

• SALES TEAMS • GUIDE

The skills matrix *for sales teams*

Sales leaders measure reps by the number, quota attainment, but the number alone never explains *why* someone is over or under, or what would help. A skills matrix adds the missing half: the underlying capability across the sales process, prospecting, discovery, closing. Put capability next to performance and the team comes into focus, who to coach, who to stretch, and whose results may not last.



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

THE SHORT ANSWER

A sales skills matrix maps reps against the competencies of the sales process, prospecting, discovery and qualifying, objection handling, closing and negotiation, account management, plus product knowledge and CRM, scored on a clear scale. Read alongside quota attainment, it explains why performance varies and where coaching would help. In short: **quota tells you who is performing; the matrix tells you why, and what to coach, so you can develop reps deliberately rather than just rank them.**

KEY TAKEAWAYS

- **Quota alone misses the picture.** Attainment shows who is performing, not why, or what would lift the rest. The matrix adds the capability behind the number.
- **Map the sales process.** Prospecting, discovery, objection handling, closing, account management, each a distinct competency to score.
- **Capability vs performance reveals the team.** Plotting both shows role models, who to coach, who to stretch, and whose results may be fragile.
- **Coaching beats generic training.** The matrix targets coaching at the specific competency a rep lacks, not a broad course.
- **It makes onboarding and reviews consistent.** A clear competency ladder shows new reps what to learn, and grounds reviews in evidence.

— START HERE

The number tells you *who, not why*

Every sales team has the number: quota attainment, the percentage of target each rep hit. It is essential, but it is only an outcome, it tells you *who* is performing and *who* is not, never *why*, or what would help. A skills matrix supplies the missing half: the capability across the sales process that sits behind the number, and turns ranking into coaching.

Map the sales process, not just "selling"

A sales matrix maps reps against the distinct competencies of the **sales process**: prospecting, discovery and qualifying, objection handling, closing and negotiation, account management, plus the enabling skills of product knowledge and CRM use. "Good at sales" is too vague to coach; "strong closer, weak at discovery" is actionable. Breaking selling into its real competencies, each scored on a clear scale, is what makes the matrix a development tool rather than just another scorecard.

Capability beside performance

The insight comes from reading **capability and performance together**. Quota attainment on its own cannot distinguish a rep who is genuinely skilled from one riding an easy territory, or tell you whether an underperformer lacks skill or motivation. Place mapped capability next to attainment and the picture sharpens: strong-and-performing role models, capable reps underperforming for non-skill reasons, and reps hitting target without the

underlying capability, whose results may not last. Each calls for a different response.

From ranking to coaching

This is the real shift a matrix brings to sales: from **ranking reps to developing them**. A leaderboard sorts people; it does not improve them. The matrix shows exactly which competency a given rep needs to build, so coaching is precise, "let's work on your discovery questioning", not "try to sell more". Skill coaching aimed at a specific, observed gap is far more effective than generic training, and the matrix is what makes it possible by naming the gap.

— WHY IT MATTERS NOW

You cannot coach a *number*

A quota figure tells a rep they are behind, but not what to do about it, and that is where most sales development stalls. Pairing capability with performance is how a leader turns the number into targeted coaching that actually moves it.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, so most sales teams coach on instinct, not on a clear skills picture.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, as buyers, channels and sales tools keep evolving.

63%

WEF, 2025

of employers call skills gaps the biggest barrier to change; in sales they read as missed quota and lost deals.

When a team relies on quota attainment as the sole measure of capability, it misses the skills-level picture that explains why performance varies and what would improve it. That has real costs: coaching aimed at the wrong thing, top performers whose hidden skill gaps surface when their territory turns, and underperformers written off when a single competency, discovery, say, was all that held them back. A skills matrix addresses this by making the **capability behind the number visible**, competency by competency, so leaders coach the specific gap, spot the single points of failure, and develop

the whole team deliberately, rather than simply rewarding this quarter's winners and hoping the rest catch up.

— WHAT IT REVEALS

Four things a sales matrix reveals

Read alongside performance, a sales skills matrix reveals four things a leaderboard cannot. Each turns the same data into a more deliberate way to lead the team.

REVEALS 01

Why performance varies

By showing the competency behind the number, the matrix explains why one rep closes and another stalls, so the cause, not just the result, is visible.

REVEALS 02

What to coach, precisely

It pinpoints the exact competency a rep needs to build, so coaching targets discovery or objection handling specifically, not a generic "sell more".

REVEALS 03

Fragile results

It flags reps hitting target without the underlying capability, results that may rest on an easy territory or luck and could falter when conditions change.

REVEALS 04

Single points of failure

It surfaces competencies, or key accounts, that rest on one rep, so you can build cover before a departure or a bad quarter exposes the gap.

The common thread is moving sales leadership from **reacting to results to developing the causes of them**. A leaderboard is backward-looking: it tells you what already happened. A skills matrix is forward-looking: it shows the capability that will drive future results, and exactly where to invest coaching to improve them. Used together, the number and the matrix let a leader see not just who won this quarter, but why, who is about to, and what would help the rest of the team get there.

— THE SCALE BEHIND THE SCORES

The 0 to 5 capability framework

A sales matrix needs a scale that distinguishes a rep learning a competency from one who has mastered it. This framework, developed

by Dr Alex J. Martin-Smith, provides it, with Level 3, performs the competency unaided to standard, the bar for a fully ramped rep, and Level 4 plus the closers who can coach it.

-
- 0** **Not required for the role** EXCLUDED
The competency is not part of this rep's role, for example complex contract negotiation for a transactional inside-sales role. Excluded from their score.
-
- 1** **In training / Ramping** WEIGHTING 25%
Learning the competency, works it only with support. Up to 75% of the way to ramped. A new rep early in their first 90 days on this part of the process.
-
- 2** **Developing** WEIGHTING 50%
More than 75% there. Handles routine situations, but complex deals or tough objections still need a manager's support. A common coaching focus.
-
- 3** **Capable** WEIGHTING 75% · FULLY RAMPED
Performs the competency unaided and to standard across the normal range of deals. The level a fully ramped rep is expected to reach on the core sales competencies.
-
- 4** **Expert / Coach** WEIGHTING 100%
Prolonged mastery; handles the hardest deals and coaches others on the competency. Your top closers and player-coaches. Reconfirm if a skill goes unused.
-
- 5** **Strategic ownership / Sales lead** WEIGHTING 100%
Shapes the sales methodology and standards, defines how the team sells. The purple flag marks your sales leaders and enablement owners.

Capability as a score, beside the quota

Score each rep 0 to 5 on each competency, and the weightings, Level 1 = 25%, 2 = 50%, 3 = 75%, 4 and 5 = 100%, give an overall capability figure per rep. Plot that against their quota attainment and the team sorts itself into meaningful groups, rather than a single ranked list. Reading the two together is what turns a leaderboard into a coaching plan.

A worked example. Why two reps on the same quota need different help:

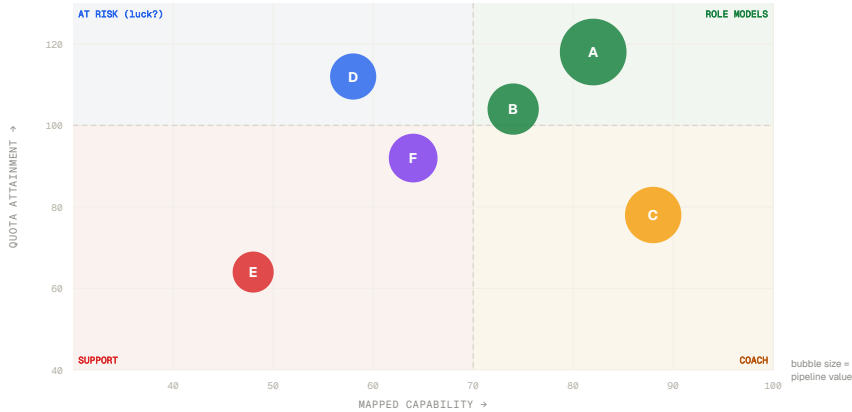
```
Rep C  capability high, attainment 78% → skilled but  
underperforming: motivation, territory, focus  
Rep D  capability low, attainment 112% → performing without  
the skills: results may be fragile  
same dashboards, opposite coaching – the matrix tells them  
apart.
```

— [SEE THE TEAM](#)

Capability against *performance*

Here is a sales team plotted on two axes: mapped capability across the page, quota attainment up it, each rep a bubble sized by pipeline. The four quadrants name the response: role models to learn from, capable reps to coach back up, performers to watch, and those who need support. Quota alone could never show this.

CAPABILITY vs PERFORMANCE · EACH BUBBLE A REP



● role model ● capable, coach up ● watch (results fragile?) ● needs support

C&D

same quarter, opposite needs: C is capable but under target; D is over target without the capability

Illustrative team on the Upleashed 0 to 5 framework. Each bubble is a rep, placed by capability and attainment, sized by pipeline.

WHAT THE SALES LEADER READS HERE

- **Role models, top right.** Reps A and B are both capable and over target, the pattern to study and share. Their strength is earned skill, so their results are the kind that last and that others can learn from.
- **Coach C back up.** Rep C is highly capable but under target. The skill is there, so the issue is something else, territory, motivation, focus, a coaching conversation, not a training course.
- **Watch D closely.** Rep D is over target with lower mapped capability. The result is welcome, but may rest on an easy patch or luck; build the underlying skill so it holds when conditions turn.
- **Support E.** Rep E is low on both. This is the priority for structured development, the core competencies first, before quota pressure alone makes the situation worse.

— READY-TO-USE EXAMPLES

Example competencies to map for a sales team

A sales matrix should map the competencies of your sales process plus the enabling skills. Here are ready-to-adapt categories, a starting point to tailor to your motion and market.

Category	Examples to map (the columns)	Watch out for
Pipeline generation	Prospecting, outreach, qualifying, multi-threading	Rewarding activity volume without the skill behind it
Deal execution	Discovery, presenting value, objection handling, closing, negotiation	Scoring "good at sales" rather than each distinct competency
Account management	Retention, upsell and cross-sell, relationship building	Ignoring post-sale skills that drive net revenue retention
Enabling skills	Product knowledge, CRM and tools, sector and competitor insight	Assuming product knowledge equals selling capability
Evidence sources	CRM activity, call reviews, win-loss, deal size, attainment	Rating on impression; ground each score in observed evidence

Map the competencies of your actual sales process, scored so Level 3 means a fully ramped rep who performs it unaided, and ground each rating in evidence, CRM activity, call recordings, win-loss reviews, deal trends, rather than impression. Then read capability beside quota attainment. As always, map the vital competencies that genuinely drive your results, keep it current as reps ramp and grow, and use it in coaching and reviews, or, like any unused matrix, it becomes paperwork.

— AVOID THESE

Six mistakes on a sales matrix

MISTAKE 01

Quota as the only measure

Attainment shows who, not why. Map the underlying competencies so you can coach the cause, not just rank the result.

MISTAKE 02

One "selling" score

"Good at sales" cannot be coached. Break selling into prospecting, discovery, closing and the rest, each scored.

MISTAKE 03

Ignoring fragile performers

Hitting target without capability can rest on luck. Build the skill so the results hold when the territory turns.

MISTAKE 04

Rating on gut feel

Charisma is not competence. Ground each score in CRM activity, call reviews and win-loss evidence.

MISTAKE 05

Generic training

A broad course rarely fixes a specific gap. Target coaching at the exact competency the matrix flags.

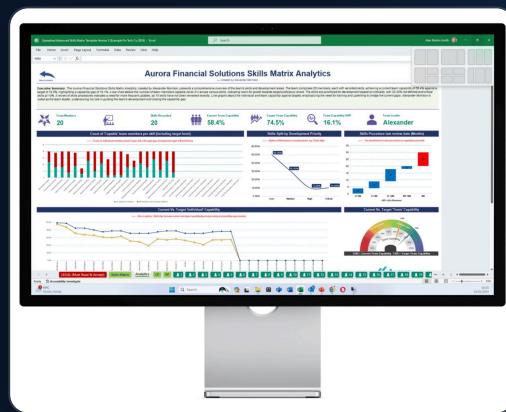
MISTAKE 06

Leaders not using it

If managers do not reference it in coaching and reviews, reps ignore it. Get sales leaders bought in first.

The method is free. A ready-made matrix just makes capability-beside-performance *obvious*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template just makes the sales view effortless: score reps on the 0 to 5 scale across the sales competencies, and overall capability is calculated for you, ready to read beside quota attainment, so the role models, the reps to coach, the fragile performers and the development priorities stand out, turning a leaderboard into a coaching plan.



The Advanced Excel Skills Matrix shows each rep's capability across the sales competencies at a glance, the basis for reading capability against performance, all on the same 0 to 5 framework used throughout this guide.

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<p>£0</p> <p>The online 5x5 builder maps a small team in your browser, with no sign-up. A fast way to map a pod.</p>	<p>£199</p> <p>The full Excel template: heat map, capability scores, required levels and analytics, up to 30 people and 30 skills. One-off, yours forever.</p>	<p>£1</p> <p>Upgrade to PulseAI in your first year for a living, web and mobile version with AI skill suggestions and reminders.</p>

— COMMON QUESTIONS

Quick *answers*

Q What is a skills matrix for a sales team?

It is a grid mapping reps against the competencies of the sales process, prospecting, discovery, objection handling, closing, account management, plus product knowledge and CRM, scored on a clear scale. Read alongside quota attainment, it explains why performance varies and shows exactly what to coach.

Q Why not just use quota attainment?

Because quota is an outcome: it shows who is performing, not why, or what would lift the rest. A rep can hit target on an easy territory while a skilled rep misses on a hard one. Mapping capability alongside attainment explains the number and turns a backward-looking leaderboard into a forward-looking coaching plan.

Q What does capability versus performance show?

Plotting both places each rep in one of four groups: capable and performing (role models), capable but under target (coach the non-skill cause), performing without capability (watch, results may be fragile), and low on both (structured support). Each group needs a different response, which quota alone could never reveal.

Q Which sales competencies should I map?

The distinct stages of your sales process: prospecting and qualifying, discovery, presenting value, objection handling, closing and negotiation, and account management, plus enabling skills like product knowledge and CRM. Map the competencies that actually drive your results, and score each from observed evidence.

Q How does it improve coaching?

By naming the precise gap. Instead of "sell more", a manager can see a rep is strong at closing but weak at discovery, and coach that specific competency. Skill coaching aimed at an observed gap is far more effective than generic training, and the matrix is what makes the gap visible and the coaching targeted.

Q How should I score sales capability fairly?

Ground every rating in evidence rather than impression: CRM activity for prospecting, call recordings for discovery and objection handling, win-loss reviews and deal trends for closing and negotiation. Requiring concrete examples behind each score, and calibrating across managers, keeps the matrix fair and trusted.

— 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

— SOURCES

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Martin-Smith, A. J. (n.d.). *The 0 to 5 capability framework*. Upleashed Limited.
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Coach the *why, not just the number.*

You now have the sales method. The quickest way to start is to map your team's competencies across the sales process this week, score them from real evidence, and plot capability against quota attainment. The role models, the coachable gaps and the fragile results you uncover are exactly where deliberate coaching pays off.

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