

• BEST PRACTICES • GUIDE

## Skills matrix best practices: *what good looks like*

Almost anyone can build a skills matrix. Far fewer build one that stays accurate, gets used, and actually changes decisions. This is the difference: the best practices that separate a living, trusted matrix from a forgotten spreadsheet, and a maturity model to show you exactly where yours stands today.



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

### THE SHORT ANSWER

The best skills matrices share a handful of habits: a focused list of the skills that matter, one clearly defined rating scale, honest evidence-based scoring, required target levels, and regular re-scoring so the data stays current. Above all they serve the managers and employees who use them daily, not just HR, and every reading drives a real decision. In short: **keep it focused, defined, honest, current, and genuinely used.**

#### KEY TAKEAWAYS

- **Keep it current.** The single most common failure is building a matrix once and never updating it. A stale matrix is worse than none.
- **Serve the end users.** If it only serves HR audits and not the managers and staff who use it daily, it will be ignored.
- **Map the vital few.** A focused list of skills that genuinely matter beats an exhaustive one nobody maintains.
- **Define the scale, score on evidence.** Clear, observable levels and honest scoring are what make the data trustworthy.
- **Act on it.** A matrix that changes no decision is wasted effort; its whole value is in the actions it drives.

— [START HERE](#)

## Why most matrices *quietly fail*

A skills matrix rarely fails with a bang. It fails slowly: built with enthusiasm, used for a while, then left to drift out of date until no one trusts it. Understanding why that happens is the key to the practices that prevent it.

### The failure is usually neglect, not design

The most common reason a matrix fails is the simplest: it is treated as a **one-off exercise and never updated**, reducing what should be a living management tool to a static snapshot that ages into fiction. Skills change, people join and leave, requirements shift, and a matrix that does not keep pace quietly loses its grip on reality. Most matrices are not badly built; they are badly maintained. The best practices are, above all, the habits that keep a matrix alive.

### If it does not serve the user, it dies

The second great failure is building the matrix purely for HR, for audits, compliance and reporting, while ignoring the managers and employees who would actually use it day to day. When it does not help a team leader make a staffing call or a person see their own development, it becomes **tedious paperwork**, and paperwork gets abandoned. A matrix earns its place by being useful to the people closest to the work, not by satisfying a reporting requirement.

## Good practice is a small set of habits

The encouraging news is that the difference between a matrix that thrives and one that dies is not complexity or software; it is a handful of disciplines applied consistently. Keep the skills focused, the scale defined, the scoring honest, the targets clear, the data current, and the whole thing genuinely useful. None is difficult on its own; together they are what move a matrix from a **spreadsheet nobody trusts to an instrument the whole team relies on.**

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— WHY IT MATTERS NOW

## A trusted matrix is rarer than it *should* be

Skills data has never mattered more, yet a genuinely trustworthy, well-maintained matrix remains uncommon. The gap between organisations that have mastered the practice and those still wrestling with spreadsheets is wide, and widening.

8%

GARTNER, 2024

of organisations have reliable workforce skills data, a direct measure of how rare good practice is.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, so keeping a matrix current is no longer optional.

85%

WEF, 2025

of employers plan to prioritise upskilling, which depends entirely on a matrix they can actually trust.

The message in these numbers is that good practice is both rare and increasingly decisive. Most organisations cannot rely on their skills data, the requirement to keep it current is accelerating, and nearly all of them are betting on upskilling that only works if the underlying matrix is sound. The organisations that pull ahead will not be the ones with the fanciest tool; they will be the ones with the **disciplined habits** that keep a matrix focused, honest and alive. Those habits are learnable, and that is what the rest of this guide lays out.

# Eight best practices that make a matrix work

These are the disciplines the best skills matrices have in common. None is hard in isolation; the value is in applying them together and consistently.

## 1 Map the vital few skills, not everything

Focus on the skills the work genuinely depends on, usually 8 to 20, rather than an exhaustive list. A focused matrix gets maintained and read; a sprawling one collapses under its own weight. When in doubt, leave a skill off; you can always add it later.

**WATCH OUT** A matrix with a hundred skills is a museum piece. Keep it to what genuinely drives performance and risk.

## 2 Use one clearly defined rating scale

Pick a single scale and define each level in plain, observable words, so a given level means the same to everyone. A defined scale is the foundation of comparable, trustworthy data; a vague one quietly erodes confidence in every number above it.

**WATCH OUT** If "3" means something different to each scorer, no figure in the grid can be compared. Define before you score.

## 3 Score honestly, against evidence

Rate what people can demonstrably do, not what feels generous. Pair self-assessment with manager validation, anchored to evidence. Inflated scores feel kind but hide the very gaps the matrix exists to reveal, defeating its whole purpose.

**WATCH OUT** Kindness that inflates scores is not kindness; it leaves real gaps unaddressed. Anchor to the definition.

## 4

### Set a required level for each skill

Record not just what people have but what each role needs. A target level per skill turns the matrix from a passive inventory into a tool that surfaces gaps automatically, the difference between describing capability and managing it.

**WATCH OUT** A matrix with no targets can show scores but not gaps. Without a required level, you cannot tell strong from short.

## 5

### Read the columns, not just the rows

Always check coverage, how many people are capable of each skill, not only individual profiles. A team of strong individuals can still leave a critical skill resting on one person. Single-cover skills are risks hiding in plain sight.

**WATCH OUT** Healthy rows can mask a dangerous column. The single-cover skill is the gap that bites when someone is away.

## 6

### Keep it current with a re-scoring cycle

Re-score on a regular cadence and whenever training completes or roles change. This is the practice that most separates living matrices from dead ones. Currency is not a nice-to-have; an out-of-date matrix is actively misleading.

**WATCH OUT** The most common failure of all: build it once, never revisit it. A stale matrix is worse than none, because it is trusted.

## 7

### Make it serve managers and employees

Build the matrix for the people who use it daily, not only for HR reporting. When a team leader can staff a shift with it and a person can see their own path, it gets used and trusted. When it serves only audits, it gathers dust.

**WATCH OUT** A matrix built solely for HR audits becomes paperwork. If end users see no value, they disengage and the data rots.

## 8

### Always act on what it shows

Tie every reading to a decision: training, allocation, cross-training, succession. A matrix that changes nothing is wasted effort. Its entire value lies in the actions it drives, so close the loop from insight to action every time.

**WATCH OUT** A beautiful dashboard nobody acts on is decoration. Judge the matrix by the decisions it changes, not the charts it draws.

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#### — THE MINDSET

## Four principles behind the practices

Beneath the specific habits sit four principles. Hold these and the individual practices follow naturally; lose them and even a well-built matrix drifts.

#### PRINCIPLE 01

##### Living, not static

A matrix is a current picture, not a one-time document. Treat it as something you maintain, like accounts, not something you produce once and file away.

#### PRINCIPLE 02

##### Honest, not flattering

Its value comes from reflecting reality, including the uncomfortable gaps. A matrix that flatters the team is worse than useless; it conceals the very things you need to act on.

#### PRINCIPLE 03

##### Useful, not ornamental

Every element should earn its place by informing a decision. If a column or a report changes nothing, cut it. Usefulness to the end user is the test that matters.

#### PRINCIPLE 04

##### Focused, not exhaustive

Completeness is the enemy of maintenance. A focused matrix on the vital few skills will be kept alive; an exhaustive one will quietly die.

These four pull in the same direction: toward a matrix that is small enough to maintain, honest enough to trust, and useful enough that people actually reach for it. Notice that none of them is about software or sophistication. The best skills matrix in an organisation is not the most elaborate; it is the one that is **current, candid and used**, and these principles are what keep it that way.

# The 0 to 5 capability framework

Several best practices, a defined scale, honest scoring, required levels, rest on having a sound framework underneath. This one, developed by Dr Alex J. Martin-Smith, supplies it: six clearly defined levels that make consistent, comparable scoring possible.

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|   |   |
|---|---|
| 0   | <b>No skill required or desired</b> <span>EXCLUDED</span>           |
| No expectation that the person or role needs this skill within the next year. Take a longer-term view here, and do not use this level for short-term assessments. A 0 drops the skill out of that person's score entirely.                                    |   |
| 1   | <b>In training / Trainee</b> <span>WEIGHTING 25%</span>             |
| Expected to be proficient within a year. Has completed up to 75% of training and does not yet fully understand the quality requirements.  |   |
| 2   | <b>Developing capabilities</b> <span>WEIGHTING 50%</span>           |
| Has completed more than 75% of training. Can probably perform the task alone, but consistent quality and productivity are not yet evidenced, so complex output still needs checking or verification.  |   |
| 3   | <b>Capable</b> <span>WEIGHTING 75% · USUAL TARGET</span>            |
| Has completed 100% of training and shown consistent quality and productivity. Can work unsupervised. This is the level most roles aim for, the point at which a person genuinely counts on a skill.   |   |
| 4   | <b>Subject Matter Expert / Trainer</b> <span>WEIGHTING 100%</span>  |
| Prolonged experience at a consistent quality and productivity level. Works autonomously and can train others to a high standard. If the skill has not been used in three months, drop back to Level 3 to reconfirm competence.                                |   |
| 5   | <b>Strategic ownership / Leadership</b> <span>WEIGHTING 100%</span> |
| Can define and develop new processes and skill requirements, show cross-function expertise, and demonstrate leadership. Carries the same numeric weight as Level 4; the purple flag highlights strategic capability and helps you spot succession candidates. |   |

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## A defined scale is a best practice in itself

Three of the eight practices depend on this framework being in place: a defined scale (practice 2), honest evidence-based scoring against clear levels (practice 3), and required target levels drawn on the same scale (practice 4). The weightings, Level 1 = 25%, 2 = 50%, 3 = 75%, 4 and 5 = 100%, with 0 excluded, also give you the capability percentages that make currency and coverage measurable over time.

**A worked example.** A defined scale turns a vague rating into a comparable one:

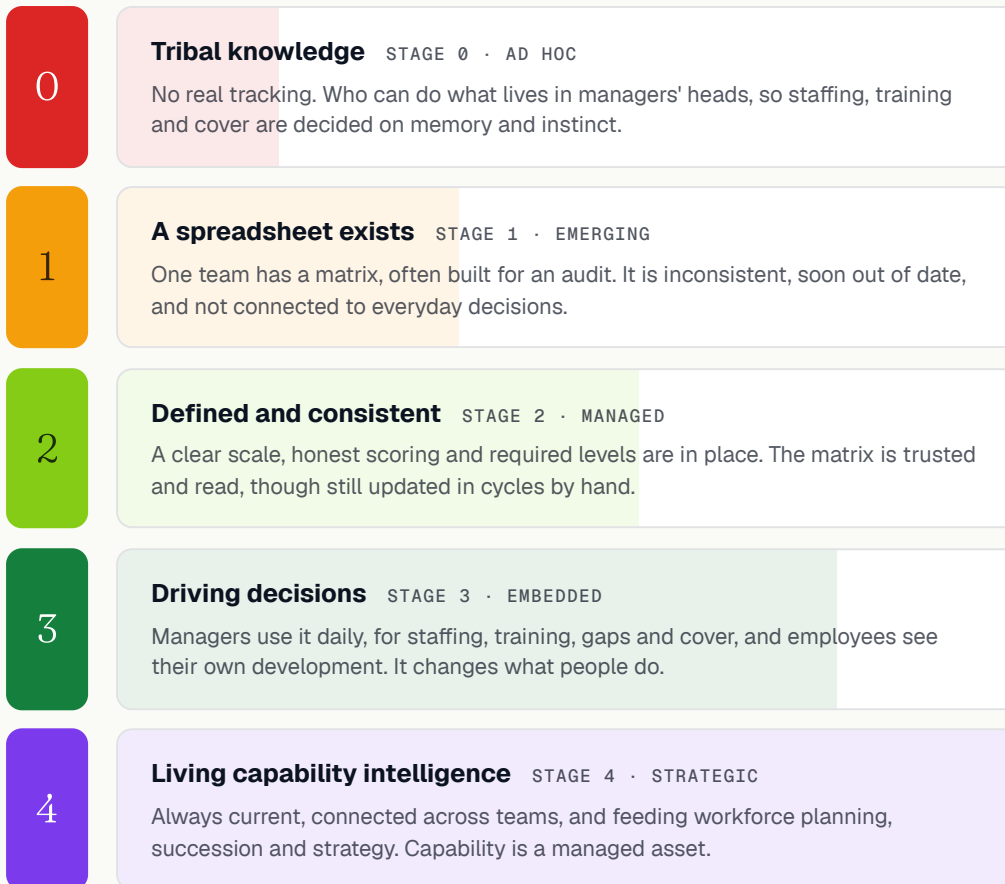
Vague "Pretty good at data analysis" → not comparable, not actionable  
Defined "Level 2: works alone but output still needs checking" → comparable, and a clear next step to Level 3.

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### — WHERE DO YOU STAND?

## The skills matrix *maturity model*

Best practice is a journey, not a switch. Organisations progress through recognisable stages, from no real tracking to a living, decision-driving instrument. Here is the maturity model: find where you are today, and the next stage shows you where to aim.



90%  
of organisations sit in the lower stages, on tribal knowledge or a stale spreadsheet

*Illustrative maturity model. Most organisations are earlier on this journey than they think; the goal is to move up one stage at a time.*

**HOW TO USE THE MODEL**

- **Find your stage honestly.** If the answer to "who can do X?" is a chain of emails, you are at Stage 0 or 1, and that is where most teams genuinely are, whatever they would like to think.
- **Aim for the next stage, not the last.** The jump from a stale spreadsheet (1) to a defined, trusted matrix (2) delivers the biggest gain, and the eight practices are exactly how you make it.
- **Stage 2 is where real value starts.** A defined, honestly-scored, target-driven matrix is trustworthy enough to act on. Most of this guide is about reaching it.
- **Higher stages are about use, not tools.** Stages 3 and 4 come from embedding the matrix in daily decisions and keeping it live, not from buying the most elaborate software.

— AVOID THESE

# Six mistakes that undo good practice

## MISTAKE 01

### **Building it once**

The cardinal sin. A matrix never updated drifts into fiction, and a trusted fiction is more dangerous than no data at all.

## MISTAKE 02

### **Serving only HR**

If managers and employees get no daily value, they disengage. Build it for the people closest to the work.

## MISTAKE 03

### **Mapping everything**

An exhaustive skill list never gets maintained. Focus on the vital few that genuinely drive performance and risk.

## MISTAKE 04

### **Recording only "has the skill"**

A yes/no inventory misses proficiency, recency and target. Capture the level, not just the presence of a skill.

## MISTAKE 05

### **Inflating to be kind**

Generous scores hide the gaps the matrix exists to find. Honest, evidence-based scoring is the kinder choice long term.

## MISTAKE 06

### **Never acting on it**

Insight that changes no decision is wasted. Close the loop from what the matrix shows to what you actually do.

— BEST PRACTICE, BUILT IN

## The practices are free. A ready-made matrix just *bakes them in*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template simply makes good practice the path of least resistance: the scale comes defined, scoring is structured, required levels and coverage are built in, and the analytics update as you re-score, so staying focused, honest and current takes less effort than letting the matrix drift.



*The Advanced Excel Skills Matrix bakes the best practices in: a defined scale, required levels, coverage and capability analytics, so the easy path is also the well-maintained one, 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 start the right way.

MOST POPULAR

### £199

The full Excel template: defined scale, required levels, coverage 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.

## Quick *answers*

### **Q What are the best practices for a skills matrix?**

Map the vital few skills, use one clearly defined rating scale, score honestly against evidence, set a required level per skill, read coverage as well as individual profiles, re-score on a regular cycle, build it to serve managers and employees, and always act on what it shows. Applied together, these keep a matrix trusted and useful.

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### **Q What is the most common skills matrix mistake?**

Treating it as a one-off exercise and never updating it. A matrix that is not kept current drifts out of date until no one trusts it, turning a powerful management tool into a static, misleading snapshot. Regular re-scoring is the single most important habit.

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### **Q How do I keep a skills matrix from becoming shelfware?**

Make it useful to the people who would actually use it. If a team leader can staff a shift with it and an employee can see their own development path, it gets used. Build it only for HR audits and it becomes paperwork that gets abandoned. Usefulness drives adoption.

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### **Q What is a skills matrix maturity model?**

It is a way to gauge how advanced your practice is, typically from no formal tracking (tribal knowledge), through a basic spreadsheet, to a defined and consistent matrix, to one that drives daily decisions, to living capability intelligence connected to strategy. It helps you see your current stage and aim for the next.

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### **Q How often should a skills matrix be updated?**

Re-score on a regular cadence, quarterly works for many teams, and whenever someone completes training or changes role. The aim is a current picture rather than a historical one. A live matrix updates almost continuously; a periodic one should at least be revisited each quarter.

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### **Q Do best practices require special software?**

No. Every practice here works in a well-built spreadsheet, and most teams should start there. Software helps you sustain good practice at scale, keeping the matrix current, shared and consistent across many teams, but the disciplines matter far more than the tool.

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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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## Build one that *lasts*.

You now know what good looks like and where you stand. The quickest way to improve is to find your stage on the maturity model this week, pick the one practice that would move you up, and apply it. A living, trusted matrix is built one good habit at a time.

[Try the free 5x5 builder →](#)

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