

# Triadic Skills Matrix

## Developing an Effective Skills Matrix

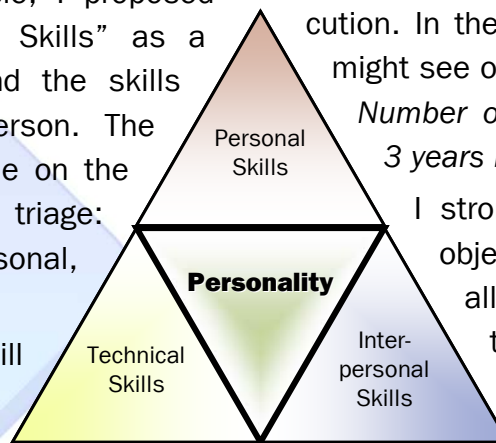
### Executive Summary:

In this article, I will outline the use of the Skills Triage on a concrete example: the Skills Matrix.

### The Skills Triage

In a prior article, I proposed the “Triage of Skills” as a means to understand the skills dimensions of a person. The diagram in the middle on the page shows this triage: personal, interpersonal, technical.

In this article, we will delve into the actual usage of this model.



Deliverables are *what* you do, objectives are the measurements indicating how *well* you do it. Typically, you have deliverables (or *accountabilities*) like “*Manage the Order2Cash Process*” or “*Manage the Pipeline for Product Line XYZ*”. You then get targets which indicate the level of execution. In the examples above you might see objectives like “*Reduce Number of Products older then 3 years by 5%*”.

I strongly suggest creating objectives together with all constituents, but let the owner of the team be the decision maker. Customer

and suppliers are good, valid sources of input; in the end the person responsible has to deliver the value she is accountable for.

Objectives need to be [SMART](#) and written down to ensure consistent labeling and measurements. They also need to be the backbone of your performance appraisal system.

If you want to make things more robust, you might want to add those deliverables that will be added to your plate within the next 3-5 years as well. Since building a skills base is time-consuming, you might as well start thinking about it now.

### The Process

The process to create a triage-based skills matrix is simple:

- Step 1: Deliverables and Objectives
- Step 2: Define Processes /Activities
- Step 3: Outline required Skills
- Step 4: Define proficiency
- Step 5: Assign Skills to Individuals

### Step 1: Deliverables and Objectives

Rather than starting with job descriptions, we will start with deliverables and objectives.



## Step 2: Define Processes / Activities

In the next step, you take the objectives and list the processes and activities required to meet them. First, focus on those processes that are **driven by external factors** and deliver to the external as well. Internal processes are not essential yet. Typically, you have one process per deliverable. If you have more than one, you should take a cold, hard look at your processes.

**Break the processes into activities** to make it easier to assign specific skills to them. It is ok if you have similar activities across processes. In the end, your job is to be a center of excellence for those activities; they are your building blocks.

Label the resulting processes and activities, either with a simple number code or with names. It does not matter, as long as you can reference them uniquely. This is rather important. If there is a labeling scheme in your company, **use it**.

Now, you can add remaining internal processes and their activities. They need to have a clear support role for the existing processes. If not, consider cutting them, since they do not help you achieve your objectives.

It is a really good idea to **do this work with your team**. Get a large

room and start identifying processes and activities. Use Sticky Notes to map these, not whiteboards or flipcharts. You need interaction and ownership. This will make the next steps of assigning responsibilities much easier to implement. Just make sure that you keep a firm hand on the proceedings.

*Management by objective works - if you know the objectives. Ninety percent of the time you don't.*

Peter Drucker

It helps to clearly describe the activities, so that people can get a feel for what they are analyzing. You can come up with a

simple structure like name / input / output / supplier / customer / timing (critical etc.) / complexity / verbal description. Use a template, if you can, that you print beforehand.

**Process Flows are straight lines;** do not get into workflow design with conditional branches. You need a clean line of activities that perform value-added work between a defined input and output pair.

## Step 3: Outline required Skills

The third step links activities with skills. This is rather straightforward. **At first**, you want to use the process map of sticky notes to overlay them with skills. A good way of doing that is to take the process flow and start stacking sticky notes vertically underneath the activities



they implement. Use notes in different colors for personal, interpersonal, and technical skills. You should have at least one note of each kind underneath each activity. Using different colors ensures that you can spot imbalances easier. I tend to use white notes for activities, and colored ones for skills. If you have clearly defined technical skills when you start, it really helps to list these first and get them out of the way.

As a next step, copy the information into a spreadsheet. One column lists the deliverables/objectives, the next the processes, then the activities, and at last the skills. Format it as a tree diagram, if that makes it easier to read. You can also use a MindMap to organize the content.

Mark skills specially if they are not necessary today but will be in the future to keep things easy to understand and yourself focused on the task at hand.

## **S**tep 4: Define Proficiency

Now it is time for you to determine what level of proficiency your team needs to have to effectively work the skill to achieve the objectives. Consider the day-2-days situation, not emergencies etc.

I found that using a three-tier system of “*Working Knowledge*”, “*Regular User*”, and “*Trainer*” is enough to get by. This system makes it easy to identify and describe the levels:

**Working Knowledge:** The person has been trained or has good experience in working the skill. Anything below that, especially w/o training, is a novice. A good sign to me is that the person knows where to ask / look for help when stuck.

**Regular User:** The skill is used regularly (at least once a month or week, your call). Repetition develops a firm grasp of a skill. W/o repetition, expect skills to degrade rapidly to working knowledge.

**Trainer:** The user is good enough to teach others how to use the skill without the occasional glance at notes etc. She has received extensive training or has a large body of experience. She is the go-to person for questions of the other users.

It is easiest to open a new sheet in your spreadsheet and call it “Skills Matrix”. The first one you can call “Objectives”.

First, you take all skills and copy them into the “Skills Matrix”. Here you should sort them to find and eliminate duplicates. I found it very helpful to keep track of such doubles or triples by adding a column just after the skill’s name called “Usage”. Now you have a clue how versatile the skill is.

For each skill, I suggest you add three columns for now, for each of the proficiency levels. For each skill, you now add the number of people that need to have this skill at the given level.



If you know, you can add columns for requirements in 3 and 5 years.

Now you have a matrix that tells you why you need skills in what quality and quantity. This is a great tool to have development discussions.

## Step 5: Assign Skills to Individuals

As the last step, you take the team and add three columns at the end of the spread sheet for each person. These “Main Assignments” columns have the same meaning as the ones in step 4, only now you will enter a “1” wherever you think a specific persons matches the skills requirements. This has the advantage that you can do a simple addition/subtraction to see whether all you skill needs are met (simply add all the required skill levels and subtract the sum of all assigned ones).

This column group gives you the current skills profile of your team.

Then, you add another 3 columns to the matrix, this time for the planned skills assignments. Now is decision time: who will be trained, who will underutilize a skill, who is lead user.

You can mark specific cells in the matrix to signify the “Lead User” for a specific skill, and “Failover Users” that need to be kept proficient in the skill they are are meant to take responsibility for in case of a departure or unavailability of a team member. You can use the background color or border of the cell.

The lead user should ideally also be the head of the Community of Practice for that skill, or your team’s representative.

It is also possible to plot where you want your team to move to in a more distant future, by creating a second column group called “Assignments 3 years”. Here, you can list where people will migrate to, how to phase out obsolete skills and how to get new skills in.

## References

The Triage of Skills:

<http://www.sarjay.com/cms/welcome/our-articles/4-articles/46-a-triage-of-skills.html>

SMART:

[http://en.wikipedia.org/wiki/SMART\\_%28project\\_management%29](http://en.wikipedia.org/wiki/SMART_%28project_management%29)

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