**Skills Assessment Guide**

**Context**

This document is intended to be your guide for the *TEMPLATE — Team Skills Assessment*. The two work in tandem.

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# Why This Skills Assessment?

This tool helps individual contributors and managers reflect on and map out skill sets within the team. It’s up to the leadership team to list the relevant skills within your business and then pass it along to employees for the self-assessment.

## For individual contributors

This tool helps individual contributors identify how well their expertise and interests fit their responsibilities. The matrix next to the individual contributor assessment tab breaks down skills into four different categories:

* **Genius zone:** Skills you value and are highly skilled at. Where individual contributors should be spending most of their time.
* **Growth zone:** Skills you're interested in honing. These represent growth opportunities, and can be developed through further training, mentorship, or hands-on experience.
* **Delegation zone:** Skills the contributor is strong at but is no longer interested in owning. This often reflects the growth of this person to a new level, role changes, or a general shift in interest. Managers need to ensure this is reflected in their responsibilities if possible.
* **No-go zone:** Skills the person doesn’t have and is not interested in developing. Likely things that fall outside of their role, but if not this may require a discussion between the manager and team member.

## For teams

These assessments provide a ton of value for managers looking at the team as a unit.

* **Dividing up responsibilities:** Areas of responsibility will usually belong to the person with the most expertise in a skill or set of skills. That person can eventually train other team members to either delegate the AoR or divide it up in smaller chunks.
* **Identifying skills gaps:** When a whole skillset lands in the no-go zone among existing team members, it highlights a clear need to hire someone to fill that hole, be it a full-timer or a consultant!
  + **Hiring:**This tool can also be used to evaluate job applicants, if you just pull out a copy of the individual assessment tab.

# How to use the skills assessment document

## Instructions for Managers

### Step 1: Skillsets & Skills

* Create the list of skills and skillsets (ie. groups of skills) for your team in the "Team Skills View" tab. You can also add a description of each skill to make sure everyone understands what you mean *(just click the + above column B).*
* This list should ideally include all the skills you foresee needing now and in the next ~6 to 12 months in order to achieve your team's goals.

### Step 2: Complete your own skills assessment!

* A great step to check whether your list of skills is ready to be used by your team members is to fill it out yourself.
* This also shows vulnerability to your team, as you highlight your own strengths and weaknesses.
* See “Instructions for Individual Contributor” to understand how you can fill out your own skills assessment.

### Step 3: Share & Analyze

* Replace the GOT names with real ones and click the + sign above each name, otherwise your team members might not score their interests.
* Share the spreadsheet with your team asking them to fill out their own columns.
* The "Team Skillset View" tab will automatically fill itself out providing the overview you need.
* The “Individual View / Matrix” will also automatically fill itself out once you select a team member in the A1 cell of that tab.
* Review the individual skills assessments with your team members in 1on1s after asking yourself the following questions:
  + Do I agree with how my team members assessed themselves? If you don't, you should aim to come to an agreement.
  + In which section of the matrix do their current responsibilities & day-to-day activities fit?
  + Are we taking full advantage of their expertise?
  + Are my team members evolving towards responsibilities that interest them?

# Instructions for Individual Contributors

1. Make sure you check the scoring legend below before filling out the Skills Assessment.
2. Go to "Team Skills View" tab, find your name (or add it) in line 1, click the + above your name to make the “Interest” & “Comment” columns appear, and start filling it out!
3. Avoid looking at your teammates' assessments before completing your own to avoid bias.
4. Make sure you add comments whenever you had to use your judgement to interpret a skill or when you feel like the way you scored yourself needs some context.
5. If you feel like you need to give your manager more context, add comments.

# Scoring legend

*FYI: this legend is a work in progress, please comment if you have suggestions for improvement!*

|  |  |  |
| --- | --- | --- |
|  | **Expertise** | **Interest** |
| **0** | Never done that before | Really don't want to work on that / not interested in learning |
| **1** | You are getting started (<1 year), can accomplish the basics but need guidance or extra time to go beyond that. | Would rather not spend a lot of time doing / learning this |
| **2** | You are skilled but not an expert yet. You can accomplish most tasks requiring this skill, but you could still learn things from a mentor. | Interested in doing some / Looks like something you might want to learn |
| **3** | You’re an expert in that skill and would consider yourself among the 25% best in your industry (top quartile of those with that skill). You could mentor most people on this. | Definitely interested, that's where you see yourself growing |

If you feel like you belong somewhere in between these steps, feel free to use 0.5 points to communicate that! (eg. 2.5)