

How to Create and Use a Skills Matrix (+Templates & Example)

Source: leapsome | **Published:** March 25, 2026 | **PMS Relevance:** PMS CORE | **Type:** Practitioner Guide | **Geography:** Global

Source URL: <https://site.leapsome.com/blog/skills-matrix>

Executive Summary

This article addresses the challenge HR leaders face in gaining visibility into existing workforce competencies for the purposes of workforce planning, succession planning, and training allocation. The author's central argument is that a skills matrix — a visual grid mapping individual team members against defined competency levels — is an effective and accessible tool for resolving this visibility gap. Key evidence is presented through three hypothetical skills matrix examples covering Engineering, Sales, and HR functions, each featuring six competencies rated across five proficiency levels with behaviorally anchored descriptors. The article also provides a downloadable Excel and Google Sheets template attributed to Leapsome, and includes a single external quote from a Forbes Council Member on the value of visual data representations. The article concludes that skills matrix outputs can feed into 360-degree performance reviews, development plans, resource allocation, and strategic hiring decisions. No empirical research is cited to validate these claims; the article functions primarily as a practitioner how-to guide with an embedded product promotion.

Key Insights

1. A skills matrix maps individual team members against defined competency levels using a visual grid format, enabling rapid identification of skill gaps and strengths across a team.
2. Proficiency descriptors anchored to behavioral indicators (Levels 1–5) provide a consistent reference point for managers and employees when assessing competency, reducing subjectivity in evaluations.
3. Skills matrix outputs are positioned as inputs to multiple downstream HR processes, including succession planning, training program design, resource allocation, and performance reviews.

Practical Takeaways

- A five-level proficiency scale with behaviorally anchored descriptions — ranging from 'Beginner' to 'Expert' — can be applied across diverse functional domains such as Engineering, Sales, and HR to create comparable competency assessments.
- Skills matrices are presented as compatible with 360-degree review processes, with the article suggesting that matrix findings be used to inform individual development plans following assessment exercises.

Frameworks Mentioned

360-Degree Review — Referenced as a performance review process that skills matrix insights can feed into, enabling a multi-source view of individual competency and development needs.

Critical Analysis

Strengths: The article provides concrete, domain-specific examples with behaviorally anchored competency descriptors, making it immediately actionable for practitioners. The three functional examples (Engineering, Sales, HR) offer sufficient breadth to illustrate adaptability. The inclusion of a downloadable template adds utility. **Limitations:** The article is published by Leapsome, a commercial HR software vendor, and contains direct product promotion including a call to take a product tour and links to Leapsome-branded features. No independent research or empirical evidence is cited to validate the effectiveness of skills matrices on the claimed outcomes (e.g., improved workforce planning accuracy, retention, productivity). The single external quote from Paul Ross is attributed to a Forbes Council Member — a paid membership publication — which limits its evidentiary weight. The article also contains a duplicate section for the 'Training & Development' skill in the HR example, suggesting editorial oversight gaps. The claimed benefits (succession planning, resource allocation improvement) are asserted without supporting data.

Organizational Practice

The article describes the practice of constructing skills matrices — visual grids that map named employees or roles against defined competencies at multiple proficiency levels — as a workforce planning and talent development tool. Examples are given for Engineering teams (coding, system design, DevOps, testing), Sales teams (lead generation, negotiation, CRM management), and HR teams (recruitment, employee relations, performance management, employment law). The article describes using matrix outputs to inform development planning, succession planning, training program design, resource allocation decisions, and 360-degree performance reviews.

Strategic Implications

The article reflects a broader trend toward competency visibility and skills-based talent management, suggesting that organizations are moving toward more granular, role-specific assessments rather than relying on general performance ratings alone. The emphasis on visual data tools and behaviorally anchored scales points to a growing expectation that HR functions will operate with greater analytical precision in workforce planning. The positioning of skills matrices as inputs to multiple HR processes — rather than standalone assessments — indicates an integrative view of performance management infrastructure.

Validation Status: passed
