

• THE RATING SCALE • GUIDE

## The 0 to 5 competency scale, *explained*

A skills matrix is only as trustworthy as the scale behind its numbers. Get the scale right and a "3" means the same thing for everyone, every time. This is the 0 to 5 competency scale in full: what each level means, how it is weighted, how to evidence it, and how a row of scores becomes a capability figure you can track.



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

### THE SHORT ANSWER

The 0 to 5 competency scale rates capability on six clearly defined levels, from 0 (skill not required) through 3 (capable, works unsupervised) to 5 (strategic leadership). Each level has a plain definition and a proficiency weighting, so scores can be averaged into a single capability percentage. Defining each level the same way for everyone is what makes a skills matrix consistent, comparable and trustworthy. In short: **six defined levels, each weighted, turning judgement into a number you can compare and track.**

#### KEY TAKEAWAYS

- **Six levels, clearly defined.** 0 (not required), 1 trainee, 2 developing, 3 capable, 4 expert, 5 strategic.
- **Level 3 is the line.** "Capable" is the usual target, the point at which someone can do the work unsupervised.
- **Each level carries a weighting.** 25, 50, 75, 100%, so a row of scores averages into a capability percentage.
- **It is Dr Martin-Smith's own framework.** Developed through doctoral research and 20+ years of practice, extending the classic operator-rating tradition into a 0 to 5 model.
- **Definitions make it trustworthy.** When everyone scores to the same descriptions, the numbers become genuinely comparable.

— [START HERE](#)

## Why the scale *is the foundation*

Every skills matrix puts a number in each cell. The 0 to 5 competency scale is the shared definition of what those numbers mean. Without it, a matrix is just opinions dressed as data; with it, the numbers become consistent, comparable and worth acting on.

### A scale turns judgement into a comparable number

Capability is a judgement, but a judgement made against clear, shared definitions becomes something close to a measurement. That is the whole job of a rating scale: to ensure that when two different managers look at the same person's work, they arrive at the same number, because they are scoring against the same written descriptions rather than their own private sense of "good". A well-defined scale is what lets you **compare people fairly, average scores meaningfully, and track change honestly** over time.

### Why six levels, and why 0 to 5

Six levels strike the balance that makes the scale work. Too few, say a simple yes/no, and you lose the all-important distinction between someone still learning and someone who can train others. Too many, say a 1 to 10, and the levels blur into false precision nobody can score reliably. Six gives enough resolution to be useful without being fiddly. Starting at **0** matters too: it lets you mark a skill as genuinely not required for a person, so it drops out of their score rather than dragging it down unfairly.

## It is grounded in practice and doctoral research

The shape of the scale is not arbitrary, and it is not borrowed. It was developed by Dr Alex J. Martin-Smith, the framework's author, through formal doctoral research and more than two decades of deploying skills matrices in the field, from UK financial services to aerospace teams. It builds on the long-standing manufacturing tradition of rating operator capability, the Toyota Production System skills matrix graded capability across four levels, and **extends it in two important ways**: a Level 0 for skills a role genuinely does not need, and a Level 5 for strategic ownership above pure expertise. The result is a scale tested against real teams, not derived from theory alone.

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### — WHY IT MATTERS NOW

## An inconsistent scale makes data you *cannot trust*

The most common reason a skills matrix fails is not a bad grid; it is a vague scale. When "3" means different things to different people, every figure that follows is built on sand. A defined scale is what makes the whole exercise reliable.

8%

GARTNER, 2024

of organisations have reliable workforce skills data; an inconsistent scale is a big reason the rest do not.

20+

YEARS IN PRACTICE

of field deployment and doctoral research behind the 0 to 5 scale, refining it against real teams.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, so a stable, re-scorable scale matters more than ever.

The payoff of a defined scale is reliability you can build on. Because every score rests on the same written descriptions, you can average a person's row into a fair capability figure, compare two people without arguing about what the numbers mean, roll a team up into a single percentage, and re-score next quarter knowing the change you see is real, not a drift in interpretation. A good scale is the quiet foundation beneath every useful thing a skills matrix

does: **get it right once, and everything built on top of it becomes trustworthy.**

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— THE SCALE IN FULL

## Every level, *defined and weighted*

Here is the complete 0 to 5 scale: each level with its proficiency weighting, what it looks like in practice, and how you would evidence it. This is the reference every score in a matrix should be made against.

Level	Meaning	Weighting	What it looks like	How to evidence it
0	<b>Not required</b>	Excluded	The skill is not needed by this person or role within the next year.	Role definition; a deliberate decision to exclude, not an oversight.
1	<b>Trainee</b>	25%	Learning the basics, following instructions, up to 75% trained, quality not yet understood.	Training started; supervised work; early practice records.
2	<b>Developing</b>	50%	Over 75% trained; can work alone, but consistent quality is not yet proven, so output is checked.	Checked work samples; training near complete; supervisor notes.
3	<b>Capable</b>	75%	Fully trained, consistent quality, works unsupervised. The usual target level.	Unsupervised work to standard; sign-off; consistent output over time.
4	<b>Expert / Trainer</b>	100%	Prolonged high performance; works autonomously; can train others to standard.	Trained others; handled complex cases; sustained quality record.
5	<b>Strategic</b>	100%	Defines new processes and skill requirements; cross-function expertise; leadership.	Set standards or process; led across functions; succession-ready.

**3 is the line, "capable", the point at which work is done unsupervised** 0  
**0 is excluded, dropped from the score, not counted as a weakness**

*The Upleashed 0 to 5 framework. Levels 4 and 5 share the same 100% weighting; the difference is scope, Level 5 carries a strategic, succession flag.*

#### THE DESIGN DECISIONS THAT MATTER

- **Level 3 is the target, not Level 5.** "Capable" means trained, consistent and unsupervised, which is what most roles genuinely need. Aiming everyone at expert wastes effort and invents gaps that do not matter.
- **0 protects the score.** Marking a skill "not required" removes it from a person's average, so people are judged only on the skills their role actually needs.
- **4 and 5 weigh the same.** Both are full proficiency; the distinction is scope, not skill. Level 5's purple flag highlights strategic and succession capability.
- **Evidence turns a level into a fact.** Each level has a way to prove it. A score you can evidence survives scrutiny; one you cannot is just an opinion.

#### — WHERE IT COMES FROM

## The origins of the *0 to 5 scale*

The 0 to 5 scale did not appear from nowhere, nor is it lifted from an academic model. It is the product of a long industrial tradition of rating

capability, refined and extended by Dr Alex J. Martin-Smith through doctoral research and two decades of practice into the form used here.

#### THE ROOTS

##### **An industrial heritage**

Rating operator capability on a simple, visual scale is a long-established manufacturing practice; the Toyota Production System skills matrix graded capability across four levels, giving teams a shared way to see who could do what.

#### THE EXTENSION

##### **Levels 0 and 5 added**

Two deliberate additions create the 0 to 5 scale: Level 0, for a skill a role genuinely does not need, so it never drags down a score, and Level 5, separating strategic ownership and leadership from pure expertise at Level 4.

#### THE VALIDATION

##### **Tested, not theorised**

Dr Martin-Smith refined the scale through formal doctoral research and more than 20 years deploying skills matrices across sectors, from financial services to aerospace, testing it against real teams rather than theory.

That lineage is what makes the scale both familiar and field-tested. The four working levels echo a rating tradition managers in industry already recognise, while the two additions, 0 and 5, solve real problems that the older scales left open: how to handle a skill that simply is not required, and how to distinguish someone who can do the work superbly from someone who shapes the work itself. It is a practical instrument, owned and developed by its author and proven in use, rather than a borrowed model bent to fit.

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#### — THE CALCULATION

## How a row of scores becomes a *capability percentage*

The weightings are what let the scale do arithmetic. Each level converts to a percentage, and averaging those across the skills a role needs turns a row of judgements into a single, trackable capability figure. Here is exactly how it works.

## The weightings, and the method

Each level carries a proficiency weighting: Level 1 counts as 25%, Level 2 as 50%, Level 3 as 75%, and Levels 4 and 5 both as 100%. A Level 0 means the skill is not required by that person, so it is excluded from their calculation entirely. A person's capability is the average of those weightings across the skills their role needs; a team's capability is the average across its people. That is the whole method, simple enough to do by hand, consistent enough to trust.

**A worked example.** Convert one person's row of scores into a capability percentage:

```
Sarah's scores 4, 3, 2, 3, 2, 2, 1
as weightings 100, 75, 50, 75, 50, 50, 25
sum 425 ÷ 7 skills = 61% capability
```

**And with an excluded skill.** If a skill is scored 0, it drops out and the average is taken over fewer skills:

```
Scores 3, 4, 0, 2 (third skill not required)
counted 75, 100, -, 50 → sum 225 ÷ 3 skills (not 4)
capability = 75%
```

Two things make this robust. First, because Levels 4 and 5 share the 100% weighting, promoting someone from expert to strategic does not inflate the capability figure, the number reflects proficiency, while the flag captures scope. Second, because a 0 is excluded rather than counted as zero, nobody is penalised for lacking a skill their role never needed. The result is a capability percentage that is fair to the individual and meaningful to compare, the single figure you can watch rise as a person, or a team, develops.

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### — WHY THIS SCALE

## The 0 to 5 scale versus the alternatives

Plenty of rating scales exist. The 0 to 5 framework is shaped to be both reliable to score and useful to calculate. Here is how it compares with the common alternatives, and what each trades off.

Scale	Strength	The trade-off
Yes / No (can / can't)	Dead simple, fast to score	Loses every useful distinction, a trainee and a trainer look identical
1 to 3 (low/med/high)	Quick, easy to agree on	Too coarse to plan with; no room for "developing" versus "expert"
1 to 10	Feels precise	False precision, nobody scores a 6 versus a 7 reliably, so data drifts
0 to 5, defined & weighted	Enough resolution, each level defined, and it averages into a percentage	Needs the levels written down and scored honestly, the one habit worth building

The pattern is a balance between resolution and reliability. Too few levels and you cannot tell apart the people you most need to distinguish; too many and the scores become guesswork that quietly undermines the data. The 0 to 5 scale sits at the sweet spot: six levels, each pinned to a written description and a weighting, giving you enough detail to plan training, allocate work and set minimum standards, while staying simple enough that two managers will score the same person the same way.

— AVOID THESE

## Six mistakes in using the scale

**MISTAKE 01**

### Scoring without definitions

If people rate from gut feel rather than the written level descriptions, the numbers stop being comparable.

**MISTAKE 02**

### Treating 0 as "bad"

Zero means "not required", not "failed". Use it to exclude a skill from a person's score, not to mark a weakness.

**MISTAKE 03**

### Aiming everyone at Level 5

Most roles need Level 3. Targeting expert everywhere wastes effort and invents gaps that do not matter.

**MISTAKE 04**

### Inflating scores to be kind

A generous 3 that is really a 2 hides the gap the scale exists to reveal. Score against evidence, not sympathy.

**MISTAKE 05**

**Confusing Level 4 and 5 with skill**

Both are full proficiency; the difference is scope. Level 5 is about strategic ownership, not being "more expert".

**MISTAKE 06**

**Never re-scoring**

Skills fade and grow. A level set once and never revisited stops reflecting reality, so re-score on a cycle.

— THE SCALE, BUILT IN

## The scale is free to use. A ready-made matrix just *does the weighting for you.*

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template simply bakes the scale in. The six levels and their definitions are ready, the weightings and averages are calculated for you, and the heat map colours each level automatically, so every score instantly becomes a capability percentage you can compare and track, with no formulas to write.



*The Advanced Excel Skills Matrix applies the 0 to 5 weightings automatically, turning every score into a capability percentage for each person, skill and the whole team, on the exact framework explained in this guide.*

TRY IT FREE

### £0

The online 5x5 builder maps a small team in your browser, with no sign-up. A fast way to see the scale in action.

MOST POPULAR

### £199

The full Excel template: the 0 to 5 scale, automatic weightings, heat map and analytics, up to 30 people and 30 skills. One-off, yours forever.

WHEN YOU ARE

READY

### £1

Upgrade to PulseAI in your first year for a living, web and mobile version with AI skill suggestions and reminders.

## Quick *answers*

### **Q What is the 0 to 5 competency scale?**

It is a six-level rating scale for capability: 0 (not required), 1 (trainee), 2 (developing), 3 (capable), 4 (expert/trainer) and 5 (strategic). Each level has a plain definition and a proficiency weighting, so scores can be averaged into a single, comparable capability percentage.

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### **Q What does each level mean?**

0 is a skill the role does not need; 1 is in training; 2 is developing but not yet consistent; 3 is capable and works unsupervised, the usual target; 4 is an expert who can train others; 5 adds strategic ownership and leadership. Levels 4 and 5 share the same 100% weighting.

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### **Q Why does Level 0 not count against someone?**

Because 0 means the skill is genuinely not required for that person, not that they failed at it. Excluding it from their average means people are judged only on the skills their role actually needs, which keeps the capability figure fair.

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### **Q How do the weightings turn scores into a percentage?**

Each level converts to a weighting, 25, 50, 75, 100%, and you average those across the skills a role requires. So a row of 4, 3, 2, 3, 2, 2, 1 becomes 100, 75, 50, 75, 50, 50, 25, summing to 425 over seven skills, which is 61% capability.

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### **Q Who created the 0 to 5 scale, and is it research-based?**

The 0 to 5 capability framework was developed by Dr Alex J. Martin-Smith, refined through his doctoral research and more than two decades of deploying skills matrices in practice. It builds on the long-standing manufacturing tradition of rating operator capability, extending it with a Level 0 for skills not required and a Level 5 for strategic ownership. It is documented in full at [upleashed.com](http://upleashed.com).

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### **Q Should every skill be targeted at Level 5?**

No. Most roles only need Level 3, "capable". Reserve Level 4 for skills where you need someone who can train others, and Level 5 for strategic ownership. Setting every target at the top invents training needs that do not really exist.

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— 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 capability from a gut feel into something they can measure, manage and prove.

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

Dr Alex J. Martin-Smith

— SOURCES

Gartner. (2024). *Talent management research: Workforce skills data*. Gartner.

Martin-Smith, A. J. (n.d.). *The 0 to 5 capability framework*. Upleashed Limited.  
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World Economic Forum. (2025). *The future of jobs report 2025*. World Economic Forum.

## One scale, scored *the same way*.

You now know the whole scale: what each level means, how to evidence it, and how scores become a capability figure. The quickest way to start is to score one skill across your team against these definitions this week, and watch how much clearer the picture becomes when everyone uses the same line.

[Try the free 5x5 builder →](#)

[Get the template, £199](#)

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