Skills matrix template with a 0–3 scale and a cross-training plan

A skills matrix template shows who in a team can do each task today and which tasks depend on one person. This kit gives you a 0–3 scale in which each level describes what you can see in the work, a can-coach flag, a coverage count that marks a gap when fewer than two people can do a task alone, and a cross-training plan, with a filled example and a 45-minute session to fill it in together. It is for spreading cover across a team, not for appraisal or pay.

45 minutes | 4–12 participants | Online and adaptable in person

Updated 2026-10-10

The outcome

In 45 minutes a team of 4 to 12 people agrees 8 to 12 task rows, rates itself on the 0–3 scale, counts the tasks that fewer than two people can do alone and agrees three or four cross-training pairs, each with a learner, a coach, a first step, hours and a date for the level check.

Before the session

- For team leads, trainers and facilitators who want to see where a team of 4–12 people depends on one person, and plan who learns what from whom. Use it once a quarter or when someone joins or leaves.
- Draft 8 to 12 task rows with two team members: tasks with a verb, not traits. Print the scale and one rating card per person, and prepare one matrix on paper or a shared screen.
- Decide before the session who will see the matrix: the team and its lead. Say in the invitation that it will not go to appraisal, pay or HR files, and keep to that.
- Send the scale, the task list and the rating card a day early as plain text for screen readers. Ratings are written, not spoken; anyone can leave a row blank or pass. Cameras are optional online. Levels are numbers, not colours.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- The 0–3 rating scale
- Turn a vague skill into a task row
- My rating card
- Skills matrix
- Cross-training plan
- Filled example: skills matrix
- Filled example: cross-training plan
- Filled example: rating card
- Facilitator section: run of show, reference tables, debrief and adaptations

The 0–3 rating scale

Rate each task, not yourself as a person. Rate the last six months of real work. When you are unsure between two levels, choose the lower one.

Not for appraisal or pay. The matrix shows where the team depends on one person. It is not a measure of anyone's performance.

Level	Name	What you can see in the work	Questions to ask yourself
0	Not yet	Has not done this task in the last six months, or has only watched it. Someone else would need to do it, or sit with them throughout.	Have I done this myself since April?
1	With help	Has done it with a guide or a colleague checking. Stops to ask at some steps. Someone checks the result before it goes out.	Could I do it next week if the usual person were away? Only with help?
2	On my own	Does the usual version to the team's standard without help, and knows where to look when stuck. The result does not need checking.	Would anyone need to check my work on the usual case?
3	Handles the unusual	Deals with exceptions and errors, can say why each step exists, and colleagues bring their questions to them.	What did I do the last time this task went wrong?
C	Can coach (a flag)	Level 2 or 3, and willing to show a colleague in working time. A flag, not a level: someone at level 3 may say no.	Do I have time to show someone this in the next two months?

Turn a vague skill into a task row

People can rate a task they do. They cannot rate a trait. Use these examples when a draft row is too broad to rate.

Too vague to rate	A task row people can rate	Why it works better
Communication	Answer learner queries in the shared inbox	Everyone can name the last time they did it.
Excel	Run the monthly attendance and completion report	It names the output, so level 2 has a clear test: the report needs no checking.
Learning system	Set up a course in the learning system	A system has many tasks. Split it into the two or three the team must cover.
Customer focus	Arrange accessibility adjustments for a learner	A trait cannot be covered when someone is away. A task can.
Finance	Raise purchase orders and match supplier invoices	It says which part of finance this team does.

My rating card

Write the agreed tasks in the first column. For each, write your level from 0 to 3, C if you can coach it and L if you want to learn it. You may leave a row blank.

Name:

_____

#	Skill or task	My level (0–3)	Can coach (C)	Want to learn (L)	Last time I did it, or why not
S1					
S2					
S3					
S4					
S5					
S6					
S7					
S8					
S9					
S10					
S11					
S12					

Skills matrix

Write each person's first name over a column (P1 to P12) and the agreed tasks in the rows. Each person writes their own level, with C after it if they can coach. 2–3: people at level 2 or 3. Coach: people with a C. Gap: fewer than two at level 2 or 3.

#	Skill or task	P1	P2	P3	P4	P5	P6	P7	P8	P9	P10	P11	P12	2–3	Coach	Gap?
S1																
S2																
S3																
S4																
S5																
S6																
S7																
S8																
S9																
S10																
S11																
S12																

Cross-training plan

One row per pair. The learner volunteers; the coach has a C on that task. The level check is the day the learner does the usual case alone and the coach looks at the result. Status: planned, in progress, done or stopped.

#	Skill (gap)	Learner (level now)	Coach	Target	How they will practise	Hours	Start	Level check	Status
X1									
X2									
X3									
X4									
X5									
X6									

Filled example: skills matrix

A fictional learning operations team of six fills in the matrix on Tuesday 13 October 2026. Four of the eight tasks are gaps: fewer than two people can do them alone. S4 has no coach: Dmitri is at level 3 but did not flag C.

#	Skill or task	Amira	Ben	Carys	Dmitri	Esi	Finn	At 2 or 3	Can coach	Status
S1	Set up a course in the learning system	3 C	2	1	2	0	1	3	1	Covered
S2	Book venues and external trainers	2	0	3 C	1	1	0	2	1	Covered
S3	Produce a live online session (rooms, breakouts, recording)	1	3 C	0	2	2	1	3	1	Covered
S4	Run the monthly attendance and completion report	0	1	0	3	0	1	1	0	Gap, no coach
S5	Edit an e-learning module in the authoring tool	0	0	1	0	3 C	0	1	1	Gap
S6	Arrange accessibility adjustments for a learner	2 C	1	0	1	0	0	1	1	Gap
S7	Answer learner queries in the shared inbox	2	2 C	2	1	1	2 C	4	2	Covered
S8	Raise purchase orders and match supplier invoices	1	0	3 C	0	0	1	1	1	Gap

Filled example: cross-training plan

The four pairs, one per gap, as they stood at the review on Tuesday 17 November 2026. X3 is done. The level check for X4 was due on Friday 13 November and is four days overdue. Twelve hours of practice in total; no coach has more than one pair.

#	Skill (gap)	Learner (level now)	Coach	Target	How they will practise	Hours	Start	Level check	Status
X1	S4 Run the monthly attendance and completion report	Finn (1)	Dmitri (not flagged)	2	Dmitri writes the steps as a one-page job aid by Fri 23 Oct. Finn runs the October report with Dmitri beside him, then the November report alone, with Dmitri checking the figures.	3	Mon 2 Nov	Wed 2 Dec	In progress
X2	S5 Edit an e-learning module in the authoring tool	Carys (1)	Esi	2	Two one-hour sessions editing a copy of a live module. Then Carys makes the next requested change alone and Esi reviews it before it is published.	4	Mon 23 Nov	Fri 18 Dec	Planned
X3	S6 Arrange accessibility adjustments for a learner	Ben (1)	Amira	2	Ben sits in on Amira’s next request. He handles the following two himself, and Amira reads each reply before it goes to the learner.	2	Mon 19 Oct	Fri 13 Nov	Done
X4	S8 Raise purchase orders and match supplier invoices	Amira (1)	Carys	2	Amira raises the next three purchase orders with Carys checking each one, then matches one month of supplier invoices alone, with a review.	3	Mon 2 Nov	Fri 13 Nov	In progress

Filled example: rating card

Finn's card from the same session. He marked two tasks he wants to learn, S4 and S8, and both became cross-training pairs. The last column keeps each rating honest.

#	Skill or task	My level (0–3)	Can coach (C)	Want to learn (L)	Last time I did it, or why not
S1	Set up a course in the learning system	1			Set up two short courses in September with Amira checking
S2	Book venues and external trainers	0			Never needed to
S3	Produce a live online session (rooms, breakouts, recording)	1			Ran the chat for two sessions; never the rooms
S4	Run the monthly attendance and completion report	1		L	Pulled the data once in August; Dmitri did the rest
S5	Edit an e-learning module in the authoring tool	0			Not yet; not a priority for me
S6	Arrange accessibility adjustments for a learner	0			Not yet
S7	Answer learner queries in the shared inbox	2	C		Most days; I wrote half of the saved replies
S8	Raise purchase orders and match supplier invoices	1		L	Raised one purchase order in July with Carys checking

Facilitator run of show

1 Set the purpose and the rules | 5 minutes

Say: "Today we find the tasks that only one of us can do, so that nobody is stuck when someone is away. This is not an appraisal. The matrix stays in this team and does not go to pay or HR files. You rate yourself, and you can leave any row blank." Read the four levels and the coach flag aloud. Add two rules: rate the last six months of real work, and when you are unsure, choose the lower level.

2 Agree the task rows | 7 minutes

Show the draft rows. Give two minutes of silent reading: each person writes on their card any task that is missing, or a row that is too vague to rate. Take five minutes to agree the list. Turn traits into tasks: not "communication" but "answer learner queries in the shared inbox". Split a row when people would rate its parts differently. Stop at 12 rows.

3 Rate yourself in silence | 10 minutes

Each person fills in their rating card alone: a level from 0 to 3 for each task, C where they can coach, L where they want to learn, and the last time they did the task. Say: "Rate what you have done, not what you could do. A 1 is useful information, not a weakness." Nobody reads anyone else's card. Give a one-minute warning.

4 Fill the matrix | 8 minutes

Each person copies their own column onto the shared matrix, all at the same time, which takes about four minutes. Online, each person types in their own column. In the remaining four minutes, everyone reads the matrix in silence. Ask one question only: “Is there a row where your level surprises you now that you see the others?” A person may change their own rating. Nobody changes someone else’s.

5 Count the cover | 5 minutes

For each row, count the people at level 2 or 3 and the coaches, and write them in the last columns. Mark a row as a gap when fewer than two people can do the task alone. Read the gaps aloud. For each gap, ask: “What happens to this task if that person is away for two weeks?” Mark the gaps that have no coach.

6 Agree cross-training pairs | 8 minutes

Start with the gap that would hurt most. For each one, the learner is a volunteer with an L, often at level 1; the coach is someone with a C. Agree the first step, the hours and the date of the level check. A level check means: the learner does the usual case alone and the coach looks at the result. Where a gap has no coach, ask the level-3 person to write the steps down first. Agree three or four pairs, and no more than one pair per coach.

7 Close | 2 minutes

Read back the pairs, the hours and the check dates. Agree the date of the review, about four weeks away, and who keeps the matrix. Say: “At the review we update only the rows that changed.” Ask each person for one word on how that felt, aloud or in the chat, or a pass.

Reference tables

Skills matrix, training needs analysis or training plan?

Four tools that look alike. This kit is the first; the second and third are separate Superglue kits.

Tool	Question it answers	Rows and columns	When to use it
Skills matrix (this kit)	Who can do each team task today, and where does the work depend on one person?	Tasks by people, with levels 0–3 and a coach flag	Once a quarter, and when someone joins, leaves or goes on long leave
Training needs analysis	Is training the right answer to this performance problem, and which skills come first?	Tasks with a needed and a current level, scored for priority	Before you design a course
Training plan	What will a programme teach, in which sessions, and how will we check it?	Objectives, sessions, practice and evidence	After the needs analysis, before delivery
Compliance training record	Who holds which required certificate, and when does it expire?	People by certificates, with expiry dates	Where law or policy requires it. Not covered by this kit

Debrief and next steps

Questions for reflection

- Which gap surprised us most, and what would happen to that task if its one person were away for two weeks?
- Where did a self-rating feel hard, and what would make the level easier to judge next time?
- Which coach is carrying too much, and who could share the load?
- What will be different in four weeks if the pairs keep their check dates?

Adapt the session

- For a team of four or five, skip the shared copying step: the facilitator writes each column from the cards while people read. Aim for two pairs, not four, so that fewer people coach and learn at the same time.
- For a 25-minute version, agree the task rows by message the week before and ask people to bring a filled rating card. In the session, fill the matrix, count the cover and agree two pairs.
- Online, share the matrix as a document in which each person edits only their own column. Collect cards privately by message if people prefer. Keep cameras optional, read each gap aloud and turn on captions.
- For quiet participants, people working in a second language and anyone uneasy about showing a low level, keep every rating written and never ask anyone to explain one aloud. A person can hand the card to the facilitator instead of copying it up, or leave a row blank.
- After a restructure or when trust is low, show only the counts and gaps to the team, not individual levels. The lead keeps the full matrix and uses it only to agree cross-training pairs with volunteers.

After the session

Send the matrix and the plan on the same day. Each coach books the first practice slot within a week. At the review, about four weeks later, update only the rows that changed and close the pairs whose level check is done. Repeat the full session once a quarter, and add a row when a new task arrives. When a gap has no coach, ask the level-3 person to write the steps as a one-page job aid before the cross-training starts.

Questions people ask

What should a skills matrix template include?

A list of tasks the team must cover, a column per person and a rating scale in which each level describes what you can see in the work. Add a flag for who can coach, a count of people who can do each task alone, a mark for each gap and a plan for who learns what from whom. This kit has all of these, with a filled example.

How do you rate skills in a skills matrix?

Each person rates themselves on each task from 0 (not yet) to 3 (handles the unusual), using the last six months of real work. When unsure between two levels, choose the lower one. Ratings are written first and copied into the matrix; nobody changes another person’s rating.

Can we use the matrix for appraisals or pay?

No. The matrix shows where the team depends on one person, so that the team can spread cover. If ratings could affect pay or appraisal, people would rate themselves up and the gaps would disappear from the sheet but not from the work. Say this in the invitation and keep the matrix in the team.

How is this different from the training needs analysis template?

The training needs analysis template checks whether training is the right answer to one performance problem and ranks skill gaps for a course. This skills matrix is an ongoing team tool: it shows which tasks fewer than two people can do and plans cross-training inside the team. Use the needs analysis when a gap is too big to close by cross-training, and the training plan template when you then design the programme.

Is a skills matrix the same as a training matrix?

The names are often used for the same thing. In some workplaces a training matrix means a record of required certificates and their expiry dates. This kit does not track certificates or expiry dates and is not a compliance or legal record.

What is included in the free and editable files?

The open PDF has the rating scale, examples of task rows, the rating card, the blank matrix for up to 12 people, the cross-training plan, a filled example of the matrix, the plan and one rating card, and the 45-minute session. Subscribers also receive the editable Word file, an Excel workbook that counts cover, marks gaps and flags overdue level checks, and a CSV of the example matrix.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.