Skills Matrix Instructions

The Skills Matrix is a collaborative Lean tool to help increase the team's capacity 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 and skills that are needed to perform specific tasks in your process. Identify activities and skills 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 or skill 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 to work 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 during short time periods. 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 mold of training as a team-wide event planned weeks in advance, many formats will begin to come forward. 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.
b) **Just in time training**: when a specific employee needs to perform an activity he/she is not familiar with, he/she can go to an 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 and skills 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 and 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)

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

	Revise Application form (Activity)	PowerPoint (Skill)	AxIS Database (Skill)	Complete tab 2 and 3 in ExPlore System (Activity, Skill)	RDIMS	DocuDoc	Learning Plan Needs
Patricia	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	