

## Using a skills matrix for *performance reviews*

Performance reviews fail when they rest on memory and impression: recency bias, vague feedback, conversations no one trusts. A skills matrix fixes that by grounding the review in evidence and, crucially, in progress, this review's levels against last review's. "You were a 2 on data analysis, you're a 3 now" is a fairer, clearer conversation than any rating pulled from a hunch. This is how to run reviews from the matrix.



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

### THE SHORT ANSWER

To use a skills matrix in a performance review, compare each person's current levels against their levels at the last review to show progress with evidence, discuss the growth and the gaps against what the role requires, and agree next steps, all grounded in the same defined scale rather than impression. Calibrate across managers first so a level means the same for everyone. In short: **the matrix turns a subjective review into an evidence-based conversation about real, visible progress since last time.**

#### KEY TAKEAWAYS

- **Progress is the story.** The most powerful review view is this period's levels against last period's, growth made visible and concrete.
- **Evidence beats impression.** Levels tied to a defined scale and real examples replace recency bias and gut feel.
- **It makes feedback fair.** Shared, visible criteria mean a rating is easier to explain and easier for the person to accept.
- **Calibrate first.** A review is only fair if a "3" means the same across managers, so align ratings before the conversation.
- **No surprises.** The review confirms what regular one-to-ones already discussed; it should never be the first time feedback is heard.

#### — START HERE

## The review's real subject is *progress*

A performance review built on memory tends to collapse into impressions of the last few weeks. A skills matrix changes the subject entirely: it makes the review about **measured progress over the whole period**, this review's levels set against last review's. That single shift, from impression to evidenced movement, is what makes a review fair, clear and genuinely useful.

### Last review versus this review

The most valuable thing a matrix brings to a review is a **before-and-after comparison**. Because capability is scored on a defined scale and re-scored over time, you can place this period's levels next to last period's and see exactly where someone has grown. "Last year you were at Level 2 on data analysis, this year you're at Level 3" is concrete, motivating and impossible to argue with, far better than "you've improved a bit". Progress becomes a fact on the page, not a feeling in the room.

### Evidence instead of impression

Reviews are routinely criticised as subjective and inconsistent, shaped by what happened most recently or by a single strong impression. A matrix replaces that with **evidence against shared criteria**. Each level has a defined meaning, and each score rests on real examples, so the conversation is about demonstrated capability, not gut feel. This is also the antidote to the

classic biases, recency and the halo effect, that quietly distort reviews and erode people's trust in them.

### It makes feedback easier to give and accept

When expectations are visible and agreed, feedback gets easier on both sides. The manager can point to the scale and the evidence rather than delivering a verdict, and the person can see exactly where they stand and why. A rating grounded in **shared, observable criteria** is far easier to accept than one that feels like an opinion, which is why matrix-based reviews tend to feel fairer and produce more constructive, less defensive conversations.

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#### — WHY IT MATTERS NOW

## Subjective reviews *erode trust*

A review people do not trust is worse than no review: it demotivates, feels unfair, and makes every downstream decision, pay, promotion, development, look arbitrary. Grounding reviews in a skills matrix is how you make them fair, and how you prove progress that would otherwise go unrecognised.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so most reviews rest on memory rather than evidence.

2×

WORKHUMAN, 2025

more likely employees are to stay when development is visibly invested in, which a progress-based review shows.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, so tracking capability over time matters more each year.

The cost of a subjective review is corrosive precisely because it is invisible at the time: the conversation feels fine, but the person leaves unsure the rating was fair, and managers quietly dread the process. A matrix-based review addresses this at the root by making the assessment **evidenced, comparable and centred on progress**. It recognises growth that impression-based reviews miss, frames gaps as the next step rather than a failing, and gives both sides a shared, honest basis for the harder conversations about

pay and promotion. Done this way, the review stops being an ordeal and becomes a genuinely useful checkpoint.

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## — WHAT IT BRINGS

# Four things the matrix brings to a review

Used in a performance review, a skills matrix contributes four things a conventional review struggles to deliver. Each makes the conversation fairer and more useful.

### BRINGS 01

#### Visible progress

The before-and-after comparison shows exactly how someone has grown since the last review, recognising development that memory-based reviews routinely overlook.

### BRINGS 02

#### Objectivity

Levels tied to a defined scale and real evidence replace impression and recency bias, so the assessment reflects the whole period, not the last fortnight.

### BRINGS 03

#### Fairer comparison

When everyone is assessed against the same criteria, and ratings are calibrated, comparisons for pay and promotion become defensible rather than arbitrary.

### BRINGS 04

#### Clear next steps

Gaps against the required level point straight to development goals, so the review ends with a concrete plan, not just a backward-looking score.

Together these change what a review is *for*. Instead of a backward-looking judgement delivered once a year, it becomes a fair, evidenced checkpoint that recognises progress, explains where someone stands, and sets the next steps, all from the same data the team already uses day to day. And because the matrix connects naturally to development planning and calibration, the review stops being an isolated event and becomes part of a **continuous, joined-up cycle** of capability management.

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## — THE SCALE BEHIND THE SCORES

# The 0 to 5 capability framework

A review needs a scale stable enough to compare across time, so this year's level genuinely means more than last year's. This framework, developed by Dr Alex J. Martin-Smith, gives each level a fixed, defined meaning, which is what makes a year-on-year comparison valid rather than just two numbers.

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<b>0</b>	<b>No skill required or desired</b> <span>EXCLUDED</span>
	The skill is not needed for this role within the next year. In a review, it keeps the conversation on the skills that actually matter to the person's role and goals.
<b>1</b>	<b>In training / Trainee</b> <span>WEIGHTING 25%</span>
	Up to 75% trained and does not yet fully understand the quality requirements. A common starting point whose movement to Level 2 or 3 is real, reviewable progress.
<b>2</b>	<b>Developing capabilities</b> <span>WEIGHTING 50%</span>
	More than 75% trained; can work alone, but consistent quality is not yet evidenced. Moving from here to Level 3 is the most common and motivating progress story in a review.
<b>3</b>	<b>Capable</b> <span>WEIGHTING 75% · USUAL TARGET</span>
	100% trained, consistent quality, works unsupervised. The level most roles require, so reaching it is a clear, celebrated milestone in a review.
<b>4</b>	<b>Subject Matter Expert / Trainer</b> <span>WEIGHTING 100%</span>
	Prolonged expertise; works autonomously and can train others. Reaching Level 4 supports a case for added responsibility or progression at review.
<b>5</b>	<b>Strategic ownership / Leadership</b> <span>WEIGHTING 100%</span>
	Defines processes and standards and shows leadership. In a review, evidence at this level supports promotion and succession conversations.

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## Two numbers tell the progress story

The review power of the framework is simple: hold last review's level next to this review's, and the movement is the story. Because each level is defined, a step from 2 to 3 is not a vague "better", it is "now works unsupervised to consistent quality", a real, evidenced milestone. Averaging the weightings, Level 1 = 25%, 2 = 50%, 3 = 75%, 4 and 5 = 100%, also gives an overall capability figure you can compare period to period.

**A worked example.** One skill, told as progress:

```
Data analysis last review 2 (developing) → this review 3
(capable, unsupervised)
movement = +1 level, evidenced by owning the quarterly
report unaided
the review → recognise the growth, then set the next
target.
```

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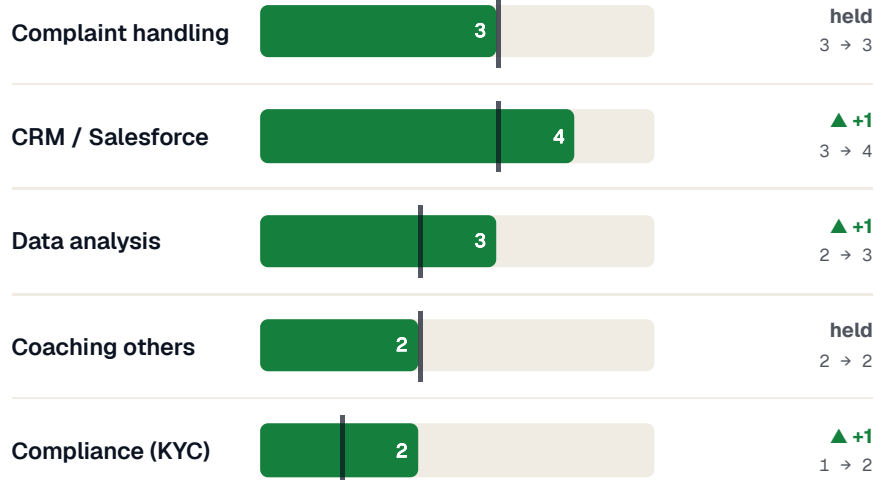
[SEE THE PROGRESS](#)

## A review built on *progress*

Here is one person's review view: for each skill, the bar shows this review's level, and the marker shows where they were at the last review. The distance between them is the growth over the period, the heart of the conversation. It turns a review from a snapshot judgement into a story of movement.

## Aisha's *year in review*

CUSTOMER TEAM · VS LAST REVIEW



■ this review | last review Levels on the 0 to 5 scale (each step = 20%).

+3

**levels gained across the year** (CRM, data analysis, compliance), two skills held steady

*Illustrative review on the Upleashed 0 to 5 framework. The marker is last review's level; the bar is this review's. The gap is the progress.*

### HOW TO RUN THE CONVERSATION

- **Lead with the growth.** Three skills moved up a level this year, CRM, data analysis and compliance. Open the review by recognising that evidenced progress; it sets a fair, motivating tone before any gaps.
- **Use evidence for each move.** A level rise should rest on a real example, owning the quarterly report lifted data analysis from 2 to 3. That is what makes the rating fair and the recognition meaningful.
- **Discuss the steady ones honestly.** Complaint handling held at target (fine), but coaching stayed at 2 against a higher aim, an open, evidence-based talking point, not an accusation.
- **End on the next target.** Turn the review forward: which one or two skills are next, and what action gets there? The progress view flows straight into the next development plan.

### — RUNNING THE REVIEW

# Five steps to a matrix-based review

Bringing the matrix into a review is straightforward, and it makes the whole conversation fairer. These five steps keep it evidenced, balanced and forward-looking.

1

## Re-score and calibrate first

Before any review, re-score each person against the scale on current evidence, then calibrate across managers so a level means the same for everyone. An uncalibrated review is an unfair one, this step is what makes the ratings, and the comparisons drawn from them, trustworthy.

2

## Put this period next to last

Prepare the comparison view: this review's levels against last review's, with the movement highlighted. This is the backbone of the conversation, so have it ready before you sit down, not improvised from memory in the room.

3

## Lead with evidenced progress

Open by recognising where the person has grown, and tie each rise to a concrete example. Starting with real, evidenced progress sets a fair and motivating tone, and earns the credibility to discuss the gaps honestly afterwards.

4

## Discuss gaps against the required level

Compare current levels to what the role requires, and talk about the shortfalls as next steps rather than failings. Framed against a shared, visible standard, a gap is a development target both of you can see, not a verdict delivered from on high.

## 5

### Agree next targets and record it

Close by agreeing the one or two skills to focus on next, flowing straight into a development plan, and record the agreed levels and actions. This both documents the review fairly and sets the baseline for measuring progress at the next one.

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#### — AVOID THESE

## Six mistakes in matrix-based reviews

#### MISTAKE 01

##### Skipping calibration

An uncalibrated review compares noise. Align ratings across managers first, so a level means the same for everyone.

#### MISTAKE 02

##### Ignoring the comparison

A single snapshot misses the story. Always show this period against last, so progress is visible and recognised.

#### MISTAKE 03

##### Rating on recency

The last few weeks are not the whole year. Score against evidence from the full period, not the latest impression.

#### MISTAKE 04

##### Scores without evidence

A level with no example behind it feels arbitrary. Tie every rating, and every change, to a concrete instance.

#### MISTAKE 05

##### Surprises in the review

A review should never be the first time feedback is heard. Use regular one-to-ones so the review only confirms.

#### MISTAKE 06

##### Looking only backward

A review that just judges the past wastes the moment. End on agreed next targets and a forward development plan.

— FROM SUBJECTIVE TO EVIDENCED

The method is free. A ready-made matrix just makes the *progress view automatic*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template just makes the review effortless: because levels are scored on the defined 0 to 5 scale and re-scored over time, the period-on-period comparison, the capability trend and the gaps against target are simply there when review time comes, so the conversation starts from evidence and progress, not a blank page and a hazy memory.



*The Advanced Excel Skills Matrix tracks capability over time, so a performance review starts from evidenced progress and clear gaps against target, all on the same 0 to 5 framework used throughout this guide.*

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## — COMMON QUESTIONS

### Quick *answers*

#### **Q How do I use a skills matrix in a performance review?**

Compare each person's current levels against their levels at the last review to show evidenced progress, discuss the growth and the gaps against what the role requires, and agree next steps, all on the same defined scale. Calibrate ratings across managers first so a level means the same for everyone.

#### **Q Why is the matrix better than a traditional review?**

Because it replaces memory and impression with evidence against shared criteria, and it shows progress over time. That makes reviews fairer, reduces recency and halo bias, recognises growth that subjective reviews miss, and gives a defensible basis for pay and promotion decisions, all of which build trust in the process.

#### **Q How does it show progress?**

By placing this review's levels next to the last review's. Because capability is scored on a defined scale and re-scored over time, the movement is visible and concrete, "Level 2 last year, Level 3 now", which is far more meaningful and motivating than a general comment that someone has improved.

## Q Should I calibrate before reviews?

Yes. A review is only fair if a given level means the same regardless of which manager assessed it, so run a calibration session to align ratings against evidence before the review conversations. Without it, you are comparing inconsistent scores, and any cross-team decision drawn from them is unfair.

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## Q How does it reduce bias in reviews?

By anchoring every rating to a defined level and real evidence from the whole period, rather than a recent event or a single strong impression. That directly counters recency bias and the halo effect, and because the criteria are visible and shared, the assessment is easier to explain and harder to skew.

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## Q Does a matrix review replace a normal appraisal?

It strengthens it rather than replacing it. The matrix provides the objective, evidence-based capability picture and the progress story; your appraisal still covers goals, behaviours and wider contribution. Used together, the conversation is fairer and more concrete, and it flows naturally into a forward-looking development plan.

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

## Review the *progress, not the impression.*

You now have the review method. The quickest way to start is to calibrate your ratings, put each person's current levels beside last review's, and open the conversation with the growth you can both see. An evidenced, progress-based review is one people trust, and one that actually drives development.

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