

Team Balance Sheet

In the table below, enter the names of your team members alongside their preferred roles. Their highest scoring one will go under “Primary Preference”, the second highest under “Secondary Preference” and the third highest under “Tertiary Preference.” You can have more than one name in any box.

<i>TEAM ROLE</i>	<i>PRIMARY PREFERENCE</i>	<i>SECONDARY PREFERENCE</i>	<i>TERTIARY PREFERENCE</i>	<i>TOTALS (rows)</i>
<i>Coordinator (CO)</i>				
<i>Shaper (SH)</i>				
<i>Plant (PL)</i>				
<i>Resource Investigator (RI)</i>				
<i>Monitor Evaluator (ME)</i>				
<i>Implementer (IM)</i>				
<i>Teamworker (TW)</i>				
<i>Completer Finisher (CF)</i>				
<i>Specialist (SP)</i>				

Missing Roles or Gaps:

Look at the rightmost column and write here the team roles that have a total of “0”.

Over-represented Roles or Surpluses:

Look at the rightmost column and write here the team roles with totals equal to or greater than 50% of the number of people in your team.