

• LOGISTICS & WAREHOUSE • GUIDE

## The skills matrix *for logistics teams*

A warehouse is a flow: goods come in, get put away, are picked, packed and dispatched. If any one stage runs short of trained, certificated operators, the whole line backs up and orders ship late. A skills matrix shows where along that flow your cover is solid and where a single absence, or a lapsed forklift licence, would stop the goods moving.



**Dr Alex J. Martin-Smith**

CMGR · MBA · LLM · DBA

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

### THE SHORT ANSWER

A logistics skills matrix maps warehouse operators against the stages of the goods flow, goods-in, put-away, picking, packing and dispatch, plus the equipment licences like forklift and reach truck that gate who can do what. Read it along the flow to see which stage is thinnest on trained, certificated cover, because that stage sets the pace for the whole operation. In short: **it shows where the flow of goods is one absence or one expired licence from backing up, so you cross-train and renew before orders ship late.**

#### KEY TAKEAWAYS

- **The warehouse is a flow.** Goods-in, put-away, pick, pack, dispatch; the matrix maps coverage at each stage, because the thinnest stage sets the pace.
- **The bottleneck is your risk.** One stage short of cover backs up the whole line, just like a single slow station on a production line.
- **Licences gate the work.** Forklift and reach-truck tickets must be valid; an expired licence is a coverage gap even when the skill is there.
- **Cross-training is the fix.** Operators who can flex across stages absorb absence, seasonal peaks and the inevitable late truck.
- **Shifts must each be covered.** Nights and weekends need the same capability as days, so read coverage by shift, not just in total.

#### — START HERE

## A warehouse is a *flow, not a pile*

The thing that makes a logistics skills matrix different is the shape of the work. A warehouse is not a set of separate jobs; it is a flow, goods move in one direction through a sequence of stages, and the team's capability has to hold up at every stage or the whole flow stalls. The matrix maps capability along that flow.

### The stages are the flow of goods

Warehouse work standardises into a familiar sequence: **goods-in** (receiving and checking), **put-away** (racking to locations), **picking** (assembling orders, often with RF scanners), **packing** (pack, label, quality check) and **dispatch** (loading and despatch). These stages are the columns of a logistics matrix. Mapping operators against them shows, at each step of the journey a parcel takes through your building, how many people can do that step to standard.

### The thinnest stage sets the pace

Because the work is a flow, its throughput is governed by its **bottleneck**, the stage with the least capable cover. It does not matter how many people can pick if only one can pack; orders pile up at packing and ship late regardless. This is exactly the lesson of a production line, applied to a warehouse: reading coverage **along the flow** reveals the stage that is quietly capping your throughput and your resilience, which is usually not the stage that feels busiest.

## Skill and licence are both required

Logistics adds a second layer that office teams do not have: **equipment certification**. Operating a counterbalance forklift, a reach truck or an order picker needs a valid licence, and an expired ticket stops an operator from that task however skilled they are, much like a construction card. So a logistics matrix tracks two things at each relevant stage: the **capability** to do the work, and the **valid licence** to operate the equipment it needs. Both must be in place for that operator to count as cover.

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— WHY IT MATTERS NOW

## One thin stage and the *orders back up*

In a warehouse a skills gap is not abstract; it is a queue. A stage short of trained, licensed cover becomes the bottleneck that holds up every order behind it, and with peaks, shifts and licence renewals to juggle, keeping every stage covered is a constant task.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so most sites manage stage cover and licences on memory.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, as automation, WMS and equipment keep evolving.

63%

WEF, 2025

of employers call skills gaps the biggest barrier to change; in a warehouse they read as missed despatch cut-offs.

Logistics has the same two features that make a matrix invaluable on a shop floor or production line, and then some. The work is a **flow**, so a gap at one stage is felt immediately downstream; it is **shift-based**, so nights and weekends need cover too; and it is **licence-gated**, so capability can lapse on a calendar date even when nobody's skill has changed. A matrix that maps capability and licence validity along the flow turns all three into something visible: the bottleneck stage to cross-train, the licence to renew, and the shift that is quietly running thin, before a late truck becomes a missed cut-off.

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WHAT IT PROTECTS

## Four things a logistics matrix safeguards

On a warehouse floor, a skills matrix protects four things that translate straight into throughput, safety and on-time despatch. Each is a daily return on keeping the grid current.

PROTECTS 01

### Throughput & flow

By showing coverage at every stage, the matrix reveals the bottleneck that caps throughput, so you cross-train where it matters and keep goods moving end to end.

PROTECTS 02

### Safety & licence compliance

It tracks who holds a valid forklift, reach-truck or order-picker licence, so only certificated operators run equipment, the heart of warehouse safety and audit.

PROTECTS 03

### On-time despatch

It ensures every shift, including nights and weekends, has the cover to hit carrier cut-offs, so orders leave on time rather than waiting for the one trained packer.

PROTECTS 04

### Peak flex

It shows where versatility is strong enough to absorb a seasonal spike or a sudden absence, and where cross-training is needed before the peak arrives.

The common thread is **keeping the flow moving**. A warehouse where most operators can work most stages, on valid tickets, flexes around absence, peaks and late arrivals without the line stalling. One where each stage rests on a single licensed operator is brittle: one sickness, one expired forklift licence, and the goods stop moving at that point. The matrix is simply the instrument that shows which kind of operation you are running, and exactly where to build the cover and renew the tickets that keep it flowing.

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THE SCALE BEHIND THE SCORES

## The 0 to 5 capability framework

A logistics matrix needs a clear scale so a rating means the same on every shift. This framework, developed by Dr Alex J. Martin-Smith, provides it for capability, while equipment licences sit alongside as a

separate valid-or-not status. Level 3, works the stage unsupervised, is the line for genuine cover.

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- 0** **Not required for the role** EXCLUDED
- The stage or equipment is not part of this operator's role, for example reach-truck work for a dedicated packer. Excluded from their score, not counted as a gap.
- 
- 1** **In training / New starter** WEIGHTING 25%
- Learning the stage under supervision. Up to 75% trained and does not yet fully understand the standard or the safety requirements. Should not run the stage alone.
- 
- 2** **Developing** WEIGHTING 50%
- More than 75% trained. Can work the stage in normal conditions, but is not yet consistent on pace and accuracy under pressure, so a peak or an awkward order still needs support.
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- 3** **Capable** WEIGHTING 75% · COUNTS AS COVER
- Fully trained, consistent on pace and accuracy, works the stage unsupervised. The level that genuinely counts as cover for that stage on a shift, and the floor for running equipment alone.
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- 4** **Expert / Trainer** WEIGHTING 100%
- Prolonged expertise; works the stage to a high standard, handles exceptions and trains others on it. Often the shift's go-to for the tricky jobs. Reconfirm if unused for a period.
- 
- 5** **Strategic ownership / Lead** WEIGHTING 100%
- Sets method and standards for the operation, plans flow and resourcing across stages and shifts. The purple flag marks your shift managers and warehouse leads.

## Coverage along the flow, licences alongside

Score each operator 0 to 5 at each stage, and the weightings, Level 1 = 25%, 2 = 50%, 3 = 75%, 4 and 5 = 100%, with 0 excluded, give a capability figure. But the number that matters most is coverage per stage: how many operators are at Level 3 or above, and, for equipment stages, also hold a valid licence. Read across the stages and the lowest count is your bottleneck, the stage that caps the whole flow.

**A worked example.** Finding the bottleneck along the flow:

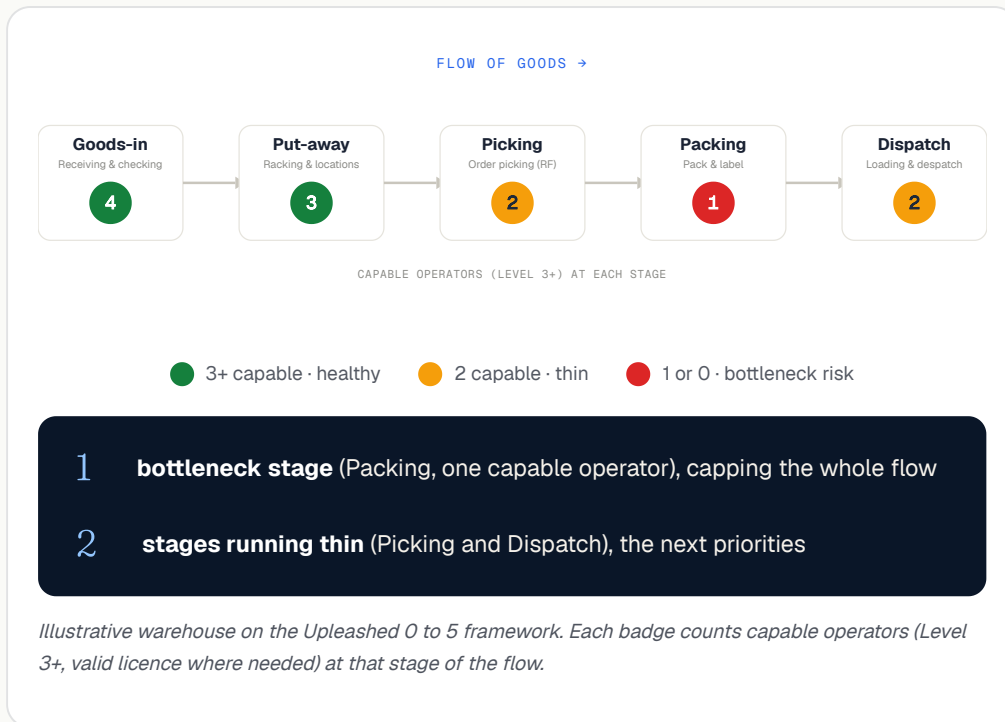
Capable cover (L3+) Goods-in 4, Put-away 3, Picking 2,  
**Packing 1**, Dispatch 2  
lowest → **Packing = 1** the bottleneck  
however fast the rest run, orders queue at packing – cross-  
train here first.

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— SEE IT ALONG THE FLOW

## Coverage across the *flow of goods*

Here is a warehouse mapped the way the work actually runs, as a flow. Each stage shows how many operators can run it unsupervised (Level 3 or above, with a valid licence where equipment is needed). Reading left to right, the thinnest stage is the bottleneck that sets the pace for the whole operation.



#### WHAT THE SHIFT MANAGER READS HERE

- **Packing is the bottleneck.** Only one operator can pack to standard. However fast goods-in and picking run, orders queue at packing, so it is the single most urgent cross-training priority on the floor.
- **The pace is set by the weakest stage.** Goods-in's healthy cover of four cannot speed up despatch while packing sits at one. Reading along the flow shows where throughput is really capped.
- **Two more stages are thin.** Picking and dispatch each have two capable operators, fine today but one absence from trouble, the next stages to build once packing is fixed.
- **Check licences, not just skill.** Put-away and dispatch rely on forklift and reach-truck tickets. A count here only counts operators whose licence is valid, since an expired ticket is a coverage gap whatever the skill.

#### — READY-TO-USE EXAMPLES

## Example skills to map by warehouse stage

The columns of a logistics matrix should follow the flow of goods and the equipment each stage needs. Here are ready-to-adapt skill lists for the common stages, a starting point to tailor to your operation.

Stage / area	Example skills to map (the columns)	Watch out for
<b>Goods-in</b>	Receiving, checking against paperwork, booking in, quality inspection	Assuming anyone can check goods in accurately against a PO
<b>Put-away &amp; storage</b>	Racking to location, reach-truck operation, stock accuracy, WMS use	Counting reach-truck work without a valid licence as cover
<b>Picking</b>	Order picking, RF scanner use, pick accuracy, batch and wave picking	Treating speed as skill while accuracy quietly slips
<b>Packing &amp; dispatch</b>	Pack and label, carrier systems, loading, forklift, despatch paperwork	A single-cover packing or loading stage that caps despatch
<b>Equipment licences</b>	Counterbalance forklift, reach truck, order picker, pump truck, PPT	Tracking that a licence exists but not its renewal date

Take the stages your site runs, trim each to the vital few skills, and add the equipment licences each stage needs, tracked by validity date. Keep those licences current, since an expired forklift ticket is a coverage gap at that stage even when the operator's skill is unchanged, exactly the kind of hidden hole that stalls a flow. As always, map enough to be useful and few enough that supervisors keep it current across the shifts.

— AVOID THESE

## Six mistakes on a logistics matrix

**MISTAKE 01**

**Ignoring the bottleneck**

A flow runs at the pace of its thinnest stage. Read coverage along the flow and cross-train the bottleneck first.

**MISTAKE 02**

**Tracking licences, not expiry**

A forklift ticket that has lapsed is no cover at all. Record renewal dates, not just that a licence once existed.

**MISTAKE 03**

**Reading totals, not shifts**

A site can look covered overall yet have no packer on nights. Read coverage by shift, not just in aggregate.

**MISTAKE 04**

**Confusing speed with skill**

Fast but inaccurate picking causes returns and rework. Score consistent accuracy to standard, not raw pace.

**MISTAKE 05**

**One column for "the warehouse"**

Each stage is its own skill. Lumping the flow into one column hides exactly the bottleneck you need to see.

**MISTAKE 06**

**Letting it go stale**

High turnover erodes cover constantly. A matrix updated once a year cannot keep a flow moving; keep it live.

The method is free. A ready-made matrix just makes the *bottleneck obvious*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template just makes the warehouse view effortless: score operators on the 0 to 5 scale and record each licence with its expiry, and the coverage counts per stage calculate themselves, so the bottleneck stage, the thin shifts and the licences about to lapse stand out at a glance, before a late truck becomes a missed cut-off.



*The Advanced Excel Skills Matrix shows capable operators per stage at a glance, so the bottleneck and the licences about to expire are obvious, all on the same 0 to 5 framework used throughout this guide.*

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## — COMMON QUESTIONS

### Quick *answers*

#### **Q What is a skills matrix for logistics?**

It is a grid mapping warehouse operators against the stages of the goods flow, goods-in, put-away, picking, packing and dispatch, plus the equipment licences each stage needs, with a level in each cell. Read along the flow, it shows which stage is thinnest on trained, certificated cover.

#### **Q Why map the warehouse as a flow?**

Because the work is a flow, and its throughput is set by its thinnest stage, the bottleneck. Mapping coverage stage by stage reveals where the flow is capped, which is often not the busiest-looking area. Fixing the bottleneck does more for throughput than improving a stage that already has plenty of cover.

#### **Q How does the matrix handle forklift and equipment licences?**

As a separate validity status alongside the capability score. Operating a forklift, reach truck or order picker needs a valid licence, so at equipment stages an operator only counts as cover if they are both capable (Level 3+) and currently licensed. Track renewal dates, since an expired ticket is a coverage gap whatever the skill.

## Q What skills should a logistics matrix include?

Follow the flow: receiving and checking at goods-in, racking and reach-truck work at put-away, order picking and RF accuracy at picking, pack and label and loading at packing and dispatch, plus the equipment licences each needs. Map the vital few per stage and keep the licences current.

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## Q How does it help with peaks and turnover?

It shows where cross-training is strong enough to absorb a seasonal spike or a sudden absence, and where a stage rests on too few operators. With warehouse turnover high, capability erodes constantly, so a live matrix lets you see a stage running thin and cross-train ahead of the peak rather than scrambling when a key operator leaves.

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## Q Do I need software for a logistics skills matrix?

No. A well-built spreadsheet with coverage counts and licence-expiry dates works well for a site, and is where most should start. Software helps when you want a live view across stages, shifts and depots, with licence-renewal reminders and coverage that updates automatically as operators train, certify and move on.

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### — ABOUT THE AUTHOR



## Dr Alex J. Martin-Smith

CMGR · MBA · LLM · DBA

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.

Connect on LinkedIn: [linkedin.com/in/alexmartinsmith](https://www.linkedin.com/in/alexmartinsmith)

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

Dr Alex J. Martin-Smith

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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.

## Keep the goods *moving*.

You now have the logistics method. The quickest way to start is to list your stages this week, count who can run each unsupervised on a valid licence, and read along the flow. The thinnest stage you find is your bottleneck, and exactly where to cross-train before a late truck turns into a missed cut-off.

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