

Skills Matrix Instructions

The Skills Matrix is a collaborative Lean tool to help increase the team's capability by cross-training employees. It should be used to create learning plans, not to assess performance.

1. As a team, create a list of activities, skills and knowledge that are needed to perform specific tasks in your process. Identify activities, skills and knowledge needed by the team members to complete the tasks effectively.
2. Once you have a list, ask each employee to self-assess against each activity, skill and knowledge using the following scale for the number of squares to fill: 4 = super user, knows all the tricks and how to fix problems, 3 = expert, knows a lot and is capable of working independently, 2 = capable, knows enough to get by, but requires assistance/supervision on a regular basis, 1 = knows the basics, requires assistance/supervision, and "blank" = don't know at all.
3. Once the skills matrix is filled out, the manager and employees should create a training priority list.
4. Remember: training does not only happen in a structured classroom setting or specific departmental/group formal training. Peer-to-peer training can be very profitable and rewarding for the organization and for the employees. After identifying training priorities, identify those in the team that are "super users" for each activity or skill.
5. Once priorities and super users have been identified, make a practical plan to have the super users regularly work with those who need training to close the gaps for short periods of time. For example, rather than trying to arrange for an outside expert to come in and provide the whole team with a 2-day training seminar, have the super users train one employee every day for 15 minutes.

Once you break the mould of training as a team-wide event planned weeks in advance, new training formats will emerge. Here are some examples:

- a) **Theme days:** super users train the whole team for 10 minutes each day/week, first thing in the morning. This week: activity 1, next week: activity 2, the following week: knowledge 1.
 - b) **Just in time training:** when a specific employee needs to perform an activity he/she is not familiar, he/she can consult the skills matrix and go to a super user to get help. There is common understanding of each other's roles (super user/trainee).
6. After an initial capability evaluation of activities, skills and knowledge and formal and practical learning and training, the gaps will shift to new activities and skills and employees. Therefore, it is important to revise the matrix on a regular basis. When implemented properly, a skills matrix can motivate employees to self-improve by alerting them of the value of certain activities for which they can actively seek out training or development opportunities.

Definitions:

Activity: a task that needs to be performed in a process (i.e. review application form, prepare agreement template)

Skills: ability to perform a task using specific tools (i.e. Word, PowerPoint, specialized software or equipment)

Knowledge: information acquired through education or experience (i.e. knowledge of a specific family of chemicals, knowledge of generally acceptable accounting principles, knowledge of the laws and principles of flow, knowledge of the machinery of government)

Example of a Skills Matrix for Administrative Assistants in an Application Process

	Revise Application form (Activity)	PowerPoint (Skill)	AXIS Database (Skill)	Complete tabs 2 and 3 in ExPlore System (Activity, Skill)	RDIMS	Acronyms for applicant training levels (Knowledge)	Learning Plan Needs
Patricia							
Mary							
Jean-Pierre							
Ahmed							
Julie							