

# The skills matrix *for contact centre teams*

A contact centre routes every call, chat and email to the agent best able to resolve it. That only works if you know precisely who can handle what, across channels and across query types. A skills matrix is the map behind skills-based routing: it shows the shape of your team across each skill, where you have the depth to cover volume, and where too few experts leave escalations exposed.



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

## THE SHORT ANSWER

A contact centre skills matrix maps agents against the channels they work, phone, email, chat, social, and the distinct query types they can handle, with a level in each cell. Read it for the shape of the team on each skill: how many agents can handle it unsupervised to cover volume, and how many experts you have for escalations. In short: **it is the map behind skills-based routing, showing where you have the depth to cover demand and where too few experts leave escalations exposed.**

#### KEY TAKEAWAYS

- **It powers skills-based routing.** Routing a contact to the best-qualified agent only works if the matrix records who can handle what.
- **Map distinct skill tags.** Each channel and query type is its own skill; broad "support" tags hide who can really handle what.
- **Read the team's shape.** The distribution across levels shows whether you have the depth to cover volume and the experts for escalations.
- **Escalation needs enough experts.** Too few agents at the top means complex queries queue or escalate badly.
- **Cross-train for fluctuating volume.** Agents who handle more skills let you flex routing as demand shifts across channels and queues.

#### — START HERE

## The matrix behind *skills-based routing*

Modern contact centres do not hand the next call to the next free agent; they route it to the agent best qualified to resolve it. That is skills-based routing, and it is only as good as the data behind it. A skills matrix is that data: the live record of which agents can handle which channels and query types, and to what level.

### Channels and query types are the columns

A contact centre matrix maps agents against two kinds of skill: the **channels** they work, phone, email, web chat, social, and the **query types** they can handle, billing, technical, complaints, retentions, and so on. Each is a distinct skill, because handling billing on the phone is not the same as handling a technical issue over chat. Mapping these is what lets routing send each contact to an agent genuinely equipped to resolve it, first time.

### Use specific skill tags, not broad ones

The most common mistake is lumping work into broad categories like "technical support". Good routing needs **specific skill tags**: if two query types need different training to handle, they are two different skills and belong in two columns. The matrix is where those distinct tags live, and the discipline of mapping them precisely is what stops routing from sending a contact to an agent who cannot actually resolve it.

## The shape of the team matters

Beyond who can do what, a contact centre has to read the **shape** of its team on each skill: how the agents are distributed across the levels. A skill where most agents are merely developing, with only one or two experts, behaves very differently from one with a healthy spread, even if the headcount is the same. The first cannot absorb volume or escalate well; the second can. Reading that distribution is how you see whether a skill is genuinely resilient or quietly fragile.

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### — WHY IT MATTERS NOW

## The wrong agent is a *failed contact*

In a contact centre a capability gap shows up instantly: a misrouted contact, a transfer, a customer repeating themselves, a query that escalates badly. Knowing the real shape of your team on each skill is how you route well, cover volume, and keep escalations flowing.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so much routing rests on rough, out-of-date skill tags.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, as channels, products and tools keep evolving.

63%

WEF, 2025

of employers call skills gaps the biggest barrier to change; in a contact centre they read as failed contacts.

The cost compounds with every contact. Send a query to an agent who cannot resolve it and you get an unnecessary transfer, a longer handling time, a frustrated customer and, often, an escalation, each adding cost and risk. Multiply that across thousands of daily interactions and a poor skills picture becomes expensive fast. A skills matrix attacks the root cause by giving routing an accurate, current map and by revealing the **shape of each skill**: enough capable agents to cover the volume, and enough experts to take the escalations. See the team clearly and you route the right contact to the right agent, flex as demand shifts, and cross-train exactly where the distribution is thin.

## Four things a contact centre matrix safeguards

In a contact centre, a skills matrix protects four things that translate straight into resolution, cost and customer experience. Each is a direct return on knowing the team's real capability.

### PROTECTS 01

#### Routing accuracy

By recording who can genuinely handle each channel and query type, the matrix lets routing send every contact to an agent equipped to resolve it, first time.

### PROTECTS 02

#### Volume cover

It shows whether enough agents are capable on each high-volume skill, so demand is absorbed without queues, misroutes or burnout on a thin few.

### PROTECTS 03

#### Escalation depth

It reveals how many experts you have for complex queries, so escalations are handled well rather than bottlenecking on one or two people.

### PROTECTS 04

#### Flex for peaks

It shows where cross-skilling is strong enough to re-route across channels as volume fluctuates, so peaks in one queue do not sink service.

The thread connecting all four is **matching contacts to genuinely capable agents at scale**. A contact centre with a healthy spread of capability on each skill, plenty of capable agents and enough experts, routes accurately, covers volume, escalates cleanly and flexes with demand. One where a skill rests on a thin layer of capability is fragile: routing misfires, queues build, escalations jam, and a single absence hurts. The matrix is the instrument that shows which contact centre you are running, skill by skill, and exactly where to cross-train next.

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## The 0 to 5 capability framework

A contact centre matrix needs a clear scale, because routing depends on the difference between "still learning" and "handles it alone". This framework, developed by Dr Alex J. Martin-Smith, draws that line at

Level 3, handles the skill unsupervised, with Level 4 and above the experts who take escalations.

|   |                                                                    |                                                                                                                                                                            |
|---|--------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 | <b>Not required for the role</b> <span>EXCLUDED</span>             | The channel or query type is not part of this agent's role. Excluded from their score, and a signal to routing not to send that contact type to them.                      |
| 1 | <b>In training / New agent</b> <span>WEIGHTING 25%</span>          | Learning the skill, takes contacts only with support or within a narrow band. Up to 75% of the way there. New agents often start on just one or two skill areas.           |
| 2 | <b>Developing</b> <span>WEIGHTING 50%</span>                       | More than 75% trained. Handles routine contacts of this type, but complex ones still need support or a transfer. Not yet reliable solo cover for the skill.                |
| 3 | <b>Capable</b> <span>WEIGHTING 75% · HANDLES IT SOLO</span>        | Fully trained, resolves this contact type unsupervised across the normal range. The level at which an agent genuinely counts as cover, and can be routed the skill freely. |
| 4 | <b>Expert / Escalation point</b> <span>WEIGHTING 100%</span>       | Prolonged expertise; takes the hard contacts, handles escalations and coaches others. Your functional escalation depth. Reconfirm if a skill goes unused for a period.     |
| 5 | <b>Strategic ownership / Team lead</b> <span>WEIGHTING 100%</span> | Sets standards for the skill, defines how it is handled and routed, shapes training. The purple flag marks your team leaders and subject authorities.                      |

## Read the distribution, not just the average

For each skill, score agents 0 to 5 and the weightings give a capability figure, but the number that matters for routing is the **distribution**: how many sit at each level. Count agents at Level 3+ for volume cover, and at Level 4+ for escalation depth. An average can look healthy while hiding a shape that cannot escalate, which is why reading the spread beats reading the mean.

**A worked example.** Why the average misleads on a key skill:

```
Complex query handling agents by level L1:3 · L2:7 · L3:6 ·  
L4:2 · L5:1  
can handle solo (L3+) 9 · escalation experts (L4+) only 3  
most agents bunched at developing – thin at the top for  
escalations.
```

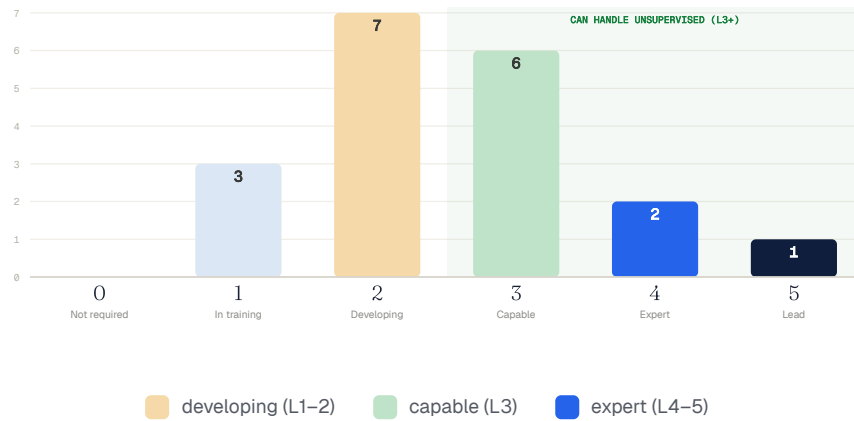
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— SEE THE SHAPE

## The shape of the team, *by level*

Here is a core skill, complex query handling, shown as the distribution of agents across the 0 to 5 levels. The shape tells you more than any average: where the team bunches, whether enough agents can handle the skill unsupervised, and how deep your escalation expertise really is. The shaded zone marks Level 3 and above, the agents who can take the contact alone.

#### TEAM SHAPE: AGENTS AT EACH LEVEL · COMPLEX QUERY HANDLING



9

**can handle it unsupervised (L3+),** but only **3** are escalation experts (L4+), thin at the top

*Illustrative team on the Upleashed 0 to 5 framework. Each bar is the number of agents at that level for the skill; the shaded zone can handle it solo.*

#### WHAT THE RESOURCE PLANNER READS HERE

- **The team bunches at developing.** The tallest bar is Level 2: many agents can handle routine contacts but still need support on complex ones. Lifting some of them to Level 3 is the fastest way to widen solo cover.
- **Solo cover is reasonable, for now.** Nine agents at Level 3 or above can take this contact type unsupervised, enough for normal volume, but watch it against demand and absence.
- **Escalation depth is thin.** Only three agents sit at Level 4+ to take escalations and coach. If one is off, complex queries bottleneck, so growing experts is the priority, not just more capable agents.
- **The shape guides the plan.** A healthy skill has a solid middle and enough at the top. Here, the move is to ramp Level 2s to Level 3 and develop a couple more experts, exactly what the distribution shows.

#### — READY-TO-USE EXAMPLES

## Example things to map for a contact centre

A contact centre matrix should capture the channels and query types you handle, as distinct skill tags. Here are ready-to-adapt categories, a

starting point to tailor to your operation.

| Category              | Examples to map (the columns)                                       | Watch out for                                                                  |
|-----------------------|---------------------------------------------------------------------|--------------------------------------------------------------------------------|
| Channels              | Phone, email, web chat, social media, messaging                     | Assuming a strong phone agent is automatically strong on chat or social        |
| Query types           | Billing, technical, complaints, retentions, sales, each its own tag | Broad tags like "support" that hide who can really handle what                 |
| Escalation & complex  | Complex query handling, escalation point, de-escalation             | Too few experts, so complex contacts bottleneck or escalate badly              |
| Systems & languages   | CRM, knowledge base, telephony, plus any languages offered          | Forgetting language-channel combinations, e.g. ample phone but thin chat cover |
| Quality & soft skills | Customer handling, empathy, accuracy, after-call work               | Mapping only product knowledge and missing what drives CSAT                    |

Map your channels and query types as distinct, specific tags, and score each agent 0 to 5 so routing knows not just who is trained but who can genuinely handle each contact type solo. Track language-channel combinations carefully, since ample phone cover in a language tells you nothing about chat cover in it. As always, start with a handful of broad categories and add granularity as the data earns it, and keep the matrix current as agents cross-train and grow.

#### — AVOID THESE

## Six mistakes on a contact centre matrix

### MISTAKE 01

#### Broad skill tags

Lumping work into "support" misroutes contacts. If two query types need different training, map them as two skills.

### MISTAKE 02

#### Reading the average

A healthy mean can hide a fragile shape. Read the distribution: capable for volume, experts for escalations.

**MISTAKE 03**

**Too few experts**

Thin Level 4+ depth means escalations bottleneck. Grow experts, not just more agents at capable.

**MISTAKE 04**

**Ignoring the channel**

Phone skill is not chat skill. Map each channel separately, and watch language-channel combinations.

**MISTAKE 05**

**Overloading new agents**

Routing everything to a new starter backfires. Start them on one or two skills and expand as they ramp.

**MISTAKE 06**

**Letting it go stale**

Agents cross-train and churn constantly. A matrix updated rarely cannot drive accurate routing for long.

The method is free. A ready-made matrix just makes each skill's *shape obvious*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template just makes the contact centre view effortless: score agents on the 0 to 5 scale across channels and query types, and the capable counts and expert depth per skill calculate themselves, so the thin skills, the missing escalation cover and the channels short of capacity stand out, before they show up as failed contacts.



*The Advanced Excel Skills Matrix shows capable and expert depth per skill at a glance, the basis for reading the shape of each channel and query type, all on the same 0 to 5 framework used throughout this guide.*

| TRY IT FREE                                                                                           | MOST POPULAR                                                                                                                              | WHEN YOU ARE READY                                                                                                  |
|-------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| £0                                                                                                    | £199                                                                                                                                      | £1                                                                                                                  |
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## — COMMON QUESTIONS

### Quick *answers*

#### **Q What is a skills matrix for a contact centre?**

It is a grid mapping agents against the channels they work, phone, email, chat, social, and the distinct query types they can handle, with a level in each cell. It is the data behind skills-based routing, showing who can genuinely handle what, and the shape of the team's capability on each skill.

#### **Q How does it support skills-based routing?**

Routing sends each contact to the best-qualified available agent, which only works if the system knows who can handle what. The matrix provides that record, with specific skill tags per channel and query type and a level for each, so routing can match a contact to an agent genuinely able to resolve it rather than just the next one free.

#### **Q Why read the distribution rather than the average?**

Because the average hides the shape. Two skills can share the same mean while one has a healthy spread and the other bunches at developing with no experts. Reading the distribution, how many agents sit at each level, shows whether you have enough capable agents for volume and enough experts for escalations, which the average cannot.

### **Q How many experts does a skill need?**

Enough that escalations never rest on one person. Complex contacts and escalations go to your Level 4+ agents, so if only one or two can take them, a single absence bottlenecks the queue. The right number depends on escalation volume, but the principle is clear: watch expert depth as carefully as overall coverage.

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### **Q How should new agents be mapped?**

Start them on one or two skill areas and expand as they ramp. Routing everything to an under-trained new agent leads to contacts they cannot resolve, so the matrix should reflect their narrow initial competency and widen as they cross-train, which also makes their onboarding ramp visible and trackable.

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### **Q Do I need software for a contact centre skills matrix?**

A spreadsheet is a fine place to start and works well for a single team or queue. At contact-centre scale, where routing is automated and agents number in the dozens or hundreds, you will want skills data that connects to your routing platform and updates as agents train, but the capability picture, the shape of each skill, is the same either way.

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

Dr Alex J. Martin-Smith

## SOURCES

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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.

## Route it to the *right agent*.

You now have the contact centre method. The quickest way to start is to map your channels and query types as distinct skills this week, score your agents, and read the shape of each one. The skills that bunch at developing, or run thin on experts, are exactly where to cross-train before they become failed contacts.

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