

TEAM ROLES IN FAMILY BUSINESSES AND QUALITY OF FAMILY BUSINESS – CASE STUDY

Ondřej Linhart¹; Petra Rydvalová²

Technical University of Liberec, Faculty of Economics,
Department of Business Administration and Management,
Voroněžská 13, 460 01 Liberec, Czech Republic

e-mail: ¹ondrej.linhart@tul.cz; ²petra.rydvalova@tul.cz

Abstract

Team roles, personal character, and temperament play a key role in team management. The unique approach brought by Dr. M. Belbin's unique approach, known as the Belbin Team Roles, is widely used in education, research, and professional consultancy. However, there is a significant gap in research on team roles in family businesses, which hinders the understanding of a specific form of human economic activity: family business.

The aim of this article is to show the methodology used in the research of team roles in family businesses, with a focus on family business quality in one specific Czech company. The company was evaluated using Belbin Team Roles 360-degrees analysis and a Family Business Quality self-evaluating questionnaire. This case study provides a foundation for future research in this area.

Keywords

Belbin Team Roles; Family Business; Business quality; Team; Social entrepreneurship.

Introduction

The family is not only important from a social point of view, but also historically linked to the economic activity of people and is considered to be the basic building block of any human society [1]. Family business is the oldest form of business and still functions as a model in the 21st century [2]. In the economies of East Asia, the Middle East and Southern Europe, families control up to 95% of businesses [2], and estimated up to 80% of businesses worldwide [3]. Therefore, it is crucial to understand family businesses and to try to understand them more deeply.

Family businesses have received significant scientific attention, particularly in relation to sustainability, succession planning, and financial management [4–7]. However, the unique approach of viewing family business as a team has been largely overlooked. Both manual research and artificial intelligence tools have shown that there is a gap when it comes to examining the impact of team roles on family businesses. When asked to show any data concerning family business and team roles, the software answered,

“There is a gap in research when it comes to examining the impact of team roles on family businesses. While much research has been conducted on the factors that contribute to the success or failure of family businesses, little attention has been paid to the specific roles that family members play within the business, and

how these roles affect the business's overall performance.” Tested on March 6 2023, <https://openai.com/>.

On the other hand, there are articles that examine Belbin Team Roles in entrepreneurship. For example, one study attempted to identify leader team roles within startups [8].

The topic of team roles is addressed in the context of increasing team performance [9–11]. It is worth noting that Belbin's theory of team roles is not just applicable to managers in family businesses (where not all family members are in managerial positions), but also to non-managers. This theory has been applied in various fields such as business and education, and has been proven successful in a sibling business team [12].

One family business, which wishes to stay anonymous, was evaluated using a combination of two methods – Belbin Team Roles and self-evaluating questionnaire called National Award of Czech Republic for Quality of Family Business (developed through academic research focused on vitality of family businesses). The first method gave insights into the work style of each team member, and when combined, identified possible gaps that could occur in their cooperation and predicted potential problems of the team as a whole. On the other hand, the second method evaluated the management and governance quality of the family business based on numeric data in three modules – Governance, Management and Finances [14].

1 Aim of the Article

The purpose of this article is to demonstrate the research methodology used for investigating team roles in family businesses, with a focus on one specific Czech family business. In order to assess the company's performance, the Belbin Team Roles 360-degree analysis and a self-evaluating Family Business Quality questionnaire were utilized. This case study serves as a foundation for further research in this area.

Based on these methods, the research question was posed: *“Is it possible to predict family business quality based on Belbin Team Roles within the team?”* In this case study, the detailed results will be presented and discussed.

After receiving positive feedback and identifying potential deficiencies in management processes and governance through earnest consultation with the tested team, it was decided to continue the research on other family businesses.

2 Methodology

This article only focuses on one family business that volunteered for the case study, and no statistical method was employed for representative selection. However, a comprehensive research methodology was carried out to analyze the family business, and therefore it will be discussed in detail.

Planned milestones of constructing this case study were:

- a) Analysis of family team members using Belbin individual report
- b) Analysis of family team using Belbin team report
- c) Evaluation of family business quality using National Award of the Czech Republic for Quality of Family Business questionnaire (Quality of Family Business)
- d) Identification of deficiencies in the results from the second method using the first method
- e) Direct interview with the family team members

2.1 Belbin Individual Report and Belbin Team Report

Meredith Belbin identified 9 team roles that occur in teams during the cooperation of their team members. Each role is associated with specific strengths and acceptable weaknesses that are a necessary trade-off to ensure that the team works well together. In practice, every individual has a tendency towards one or more team roles and usually performs multiple roles at once. Usually, 2-3 team roles are preferable, 2-5 team roles are possible to undertake and 2-3 roles are unfeasible for the individual to perform. The typology is shown in Table 1.

Tab. 1: *Belbin Team Roles*

Team role	Strengths	Acceptable weaknesses
Shaper	Challenging, dynamic, thrives on pressure. Has the drive and courage to overcome obstacles.	Can be prone to provocation, and may sometimes offend people's feelings.
Coordinator	Mature, confident, identifies talent. Clarifies goals.	Can be seen as manipulative and might offload their own share of the work.
Plant	Creative, imaginative, free-thinking, generates ideas and solves difficult problems.	Might ignore incidentals, and may be too preoccupied to communicate effectively.
Resource Investigator	Outgoing, enthusiastic. Explores opportunities and develops contacts.	Might be over-optimistic, and can lose interest once the initial enthusiasm has passed.
Monitor Evaluator	Sober, strategic and discerning. Sees all options and judges accurately.	Sometimes lacks the drive and ability to inspire others and can be overly critical.
Implementer	Practical, reliable, efficient. Turns ideas into actions and organizes work that needs to be done.	Can be a bit inflexible and slow to respond to new possibilities.
Team Worker	Co-operative, perceptive and diplomatic. Listens and averts friction.	Can be indecisive in crunch situations and tends to avoid confrontation.
Completer Finisher	Painstaking, conscientious, anxious. Searches out errors. Polishes and perfects.	Can be inclined to worry unduly, and reluctant to delegate.
Specialist	Single-minded, self-starting and dedicated. They provide specialist knowledge and skills.	Tends to contribute on a narrow front and can dwell on the technicalities.

Source: [13]

Further, the team roles are divided into three groups. Resource Investigator, Coordinator and Team Worker fall into the category **social**; Plant, Monitor Evaluator, and Specialist into the category **thinking**, and Shaper, Implementer, and Completer Finisher into the category **action**. [13]

Ideally, at least one member of a team should occupy each category with their dominant team role.

In order to identify an individual's team role of, they must evaluate their typical work style using a certified questionnaire. Then, 4-6 observers are needed to match the evaluated person with written typical strengths and weaknesses. This approach is known as 360 degrees analysis. The result of this method is a report that indicates preferred and therefore dominant

team roles and working style. All of this information is displayed in a chart from the most preferred to the least preferred team role.

By combining all the individual reports, a team report emerges.

2.2 Quality of Family Business

A self-evaluating method has been developed mainly by members of the Faculty of Economics at the Technical University of Liberec for family businesses. In this method, the family business as a whole, including its representatives, evaluates three areas of doing business. These areas are also referred to as “modules”, and each module consists of 10 questions. Respondents answer on a 6-step scale, indicating how much they agree with each statement. Based on the responses and statistical weights of each question, an overall mark is calculated ranging from A (the best) to F (the worst). By taking a simple arithmetical average of all three modules, an overall quality rating for the family business is obtained [14].

An example question from the first module (Governance) could be:

The company has a close connection to the municipality of the place/headquarters of its business (it has a closed cooperation agreement with the municipality, is made visible within the municipality, e.g. on the website municipality portal, has some support from the municipality).

The second example from the second module, management, is:

Conflicts in the family are strictly separated from conflicts in the company; communication in conflict resolution is open and effective.

Lastly, an example from the third, financial module:

The property of the family business and the private property of the owner and family members are strictly separated. [14]

3 Specific Family Business and Testing Results

In this section, the tested company is described, the results are shown and the case study is presented. The company went through all the steps of evaluation and in a direct interview, they stated that their participation in the case study revealed previously hidden information.

3.1 Company Introduction

First, the tested company meets the criteria of a local definition of a family business:

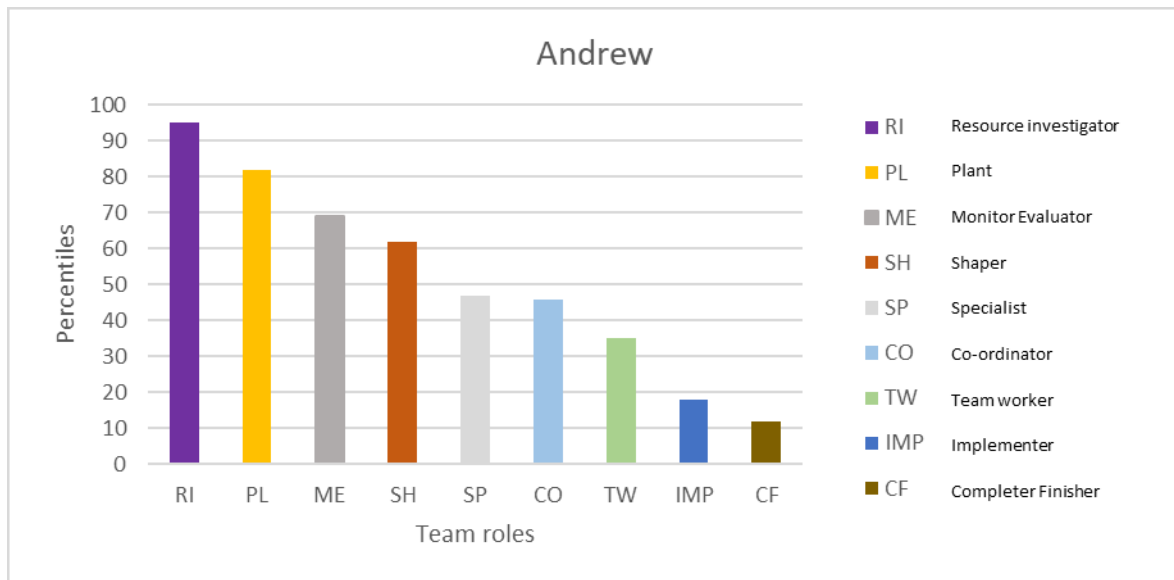
“A family business corporation is a business corporation in which members of one family directly or indirectly holds the majority of voting rights and at least one member of this family is a member of the statutory body of this business corporation.” [15]

Therefore, the company is suitable for the research purposes. The members of the family business have been involved in entrepreneurship even before officially establishing the family business and being registered in 2018. There are three main members in the business, two sons, Andrew and Vojtěch, and their mother Alena. The main activity of the company is event management.

3.2 Results

Using Belbin individual report, each of the three family business members was evaluated. These three members are the only people involved in the governance and management of the

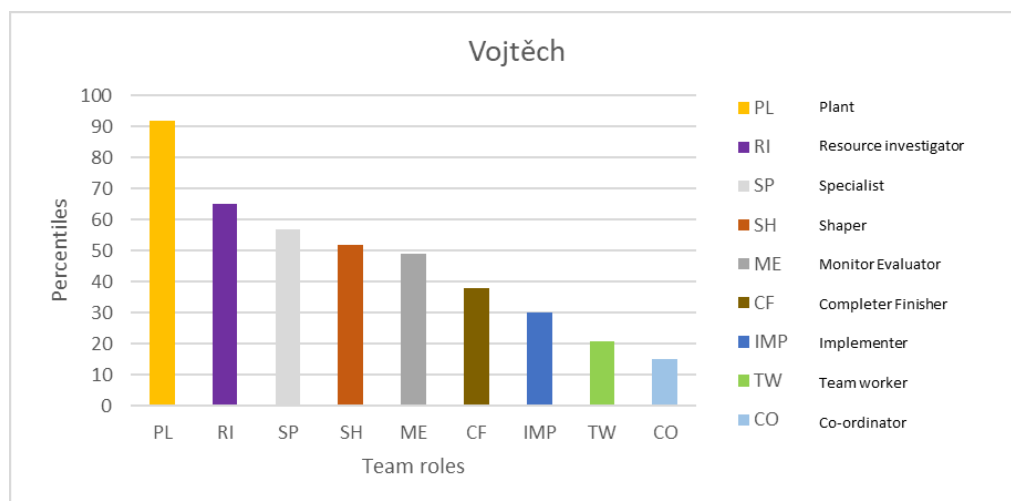
family business. The discussion will start with **Andrew** as an elder son. His profile based on Belbin individual report is as follows, see Figure 1:



Source: Own, based on results from Belbin Team Roles individual report [16]

Fig. 1: Distribution of team roles for Andrew

It is evident that Andrew favors the working styles of Resource Investigator and Plant, which are two major roles responsible for introducing new ideas (according to Belbin). On the other hand, Resource Investigator role is weak in putting these ideas into practice and hence requires support. Monitor Evaluator came as his third role, mainly based on the evaluation from his observers, therefore he seems to be critical in a constructive way. In the middle roles of Shaper is visible to be still quite strong, further Specialist and Coordinator, which are roles suitable for leadership. On the other hand, Andrew shows insignificant proportions for the two least preferred roles of Implementer and Completer Finisher. These roles are known for their systematic approach towards work, with Implementer being a very practical person and Completer Finisher focusing on details and perfect work delivery.



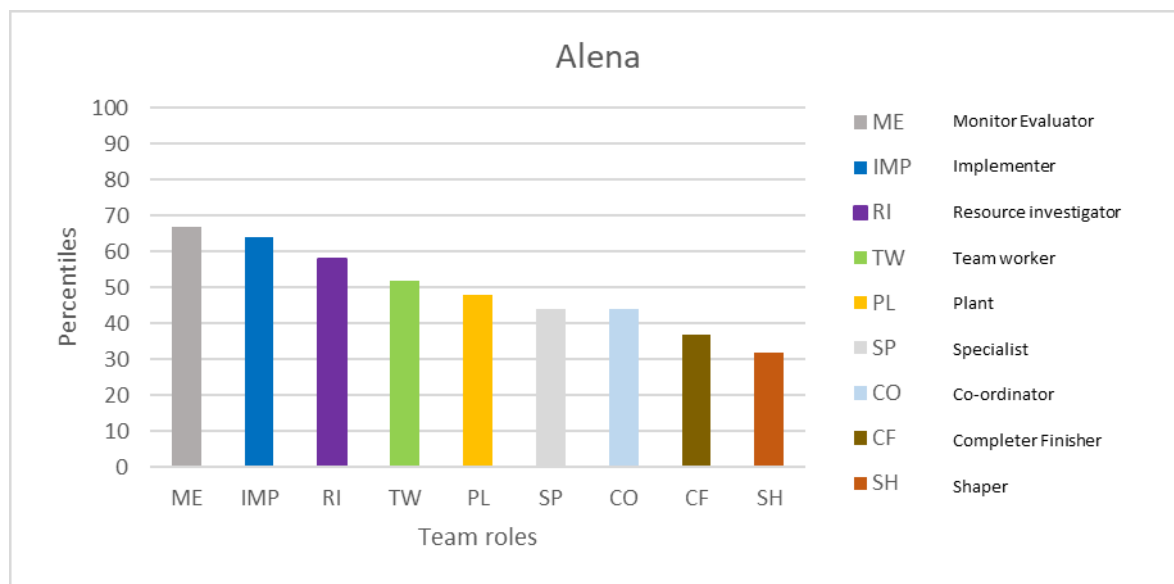
Source: Own based on results from Belbin Team Roles individual report [16]

Fig. 2: Distribution of team roles for Vojtěch

With enough space and the right practical support, Andrew's ideas and his drive could be excellently brought into life, but he closely cooperates with his younger brother, **Vojtěch**,

whose profile has more similarities than differences with Andrew's, making him a great complement to Andrew's deficiencies in certain team roles, as clearly shown in Figure 2.

As we can see, Vojtěch has a working style that is very close to his brother Andrew's. He is capable of inventing new ideas and tends to become attached to them, which is normal for the Plant team role. Compared to Andrew, Vojtěch is more introverted and is better at coming up with new ideas. Completer Finisher and Implementer, representing practical approach towards work, are rather weak in Vojtěch's example, but not as weak as Andrew's. On the other hand, two team roles that very much concentrate on close cooperation with others, that means Team Worker and Coordinator, are the least preferred. Therefore, Vojtěch's talent lies in inventing something new and unconventional, he is more practical than Andrew but unable to work effectively in close cooperation with the others. If it would be up to him, he would rather work individually.

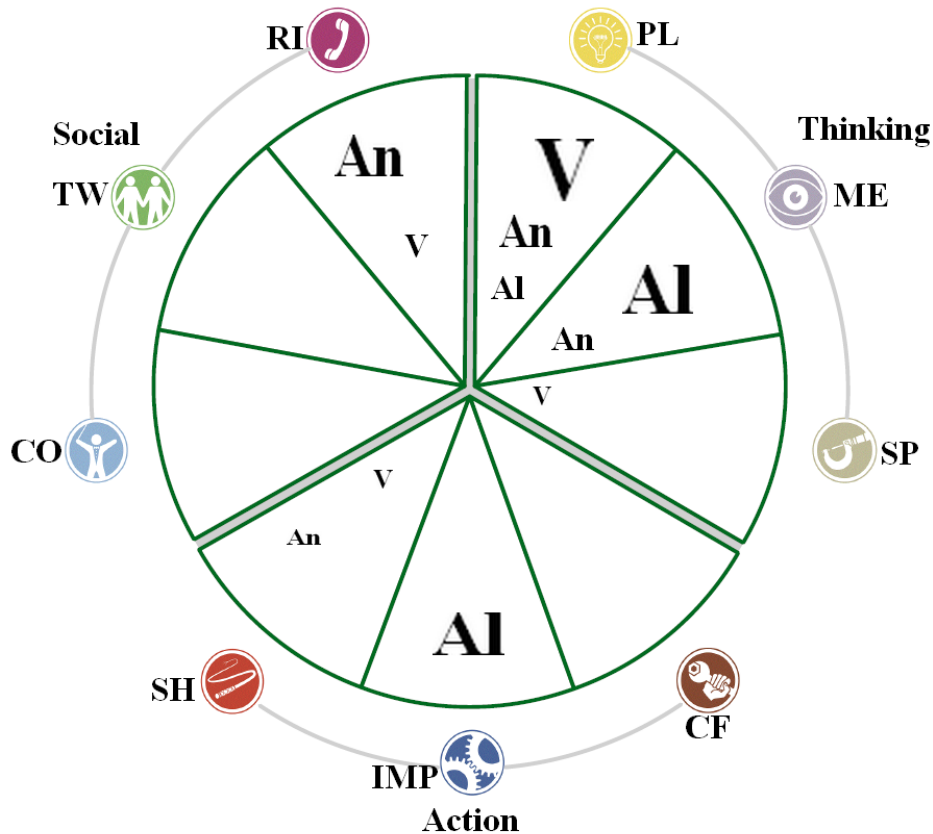


Source: Own based on results from Belbin Team Roles individual report [16]

Fig. 3: Distribution of team roles for Alena

Figure 3 shows a profile of Alena, the mother of the two brothers, which is notably different from theirs. In comparison to her sons, Alena's preferred team roles decline at a much slower rate. Although not visible in the graph, she evaluates herself differently than how others perceive her. Alena is more flexible and can take on tasks that may not be ideal for her, but she is protective and finds it difficult to trust others to deliver satisfactory outcomes. She is not very effective when it comes to delegating workload, which is the main strength of the Coordinator role, in which she scores quite low. Alena's preferred team role is the Monitor Evaluator, and she is able to critically evaluate situations and pay attention to detail. She is also more practical, as in the Implementer role. Her third role is Resource Investigator, and the least preferred role is the Shaper. In reality, she often plays the Resource Investigator and Shaper roles more often because she has been the key contact person and manager of the family business.

Based on Belbin team report and modified after a direct interview with the team, the team role circle was established (represented in Figure 4). The circle shows the distribution of the team's preferred roles after the interview (indicated by smaller letters). In the circle, letters **An** represents **Andrew**, **V** represents **Vojtěch**, and **Al** represents **Alena**.



Source: Own based on results from Belbin Team Roles team report [16]

Fig. 4: Distribution of team roles in the team

The team seems to have a strong inclination towards innovative approach and creating new ideas, with the Plant role being heavily occupied. The team also possesses the ability to assess reality with precision through the Monitor Evaluator role and exhibits strength in external communication through the Resource Investigator role. However, there is a significant risk in the Action section as Alena is the only one capable of handling practical work. The team's delegation of workload is an area of concern as the Coordinator role is missing. Additionally, the peaceful cohesion of the team is at risk due to the absence of a Team Worker role.

As stated in the official team report (and confirmed in the interview),

This team is likely to seek to explore untried possibilities, which could lead to very lively meetings. However, there is some risk that ideas will be presented in a competing fashion, and this can make it difficult to sort ideas into those that need to be eliminated and those that the team will pursue further. Solutions will be a key role for someone who is quick-thinking, level-headed and willing to discipline team members to achieve the meeting's purpose.

At its best, the team has creative and innovative potential. However, there may be situations where team members need to respect each other's ideas.

The worst-case scenario is that the team is unable to finish what they started and may disappoint their customers or clients with their mistakes or omissions.

As shown later, there is a strong connection between the culture of a family business team and the overall business quality. Insufficient delegation may result from a lack of coordination, which has been proven true.

3.3 Quality of Family Business

The third phase of this qualitative research involved evaluating the company using the Quality of the Family Business method. Alena and Andrew, the current and next-generation managers, took responsibility for rating the business performance in three modules, with each module consisting of ten questions. During a direct interview, the team stated that they expected above-average quality but found some gaps. In the following paragraphs, only answers to statements that deviate significantly from the marks received in the modules will be discussed.

Table 2 indicates the score in each of the three modules:

Tab. 2: *Score in three modules of Quality of Family Business*

Module 1 – Governance		Module 2 – Management		Module 3 – Finance		Overall	
72	B	55.6	C	87.8	A	72	B

Source: Own based on results from *Quality of Family Business* questionnaire [14]

3.3.1 Governance Module

In the governance module, the family business performance scored 72%, marked with B. Questions that demand attention are mainly 1.1 and 1.2:

- 1.1 In the company/enterprise/farm (hereinafter the company) a written document (of the family constitution type) is drawn up, which sets the relations between family members, expresses family values and rules of conduct.*
- 1.2 The company has established “organs” linked to its legal form of business (e.g. family assembly, family council, executive board, supervisory board, board of directors), which solve potential conflicts, set communication rules, etc.*

Both statements were evaluated by number 2 (0 is strong disagreement and 5 is full agreement). The entire family business operates on an informal basis and therefore organs and documents that could bring structure to the working environment are present only partially. This also explains the lack of team roles such as Implementer or Completer Finisher, which are known for their practical and conscientious working style. The somewhat chaotic working style of Resource Investigator and Plant, both strong team roles within the team, further reinforces this informality.

Question 1.7 received a score of 0, indicating a clear denial.

- 1.7 When handing over a family business, the fact that it can be managed by a hired professional can be taken into account.*

Neither Andrew nor Alena would even consider that a hired executive manager might be an option. All three family members have a significant weakness in delegation and tend to either do the work themselves or neglect it instead of passing it on to a non-family member. This could be attributed to the missing team role of a Coordinator in their team, who is an expert in effective delegation.

3.3.2 Management Module

In the management module, the family business performance scored 55.6%, marked with C. The lack of a strong managerial role of a Shaper or Coordinator (and possibly a Specialist) clearly influenced relatively weak performance in this module. During the interview, the team stated that they struggle with long-term strategic planning, as evidenced by their answers to questions 2.1 and 2.3. Additionally, the team lacks sufficient delineation of competences, which further exacerbates the problem.

2.1 Long-term family and business goals are specified in the family and in the company

2.2 Not only the business owner, but also family members are involved in deciding on the strategic plan of the family business.

Question 2.5 scored also low, marked with number 2.

2.5 Conflicts in the family are strictly separated from conflicts in the company, communication in conflict resolution is open and effective.

Andrew is suitable for the role of Shaper, while Alena is suitable for the role of Coordinator. Thus, it is essential for the team to clarify management responsibilities between these two since there are some shortcomings in the module and no willingness to delegate managerial tasks to an external member.

3.3.3 Financial Module

In the financial module, the family business performance scored 87.8%. The questions related to responsible operation with financial resources received high ratings of 4 or 5. The income is distributed according to previously agreed rules and is mostly invested into further development. The initial capital came from internal sources or from municipality donations. The financial management is transparent and well-managed. The only downturn was identified in questions 3.1 and 3.2

3.1 The property of the family business and the private property of the owner and family members is strictly separated

3.2 When starting a family business, a strategic financial plan was drawn up. It is further evaluated and updated in relation to the stages of the company's development

Andrew did not agree with these statements, and marked the first question with a 2 and the second question with a 1. Alena, on the other hand, insisted on a higher score because she is the main responsible person for this area.

Neither Andrew nor Vojtěch have a deep insight into family business finances, as they claimed. Only Alena and her Implementer and Monitor Evaluator team roles excel in this field. The clear competencies given from the rest of the team and suitable team roles to undertake tasks of financial decision-making proved to create better results than in management module where competencies and team roles mostly clash instead of harmonizing with each other.

3.3.4 Overall Quality

The calculated average of the three modules' score is the overall mark of B and a score of 72%. This family business is viable but needs to formalize its competencies and implement strategic planning. Most importantly, the business needs to clearly identify who will be the main responsible manager.

Conclusion

After analyzing a specific family business team using Belbin Team Roles and Quality of Family Business methods, it was observed that there is a direct correlation between typical strengths and weaknesses of each team role and phenomena in Quality of Family Business. While Belbin methodology is not numerical and this case study provides insight into only one family business, it can still be linked to the Quality of Family Business.

The management module of Quality of Family Business had the lowest score, indicating a lack of managerial team roles. Only one team member was identified with a practical approach towards work, but since this person was responsible for all financial issues, the financial module scored high.

The outcomes for the team are numerous. To achieve better performance, the management style must be reworked, and a clear leader with undeniable competencies should be appointed. This will help with better delegation and strategic planning. The team should also consider enhancing the competencies and responsibilities for non-family employees to involve them more closely in team cooperation, especially those employees, who show attributes of Completer Finisher, Team Worker, or Co-ordinator.

The research outcomes are also valuable. The purpose of this case study was to test the methodology, which proved seminal and useful. Belbin Team Roles, as the first step, can identify gaps in team cooperation, which can lead to specific deficiencies in areas of entrepreneurship identified by the method of Quality of Family Business. Therefore, this case study provides a positive answer to the research question: “*Is it possible to predict family business quality based on Belbin Team Roles in the team?*”

Future research on numerous family businesses is underway to further affirm this question. With enough tested teams, it might be also possible to determine which areas of doing business (which modules) might be affected by which gaps in team roles. Finally yet importantly, future research can lead to normative recommendations for family businesses to use in order to support and enhance their performance.

Acknowledgements

This article was supported by special funding for specific undergraduate research within the student project SGS-2023-1389.

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TÝMOVÉ ROLE V RODINNÉM PODNIKU A KVALITA RODINNÉHO PODNIKÁNÍ – PŘÍPADOVÁ STUDIE

Při řízení týmu hrají klíčovou roli týmové role, osobní charakter nebo temperament. Jedinečný přístup přinesl dr. M. Belbin – Belbinovy Týmové Role, které se využívají jak ve vzdělávání a výzkumu, tak i v profesionálním poradenství. Nikdy však nebyl proveden úplný výzkum týmových rolí v rodinných podnicích, což vytváří mezeru v chápání této specifické formy lidské ekonomické činnosti – rodinného podnikání.

Cílem tohoto článku je ukázat metodiku, která je využívána při výzkumu týmových rolí v rodinných firmách s vazbou na kvalitu rodinných firem na jedné konkrétní české firmě, která byla hodnocena pomocí 360ti stupňové analýzy Belbinových Týmových Rolí a sebe-evaluačního dotazníku Kvalita Rodinného Podnikání. Tato případová studie pokládá základ pro budoucí výzkum.

TEAMROLLEN IN EINEM FAMILIENUNTERNEHMEN UND FAMILIENUNTERNEHMENSQUALITÄT – EINE FALLSTUDIE

Teamrollen, persönlicher Charakter oder Temperament spielen bei der Teamführung eine Schlüsselrolle. Ein einzigartiger Ansatz wurde von Dr. M. Belbin – Belbins bym bole, die sowohl in der Bildung und Forschung als auch in der professionellen Beratung eingesetzt werden. Allerdings gibt es noch nie eine vollständige Forschung zu Teamrollen in Familienunternehmen, was zu einer Lücke im Verständnis dieser spezifischen Form menschlicher Wirtschaftstätigkeit – des Familienunternehmens – führt.

Ziel dieses Artikels ist es, die Methodik aufzuzeigen, die bei der Untersuchung von Teamrollen in Familienunternehmen verwendet wird, mit Bezug zur Qualität von Familienunternehmen in einem bestimmten tschechischen Unternehmen, die anhand einer 360-Grad-Analyse von Belbins Bym Pains bewertet wurde und ein Selbstbewertungsfragebogen zur Qualität von Familienunternehmen. Diese Fallstudie legt den Grundstein für zukünftige Herausforderungen

ROLE ZESPOŁOWE W FIRMIE RODZINNEJ A JAKOŚĆ FIRMY RODZINNEJ – STUDIUM PRZYPADKU

Role zespołowe, charakter osobisty i temperament odgrywają kluczową rolę w zarządzaniu zespołem. Unikalne podejście zaproponował dr M. Belbin – Role Zespołowe Belbina, które znajdują zastosowanie zarówno w edukacji i badaniach, jak iw doradztwie zawodowym. Nigdy jednak nie przeprowadzono pełnych badań dotyczących ról zespołowych w firmach rodzinnych, co stwarza lukę w rozumieniu tej specyficznej formy działalności gospodarczej człowieka – firmy rodzinnej.

Celem niniejszego artykułu jest pokazanie metodyki stosowanej w badaniach ról zespołowych w firmach rodzinnych w powiązaniu z jakością firm rodzinnych na przykładzie jednej konkretnej czeskiej firmy, która została oceniona za pomocą 360-stopniowej analizy Ról Zespołowych Belbina oraz kwestionariusza samooceny Jakość Rodzinnego Biznesu. To studium przypadku stanowi fundament dla przyszłych badań.