GETTING STARTED · GUIDE

How to build a skills matrix, *step by step*

A skills matrix sounds technical, but building one is genuinely simple: people down the side, skills along the top, a level in each cell. The skill is in the choices around that grid, the right skills, a clear scale, honest scoring. This is the whole process, from blank page to a matrix you can actually use, with every part explained.

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

THE SHORT ANSWER

To build a skills matrix, decide its purpose and which team it covers, choose the handful of skills that matter as your columns, list your people as rows, pick one clearly defined rating scale, set a required level for each skill, then score everyone honestly using self-assessment plus manager validation. Read the columns for coverage and the rows for individual profiles, and keep it current. In short: **people in rows, skills in columns, a defined level in every cell, and the discipline to keep it honest and up to date.**

KEY TAKEAWAYS

- **The grid is the easy part.** People in rows, skills in columns, a level in each cell. The value is in the choices around it.
- **Start with purpose and scope.** Knowing why you are building it, and for which team, shapes every later decision.
- **Pick the vital few skills.** A focused set of columns gets built, scored and maintained; an exhaustive one collapses.
- **Define the scale before scoring.** One clear scale, with each level described, is what makes the numbers comparable.
- **Add required levels and read coverage.** Targets turn it from an inventory into a tool; coverage reveals your risks.

START HERE

A skills matrix is *simpler than it sounds*

If the phrase "skills matrix" feels intimidating, the structure will reassure you. It is just a table: the people you are mapping run down the side, the skills you care about run along the top, and where a person meets a skill you record how good they are. That is the whole shape. Everything else is judgement applied around it.

People in rows, skills in columns, a level in each cell

This is the universal structure, and it does not change whatever your team or industry. **Rows are people** (or roles, for larger groups); **columns are skills**; and each **cell holds a proficiency level** on a defined scale. Reading across a row gives you one person's profile; reading down a column shows how many people hold a given skill. Once you see the matrix this way, building one stops being a project and becomes a series of small, clear decisions.

The grid is easy; the choices are what matter

Drawing the table takes minutes. What makes a matrix useful, or useless, are the choices around it: **which skills** you put in the columns, **what scale** you score on, **how honestly** you rate, and whether you **set required levels** to compare against. Get those right and a plain spreadsheet becomes a genuine management tool. Get them wrong and the prettiest software in the world will not save it. This guide walks the choices in order.

Anyone can build one, starting small

You do not need special tools or permission to begin. A single team, a handful of skills and a simple scale is a perfectly good first matrix, and far better than waiting for the perfect enterprise rollout. The best approach is to **start small, prove the value, then expand**. By the end of this guide you will have everything you need to build a working matrix for one team this week, and the confidence to grow it from there.

WHY IT MATTERS NOW

The team you cannot see, you cannot *manage*

Most managers carry a rough sense of who is good at what in their heads. A skills matrix turns that fragile, partial picture into something shared, visible and reliable, and the data shows just how rare that clarity is.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so building even a simple matrix puts you ahead of most.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, so a clear starting picture has never mattered more.

85%

WEF, 2025

of employers plan to prioritise upskilling, which has to start from knowing what skills you already have.

The case for building one is really the case against managing on memory. A picture held only in a manager's head is partial, biased and lost the moment they move on; it cannot be shared with the team, shown to leadership, or used to plan with confidence. A skills matrix makes capability **explicit and durable**, the foundation for spotting gaps, planning training, allocating work and reducing key-person risk. And because so few organisations have this clarity, building one is a genuine, achievable advantage, available to any manager willing to spend an afternoon on it.

THE METHOD

Seven steps to build your skills matrix

Follow these in order and you will go from a blank page to a working matrix. Each step is a single, clear decision, and none takes long on its own.

1

Decide its purpose and scope

Before any grid, answer two questions: what is this matrix for, and which team does it cover? Spotting training needs, reducing key-person risk and planning a project each shape the matrix slightly differently. Start with one team where clarity is most useful. A clear purpose keeps the whole thing focused, which is what makes it likely to be finished and maintained.

> **WATCH OUT** Trying to map the whole organisation at once is how matrices stall. Start with one team and a clear reason.

2

Choose the skills, your columns

List the skills the team genuinely depends on, the vital few, usually 10 to 20. Mix technical, behavioural and any compliance skills that matter. These become your column headers. Resist the urge to list everything; a focused set is what gets scored and kept current. (Choosing well is worth real thought, and has a guide of its own.)

> **WATCH OUT** An exhaustive skill list never gets maintained. If in doubt, leave a skill off; you can always add it later.

3

List the people, your rows

Add the people you are mapping as rows. For a small team, list everyone by name; for a large department, you may map by role instead. Match the grain to your purpose: individual names for development and cover decisions, roles for a higher-level view across many people.

> **WATCH OUT** Mapping individuals across hundreds of people gets unwieldy. Use roles for scale, names where you need personal detail.

4 Choose and define your rating scale

Pick one scale and define each level in plain, observable words, so a rating means the same to everyone. A 0 to 5 scale works well: from not required, through in-training and developing, to capable, expert and strategic. Defining the levels is the single most important step for trustworthy data; a vague scale undermines every number above it.

> **WATCH OUT** A scale with no written definitions invites inconsistency. Describe each level before anyone scores against it.

5 Set a required level for each skill

For each skill, record the level the role actually needs, often Level 3, capable and unsupervised. This target is what turns the matrix from a passive inventory into a tool: with it, the grid shows not just what people have but where they fall short of what the work requires. Without it, you can see scores but not gaps.

> **WATCH OUT** Skipping required levels leaves you unable to tell strong from short. The target is what makes a gap visible.

6 Collect the data honestly

Now score each person against each skill. The reliable method is self-assessment followed by manager validation, anchored to evidence, with training records and any practical checks feeding in. Score what people can demonstrably do, not what feels generous; inflated scores hide the very gaps you are building the matrix to find.

> **WATCH OUT** Self-assessment alone tends to inflate. Validate against evidence and a manager view before a score is final.

7

Build it, read it, and keep it current

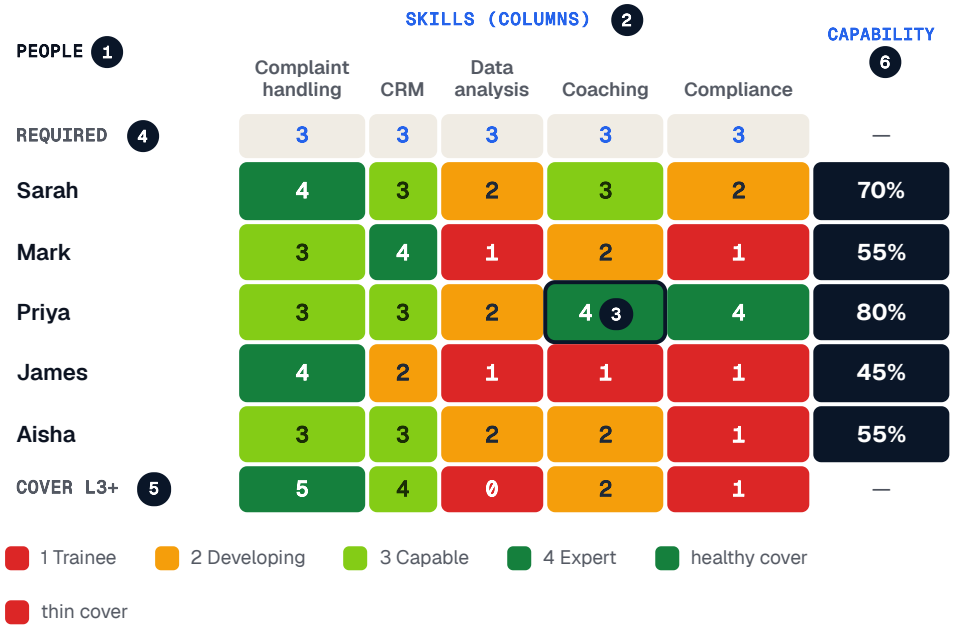
Enter the scores and the matrix comes alive. Read down the columns for coverage (how many are capable of each skill) and across the rows for each person's profile, and add a capability figure if you want a single measure. Then schedule a re-score, quarterly suits many teams, so it stays a living tool rather than a one-off snapshot.

> **WATCH OUT** A matrix built once and never updated drifts into fiction. The value is in keeping it current.

SEE IT BUILT

The *anatomy* of a finished matrix

Here is a complete skills matrix for a small team, with every part labelled. This is exactly what the seven steps produce: people in rows, skills in columns, a level in each cell, plus the required-level row and coverage row that turn it into a tool. The numbered markers point to each part.



Illustrative five-skill teaching example on the Upleashed 0 to 5 framework. Capability is each person's average across these five skills.

THE ANATOMY, PART BY PART

1. **People (rows).** Who you are mapping, by name for a small team or by role at scale.
2. **Skills (columns).** The vital few skills the team depends on, your column headers.
3. **The rating (each cell).** One person's level on one skill, on the 0 to 5 scale.
4. **Required level.** The target each skill needs, so gaps below it stand out.
5. **Coverage (L3+).** How many are capable of each skill, read down the column for risk.
6. **Capability.** A single figure per person, the average across their skills.

READING YOUR MATRIX

What to look at first, once it is built

A finished matrix rewards two simple reading habits, down the columns and across the rows. Here is what each reveals, and the order to look in.

Where to look	What it tells you	What to do about it
Down a column	How many people are capable of a skill, its coverage and risk	Cross-train where only one or none are capable, like Data analysis here
Against the required row	Where the team falls short of the level each skill needs	Target training at the biggest, most critical shortfalls first
Across a row	One person's profile, their strengths and development areas	Shape individual development around the gaps and the strengths
The capability column	A single comparable measure per person, and a team average	Track it over time to see development and prove progress
The whole grid	Patterns: thin skills, over-relied-on experts, hidden strengths	Plan cross-training, succession and allocation from the picture

The single most valuable habit is to **read the columns before the rows**. It is natural to look first at individuals, but the column view is where the risks hide: a skill only one person can do, or, like Data analysis in the example above, one nobody is yet capable of. Those coverage gaps are usually the most urgent thing a new matrix reveals, and the easiest to act on, so start there, then move to individual profiles and the team picture.

AVOID THESE

Six mistakes when building a matrix

MISTAKE 01

Starting too big

Mapping the whole organisation at once stalls. Build for one team first, prove the value, then expand.

MISTAKE 02

Too many skills

An exhaustive column list never gets maintained. Map the vital few, usually 10 to 20, that genuinely matter.

MISTAKE 03

An undefined scale

Scoring without written level definitions makes numbers incomparable. Define each level before anyone rates.

MISTAKE 04

No required levels

Without targets, the matrix shows scores but not gaps. Set the level each skill needs so shortfalls stand out.

MISTAKE 05

Scoring on self-rating alone

Self-assessment inflates. Validate against evidence and a manager view before a score is final.

MISTAKE 06

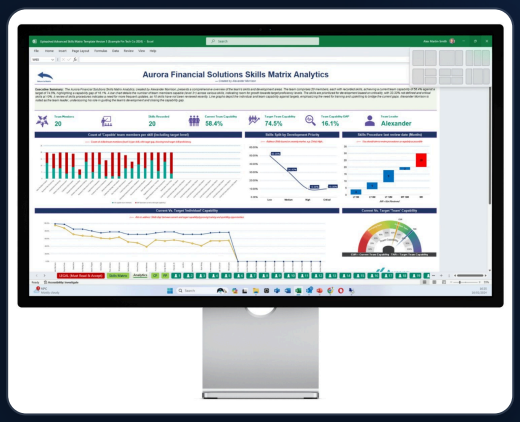
Building it once

A matrix never updated drifts into fiction. Schedule a re-score so it stays a living tool.

THE FASTEST WAY TO BUILD ONE

You can build it in a blank spreadsheet. A ready-made one just *skips the setup.*

Every step here works in a blank spreadsheet, and that is a perfectly good place to start. A purpose-built template just removes the fiddly setup: the grid, the defined 0 to 5 scale, the required-level row, the coverage counts and the capability figures are already there, so you simply add your skills and people and start scoring, and the analysis appears as you go.



The Advanced Excel Skills Matrix is a ready-built version of exactly what this guide describes: the scale, required levels, coverage and capability are already in place, so you start scoring, not setting up, all on the same 0 to 5 framework.

TRY IT FREE

£0

The online 5×5 builder maps a small team in your browser, with no sign-up. Build your first matrix in minutes.

MOST POPULAR

£199

The full Excel template: scale, required levels, heat map, coverage 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.

COMMON QUESTIONS

Quick *answers*

Q How do I build a skills matrix?

Decide its purpose and which team it covers, choose the vital few skills as columns, list your people as rows, pick and define one rating scale, set a required level per skill, then score everyone using self-assessment plus manager validation. Read coverage down the columns and profiles across the rows, and keep it current.

Q What does a skills matrix look like?

It is a table with people (or roles) in the rows and skills in the columns, with a proficiency level in each cell. Most add a required-level row showing the target for each skill, a coverage row counting how many are capable, and a capability figure per person. That structure is the same in every industry.

Q How many skills should I include?

Aim for the vital few, usually 10 to 20, that the team genuinely depends on. A focused set gets built, scored and maintained; an exhaustive list collapses under its own weight. Start small and expand once the matrix becomes routine, rather than trying to capture everything at once.

Q What rating scale should I use?

One consistent scale with each level clearly defined. A 0 to 5 scale works well: 0 not required, 1 in training, 2 developing, 3 capable and unsupervised, 4 expert and able to train, 5 strategic. What matters most is that each level is described in plain words so everyone scores the same way.

Q Can I build a skills matrix in Excel?

Yes. A spreadsheet with people in rows, skills in columns and levels in cells is a perfectly good skills matrix, and where most teams should start. Colour-coding the levels makes it readable. A purpose-built template or software helps mainly with scale, automatic analytics and keeping it current across many teams.

Q How long does it take to build one?

For a single team, an afternoon. Choosing the skills and defining the scale are the thoughtful parts; listing people and entering scores are quick. The ongoing work is light too: a periodic re-score, quarterly for many teams, keeps it current. Starting small makes the whole thing very achievable.

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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SOURCES

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

Martin-Smith, A. J. (n.d.). *The 0 to 5 capability framework.* Upleashed Limited. https://upleashed.com/capability-framework/

World Economic Forum. (2025). *The future of jobs report 2025.* World Economic Forum.

Build yours *this week.*

You now have the whole process. The quickest way to start is to pick one team, list its vital few skills, set a target for each, and score everyone on the 0 to 5 scale. An afternoon's work gives you a clearer picture of your team than most organisations ever have.

Try the free 5×5 builder → **Get the template, £199**

Award-winning method · 148,000+ teams · instant download · single-team licence