Skills Matrix Tool: How to build/maintain with a team

The Skills Matrix is a collaborative Lean tool to help increase a team's capability by cross-training employees. It should be used to see how work works and to create learning plans, not to assess performance. See sample below.

1. As a team, create a list of activities, skills and knowledge that are needed to perform specific tasks in a process. Identify activities, skills and knowledge needed by the team members to complete the tasks effectively and place them on the top of the skills matrix, one per column (see definitions for terms below and also see sample skills matrix on the next page.)

2. After the activities, skills and knowledge are identified, ask each employee to write their name on one line (on the left-most column) and self-assess against each activity, skill and knowledge. Adapt the following scale for the number of squares to fill out: 4 = super user/highly skilled/knowledgeable, experienced with varied types of cases and complexity, 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 create a training priority list.

4. **Develop people:** training does not only happen in structured classroom settings or departmental/group formal training. Peer-to-peer training is profitable and rewarding for the organization and for employees. Once training priorities are clear, identify team members who are "super users/highly skilled/knowledgeable" for each activity, skill or knowledge.

5. With clear priorities and identified "super users/highly skilled/knowledgeable", make a practical plan to have the "super users/highly skilled/knowledgeable" work regularly, for short periods of time, with those who need training to close the gaps. For example, rather than hiring an outside expert to come in and provide the whole team with a 2-day training seminar, have the "super users/highly skilled/knowledgeable" train one employee every day for 15 minutes.

New training formats will emerge when you break the mould of training as team-wide events that are planned weeks in advance. For example:

a) **Theme days:** "super users/highly skilled/knowledgeable" train the whole team for 10 minutes each day/week, first thing in the morning. This week: activity 1, next week: activity 2 and so on.
b) **Just in time training**: when an employee needs to perform an activity with which they are not familiar, they consult the skills matrix and go to a "super users/highly skilled/knowledgeable" to get help. There is common understanding of each other's roles (super user/trainee).

6. After the initial capability evaluation and formal and practical learning and training, the gaps will shift to new activities, skills and knowledge required to perform the work. Therefore, it is critical to regularly revise the matrix. Respectfully implemented, a skills matrix supports employee self-improvement. The skills matrix makes visible the value of activities/skills/knowledge for which employees can seek out training and development opportunities to be the best at what they do.

Definitions:
Activity: a task that needs to be performed in a process (i.e. analyse environmental impact, prepare agreement template, perform
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 customer demographics.)

Sample 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)	ExPlore software (Skill)	Acronyms for applicant training levels (Knowledge)	Learning Plan Needs
Pat	3/4 filled	1/4 filled	1/2 filled	empty	3/4 filled	full	
Mary	full	3/4 filled	1/4 filled	empty	1/4 filled	1/4 filled	
Jean-Pierre	1/2 filled	1/4 filled	1/2 filled	full	1/4 filled	1/4 filled	
Ahmed	1/2 filled	full	full	1/2 filled	full	full	
Julie	1/4 filled	1/4 filled	1/4 filled	1/4 filled	1/4 filled	1/4 filled	