

• ROLLING OUT · GUIDE

## How to roll out a skills matrix *across your organisation*

A skills matrix that works brilliantly for one team rarely scales by simply being mandated everywhere at once. Roll it out the way good organisations roll out any change: pilot with one team, prove the value, win the champions, then expand department by department until it is embedded. This is how to take a matrix from a single team to the whole organisation without it stalling, or becoming paperwork nobody trusts.



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

### THE SHORT ANSWER

To roll out a skills matrix across an organisation, do it in phases: pilot with one willing team (5 to 10% of people), prove the value and refine the approach, convert influential early adopters into champions, then expand department by department, and finally embed it in the regular management cycle. Track adoption per team so you can see where it is landing and where it needs support. In short: **pilot, prove, expand, embed, a phased rollout led by champions beats a big-bang mandate every time.**

#### KEY TAKEAWAYS

- **Phase it, do not mandate it.** Pilot with one team, prove the value, then expand department by department rather than switching everyone on at once.
- **Start with a willing pilot.** A single engaged team of 10 to 20 people, or 5 to 10% of staff, is the right size to learn from.
- **Champions carry it.** Convert influential early adopters into advocates; peers trust them more than a top-down mandate.
- **An implementation team gains pace.** Moving department to department, the same team gets faster and better with each rollout.
- **Track adoption per team.** Watch active use, not just access, so you can see where it is embedding and where it is stalling.

#### — START HERE

## Roll it out, do not *mandate it*

The fastest way to kill a good tool is to switch it on everywhere at once by decree. A skills matrix rolled out as a top-down mandate meets resistance, gets filled in resentfully, and becomes paperwork nobody trusts. Rolled out the way good organisations handle any change, in deliberate phases, led by people who believe in it, it embeds and lasts. The method is pilot, prove, expand, embed.

### Pilot with one willing team

Start small and start willing. Pick a **single engaged team**, ideally one whose manager actively wants it, as your pilot. Common practice is a pilot of around 5 to 10% of your people, or a single team of 10 to 20; large enough to generate real learning, small enough to manage closely. The pilot is where you prove the value, work out what good looks like in your organisation, and gather the evidence and stories that will carry the rollout to everyone else.

### Convert champions, then expand

Adoption is a people problem before it is a process one. The pilot's purpose is partly to **create champions**: influential people who have used the matrix, seen its value, and will advocate for it to their peers. Peers trust a colleague's "this genuinely helped my team" far more than a leadership mandate. With champions in place and the approach refined, you **expand department by**

**department**, ideally with an implementation team that moves from one to the next, getting faster and better with each rollout as it learns.

## Embed it in the management cycle

A rollout is not finished when every team has a matrix; it is finished when the matrix is **embedded**, used routinely in one-to-ones, reviews, planning and development, not maintained as a separate chore. The final phase is about making it part of how the organisation already works: tied to the existing review cycle, owned by managers, and governed so it stays current. Until it is embedded in the routine, a rollout has only installed the tool, not the habit.

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### — WHY IT MATTERS NOW

## A big-bang rollout *stalls*

Switching a whole organisation onto a new tool overnight overwhelms people, breeds resistance, and tends to collapse into half-filled grids nobody believes. A phased, champion-led rollout is how the matrix actually takes root and delivers organisation-wide value.

3–6

PHASED ROLLOUT,  
SMB

months is a typical timeframe to roll out across a smaller organisation; 6 to 18 for a large enterprise.

~70%

ADOPTION  
BENCHMARK

adoption by the end of the pilot phase is a common signal that a full rollout will succeed.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so most rollouts are starting from scattered, partial records.

The reason big-bang fails is that adoption is human, not technical. When a tool is imposed on people who did not choose it, especially in a top-down rollout, resistance is the natural response, and a matrix only works if people keep it honest and current. A phased approach defuses this: the pilot proves value on a small scale, early adopters become champions who bring their peers along, and each department gets focused support and training for its needs rather than a generic switch-on. Crucially, you can **see it landing**, tracking adoption team by team shows where the matrix is embedding and

where it is stalling, so you intervene before a department quietly abandons it. Rolled out this way, a matrix scales; mandated all at once, it usually stalls.

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## — THE FOUR PHASES

# Pilot, prove, expand, embed

A skills-matrix rollout moves through four phases, each with a different goal. Knowing which phase a team is in tells you what it needs next.

### PHASE 01 · DISCOVER

#### **Pilot**

Run the matrix with one willing team of 10 to 20 people. Prove the value, learn what works in your context, and gather the evidence and stories for what comes next.

### PHASE 02 · PROVE

#### **Champions**

Turn the pilot's engaged users into advocates. Their first-hand "this helped my team" is what wins the next departments over, far more than a mandate.

### PHASE 03 · SCALE

#### **Expand**

Roll out department by department, with an implementation team that moves between them. Each rollout is faster and smoother as the team gains expertise.

### PHASE 04 · EMBED

#### **Govern**

Make it routine: tied to reviews and planning, owned by managers, kept current. The rollout is done when the matrix is a habit, not a separate chore.

The phases are sequential for a reason: each earns the right to the next. A pilot that has not proven value should not expand; an expansion without champions meets the resistance the pilot was meant to dissolve; and an organisation-wide rollout that is never embedded simply leaves a lot of half-used grids behind. Moving deliberately through **pilot, prove, expand, embed**, and tracking adoption at each step, is what turns a single team's success into an organisation-wide habit that sticks.

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## — THE SCALE BEHIND THE SCORES

# The 0 to 5 capability framework

A rollout works best when every team scores capability the same way, so the data means the same thing across the organisation. This framework, developed by Dr Alex J. Martin-Smith, gives you that shared language, a

single, consistent scale that travels from the pilot team to the whole organisation.

- 
- 0** **No skill required or desired** EXCLUDED  
Not needed for the role. A consistent definition of "not required" matters across an organisation, so one team's exclusions are read the same way as another's.
- 
- 1** **In training / Trainee** WEIGHTING 25%  
Up to 75% trained. A shared meaning for each level is what lets you compare and aggregate capability across departments once the rollout scales.
- 
- 2** **Developing capabilities** WEIGHTING 50%  
More than 75% trained; works alone but quality not yet consistent. Defined once, applied everywhere, so a Level 2 in Finance means what it does in Operations.
- 
- 3** **Capable** WEIGHTING 75% · USUAL TARGET  
100% trained, consistent quality, works unsupervised. The common target across teams, giving the whole organisation a shared bar for "capable".
- 
- 4** **Subject Matter Expert / Trainer** WEIGHTING 100%  
Can train others. Your Level 4s often make the best rollout champions and implementation-team members, spreading both the skill and the habit.
- 
- 5** **Strategic ownership / Leadership** WEIGHTING 100%  
Defines processes and standards. Senior sponsors at this level give a rollout the air cover and consistency it needs to reach every department.

## One scale, the whole organisation

The reason to standardise on one framework before you scale is simple: capability data is only comparable if every team scores it the same way. With a shared 0 to 5 scale, weightings Level 1 = 25% up to Level 3 = 75% and 4 and 5 = 100%, you can express each team's capability as a percentage and **roll the numbers up** to a department or organisation view. Let each team invent its own scale and you get grids that cannot be compared or combined.

**A worked example.** Why a shared scale matters at scale:

```
Pilot team adopts the 0 to 5 scale → capability 78%  
rollout → every team uses the same scale → figures  
compare and aggregate  
result → an organisation-wide capability view, not nine  
incompatible grids.
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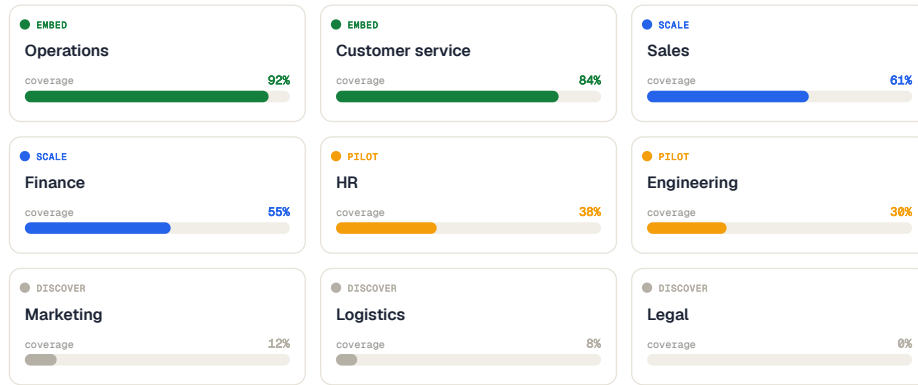
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— [SEE THE ROLLOUT](#)

## The rollout, *team by team*

Here is an organisation's rollout at a glance: one small card per team, showing the phase it has reached, discover, pilot, scale or embed, and how much of the team is covered so far. Seeing every team together shows exactly where the rollout is landing, where it is moving, and where it has not yet started.

#### ROLLOUT BY TEAM · STAGE & COVERAGE



● Discover ● Pilot ● Scale ● Embed

2 of 9

**two teams have embedded it** (Operations, Customer service); the rollout is now scaling into Sales and Finance

*Illustrative rollout. Each card is a team, showing its rollout stage and the share of the team covered so far.*

#### WHAT THE ROLLOUT LEAD READS HERE

- **Two teams have embedded it.** Operations and Customer service are at the Embed stage with high coverage. These are your proof points and your champions, use their stories to bring the next teams on board.
- **The middle is scaling.** Sales and Finance are in Scale, climbing past half coverage. This is where the implementation team is focused now; keep the momentum and support going.
- **HR and Engineering are piloting.** Both are early, in Pilot with lower coverage. Expected at this stage, the job here is to prove value and find champions before pushing for more.
- **Three teams have not started.** Marketing, Logistics and Legal are still in Discover. That is fine in a phased rollout, but the view makes sure they are not forgotten, each has its turn coming.

#### — DOING IT

## Five steps to roll it out

A phased rollout is straightforward to run if you respect the sequence. These five steps take a matrix from one team to the whole organisation.

1

### **Standardise the framework first**

Before you scale, fix the scale: agree one capability framework, the 0 to 5 levels and what each means, that every team will use. This is what makes the data comparable later; standardising afterwards is painful, so do it before the rollout spreads.

2

### **Pilot with a willing team**

Choose one engaged team, ideally a keen manager, of 10 to 20 people, and run the matrix properly. Prove the value, learn what works in your context, fix what does not, and gather the evidence and stories. Aim for strong adoption here before expanding.

3

### **Turn early adopters into champions**

Identify the influential people in the pilot who now genuinely value it, and equip them to advocate. Peer endorsement carries a rollout further than any mandate, so make your champions visible and let them help bring the next departments on board.

4

### **Expand department by department**

Roll out to one department at a time, ideally with an implementation team that moves between them and gets quicker with each. Give each department training tailored to its needs, and track adoption as you go, so you see where to lend support.

## 5

### Embed and govern

Tie the matrix into the regular cycle, reviews, one-to-ones, planning, give each team an owner, and set a cadence to keep it current. The rollout is complete only when the matrix is a routine habit, not a tool that needs a separate push to maintain.

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#### — AVOID THESE

## Six mistakes in rolling out a matrix

#### MISTAKE 01

### Big-bang mandate

Switching everyone on at once breeds resistance. Phase it, pilot, prove, expand, embed, instead.

#### MISTAKE 02

### No standard scale

Letting each team invent its own scale gives incompatible grids. Standardise the framework before you scale.

#### MISTAKE 03

### Piloting with a reluctant team

An unwilling pilot proves nothing. Start with an engaged team and a keen manager who want it to work.

#### MISTAKE 04

### No champions

Relying on mandate alone meets resistance. Convert influential early adopters into peer advocates.

#### MISTAKE 05

### Measuring access, not use

Everyone having a login is not adoption. Track active, ongoing use team by team.

#### MISTAKE 06

### Stopping at rollout

Installing the tool is not embedding the habit. Tie it into the management cycle so it lasts.

The method is free. A ready-made matrix just makes a rollout *consistent and easy to scale*.

Everything here works in a blank spreadsheet, and a single team can start today. A purpose-built template just makes scaling easier: every team works from the same 0 to 5 framework and the same layout, so capability is scored consistently, the data compares and rolls up across departments, and each new team you bring on starts from a proven, ready-made structure rather than reinventing one, exactly what a phased rollout needs.



*The Advanced Excel Skills Matrix gives every team the same framework and layout, so capability data stays consistent and comparable as the rollout scales from one team to the whole organisation, all on the same 0 to 5 framework used throughout this guide.*

TRY IT FREE

£0

The online 5x5 builder maps a pilot team in your browser, with no sign-up. A fast way to start phase one.

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## — COMMON QUESTIONS

### Quick *answers*

#### **Q How do I roll out a skills matrix across my organisation?**

In phases: pilot with one willing team of around 10 to 20 people, prove the value and refine the approach, convert influential early adopters into champions, then expand department by department, ideally with an implementation team, and finally embed it in the regular management cycle. Track adoption per team throughout.

#### **Q Why not just roll it out to everyone at once?**

Because a big-bang mandate breeds resistance and tends to collapse into half-filled grids nobody trusts. Adoption is a human challenge: people need to see the value, get tailored support, and hear from peers who found it useful. A phased rollout delivers all three; switching everyone on at once delivers none.

#### **Q How big should the pilot be?**

Around 5 to 10% of your people, or a single team of 10 to 20, is a common and sensible size, large enough to generate real learning and evidence, small enough to manage and support closely. Choose an engaged team with a keen manager, since a willing pilot is far more likely to prove the value you will build the rollout on.

## Q How long does a rollout take?

It varies with size. A smaller organisation might roll out across 3 to 6 months; a large enterprise with many departments and locations may take 6 to 18. Each phase needs enough time to embed before the next, so resist rushing, a measured pace is faster overall than repeatedly fixing a rushed rollout.

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## Q What are internal champions and why do they matter?

Champions are influential people who have used the matrix, value it, and advocate for it to their peers. They matter because peer endorsement carries far more weight than a leadership mandate, especially when people did not choose the tool. Converting early adopters into champions is one of the most effective things you can do for adoption.

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## Q How do I know the rollout is working?

Track adoption team by team, and measure active use rather than just access, everyone having a login is not adoption. Watch whether teams are actually scoring, updating and using the matrix in reviews. Around 70% adoption by the end of the pilot is a good signal the full rollout will succeed; a stalling team is a signal to add support.

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

Dr Alex J. Martin-Smith

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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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## Pilot, prove, *expand, embed*.

You now have the rollout method. The quickest way to start is to agree one capability framework, pick a single willing team to pilot it, and aim to prove enough value to create your first champions. A matrix that spreads team by team, carried by people who believe in it, embeds far deeper than one switched on by decree.

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