

• KEEPING IT CURRENT • GUIDE

How to keep a skills matrix *up to date*

The most common way a skills matrix fails is the quietest: it is built once, used for a while, then left to drift until no one trusts it. A stale matrix is worse than none, because people still believe it. This is how to keep one current, with a simple review cycle, the right cadence, and the everyday triggers that should prompt an update.



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

THE SHORT ANSWER

Keep a skills matrix current by treating it as a cycle, not a document: re-score on a regular cadence (quarterly for fast-changing or compliance-critical skills, annually for stable ones), review the gaps and coverage, act on what you find, and update it whenever something changes, a joiner, a leaver, a role change, a completed course, an expiring certificate. Give it a clear owner so it never drifts. In short: **a fixed review rhythm, plus event-driven updates, owned by someone, keeps a matrix trustworthy.**

KEY TAKEAWAYS

- **It is a cycle, not a document.** Re-score, review, act, update, then round again. A matrix is maintained like accounts, not filed like a report.
- **Match cadence to volatility.** Quarterly for fast-changing and compliance skills; annually for stable ones. One size does not fit all.
- **Triggers beat the calendar.** Joiners, leavers, role changes, completed training and expiring certificates should each prompt an update when they happen.
- **Give it an owner.** A matrix with no clear owner drifts. Name who keeps it current, usually a manager with HR support.
- **Embed it in normal work.** Tie updates to reviews, one-to-ones and team meetings, so maintenance is routine, not a special project.

— START HERE

A matrix is a *living thing*

The single biggest mistake with a skills matrix is treating it as a one-off project: build it, admire it, file it. Skills change, people come and go, certificates expire, and within months a matrix that is not maintained quietly stops reflecting reality. Keeping it current is not an afterthought; it is the discipline that makes the whole tool worth having.

A stale matrix is worse than none

This is the point that matters most. A matrix nobody updates does not just become useless; it becomes **actively misleading**, because people still trust it. A manager staffs a shift believing someone is signed off when their certificate lapsed months ago, or assumes a skill is covered when the only capable person has left. At least with no matrix you know you are guessing. A current matrix is a tool; a stale one is a trap, which is why maintenance is the difference between the two.

Think in cycles, not documents

The mental shift that fixes this is to stop thinking of a matrix as a document and start thinking of it as a **cycle**. You re-score capability, review the gaps and coverage, act on what you find, and update for any changes, and then you go round again. Each loop keeps the picture current and turns insight into action. Maintained this way, like a set of accounts rather than a report, a matrix stays alive and trusted instead of ageing into fiction on a shared drive.

Two forces keep it current

Currency comes from two things working together: a **regular rhythm** and **event-driven triggers**. The rhythm is a scheduled review on a sensible cadence, so the whole matrix gets a deliberate refresh. The triggers are the everyday events, someone joins, leaves, changes role, finishes a course, or has a certificate about to expire, that should prompt an immediate update to the relevant cell. Together they catch both the gradual drift and the sudden change, and neither alone is enough.

— WHY IT MATTERS NOW

Skills data goes off *faster than you think*

A skills matrix decays quietly. Nobody notices the day it stops being accurate; they only notice when a decision made on it goes wrong. Given how fast skills and teams change, the window in which a matrix stays accurate is shorter than most people assume.

8%

GARTNER, 2024

of organisations have reliable workforce skills data; poor maintenance is a leading reason the figure is so low.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, so a matrix frozen today dates quickly.

85%

WEF, 2025

of employers plan to prioritise upskilling, which only works from a matrix kept genuinely current.

The reason maintenance matters so much is that **every decision a matrix supports inherits its accuracy**. Staffing, training, cross-training, succession, gap analysis, all rest on the numbers being true today, not last year. A matrix refreshed only once a year is, as the saying goes, out of date before it is finished, and a single team can turn over enough people in a few months to make a static grid unreliable. The good news is that staying current is not hard; it is a light, repeatable routine. The rest of this guide lays out that routine: the cycle, the cadence, and the triggers.

— THE TRIGGERS

Four events that should prompt an update

Between scheduled reviews, certain events should each trigger an immediate update to the matrix. Catch these as they happen and the matrix barely drifts between reviews.

TRIGGER 01

People change

A joiner is added, a leaver is removed, or someone changes role. Each shifts who can do what, so update the rows the moment it happens, not at year end.

TRIGGER 02

Training completes

Someone finishes a course or is signed off on a new skill. Re-score that cell promptly, so the matrix credits the new capability and the development shows.

TRIGGER 03

A certificate expires

A licence, ticket or compliance refresher reaches its renewal date. Flag it before it lapses, since an expired certificate is a coverage gap whatever the skill.

TRIGGER 04

The work changes

A new system, product, regulation or service makes a skill newly critical, or retires one. Add or drop the column so the matrix tracks what the work now needs.

Notice that three of these four are about **people and time** rather than the annual planning calendar, which is exactly why a once-a-year refresh is not enough on its own. Teams change continuously, and certificates expire on their own schedule, indifferent to your review date. Building these triggers into normal workflow, so adding a joiner to the matrix is simply part of onboarding, and a completed course is logged as it finishes, keeps the matrix close to reality all year, and makes the scheduled review a light confirmation rather than a heavy rebuild.

— THE SCALE BEHIND THE SCORES

The 0 to 5 capability framework

A defined scale makes re-scoring quick and consistent, so an update means the same as the original rating. This framework, developed by Dr Alex J. Martin-Smith, even builds currency into the levels themselves: capability is not permanent, and the scale reflects that.

0

No skill required or desired EXCLUDED

No expectation that the person or role needs this skill within the next year. Useful at review: a skill that has become irrelevant to a role can be set to 0 and excluded rather than chased.

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.

2

Developing capabilities WEIGHTING 50%

Has completed more than 75% of training. Can probably perform the task alone, but consistent quality is not yet evidenced, so complex output still needs checking.

3

Capable WEIGHTING 75% · USUAL TARGET

Has completed 100% of training and shown consistent quality and productivity. Works unsupervised. The level most roles aim for and re-confirm at review.

4

Subject Matter Expert / Trainer

WEIGHTING 100% · CURRENCY RULE

Prolonged experience; works autonomously and can train others. Crucially, if the skill has not been used in three months, drop back to Level 3, currency built into the scale itself.

5

Strategic ownership / Leadership WEIGHTING 100%

Can define and develop new processes and skill requirements, show cross-function expertise, and demonstrate leadership. The purple flag highlights strategic capability.

The scale has currency built in

One feature of the framework matters especially for keeping a matrix current: the **three-month rule** at Level 4. Expertise that goes unused fades, so a Level 4 skill not practised for three months drops back to Level 3 until it is reconfirmed. This bakes the idea of currency into the scoring itself, a built-in prompt that ratings reflect what someone can do now, not what they once could. Re-scoring on the 0 to 5 scale is therefore quick: confirm or adjust each level against current evidence.

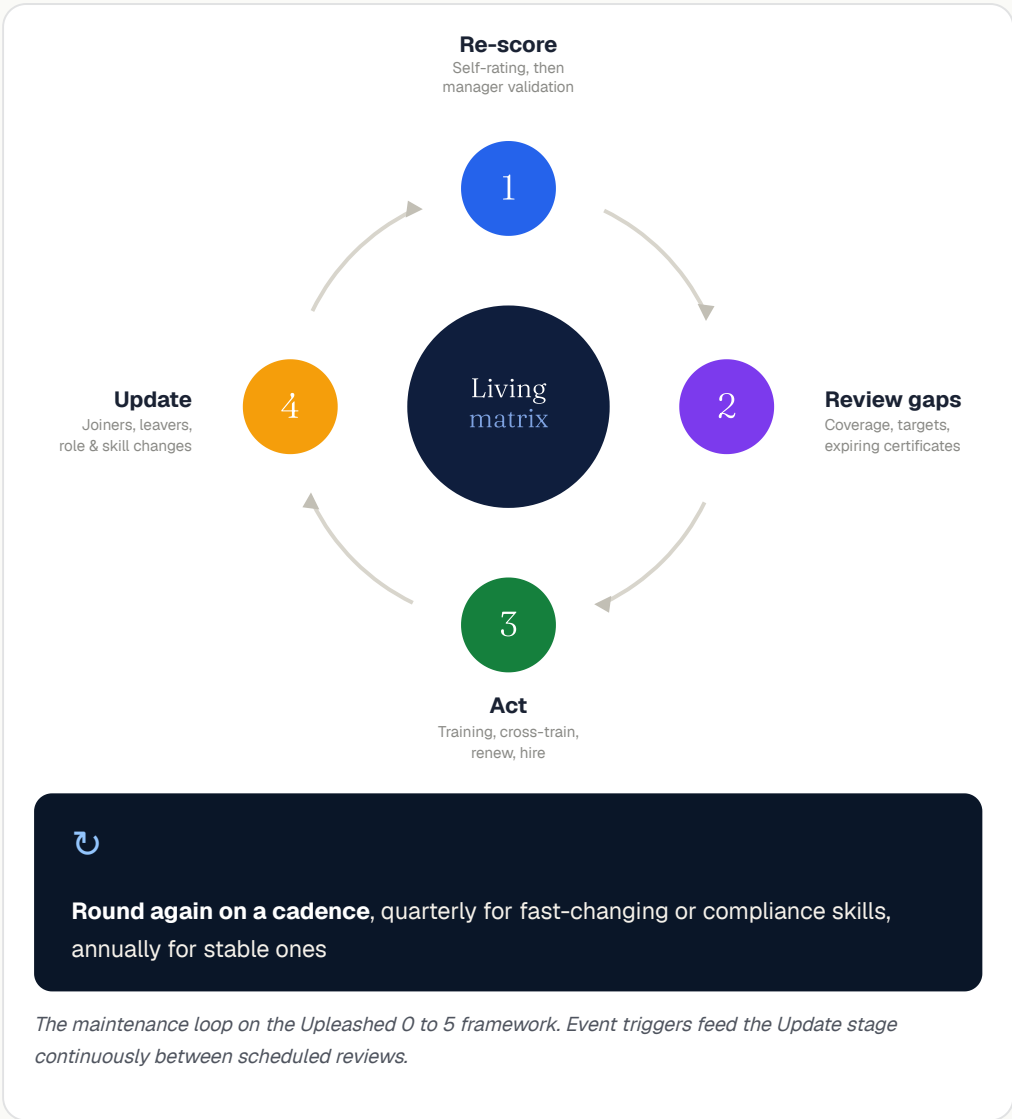
A worked example. Currency in action at a quarterly review:

```
At last review Aisha, Data analysis = 4 (expert, trained
others)
since then not used the skill in over three months
at this review → drop to 3 until reconfirmed – the matrix
stays honest.
```

— SEE THE RHYTHM

The skills matrix *review cycle*

Keeping a matrix current is a simple loop repeated on a cadence. Here it is: re-score the team, review the gaps and coverage, act on what you find, update for any changes, and round again. Each turn keeps the picture true and turns it into action, so the matrix stays a living tool.



WALKING THE LOOP

- **1 • Re-score.** Each person self-assesses, the manager validates against evidence, and levels are confirmed or adjusted, applying the currency rule so unused expertise steps back.
- **2 • Review gaps.** Read coverage down the columns, scores against required levels, and any expiring certificates. This is where the matrix earns its keep, by surfacing what needs attention.
- **3 • Act.** Turn the findings into decisions: schedule training, cross-train a single-cover skill, renew a certificate, or hire. A review that changes nothing is wasted.
- **4 • Update.** Capture joiners, leavers, role changes and completed training, fed continuously by the triggers, so the matrix is current before the next re-score even begins.

— **SETTING THE RHYTHM**

How often to review what

Not everything needs the same cadence. Match the review frequency to how fast a skill changes and how much risk a lapse carries. Here is a sensible default rhythm to adapt to your team.

What	Suggested cadence	Why
Compliance & safety-critical skills	Quarterly, plus on every expiry date	A lapse carries real risk, so these are checked most often and never left to drift
Fast-changing technical skills	Quarterly	Tools, systems and methods move quickly, so ratings date fast
Stable core skills	Annually, or at performance reviews	These change slowly, so a yearly confirmation is enough
People & roles (joiners, leavers, moves)	As it happens (triggered)	Each change alters coverage immediately; waiting makes the matrix wrong
The skill list itself	Annually, or on a major change	The skills worth mapping shift with strategy; revisit the columns periodically

The principle is simple: **the higher the volatility or the risk, the shorter the cycle**. Compliance and safety-critical skills sit at the top because a lapse there hurts most, and they get both a regular review and an event check on every expiry date. Stable skills can rest on an annual confirmation. Most teams find a **quarterly main review**, with people-changes handled as they happen, strikes the right balance between staying current and not becoming a burden, light enough to sustain, frequent enough to trust.

— AVOID THESE

Six mistakes in keeping a matrix current

MISTAKE 01

Build it once

The cardinal sin. A matrix never updated drifts into fiction, and a trusted fiction is more dangerous than no data at all.

MISTAKE 02

No owner

A matrix everyone assumes someone else maintains drifts. Name a clear owner, usually a manager with HR support.

MISTAKE 03

Calendar only, no triggers

An annual refresh misses the joiner, the leaver and the lapsed certificate. Update on events as well as on schedule.

MISTAKE 04

Same cadence for everything

Reviewing stable skills as often as volatile ones wastes effort. Match frequency to volatility and risk.

MISTAKE 05

Reviewing without acting

A review that surfaces gaps but changes nothing is wasted. Close the loop from what you find to what you do.

MISTAKE 06

A separate chore

Maintenance treated as a special project gets skipped. Embed updates in onboarding, reviews and team meetings.

The routine is free. A ready-made matrix just makes staying current *almost effortless*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template just lowers the effort of every loop: re-scoring is quick on the defined 0 to 5 scale, coverage and gaps recalculate the moment you change a cell, and certificate dates are there to watch, so the review becomes a light, regular habit rather than a rebuild, exactly what keeps a matrix alive.



The Advanced Excel Skills Matrix recalculates coverage and gaps the moment a score changes, so each review loop is quick and the matrix stays current, all on the same 0 to 5 framework used throughout 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 start the habit.

MOST POPULAR

£199

The full Excel template: live coverage, required levels and analytics that update as you re-score, 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 often should I update a skills matrix?

Match the cadence to volatility and risk: quarterly for fast-changing and compliance or safety-critical skills, annually for stable ones, and immediately, on a trigger, whenever someone joins, leaves, changes role, completes training or has a certificate expiring. Most teams settle on a quarterly main review with people-changes handled as they happen.

Q What is the biggest mistake in maintaining a matrix?

Treating it as a one-off. A matrix built once and never updated drifts out of date until it misleads, and because people still trust it, that is more dangerous than having no matrix at all. Regular re-scoring plus event-driven updates is what keeps it from becoming a trap.

Q What events should trigger an update?

Four in particular: people changes (joiners, leavers, role moves), completed training or a new sign-off, a certificate or licence reaching its renewal date, and a change in the work that makes a skill newly critical or retires one. Handling these as they happen keeps the matrix close to reality between reviews.

Q Who should own keeping the matrix current?

Name a clear owner, otherwise it drifts. In most teams the manager or team leader owns the scoring and currency, often with HR or L&D supporting the structure and governance. What matters is that one person is accountable for the matrix being up to date, not that everyone vaguely assumes someone is.

Q How do I stop a matrix going stale?

Build maintenance into normal work rather than treating it as a project. Tie re-scoring to performance reviews and one-to-ones, add joiners during onboarding, log completed courses as they finish, and watch certificate dates. A regular rhythm plus event triggers, with a named owner, keeps it current with little effort.

Q Does the rating scale help keep it current?

Yes. The 0 to 5 framework has currency built in: a Level 4 skill unused for three months drops back to Level 3 until reconfirmed, a prompt that ratings reflect present capability, not past. A clearly defined scale also makes re-scoring quick, since each review is simply confirming or adjusting a level against current evidence.

— 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

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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Keep it *alive*.

You now have the routine. The quickest way to start is to put a recurring review in the calendar this week, name an owner, and agree the handful of events that will trigger an update in between. A living matrix is built one light, regular loop at a time, and it is the maintained one that you can actually trust.

[Try the free 5x5 builder →](#)

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