gets down to action.
- Breaks things into tasks and actions.
- Delivers actions and results.

METHODS:

- Helps ensure the team's objectives have been properly established and that any tasks have been clearly defined...
- Clarifies any practical details and deals with them.

- Maintains a steady, systematic approach.
- Is calm under pressure and reliable.
- Perseveres in the face of difficult and challenging targets.
- Provides practical support to other team members.

BEHAVIOURS TO AVOID:

- Un-constructive criticism of other team members' ideas and suggestions.
- Lack of flexibility. Company worker's have a high efficiency concern.
- Being resistant to new ideas or innovations.

As a manager, a Company worker or Implementor's strengths are their ability to define objectives and practical details. They are also very effective in introducing and maintaining procedures and structures. In organizations they are often promoted because of their inherent organizing abilities and skills.

The co-ordinator/chair

ROLE:

- Controls and organizes the activities of the team, making best use of the resources available.
- Pulls the team together.
- Stands back and helicopters above the team.
- Able to get people working together.

METHODS:

- Encourages the team members to achieve the team's objectives by helping them identify their roles and contributions.
- Encourages people to put the team objectives before their own.
- Provides positive feedback on individual performance.
- Smooths over disagreements and inter-team competition with keen people insight and understanding. Uses tact and diplomacy to control and manage.
- Identifies weaknesses in the team's composition and organizes and develops the team to neutralise any weaknesses.
- Co-ordinates resources.
- Exercises self-discipline and perseverance. Acts as a focal point for the team's effort, especially when under pressure.
- Delegates effectively.

BEHAVIOURS TO AVOID:

- Not recognising enough the abilities of the team. Not using all of the team resources.
- Competing with other team types.
- Failing to add a creative, innovative or challenging aspect to their role.
- Abdicating the leadership role in the face of strong competition (particularly from Shapers and possibly Plants).

As a manager, a Chair or Co-ordinator is in a good position to lead the team. They are comfortable standing back from the detail and can mobilise people to tackle the issues. Their effective inter-personal skills also mean that people will listen and take their lead from an effective Chair.

The shaper

ROLE:

- Makes things happen.
- Gives shape and strong direction to the activities of the team.
- Injects energy and drive into a team's proceedings.

METHODS:

- Directs the team's focus setting objectives and clear priorities.
- Adopts a wide perspective of the team's goals and helps individuals understand their roles and contributions.
- Exerts a strong directive influence on the team's discussions. Summarises outcomes in terms of objectives and targets.
- Will often appear impatient and in a rush.
- Focuses on progress and achievements. Intervenes when the team wanders from their objectives.
- Challenges others when they pursue other directions.
- Can be argumentative and dismissive of people who do not move as fast as themselves.

BEHAVIOURS TO AVOID:

- An overly directive style that assumes undue authority.
- Being too directive when making summaries, appraisals or interventions.
- Not being tactful. Overly blunt or even rude and insensitive to the needs of others.
- Becoming isolated or remote from the team. Losing identity as a team member.
- Being seen as too egotistic.
- Competing with other team members, particularly the Plant and the Monitor Evaluator.

A Shaper performs best when operating in a team of peers. If they find themselves in a formal leadership position they may well need to adopt more Co-ordinator type behaviours. This may require more involvement in routine activities and more self-discipline. Shapers normally focus on a broad-brush approach to getting things done. They have little time for the detail and want to drive forward. They also need to watch that their insensitivity to the needs of others does not in the long-term create problems for them. Tact and diplomacy is not always a high priority for shapers.

The plant**ROLE:**

- Acts as a primary source of ideas and innovation for the team.
- Creative – an agent provocateur.
- An independent perspective.

METHODS:

- Concentrates their attention on the big issues and major strategies.
- Formulates new and often radical ideas and approaches
- Looks for possible breakthroughs in approaches and methods.
- Times their contributions; presenting proposals at appropriate and inappropriate moments.

BEHAVIOURS TO AVOID:

- Attempting to demonstrate their capabilities over too wide a field.
- Contributing ideas for reasons of self interest and indulgence rather than the team's needs and so alienating the team.
- Taking offence when their ideas are evaluated, criticised and rejected. Sulking and refusing to make any further contributions to the team.
- Becoming too inhibited about putting ideas forward, especially in dominant, extrovert, or over-critical groups. Being intimidated or alternatively arguing with Shapers.

A Plant needs to exercise self-discipline and be prepared to listen to team members' comments on their ideas and proposals (particularly their Monitor Evaluator colleague(s)). If found in a leadership role a Plant must not let the stresses of controlling the team stifle their creative input.

In non-directive roles a Plant should expect to be used as a strong team resource; devoting their energies and talents towards establishing their role as a creative thinker and ideas person.

The resource investigator

ROLE:

- Explores the team's outside resources and develops useful contacts for the team.
- Harnesses resources for the team.
- A networker and free agent.

METHODS:

- Makes excellent contacts quickly. Develops effective and useful relationships and allies for the team.
- Uses their interest in new ideas and approaches to explore outside possibilities. Introduces new people and resources to the team.
- Develops their role as the team's main point of contact with outside groups. Keeps up-to-date with new and related developments that may be helpful to the team's work.
- Helps maintain good relationships in the team and encourages team members to make best use of their talents, especially when the team is under pressure.

BEHAVIOURS TO AVOID:

- Becoming too involved with their own ideas at the expense of exploring others.
- Rejecting ideas or information before submitting them to the team.
- Relaxing too much when the pressure is off.
- Getting involved in wasteful or unproductive activities. This often results from the RI's natural sociability.

Resource Investigators are skilled communicators with a creative outlook. They are vital to helping bring new resources into a team and their networking capabilities make them invaluable.

The Monitor Evaluator

ROLE:

- Analyses ideas and suggestions.
- Evaluates ideas and approaches for their feasibility and practical value.
- Deals with facts.
- Introduces a high level of critical thinking ability to any team.

METHODS:

- Uses high levels of critical thinking ability to assess issues and plans.
- Balances an experimenting outlook with a critical assessment.
- Builds on others' suggestions or ideas. Helps the team to turn ideas into practical applications.
- Makes firm but practical and realistic arguments against the adoption of unsound approaches to problems.
- Is diplomatic when challenging suggestions.

BEHAVIOURS TO AVOID

- Using their critical thinking ability at the team's expense.
- Tactless and destructive criticism of colleagues' suggestions. Liable to upset others because of this.

- Negative thinking; allowing critical thinking skills to outweigh their openness to new ideas. Provoking a 'You always see reasons why it cannot be done!' type of response.
- Competitive behaviour with others.
- Lowering the team's morale by being excessively critical and objective.
- Ignoring other peoples' passion or emotional commitment to an idea.

A successful Monitor Evaluator combines high critical thinking skills with a practical outlook. When a Monitor Evaluator is a team leader they need to ensure that they do not dominate other members of the team and stifle contributions. When in a non-directive role a Monitor Evaluator has the challenge of making their voice heard and not appearing threatening to colleagues. If they can avoid a tendency towards undue scepticism and cynicism their strengths will help them develop their management capability.

The team worker

ROLE:

- Strong team player and member.
- Helps individual team members to contribute.
- Promotes and maintains team spirit and effectiveness.

METHODS:

- Applies themselves to the task.
- Observes the strengths and weaknesses of team members.
- Supports team members in developing their strengths, e.g. builds on suggestions and contributions.

- Helps individuals manage their weaknesses by personal advice and assistance.
- Selfless in outlook.
- Improves the team communications and builds their relationships.
- Fosters a strong sense of team spirit by setting an example.

BEHAVIOURS TO AVOID:

- Competing for status or control in the team.
- Aligning with one team member against another.
- Avoiding dealing with conflict situations.
- Delaying tough decisions.

The team worker role can be exercised at different levels within a team. As a team leader manager any Team Worker should see their role as a delegator and developer of people. The team worker's qualities of conscientiousness and perseverance will help ensure that projects are completed to time and to the necessary levels of cost and quality.

The completer finisher

ROLE:

- Ensures all the team's efforts are as near perfect as possible.
- Ensures that tasks are completed and that nothing is overlooked.
- Injects urgency into problems.
- Attention to detail.

METHODS:

- Perfectionist – looks for errors or omissions; especially those that may result from unclear responsibilities.
- Works on tasks where attention to detail and precision are important.
- Looks for mistakes in detail.
- Actively identifies work or tasks that require more detailed attention.
- Raises the standards of all the team's activities.
- Maintains a sense of urgency and priority.

BEHAVIOURS TO AVOID:

- Unnecessary emphasis on detail at the expense of the overall plan and direction.
- Negative thinking or destructive criticism.
- Lowering team morale by excessive worrying.
- Appearing slow moving or lacking in enthusiasm.

A Completer Finisher role can be exercised at different levels within a team and can be easily combined with another role. As a manager a Completer Finisher needs to pay careful attention to their delegation skills and to keep unnecessary interference with team members to a minimum. In a junior role a Completer Finisher will need to develop tact and discretion so as to avoid earning a reputation as a 'nit picker and worrier.' CF's also tend to possess a nervous drive that needs to be controlled and directed if it is to have positive results.

Figure 6 shows how some of the roles might stereo-typically work in a project team.

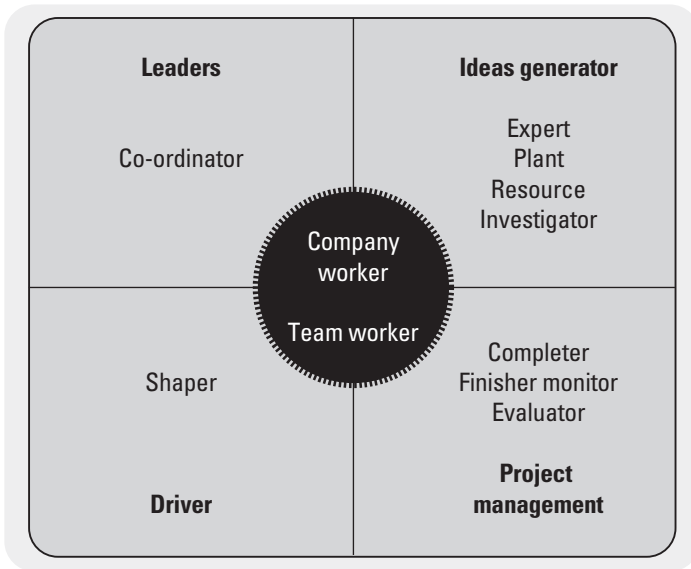


FIGURE 6: PROJECT TEAM WORKING ROLES

So you can see that from a relatively simple questionnaire you can generate a powerful analysis of preferences that people have when operating in teams. On client projects that are likely to involve some degree of team working and real complexity the early use of Belbin's approach can really start a team off in the right way. It also of course, helps us as internal consultants assess our own strengths and weaknesses in terms of team leading. We can then develop a strategy with the team to deal with any development gaps.

The attraction of Belbin's approach is that it clearly shows how important it is to have a range of skills and capabilities in order to deliver a strong project team. But at the same time you also need to consider the type of consultancy project you might be undertaking and what that might mean in terms of the types of Belbin preferences you require. If you are trying to break new ground and develop some highly innovative approaches you might need a lot of Plant or

Resource Investigator preferences. Equally if you are building a complex new production line you may require lots of Implementor and Monitor Evaluator type preferences.

Figure 7 provides some questions that you can reflect on with regard to this issue.

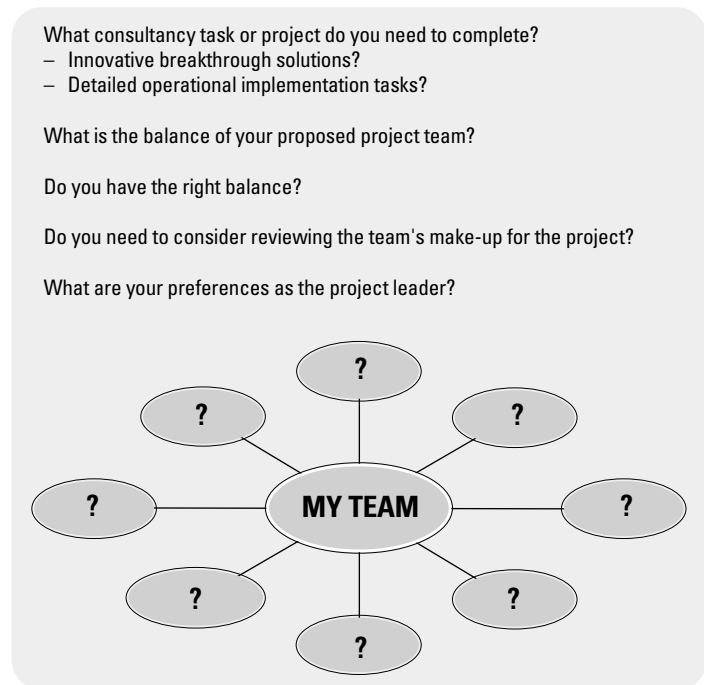


FIGURE 7: BELBIN'S TEAM TYPES – MY PROJECT TEAM

In some cases as an internal consultant you will be asked to take on the overall management of the implementation process perhaps being supported by an expert project manager. In other assignments you may be asked to provide assistance on a less involved basis. In either situation, your involvement during the implementation stage is important because very often only you and your client will have an overall understanding of the project's background and aims.

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