

Skills Matrix

Basic Growth Facilitation Methods

Background

The Skills Matrix is a visual tool used by the team to develop capacity. When you are doing Growth Facilitation, you use the Skills Matrix to help team members share their own skills with each other and create simple plans to expand their skills. The Skills Matrix requires an initial set-up workshop and then smaller regular update workshops as well as ongoing attention.

You facilitate the initial workshop for the Skills Matrix either when the team is first formed or, for a team that already exists, at a moment when the team is struggling with roles and responsibilities or individual vs. team goals. Growth Facilitation for the Skills Matrix ensures that the following attributes of the Skills Matrix are met:

- Purpose: to promote team capacity development (skill visibility, cross-training)
- Workshop Attendees: all individuals doing work to deliver Value Drivers (the “team” or the “community”)
- Agenda (Initial Workshop and Update Workshops): Set the Stage, Identify Skills, Self-Evaluate, Plan
- Outcome: a visible representation of team skills and a capacity development plan

Detailed Method – Skills Matrix Initial Workshop

Time Required: 120 minutes

Materials Required: large whiteboard OR pre-printed large format blank Skills Matrix sheet (available separately), black and red fine-point white board markers or Sharpies (one of each for each participant).

Step One – Set the Stage:

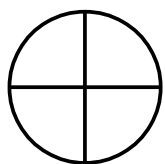
The Team Member serving to do Growth Facilitation prepares a whiteboard or pre-printed Skills Matrix sheet. This Team Member briefly explains the purpose of the Skills Matrix workshop, the agenda and (re-)introduces the context of the team's Goal, project or purpose (how they deliver value).

Step Two – Identify Skills:

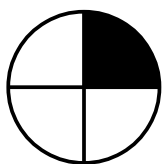
The team brainstorms all the skills required to deliver value, even if the skills do not exist within the team. There are usually four categories of skills that a team should think of: Technical Skills, Business Skills, Process Skills and Soft Skills. The focus is usually on Technical Skills, with the majority of identified skills being in this category. Some trivial skills may be removed from the list if all team members agree that there would never be any question of someone on the team having those skills. Finally, the list of skills is written along the top of the Skills Matrix.

Step Three – Self-Evaluate:

Each team member uses a black marker and writes their own name in a space on the left side of the Skills Matrix. They then proceed to fill in quadrants along their row, based on a self-evaluation of their own skill level as follows:

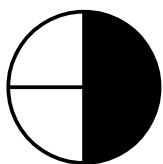


No Skill



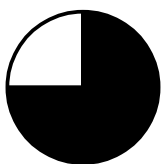
Basic

Knowledge



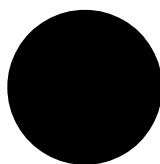
Perform

Basic Tasks



Perform

All Tasks



Teach All

Tasks

Step Four – Plan:

The team looks at each skill in turn to decide if there is a need in the team for development of that skill. For example, if only one team member knows how to perform all the tasks in a skill, then that would be a good candidate for development. Team members then volunteer to include development of that skill in their personal development plan. The volunteers indicate their commitment by marking the quadrant they wish to develop with a red marker. The team members should create plans that are based on the idea of identifying the goal (developing a specific skill) and then identifying one or two specific action items to move towards that goal.

The Skills Matrix should remain in a visible location, ideally in the team's immediate work area.

Detailed Method – Skills Matrix Update Workshops

Time Required: 20 minutes (usually done during the “Learning” portion of the Engagement Meeting)

Materials Required: existing Skills Matrix, black and red fine-point white board markers or Sharpies (one of each for each participant).

Step One – Set the Stage:

The Team Member serving to do Growth Facilitation reminds the team of the team's overall Goal.

Step Two – Identify Skills:

The team does a quick check to determine if any of the skills listed on the Skills Matrix need to be changed or if any new skills should be added.

Step Three – Self-Evaluate:

Each team member uses a black marker and fills in quadrants along their row, based on any new skills developed.

Step Four – Plan:

Team members share any updates to their skill development plans. As well, just like in the Initial Workshop, any needs of the team are identified and volunteers requested.

Mentoring Notes

If you are mentoring someone to use the Skills Matrix, you will demonstrate the Initial Workshop once by facilitating it for a team. Then you and the person you are mentoring co-facilitate the Update Workshop. Finally, you observe the other person facilitating both the Initial and Update Workshops method once. You are looking for the following skills:

1. Time management. Moving the team through each part of the workshop in a timely manner so that the overall Skills Matrix timebox is maintained.
2. Logistics. The right people are invited and attend. The space and materials are prepared.
3. Encouragement. Helping the other Team Members understand and engage with the various parts of the Skills Matrix method.
4. Connection. Facilitating the smooth flow of one part of the workshop to the next part.
5. Light touch. Imposing the least amount of self into the process.

You are also looking for signs that the person facilitating has a clear understanding of the foundations of OpenAgile (Truthfulness, Consultative Decision-Making and Systematic Learning).