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SKILLS MATRIX AND ON THE JOB TRAINING QUICK START CHECKLIST

Score the qualification of one area in one hour, with records you can point at.



SEE IT. PLAN IT. TEACH IT. PROVE IT.

START HERE

How to Use This Check

One production area, one hour with the area manager and a shift leader, twenty-five statements, one number.

01 LOOK	02 SCORE	03 ACT
Open what exists: the skills matrix, the training records, the vacation plan and the release signatures of the last six months.	Score each statement from 0 to 4. Without a record, a signature or a list you can point at, the score is 2 or lower.	Pick the weakest block and agree one action with an owner and a date before you leave the area.

The Scoring Scale

POINTS	MEANING
0	Not in place.
1	Happens occasionally, depends on individuals.
2	Partly in place, not consistent across stations or shifts.
3	Mostly in place and visible in the records.
4	Consistently in place, visible, reviewed and improved.

> **WHY QUALIFICATION IS A PLANNING FIGURE**
>
> **A roster that ignores qualification is a list of names. It works until the one person who can run the test bench takes a week of vacation. What people are allowed and able to do at each station is a number, and it can be planned like any other.**

Before You Start

- **Scope:** one production area with stations that need a release, in all the shifts it runs.
- **Evidence:** the matrix, the training records, the signed releases, the absence figures and the last six months of defect data.
- **Tone:** you check the system, not the people. Ask what somebody was never shown, not why they got it wrong.
- **Boundaries:** Instruction duties under health and safety rules, the role of the employee representatives and any agreement on qualification and pay are checkpoints for the function responsible at your site. Put them on the plan as checkpoints and get the answer from that function. This material explains a method and is not legal advice.

THE CHECK

01 The Matrix

NO.	CHECK	SCORE 0 TO 4
01	The matrix lists tasks and stations, not job titles, and every task that needs a release is in it.	
02	The levels are defined in writing, from knowing the task to being able to train it, and the people in the area can name them.	
03	Every level has one piece of evidence that can be shown: a record, an observed cycle, a signed release.	
04	A release carries a date and a validity, and the matrix shows when it runs out.	
05	A named person keeps the matrix, and it matches what the people in the area actually do today.	

02 Requirement and Risk

NO.	CHECK	SCORE 0 TO 4
06	A minimum coverage per station and per shift is agreed in writing, including the reserve.	
07	The gap between the required and the released coverage is calculated per station and shift, not for the area as a whole.	
08	Stations where one absence stops the work are listed by name and known to the shift leaders.	
09	The effect of vacation and sickness on the coverage is checked before the vacation plan is approved.	
10	Key people and the people who could follow them are named for every station that needs a release.	

THE CHECK

03 The Qualification Plan

NO.	CHECK	SCORE 0 TO 4
11	A written plan says who learns which task to which level by which date.	
12	The order of the plan follows the risk, not the willingness of the people or the convenience of the week.	
13	The effort of every qualification is estimated in hours and in EUR, and the hours are planned into the shift.	
14	The plan is reviewed every month with the people in it, and a date that slips gets a new date and a reason.	
15	Hours and money for qualification are part of the area budget, not taken from whatever is left over.	

04 Training at the Workplace

NO.	CHECK	SCORE 0 TO 4
16	Training at the workplace follows the same four steps for everyone: prepare, show, let the learner do it, follow up and release.	
17	Every task that is trained has a breakdown into steps, key points and the reason behind each key point.	
18	The people who train were chosen and prepared for it, and the training time is in their shift plan.	
19	Station, tools, parts, gauges and the written instruction are ready before the training starts.	
20	Nobody learns a task during a peak or a shortage, and nobody is trained by watching alone.	

THE CHECK

05 Release, Effect and Upkeep

NO.	CHECK	SCORE 0 TO 4
21	A person works a station alone only after a release that someone signed against the evidence.	
22	The defect rate and the cycle time of newly released people are measured and compared with the area.	
23	The matrix is updated within one week of a release, a transfer, a leaver or an expired validity.	
24	Coverage, gaps and plan adherence are reported every month with the other key figures of the area.	
25	The qualification plan is rebuilt whenever the program, the product or the stations change.	

Your Result

BLOCK	POINTS	OUT OF
01 The Matrix		20
02 Requirement and Risk		20
03 The Qualification Plan		20
04 Training at the Workplace		20
05 Release, Effect and Upkeep		20
TOTAL		100

YOUR RESULT

Read the Number

The total tells you how much of your qualification is written down. The weakest block tells you where to start.

TOTAL	WHAT IT MEANS	WHAT TO DO FIRST
0 to 39	Undocumented. Who can do what lives in the heads of the shift leaders.	List the tasks of the area. Build the matrix on tasks, not on people.
40 to 59	Listed. A matrix exists, but the levels have no evidence and no validity.	Define four levels with one piece of evidence each. Sign the releases.
60 to 79	Planned. Coverage and gaps are known and a plan runs against them.	Train the trainers, break the tasks down, measure the effect of training.
80 to 100	Managed. Coverage, risk and effect are reported and the matrix is current.	Hold the level. Take the method to the next area.

Your Three Priorities

NO.	WHAT TO IMPROVE	FIRST ACTION	OWNER	DUE

THE RULE FOR EVERY ACTION

Owner and date, or it did not happen. Repeat the check after three months and compare the blocks, not the feeling.

What to Do Next

NEXT STEP	WHAT YOU GET
SKILLS MATRIX STARTER KIT	The guide for the first 30 days in one area, plus the Excel sheet with levels, coverage per station and shift, gaps and a qualification plan.
SKILLS MATRIX EXCELLENCE BUNDLE	The playbook, a two-day workshop pack, six templates, the Excel system with risk, breakdowns, training log, effectiveness and key figures, and a deck.

Both are available at operationsinsider.com.