

• PROFESSIONAL SERVICES • GUIDE

The skills matrix *for* *professional services*

In a consultancy, agency or firm, the product is the people, and the question that runs the business is "who can we put on this engagement?" A skills matrix answers it by service line: who can lead a piece of work, who can support it, and who is still developing. Get that view right and you staff client work by Thursday with confidence, not a scramble of emails.



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 professional services skills matrix maps people against the firm's service lines and competencies, with a level in each cell and any client-required certifications tracked by validity. Read it by service line and the key distinction is who can **lead** an engagement, who can **support**, and who is still developing, because that is what staffing a client project actually needs. In short: **it shows the lead and support depth in every service line, so you can staff engagements fast and see which lines rest on a single expert.**

KEY TAKEAWAYS

- **The people are the product.** In professional services, capability is the deliverable, so knowing exactly who can do what is the core of the business.
- **Lead versus support is the key line.** Staffing needs to know who can lead an engagement and who can support, not just a single skill score.
- **One leader per service line is a risk.** A service line only one person can lead is a bottleneck on winning and delivering that work.
- **Client certifications gate the work.** PMP, PRINCE2, ISO 27001 and the like, with valid expiry, are often required before a contract is signed.
- **It ends the staffing scramble.** The matrix replaces six open spreadsheets and a flurry of emails with one clear view of who is available and able.

— [START HERE](#)

When the people *are the product*

Professional services firms, consultancies, agencies, accountants, law and engineering practices, sell capability itself. The team's skills are not a means to the product; they are the product. That makes a skills matrix less of a management nicety and more of a core operating system: it is how you know what you can actually sell and deliver, and to whom you can assign it.

The columns are service lines and competencies

On a professional services matrix, the columns are the **service lines** the firm offers, strategy advisory, data and analytics, change management, technology implementation, risk and compliance, and the underlying competencies they draw on. Mapping people against these answers the question every engagement starts with: who do we have who can do this work? Each cell records a level, and, where clients demand it, the relevant certification and whether it is still valid.

Lead, support, or still developing

The distinction that matters most in this sector is not a single score but a **role on an engagement**. Can this person *lead* a piece of client work, owning the relationship and the outcome? Can they *support*, delivering competently under someone's lead? Or are they still *developing* toward that? A consultancy needs both leaders and supporters in every active service line,

and the matrix makes that depth visible, turning a vague sense of seniority into a clear staffing picture.

It ends the "staff by Thursday" scramble

Anyone who has resourced client work knows the pain: a new engagement lands, and suddenly six spreadsheets are open and eight team leads are emailed to find who is free and able. By Friday a team is assembled based on **who came to mind, not who was the best fit**. A skills matrix replaces that scramble with a single, current view of who can lead and support each service line, so staffing becomes a quick, confident decision rather than a frantic hunt.

— WHY IT MATTERS NOW

The wrong team is a *client risk*

In professional services, a capability gap is felt by the client directly, in the quality of the work and the credibility of the team. Staffing on who is free rather than who is able risks the engagement, the relationship and the firm's reputation, and the data shows most firms cannot see their capability clearly enough to avoid it.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so most firms staff engagements on memory, not evidence.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, as client demands and technologies keep shifting.

63%

WEF, 2025

of employers call skills gaps the biggest barrier to change; in a firm they read as engagements at risk.

The cost of poor capability visibility is acute in a firm because it strikes twice. It shows up in **delivery**, an engagement staffed on availability rather than ability, leading to rework, missed scope and an unhappy client, and in **growth**, bids declined or lost because no one realised the firm had, or lacked, the leaders for that work. A skills matrix addresses both: it shows the genuine lead and support depth in each service line, so you staff

engagements with the right people, bid for the work you can credibly win, and see early where you must develop or hire before a gap costs you a client.

— WHAT IT PROTECTS

Four things a professional services matrix safeguards

In a firm, a skills matrix protects four things that translate straight into delivery, growth and margin. Each is a direct return on knowing your capability precisely.

PROTECTS 01

Engagement staffing

By showing who can lead and support each service line, the matrix lets you assemble the right team fast, on ability and availability, not on who springs to mind.

PROTECTS 02

Delivery quality

Matching genuine capability to client work reduces rework and protects the relationship, the quiet quality control that keeps clients and reputation intact.

PROTECTS 03

Lead depth & growth

It reveals the service lines that rest on a single leader, the constraint on both winning and delivering that work, so you develop or hire ahead of demand.

PROTECTS 04

Compliance & credibility

It tracks the client-required certifications, with validity, that contracts hinge on, so you can prove the team is qualified the moment a client asks.

The thread connecting all four is **matching the right people to client work, fast and credibly**. A firm with genuine lead and support depth across its service lines can staff confidently, deliver well, bid boldly and prove its credentials on demand. One where each service line rests on a single rainmaker is fragile: that person becomes the bottleneck on growth and the single point of failure on delivery. The matrix is the instrument that shows which firm you are running, and exactly where developing a second leader would unlock both capacity and growth.

— THE SCALE BEHIND THE SCORES

The 0 to 5 capability framework

A firm's matrix needs a scale that distinguishes supporting from leading, since that is the staffing question. This framework, developed by Dr Alex J. Martin-Smith, draws those lines clearly: Level 3 can support an engagement competently, while Level 4 and above can lead one.

-
- 0** **Not required for the role** EXCLUDED
- The service line is not part of this person's remit, for example deep tax for a strategy consultant. Excluded from their score, not counted as a gap.
-
- 1** **In training / Learning** WEIGHTING 25%
- Learning the service line, contributes only under close supervision. Up to 75% of the way to productive delivery. Not yet client-facing on this work unaided.
-
- 2** **Developing** WEIGHTING 50%
- More than 75% trained. Can do defined tasks on an engagement, but the work is reviewed and they do not yet carry a workstream alone. Still developing toward support.
-
- 3** **Capable - can support** WEIGHTING 75% · SUPPORT LINE
- Fully capable, delivers a workstream on an engagement unsupervised and to standard, under someone's lead. The level at which a person genuinely counts as support on client work.
-
- 4** **Expert - can lead** WEIGHTING 100% · LEAD LINE
- Prolonged expertise; can lead an engagement in this service line, own the client relationship and the outcome, and develop others. The line at which someone can lead, not just support.
-
- 5** **Strategic ownership / Practice lead** WEIGHTING 100%
- Defines the firm's approach in this service line, shapes methodology and wins the most complex work. The purple flag marks your practice leads and rainmakers.

Two lines that drive staffing: support and lead

A professional services matrix reads against two thresholds rather than one.

Level 3 is the support line: can deliver a workstream competently under a lead. **Level 4** is the lead line: can own the engagement. The weightings, Level 1 = 25%, 2 = 50%, 3 = 75%, 4 and 5 = 100%, with 0 excluded, still give a capability figure, but for staffing you count, per service line, how many can lead and how many can support.

A worked example. Reading lead and support depth on a service line:

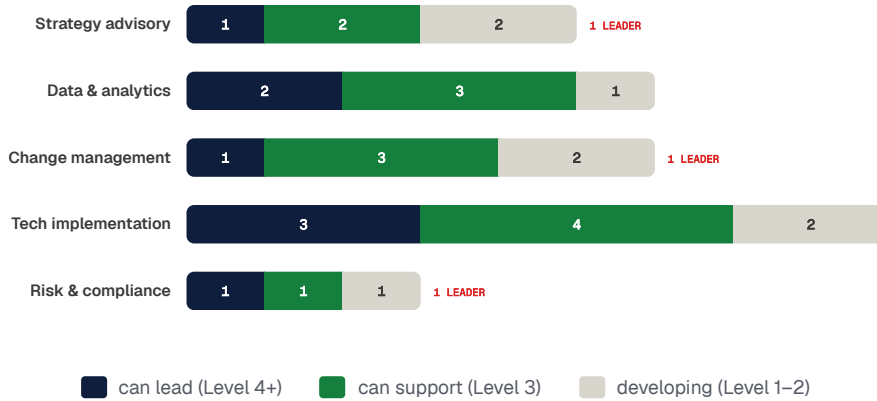
Strategy advisory count the team by threshold:
can lead (L4+) **1** · can support (L3) **2** · developing (L1-2)
2
only **one leader** → a bottleneck on winning and delivering
strategy work.

— [SEE THE DEPTH](#)

Lead and support depth, *by service line*

Here is a firm's capability read the way staffing actually needs it: for each service line, how many people can lead an engagement, how many can support, and how many are still developing. The split shows at a glance which service lines have the depth to staff and grow, and which rest on a single leader.

WHO CAN LEAD, SUPPORT OR IS DEVELOPING, BY SERVICE LINE



3

service lines with only one leader (strategy, change, risk & compliance), a growth and delivery bottleneck

Illustrative firm on the Upleashed 0 to 5 framework. Each bar is split into those who can lead, support, or are developing in that service line.

WHAT THE RESOURCING LEAD READS HERE

- **Three service lines rest on one leader.** Strategy advisory, change management and risk & compliance each have a single person who can lead. That person is the bottleneck on both winning and delivering that work, the priority for developing a second leader.
- **Tech implementation is the strongest.** Three leaders and four supporters give real depth, so it can take on parallel engagements and absorb absence, the line to lean on and to grow from.
- **Risk & compliance is thin all round.** One of each role is fragile on every front; if demand grows, this line needs both hiring and development, not just one fix.
- **The developing bench matters.** The grey segments are your pipeline: people a level below support who, with a development plan, become next year's supporters and the year after's leaders.

— READY-TO-USE EXAMPLES

Example things to map for a firm

A professional services matrix should capture the service lines you sell and the credentials clients require. Here are ready-to-adapt categories, a starting point to tailor to your practice.

| Category | Examples to map (the columns) | Watch out for |
|------------------------------|---|---|
| Service lines | Each offering you sell: strategy, data, change, tech, risk, and so on | Mapping generic skills instead of the service lines you actually staff |
| Delivery competencies | Engagement leadership, workstream delivery, client management, facilitation | Assuming a strong deliverer can automatically lead an engagement |
| Certifications | PMP, PRINCE2, ISO 27001, sector or vendor accreditations, with expiry | Recording a certification but not whether it is currently valid |
| Sector experience | The industries each person can credibly work in and reference | Treating capability as sector-neutral when clients buy sector credibility |
| Commercial & soft | Business development, proposal writing, communication, mentoring | Mapping only technical depth and missing what wins and grows work |

Take the service lines your firm sells, map who can lead and support each, and track the client-required certifications by validity date, since a lapsed PMP or ISO accreditation can cost you a contract even when the skill is intact. Add sector experience, because clients buy credibility as much as capability. As always, map the vital few that genuinely drive staffing and bids, and keep it current as people qualify, grow and move between service lines.

— AVOID THESE

Six mistakes on a professional services matrix

MISTAKE 01

Scoring seniority, not capability

A senior title does not mean someone can lead every service line. Score what they can actually deliver and lead.

MISTAKE 02

Ignoring lead depth

A service line with one leader is a growth and delivery bottleneck. Read lead depth per line, not just total headcount.

MISTAKE 03

Tracking certs, not expiry

A lapsed PMP or ISO ticket can lose a contract. Record validity dates, not just that a certification exists.

MISTAKE 04

Confusing support with lead

Delivering a workstream well is not the same as owning an engagement. Keep the support and lead lines distinct.

MISTAKE 05

Forgetting sector experience

Clients buy sector credibility, not just skill. A matrix of pure capability misses what actually wins the work.

MISTAKE 06

Letting it go stale

People qualify, grow and move between lines constantly. A matrix updated once a year cannot drive live staffing.

The method is free. A ready-made matrix just makes lead and support depth *obvious*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template just makes the firm's view effortless: score people on the 0 to 5 scale and record each certification with its expiry, and the lead and support counts per service line calculate themselves, so the single-leader lines, the thin benches and the certifications about to lapse stand out, before they cost you an engagement.



The Advanced Excel Skills Matrix shows capability and coverage per service line at a glance, the basis for reading lead and support depth, 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 map a practice.

MOST POPULAR

£199

The full Excel template: heat map, coverage counts, required levels 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 What is a skills matrix for professional services?

It is a grid mapping a firm's people against its service lines and competencies, with a level in each cell and any client-required certifications tracked by validity. Read by service line, it shows who can lead an engagement, who can support, and who is developing, which is exactly what staffing client work requires.

Q Why distinguish "lead" from "support"?

Because staffing an engagement needs both, and they are different capabilities. Someone who can deliver a workstream competently (support) is not necessarily ready to own the client relationship and outcome (lead). On the 0 to 5 scale, Level 3 marks support and Level 4 marks lead, so the matrix shows the real depth of each.

Q How does it help with engagement staffing?

It replaces the scramble of open spreadsheets and chased emails with one current view of who can lead and support each service line. When work lands, you can assemble the right team on ability and availability quickly, rather than picking whoever comes to mind, which protects both delivery quality and the client relationship.

Q How does the matrix handle client certifications?

As a validity status alongside capability. Clients in regulated or technical sectors often require specific certifications, PMP, PRINCE2, ISO 27001, before signing, so the matrix tracks not just that someone holds one but whether it is currently valid, with renewal dates, so you can prove the team is qualified on demand.

Q What does "one leader per service line" mean for the firm?

It is a bottleneck on both growth and delivery. If only one person can lead a service line, the firm can only run as much of that work as they can personally cover, and their absence puts engagements at risk. Developing a second leader in each key line is usually the highest-value capability investment a firm can make.

Q Do I need software for a professional services skills matrix?

No. A well-built spreadsheet that tracks lead and support depth and certification expiry works well for a practice, and is where most should start. Software helps when you want live staffing views across a larger firm, with certification reminders and capability that updates automatically as people qualify and grow.

— 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 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.
<https://upleashed.com/capability-framework/>

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

Staff it *with confidence*.

You now have the professional services method. The quickest way to start is to list your service lines this week, count who can lead and who can support each, and find the lines with a single leader. Those are exactly where developing a second leader unlocks both capacity and growth.

[Try the free 5x5 builder →](#)

[Get the template, £199](#)

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

Skills Matrix Template — the award-winning Excel skills matrix by Upleashed. skillsmatrixtemplate.com
Powered by [Upleashed Limited](https://upleashed.com) · upleashed.com