

• WORK ALLOCATION • GUIDE

How to allocate work *by skill*, not by habit

Most work is handed out by who is free, who is senior, or who did it last time. None of those is the same as who is best placed to do it well. This is how to allocate work by skill instead: matching each task to real, evidenced capability, so the right person does the right job.



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Reading time 12 min • **Method** Upleashed 0 to 5 capability framework • **Updated** May 2026

THE SHORT ANSWER

To allocate work by skill, first know what each task actually requires, then match it to the person whose capability fits, not just whoever is free or senior. Use a clear view of who can do what, set a minimum capability level for each task, and deploy people against it, balancing the best fit against development, workload and risk. In short: **map the capability, set the level each task needs, and match people to work on evidence, not habit.**

KEY TAKEAWAYS

- **Allocation by skill beats allocation by habit.** Who is free, senior or did it last time is rarely who is best placed.
- **Every task has a required level.** Decide the minimum capability a task needs before deciding who does it.
- **Match on evidence.** A clear capability view shows exactly who meets the bar, and who is one step away.
- **Balance fit with development.** Sometimes the right call is a capable stretch, with support, not always the safest pair of hands.
- **Protect the regulated work.** For compliance-critical tasks, the required level is a hard gate, not a preference.

— START HERE

What "allocating work by skill" *really* means

Allocating work by skill means matching each task to the person whose capability genuinely fits it, using an honest view of who can do what. It sounds obvious, yet most work is handed out on availability, seniority or habit, which is a different thing entirely.

Skill is not the same as availability or seniority

The default ways work gets assigned all use the wrong signal. "Who is free?" optimises for a clear diary, not a good outcome. "Who is senior?" assumes rank equals relevant skill, which it often does not. "Who did it last time?" entrenches single points of failure. Allocating by skill uses the right signal, evidenced capability for **this** task, and treats availability and seniority as constraints to balance, not the basis of the decision.

It is matching, in both directions

Good allocation is a two-way match. Each task has a required capability level; each person has a capability profile. The job is to pair them so the work is done to standard and people are neither badly over-stretched nor wasted on tasks far below their level. A capability view makes both sides visible at once, so you can see not just who *can* do something, but who is the **best-placed** to do it right now.

The goal is the right work to the right person

Done well, skill-based allocation quietly improves almost everything: work is done to standard the first time, less needs checking or redoing, capable people are not bored on trivial tasks, developing people get the right stretch, and regulated work always sits with someone qualified. It is one of the highest-leverage things a manager does, and most do it on instinct. Making it deliberate, and evidence-based, is the whole point.

— WHY IT MATTERS NOW

The wrong person on the job is *expensive*

Allocate by habit and the costs are quiet but real: rework, supervision, missed standards, bored experts and frustrated developers. Allocate by skill and those costs fall away, which is why the shift to skills-based deployment is accelerating.

93%

DELOITTE, 2025

of organisations say moving away from rigid job-based work towards skills is important to their success.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, so who can do what shifts constantly.

63%

WEF, 2025

of employers call skills gaps the biggest barrier to transformation, making smart deployment essential.

The direction of travel is clear: organisations are moving from organising work purely around fixed job titles towards deploying people by the skills they actually hold. The reason is simple economics. Matching capability to task **reduces the rework, supervision and reassignment** that come from putting the wrong person on the job, keeps regulated work compliant, and uses your most skilled people where they add the most value. In a world where skills shift this fast, allocating by an out-of-date job description is leaving performance on the table.

— THE METHOD

Seven steps to allocate work by skill

This turns allocation from a gut call into a quick, defensible decision. Work through it in order: understand the task, see the capability, match the two, then balance the match against the real-world constraints.

1

Define what the task actually requires

Start with the work, not the people. For each task or job, name the skills it needs and the minimum capability level for each. A routine task might need Level 2; a complex or customer-facing one Level 3; a regulated one a firm Level 3 or 4 with no exceptions. Being explicit about the required level is what makes the later matching objective rather than a feeling.

WATCH OUT Vague requirements lead to lazy allocation. "Someone good with data" is not a requirement; "Level 3 in data analysis" is.

2

Map who can do what

You cannot allocate by skill without seeing skill. Score the team against the relevant skills on one consistent scale, so you have a clear capability map: who is capable, who is developing, who is expert, on each skill that matters. This map is the single source of truth that replaces "I think Priya's good at that" with evidence anyone can check.

WATCH OUT Allocating from memory favours the visible and the recently-praised. A current map surfaces capable people you had forgotten about.

3

Match the task to capable people

Lay the requirement against the map. For each task, the people at or above the required level are your candidates; everyone below is not, at least not without support. This instantly narrows the field from "the whole team" to "the people who can actually do this to standard", which is most of the allocation decision made on evidence.

WATCH OUT Do not quietly drop the required level to fit who is free. Lowering the bar to suit availability is how quality and compliance slip.

4

Weigh the regulated and critical work first

Some tasks have a hard capability gate: compliance, safety, anything where being under-qualified is a real risk. Allocate these first and strictly, only people who genuinely meet the required level, with the evidence to prove it. For these, fit is not a preference to balance against convenience; it is a non-negotiable requirement.

WATCH OUT Never let "they'll be fine" override a regulated requirement. For compliance-critical work, the required level is a gate, not a guide.

5

Balance fit against development

The best-qualified person is not always the right choice. Sometimes the smart move is to give a capable, developing person a stretch, with a more expert colleague on hand, so the work gets done and a skill grows at the same time. Use allocation deliberately as a development tool, but only where the task and the support make the stretch safe.

WATCH OUT Always handing critical work to your one expert protects today but starves development and deepens key-person risk. Plan the occasional supported stretch.

6

Balance the workload across the team

Skill-based allocation has a failure mode: everything flows to your most capable people until they are swamped and everyone else is idle. Watch the spread. Where two people both meet the bar, let workload, development and variety break the tie. The aim is the right person for the task *and* a sustainable load across the team.

WATCH OUT If your best people are drowning while others coast, you have a single point of failure forming. Spread the work, and cross-train to widen the options.

7

Review and feed it back

Allocation is a loop, not a one-off. After the work, note how the match went: did the person meet the standard, did the stretch pay off, where was cover thin? Feed that back into the capability map and the next allocation. Over time this turns each decision into better data, and reveals exactly where cross-training would give you more flexibility.

WATCH OUT An allocation map that never updates drifts out of date. Let real outcomes keep the capability picture honest.

— THE BALANCING ACT

Three things to balance in every allocation

Allocating by skill is not just picking the highest scorer. The best decisions hold three things in tension at once, and a capability map lets you see all three.

BALANCE 01

Fit

Does the person meet the level the task requires? This is the starting filter, and for regulated work it is a hard gate. No fit, no allocation, unless you add support to close the gap.

BALANCE 02

Development

Could this task grow someone? A supported stretch for a developing person builds capability and reduces key-person risk, turning routine allocation into deliberate development.

BALANCE 03

Load

Is the work spread sustainably? Skill-based allocation tends to overload the best people. Where more than one person fits, let workload and variety decide.

The art is holding all three together. Pure fit, every time, burns out your experts and develops no one. Pure development risks quality and compliance. Pure load-balancing ignores who is actually capable. A good allocation weighs them deliberately: fit sets the candidates, the regulated tasks take strict priority, and development and load decide between equally-capable options. A clear capability map is what makes that judgement quick rather than agonising.

The 0 to 5 capability framework

To match people to work, you need a shared definition of capability, so "required level" and "this person's level" mean the same thing. This fixed, research-backed scale provides it, with Level 3 as the point at which someone can do a task to standard, unsupervised, the usual bar for allocation.

-
- 0** **No skill required or desired** EXCLUDED
No expectation that the person or role needs this skill within the next year. Take a longer-term view here, and do not use this level for short-term assessments. Not a candidate for tasks needing this skill.

 - 1** **In training / Trainee** WEIGHTING 25%
Expected to be proficient within a year. Has completed up to 75% of training and does not yet fully understand the quality requirements. Can take such work only with close supervision.

 - 2** **Developing capabilities** WEIGHTING 50%
Has completed more than 75% of training. Can probably perform the task alone, but consistent quality and productivity are not yet evidenced, so complex output still needs checking. A candidate for a supported stretch.

 - 3** **Capable** WEIGHTING 75% · USUAL ALLOCATION BAR
Has completed 100% of training and shown consistent quality and productivity. Can work unsupervised. This is the level most tasks should be allocated at, work can be handed over with confidence.

 - 4** **Subject Matter Expert / Trainer** WEIGHTING 100%
Prolonged experience at a consistent level. Works autonomously and can train others, so a Level 4 is ideal for the hardest tasks, or for supporting a developing person on a stretch. If the skill has not been used in three months, drop back to Level 3 to reconfirm competence.

 - 5** **Strategic ownership / Leadership** WEIGHTING 100%
Can define and develop new processes and skill requirements, show cross-function expertise, and demonstrate leadership. Carries the same numeric weight as Level 4; the purple flag highlights strategic capability and helps you spot succession candidates.

How the level decides the allocation

Each task carries a required level; each person carries a current level on that skill. The simple rule: a person is a candidate when their level meets or exceeds the requirement. The proficiency weightings, Level 1 = 25%, 2 = 50%, 3 = 75%, 4 and 5 = 100%, with 0 excluded, also let you compare candidates and spot who is one level short, a supported-stretch option rather than a flat no.

A worked example. Allocating a Compliance (KYC) task that requires Level 3:

KYC scores Sarah **2**, Mark **1**, Priya **4**, James **1**, Aisha **1**, Tom **2**
meets Level 3 → **Priya only** (the single qualified person)
so allocate to Priya, and note the key-person risk to fix by cross-training.

— SEE IT ON A REAL TEAM

What allocating by skill looks like *on a matrix*

Here is the same six-person team, used to allocate four real tasks. Each task has a required level; the matrix shows who meets it and names the best-placed person, with the reasoning. Notice the decision is never just "who is free".

Task to allocate	Needs	Qualified candidates	Best-placed, and why
KYC compliance check	L3	Priya	Priya only one qualified, fix the risk
Complex data analysis	L3	—	Priya + support nobody at L3, stretch the closest
Handle escalated complaint	L3	Sarah, Mark, Priya, James, Aisha, Tom	Aisha capable, spreads load off experts
Coach a new starter	L4	Priya	Priya only L4 coach, the clear fit

1 task has no qualified person (data analysis), so stretch with support 2

tasks rest on Priya alone, a key-person risk the map makes visible

Illustrative allocation on the Upleashed 0 to 5 framework. The required level filters the candidates; fit, development and load decide between them, and the map exposes where cover is dangerously thin.

HOW THE ALLOCATION WAS DECIDED

- **The level sets the shortlist.** For the KYC check and the coaching task, only Priya meets the required level, so the decision is made for you, and it flags how dependent the team is on her.
- **A gap becomes a supported stretch.** Nobody reaches Level 3 on complex data analysis, so rather than lower the bar, the best-placed person takes it with an expert alongside, doing the work and building the skill.
- **Where many qualify, load decides.** Six people can handle the escalated complaint, so it goes to Aisha to keep the experts free for the work only they can do.
- **The map reveals the risk.** Two of four tasks fall to Priya alone. Allocation by skill does not just place the work; it shows you exactly where to cross-train next.

— ALLOCATION VERSUS THE ALTERNATIVES

How teams hand out work, and what it costs

Most allocation defaults to one of a few habits. Each feels reasonable in the moment and carries a hidden cost. Here is how they compare with allocating by evidenced skill.

Basis for allocation	Why it feels right	What it costs
Whoever is free	Keeps everyone busy and the diary clear	The free person may not be capable; rework and checking follow
Whoever is senior	Rank feels like a safe proxy for skill	Seniority is not relevant capability; wastes senior time and demotivates
Whoever did it last	Fast, familiar, no thinking required	Entrenches single points of failure and starves everyone else of growth
Whoever volunteers	Willing and motivated, low friction	Willingness is not capability; the keen are not always the qualified
Whoever fits the skill	The work is matched to evidenced capability	Needs a current capability map, which is the one habit worth building

The first four all substitute a convenient signal, availability, rank, habit, enthusiasm, for the one that actually predicts a good outcome: can this person do this task to standard? Allocating by skill costs a little upkeep, a current capability map, and repays it many times over in work done right first time, experts used well, developing people grown on purpose, and regulated work always in safe hands.

— AVOID THESE

Six mistakes in allocating work

MISTAKE 01

Allocating by availability

"Who is free?" optimises for a clear diary, not a good result. Free is not the same as capable.

MISTAKE 02

Confusing seniority with skill

Rank is not relevant capability. Putting the senior person on it wastes their time and may still miss the standard.

MISTAKE 03

Lowering the bar to fit who's free

Quietly dropping the required level to suit availability is how quality and compliance slip unnoticed.

MISTAKE 04

Always using the safe pair of hands

Handing critical work to your one expert every time protects today but deepens key-person risk and stalls development.

MISTAKE 05

Overloading your best people

Skill-based allocation drifts everything to the most capable. Watch the spread, or you create burnout and a bottleneck.

MISTAKE 06

Allocating from memory

Memory favours the visible and recently-praised. A current capability map surfaces the right person, not the obvious one.

The method is free. A ready-made matrix just shows you *who fits each task*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template simply makes the capability visible at the moment you allocate. The grid and the fixed 0 to 5 scale are ready, the analytics show who is capable of each skill and how many, so you can match people to work, spot where only one person qualifies, and balance load, all from one current picture.



The Advanced Excel Skills Matrix shows who is capable of each skill at a glance, so you can allocate work to the right person and see instantly where only one person qualifies, all on the same 0 to 5 framework used throughout this guide.

TRY IT FREE	MOST POPULAR	WHEN YOU ARE READY
£0 The online 5x5 builder maps a small team in your browser, with no sign-up. A fast way to match work to skill.	£199 The full Excel template: heat map, capability analytics, who-can-do-what views, up to 30 people and 30 skills. One-off, yours forever.	£1 Upgrade to PulseAI in your first year for a living, web and mobile version with AI skill suggestions and reminders.

— COMMON QUESTIONS

Quick *answers*

Q What does it mean to allocate work by skill?

It means matching each task to the person whose evidenced capability fits what the task requires, rather than handing it to whoever is free, senior, or did it last. You set a required level for each task and deploy people who meet it, balancing best fit against development and workload.

Q Isn't giving work to whoever is free more efficient?

It looks efficient because it fills diaries, but it often is not. If the free person is not capable, the work needs checking, correcting or redoing, which costs more time than waiting for the right person or supporting a stretch. Availability is a constraint to balance, not the basis for the decision.

Q Should I always allocate to the most skilled person?

No. For regulated or critical work, yes, fit is a hard gate. But for everything else, always using your top expert overloads them, starves others of development, and deepens key-person risk. Where several people meet the required level, let workload and development decide.

Q How do I use allocation to develop people?

Give a developing person a task one level above their current capability, with a more expert colleague on hand to support and check. The work gets done and the skill grows. Reserve this for tasks where a supported stretch is safe, not for regulated or high-risk work.

Q How does this help with compliance?

For regulated work, the required capability level becomes a hard gate: only people who genuinely meet it, with evidence, can be allocated the task. A capability map with levels and evidence lets you both make and prove that decision, which is exactly what standards such as ISO 9001 expect.

Q Do I need software to allocate by skill?

No. A well-built spreadsheet showing who is capable of what lets you allocate by skill perfectly well, and most teams should start there. Software helps when you want the capability picture live and shared across many teams, with reminders and AI-assisted suggestions.

— ABOUT THE AUTHOR



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Alex is the creator of the Upleashed capability framework that powers Skills Matrix Template, the award-winning Excel skills matrix. A Chartered Manager with an MBA, an LLM and a doctorate in business administration, he has spent more than two decades helping operations, HR and quality teams turn work allocation from a gut feel into something they can measure, manage and prove.

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A stylized, handwritten signature in black ink that reads "Alex J. Martin-Smith".

Dr Alex J. Martin-Smith

— SOURCES

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Right work, right *person*.

You now have the whole method. The quickest way to start is to set a required level for your next handful of tasks this week, look at who actually meets it, and allocate on that. The map will also show you exactly where to cross-train next.

[Try the free 5x5 builder →](#)

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