

The skills matrix *for FM teams*

Facilities management keeps buildings safe, legal and running, across a sprawl of trades and a heavy load of statutory compliance. When cover on a regulated discipline runs thin, fire safety, water hygiene, electrical, the risk is not just a breakdown but a legal breach. A skills matrix maps capability across every FM discipline and the estate it serves, so a manager can see which trades are well covered, which are stretched, and which compliance-critical ones are dangerously exposed.



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

THE SHORT ANSWER

A facilities management skills matrix maps the team against the disciplines the estate depends on, hard services like HVAC, electrical, fire safety and water hygiene, and soft services like cleaning and grounds, scored on a clear scale and tracked across sites. Read each discipline's coverage, with extra weight on the statutory ones. In short: **it shows coverage discipline by discipline across the estate, so a thinly-covered statutory trade, the compliance breach waiting to happen, stands out before an audit or an incident finds it.**

KEY TAKEAWAYS

- **Map hard and soft services.** FM spans HVAC, electrical, fire and water through to cleaning and grounds; map the full range.
- **Statutory disciplines carry legal risk.** Thin cover on fire, water, electrical or gas is a compliance breach, not just a service gap.
- **Cover the whole estate.** A multi-site portfolio needs capability spread across all sites, not pooled at one.
- **Certification proves competence.** Regulated works need certified people; the matrix tracks the qualification, not just the skill.
- **Multi-skilling stretches cover.** Mobile, multi-skilled engineers cover more disciplines across more sites, the FM efficiency lever.

— START HERE

Safe, legal *and running*

Facilities management has a triple duty: keep buildings **safe, legal and running**. That depends on a wide spread of trades, and on a heavy backbone of statutory compliance where thin cover is not an inconvenience but a legal exposure. A skills matrix is the instrument that makes capability across this sprawl visible, showing which disciplines are well covered, which are stretched, and, crucially, which compliance-critical ones are dangerously thin.

Map hard and soft services

An FM matrix maps the team against the full range of **hard and soft services** the estate needs. Hard services, the building systems: HVAC, electrical, plumbing and water, fire safety systems, lifts, building fabric. Soft services, the people-facing support: cleaning, grounds, waste, sometimes security and catering. Mapping both, scored on a consistent scale, gives a complete picture of what the team can actually deliver, rather than a partial view that misses where cover is thin.

Weight the statutory disciplines

What sets FM apart is the weight of **statutory compliance**. Fire safety, water hygiene and legionella, electrical safety, gas, lifts, all carry legal duties, mandatory inspections and records, with frameworks like SFG20 mapping each requirement to maintenance tasks. Unlicensed or absent cover on these

is not just a service gap, it is a breach that lands liability on the organisation. So the matrix must flag the statutory disciplines and hold them to a higher bar: these cannot be allowed to run thin.

Cover the estate, and certify it

Two further FM realities shape the matrix. **The estate**: capability must be spread across a multi-site portfolio, not pooled at headquarters, so the matrix reads coverage across sites, and multi-skilled mobile engineers, who cover several disciplines across several buildings, are the lever that stretches thin resource. And **certification**: regulated works require certified people (Gas Safe, electrical competence, and the rest), so the matrix tracks the qualification and its currency, not just whether someone broadly has the skill.

— WHY IT MATTERS NOW

Thin cover is a *legal exposure*

In FM, a thinly-covered statutory discipline is a compliance breach waiting to happen: a missed inspection, a lapsed certification, an uncovered site. A skills matrix is how a manager sees that exposure across the estate and closes it before an auditor or an incident does.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so most FM teams track compliance cover in scattered records.

SFG20

UK FM STANDARD

maps statutory duties to maintenance tasks, so cover must align to legal requirements, not just goodwill.

63%

WEF, 2025

of employers call skills gaps the biggest barrier to change; in FM they read as compliance and continuity risk.

FM carries a uniquely literal downside: when capability falls short on a regulated discipline, the consequence can be a fire-safety failure, a legionella risk, an electrical incident, each a danger to people and a breach of law with liability attached. And the estate compounds it, capability that looks adequate in total can leave a particular site or a particular statutory trade dangerously thin. A skills matrix counters this by making **coverage visible discipline by discipline, across the estate**: where hard and soft services are

well staffed, where a statutory trade is stretched, where certification is lapsing, where a site is uncovered. Seeing this lets an FM manager prioritise the compliance-critical gaps, keep certifications current, deploy multi-skilled engineers where cover is thinnest, and demonstrate to auditors and clients that the estate is maintained by genuinely capable, certified people, before a gap becomes a breach.

— WHAT IT PROTECTS

Four things an FM matrix safeguards

In facilities management, a skills matrix protects four things that bear directly on safety, compliance and keeping the estate running. Each follows from reading coverage discipline by discipline across sites.

PROTECTS 01

Statutory compliance

By flagging thin cover on regulated disciplines, the matrix surfaces the compliance breaches waiting to happen, so they are closed before an audit.

PROTECTS 02

Estate-wide cover

It reads capability across every site, so a multi-building portfolio is not left with a discipline uncovered at a particular location.

PROTECTS 03

Certification currency

It tracks the certifications regulated works require, so no one performs a regulated task on a lapsed or missing qualification.

PROTECTS 04

Service continuity

It reveals single points of failure and where multi-skilling would help, so a breakdown or absence does not stall the estate.

The common thread is **a safe, compliant, running estate**. An FM operation cannot let a regulated discipline lapse or a site go uncovered; the duties are legal and the failures are visible. Its capability is spread across hard and soft services, weighted by statutory obligation, stretched across multiple sites, and gated by certification. The matrix makes that whole picture visible, so a manager can shore up the compliance-critical disciplines, keep cover and certification current across the estate, and deploy multi-skilled people where they stretch furthest, running the estate on evidence rather than hoping the cover holds.

The 0 to 5 capability framework

An FM matrix needs a scale that distinguishes a trainee from a certified tradesperson who can work a discipline unsupervised, and marks the experts who lead and train. This framework, developed by Dr Alex J. Martin-Smith, does that, with Level 3, certified and working the discipline unsupervised, as the bar for dependable cover.

-
- | | |
|---|--|
| 0 | Not required for the role EXCLUDED |
| 1 | In training WEIGHTING 25% |
| 2 | Developing WEIGHTING 50% |
| 3 | Capable / Certified WEIGHTING 75% · DEPENDABLE COVER |
| 4 | Expert / Supervisor WEIGHTING 100% |
| 5 | Strategic ownership / Lead WEIGHTING 100% |
-
- The discipline is not part of this person's role. Excluded from the score, keeping the matrix focused on the trades each engineer is expected to cover.
- Learning the discipline under supervision. Up to 75% trained. Useful support, but not yet certified or able to sign off regulated work alone.
- More than 75% trained; handles routine maintenance alone, but complex or regulated tasks still need a certified hand. Developing cover.
- Certified where required and works the discipline unsupervised to standard. The level that counts as genuine, compliant cover for an FM discipline.
- Deep trade expertise; handles the hardest work, supervises and trains others, and often multi-skilled across disciplines. The people who stretch cover furthest.
- Owns the discipline's standards, compliance regime and planned maintenance. The FM lead accountable for how the capability is maintained across the estate.

Read coverage, weight the statutory trades

For each discipline, count the people at Level 3 or above, certified where required, across the estate, that is your dependable cover. Then **weight the statutory disciplines**: fire, water, electrical, gas and lifts must not run thin, because thin cover there is a legal breach, not just a service risk. A statutory trade with low coverage, or covered at only one site, is the top priority. The weightings let you express each discipline's overall coverage for compliance reporting.

A worked example. Same team, very different exposure:

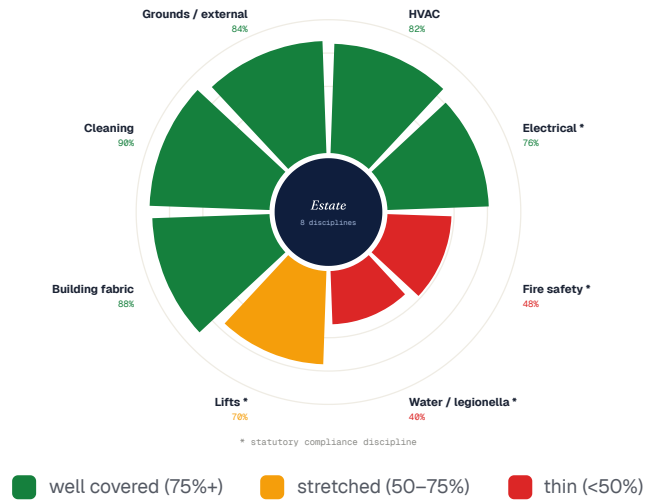
HVAC coverage **82%** across the estate → well covered
Fire safety **48%** · Water / legionella **40%** (both statutory) → **compliance risk**
cleaning looks great – but the regulated trades are where the exposure is.

— [SEE THE ESTATE](#)

Every discipline, *radiating out*

Here is the estate's coverage as a radial chart: each FM discipline is a bar growing outward from the centre, its length set by how well that discipline is covered across all sites, and its colour by status, green for solid, amber for stretched, red for thin. Statutory disciplines are marked. A short red bar on a statutory trade is the compliance gap to close; the longest bars are where the estate is safest.

COVERAGE BY FM DISCIPLINE · BAR LENGTH = COVER ACROSS ESTATE



Fire & water

are the compliance risk: two statutory disciplines with the shortest, reddest bars, thin cover where the law allows none

*Illustrative estate on the Upleashed 0 to 5 framework. Each bar's length is coverage across sites; * marks a statutory compliance discipline.*

WHAT THE FM MANAGER READS HERE

- **Fire and water are the priority.** Two short red bars, and both statutory. Thin cover on fire safety and legionella is a legal exposure, not just a service gap, so certified capability here must be built or brought in first.
- **Lifts and electrical are stretched.** Amber statutory disciplines, holding but not deep. Worth strengthening, and checking certification currency, before they slip into the red.
- **Soft services are strong.** Cleaning, grounds and building fabric show long green bars. Good cover, but the longest bars are not the ones that carry legal risk, do not let strong soft services mask thin statutory ones.
- **Read length and colour together.** A short bar matters most when it is statutory and red. The chart points the eye straight to the regulated trades where the estate is genuinely exposed.

— READY-TO-USE EXAMPLES

Example disciplines to map for FM

An FM matrix should map the team against the hard and soft service disciplines the estate depends on, with the statutory ones clearly

flagged. Here are ready-to-adapt categories, a starting point to tailor to your estate.

Category	Examples to map (the columns)	Watch out for
Statutory hard services	Fire safety, water hygiene / legionella, electrical, gas, lifts	Thin or single-site cover on a legally mandated discipline
Other hard services	HVAC, building fabric, mechanical, BMS / controls	Reliance on one engineer who knows the building systems
Soft services	Cleaning, grounds, waste, pest control, catering	Strong soft cover masking weak statutory hard cover
Compliance & admin	SFG20 / PPM scheduling, records, audits, permits to work	Maintenance done but compliance records incomplete
Cross-cutting	Health and safety, contractor management, response, multi-skilling	No multi-skilled cover to stretch across sites

Map the disciplines your estate depends on, scored so Level 3 means certified where required and working unsupervised, flag the statutory trades, and read coverage across every site. Track certifications and their currency alongside the skill, and note who is multi-skilled, since they stretch cover furthest. As always, weight the compliance-critical disciplines, keep the matrix current, and direct development and deployment at the regulated trades where cover is thinnest.

— AVOID THESE

Six mistakes on an FM matrix

MISTAKE 01

Treating all trades equally

Statutory disciplines carry legal risk. Weight fire, water, electrical and gas above the rest.

MISTAKE 02

Reading the estate total

Adequate overall can hide an uncovered site. Read coverage site by site, not just in aggregate.

MISTAKE 03

Skill without certification

Regulated work needs certified people. Track the qualification and its currency, not just the skill.

MISTAKE 04

Soft services masking hard gaps

Great cleaning cover is not compliance. Do not let long soft-service bars hide thin statutory ones.

MISTAKE 05

Ignoring multi-skilling

Single-discipline cover is rigid. Note and grow multi-skilled engineers to stretch thin resource.

MISTAKE 06

Maintenance without records

Compliance needs evidence. Map the records and PPM skills, not just the hands-on trades.

The method is free. A ready-made matrix just makes the thin statutory trades *impossible to miss*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template just makes the FM view effortless: score the team on the 0 to 5 scale across every discipline, flag the statutory ones, track certification, and the coverage per discipline across the estate is laid out for you, so the thin compliance-critical trades, the lapsing certifications and the uncovered sites stand out, before an audit or an incident finds them.



The Advanced Excel Skills Matrix reads out coverage per discipline across the estate and tracks certification, the basis for protecting statutory compliance and keeping the estate running, all on the same 0 to 5 framework used throughout this guide.

TRY IT FREE	MOST POPULAR	WHEN YOU ARE READY
<p>£0</p> <p>The online 5x5 builder maps a small team in your browser, with no sign-up. Ideal for a single building.</p>	<p>£199</p> <p>The full Excel template: coverage by discipline, certification tracking and analytics, up to 30 people and 30 skills. One-off, yours forever.</p>	<p>£1</p> <p>Upgrade to PulseAI in your first year for a living, web and mobile version with AI skill suggestions and reminders.</p>

— COMMON QUESTIONS

Quick *answers*

Q What is a skills matrix for facilities management?

It is a grid mapping the FM team against the disciplines the estate depends on, hard services like HVAC, electrical, fire and water, and soft services like cleaning and grounds, with a level in each cell, tracked across sites. Read discipline by discipline, it shows coverage, weighted towards the statutory trades, and where compliance is thin.

Q Why weight the statutory disciplines?

Because thin cover on a regulated discipline, fire safety, water hygiene, electrical, gas, lifts, is a legal breach, not merely a service gap. These carry mandatory inspections, records and certifications, and failures endanger people and attract liability. The matrix flags them so they are held to a higher bar and never allowed to run thin.

Q How does it handle a multi-site estate?

By reading coverage across sites, not just in total. Capability that looks adequate overall can leave a particular building with a discipline uncovered. Mapping cover per site reveals those gaps, and highlights where multi-skilled mobile engineers, who cover several disciplines across several sites, can stretch thin resource to keep every location compliant.

Q Does it track certifications?

Yes, and it should. Regulated FM works require certified people, Gas Safe, electrical competence, and the rest, and a lapsed certification means a person cannot lawfully perform that task however skilled. The matrix tracks the qualification and its currency alongside the skill, so no regulated work is done on an expired or missing certificate.

Q How does multi-skilling fit in?

Multi-skilled engineers are the FM efficiency lever: one person covering several disciplines across several sites stretches limited resource much further than single-trade staff. The matrix highlights who is multi-skilled and where cross-training would most help, so a manager can build the flexible cover that keeps a dispersed estate maintained without over-staffing.

Q Does this work for in-house and outsourced FM?

Yes. Whether the estate is maintained in-house, by a contractor, or a mix, the same approach applies: map the disciplines, weight the statutory ones, score coverage across sites, and track certification. For outsourced FM it also gives a clear, evidenced basis for assuring that the provider genuinely covers every compliance-critical discipline across the portfolio.

— 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

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Keep the estate *safe and legal*.

You now have the FM method. The quickest way to start is to list your disciplines, flag the statutory ones, score certified cover across your sites, and read it as a radial chart. The short red bars on regulated trades are exactly where to build cover and check certification, before a gap becomes a breach.

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