

FREE SKILLS GUIDE

HOW TO PLAN, TRAIN AND UPSKILL YOUR WORKFORCE

A practical guide to implementing a Skills Matrix on paper or digitally to enhance workforce training, competency tracking, and continuous improvement.

GEMBADOCS



SKILLS 101

Why skills matter

Tracking workforce skills can be tough. Without a system, you risk:

- Skill gaps
- Poor training
- Inconsistent processes

A Skills Matrix helps by showing:

- Who knows what
- Where the gaps are
- How to plan training

Use it on paper or digitally to build a stronger, more flexible team.

 **94%** of employees stay longer at companies that invest in training¹

 **47%** more engagement at work when employees have learning opportunities²

 **215%** more income per employee in companies with strong training programs³



1. LinkedIn Workplace Learning Report 2. Gallup 3. ATD Research

What is a skills matrix?

It’s a tool that maps your team’s skills against what’s needed for the job. **It helps you:**

- List key skills for each role
- Rate how skilled each person is
- Spot missing skills
- Plan training and cross-training
- Track growth over time

What one includes

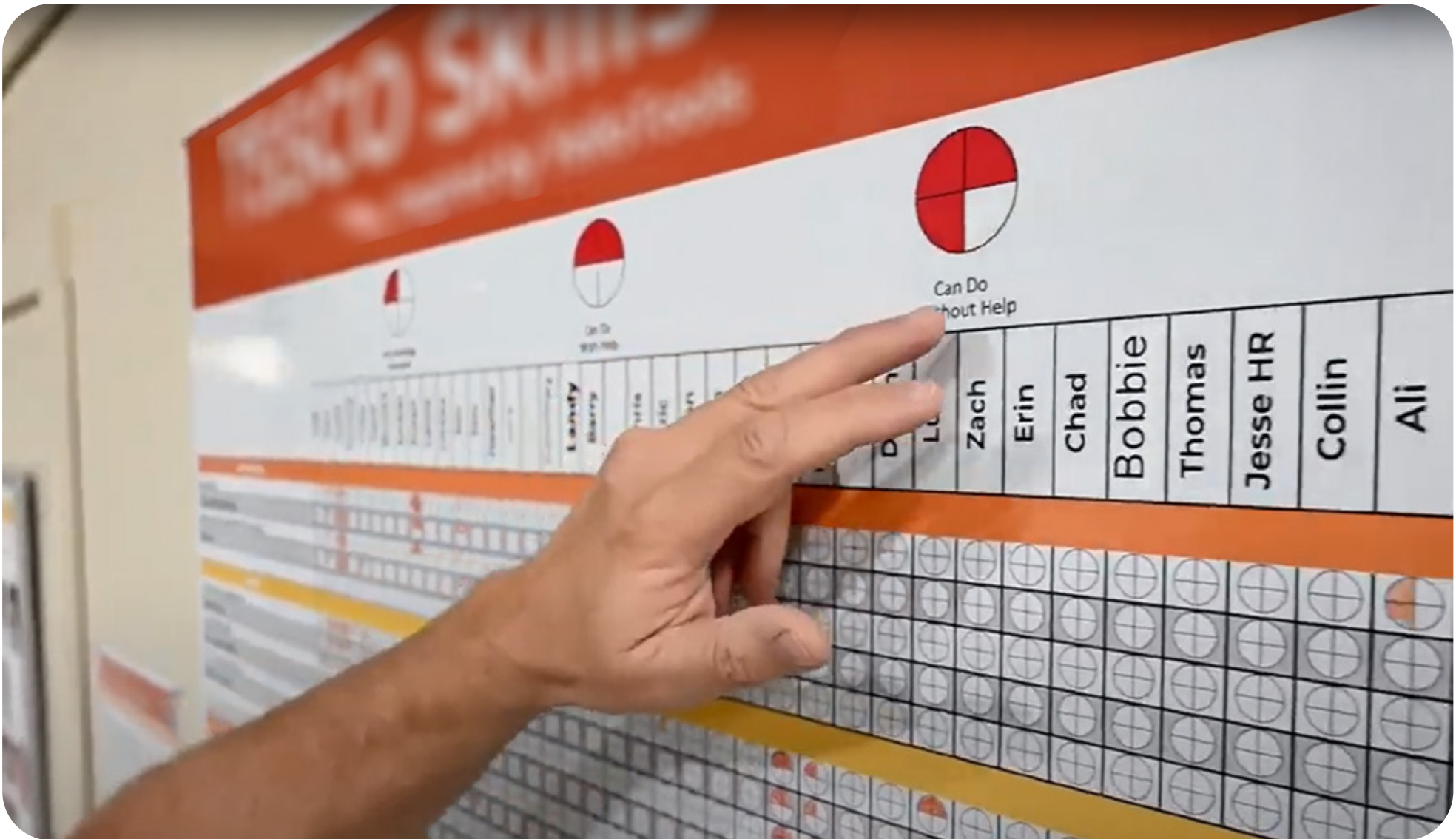
Use it on paper or digitally to build a stronger, more flexible team:

**Employees:**
Names with the option of roles/departments

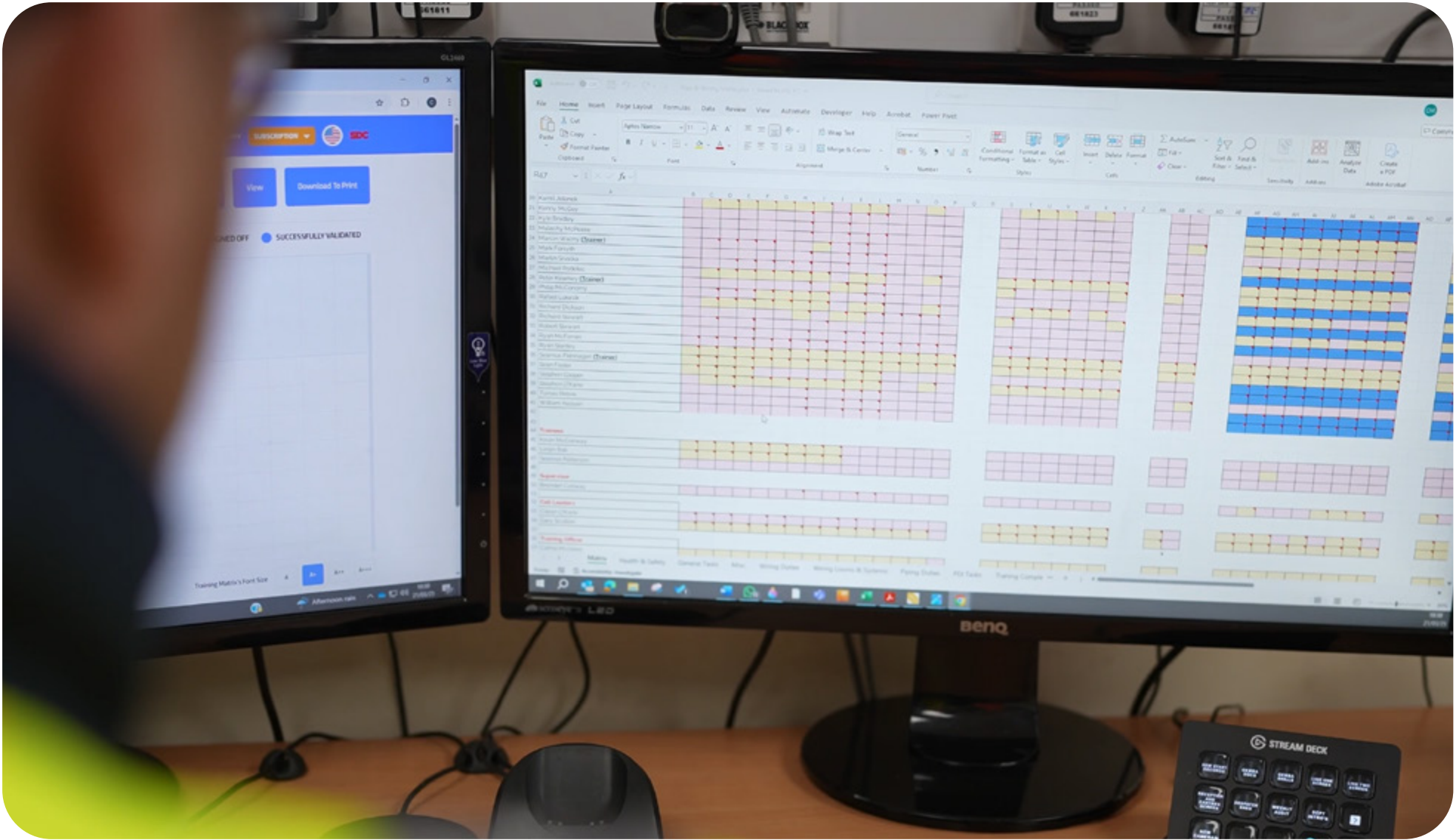
**Skills or SOPs:**
What they need to know and links to training access

**Skill level:**
(such as) Beginner, Intermediate, Expert, Trainer

**Training records**
Notes, signatures, certifications, progress



Example of a whiteboard based skills matrix



Example of a spreadsheet based skills matrix

5 STEPS TO BUILD AND USE A SKILLS MATRIX

1 Scope

- Will it be by workstation, department or physical area?
- What's going to be measured - ops, processes, soft-skills
- ▶ Example: could be a workstation, with 5 processes to be trained on.

2 People

- List the associates needed for each skill/process
- Evaluate employees using a simple rating system against the skills

3 Skills

- Map the skills in the matrix
- Map associates to each skill, and mark current skill levels (e.g. 1-5 for beginner to expert)
- Update skill with score via trainers, supervisors or self-assessment

4 Training

- Assign learning resources (SOPs, workshops, external training programs)
- Track progress and completion of training activities.
- Training plans can be created within GembaDocs skills - great for keeping learning documents (SOPs), skills matrix and plans in one place

5 Status

- Update the matrix as employees gain new skills
- Regularly review and adjust training plans
- Use digital tools to save time and reduce admin work

Trainer: John Paddington Change Trainer		Skill Levels: ☐ No Training ☒ Knows Basic Principles ☐ Demonstrates Basic Principles											
SOPs/ Training Items		Personal Protective Equipment for Welders	Fire Safety and Hazard Prevention in Welding Areas	Emergency Procedures for Welding-Related Fires	Safe Handling and Storage of Gas Cylinders	Proper Ventilation and Fume Extraction in Welding Bays	Welding Machine Setup and Calibration	Electrode and Filler Metal Selection Guide	Routine Maintenance and Inspection of Equipment	Safe Handling and Storage of Welding Consumables	Grounding and Electrical Safety in Welding Operations	Proper Welding Joint Preparation and Fit-Up	Best Practices for MIG, TIG, and Stick Welding
Training Associates													
	Michael Johnson	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
	James Anderson	☒	☒	☐	☐	☐	☒	☐	☒	☒	☒	☒	☒
	Robert Smith	☒	☐	☐	☐	☐	☒	☐	☒	☒	☐	☒	☐
	Ashley Clark	☒	☒	☒	☐	☒	☒	☒	☒	☒	☒	☒	☒
	William Thompson	☒	☒	☒	☐	☒	☐	☒	☒	☒	☒	☒	☒
	John Paddington	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	Sarah Jones	☒	☐	☒	☒	☒	☐	☒	☒	☒	☐	☒	☐
	David Taylor	☐	☐	☐	☒	☒	☐	☐	☐	☐	☐	☐	☐
	Joseph White	☒	☒	☒	☒	☐	☐	☒	☐	☒	☒	☒	☐
	Daniel Harris	☒	☒	☒	☒	☒	☒	☐	☒	☒	☐	☒	☒

CUSTOMER

Matrix in action

SDC TRAILERS

Join SDC Trailers in Northern Ireland as they take you through the benefits of a skills matrix, and how they transformed their spreadsheet into GembaDocs' Skills Matrix module.



Make people development easy with a Skills Matrix



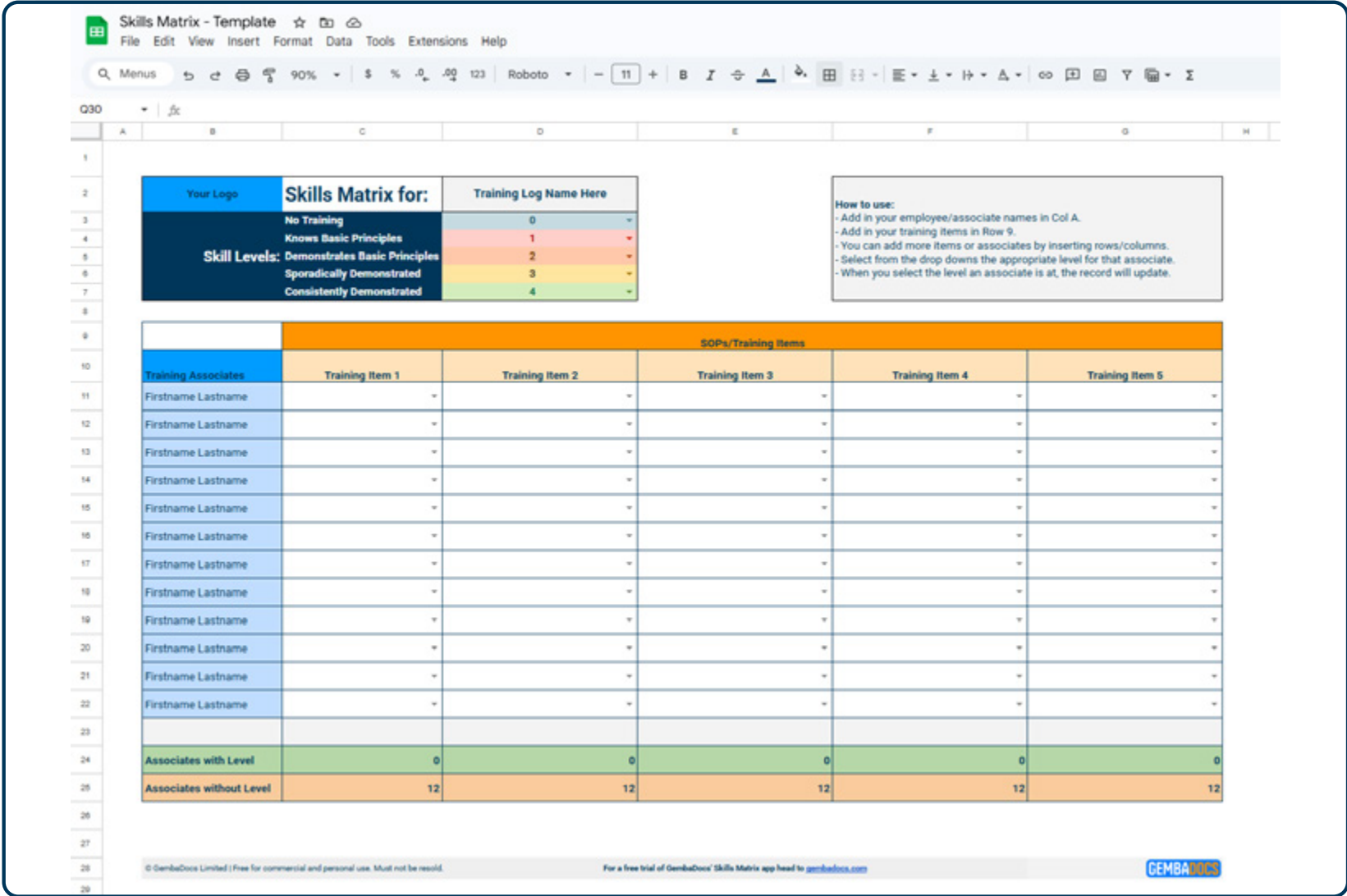
How to Implement GembaDocs' Skills Matrix

GOING DIGITAL

Spreadsheet option

You can get started with a static spreadsheet skills matrix with our free Google Sheet template - [download here](#).

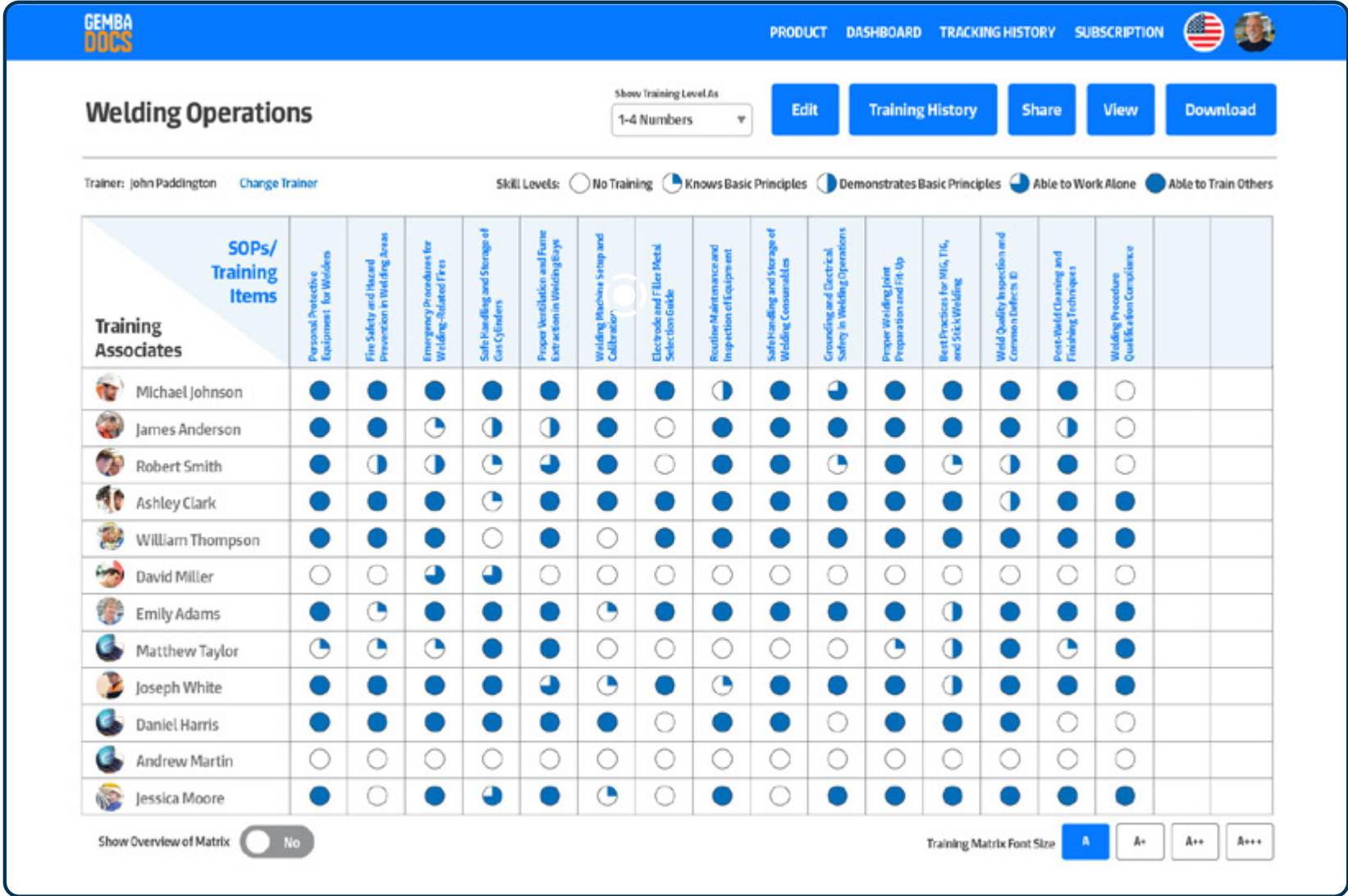
Simply create a copy of our template, and get started. We’ve even included an example layout in the second tab.



Digital option

[GembaDocs](#) has a built-in Skills Matrix that helps you:

- Connect skills to live SOPs
- Track all training on and offline
- Maintain rigor
- Training planning
- Manage change easily
- Reporting and analytics



Is digital better?

Yes. Here's why:

-  **Live documents and easy retrieval**
GembaDocs QR codes, display screens or handheld devices keep everything visible, live and signed off all on the Gemba.
-  **Low maintenance**
No whiteboards to alter, spreadsheets to reformat, or laminated sheets to reprint - updated instantly, live at point-of-access.
-  **Boost productivity**
Companies see up to 30% more output with digital document systems. ²
-  **Rigor and expiry dates**
With linked SOPs, if the process changes, the training auto update. Plus, get notified before skills expire to avoid lapses in safety training.
-  **Avoid lost documents**
7.5% of paper documents get lost, 3% misfiled - digital systems solve that.



1 Training workstation

2 Identify

3 Start small

4 Leverage digital tools

5 Commit to regular reviews

Get Started

EMAIL TOM

