From Jobs to Skills

The practical workbook for building a skills-based learning organization

A self-guided transformation program for SMEs, nonprofits, public-service teams and departments of larger organizations

Business owners, department heads, people and L&D leaders, nonprofit executives, team managers and employee representatives.

Use this workbook to change how work is defined, skills are recognized, learning happens, and people decisions are made. It is not a promise that software alone will create a learning culture.

How to use the workbook

Choose one real business challenge and one pilot team. Work through Chapters 1–8 in order for the first pilot, or jump to the chapters suggested by the optional 12-question check. Use a 60–90 minute workshop per chapter, assign an owner, and revisit your decisions every month. Complete the templates with real evidence—not aspirational statements.

Five operating principles

1. Begin with business outcomes and meaningful work, not a giant skills catalogue.
2. Define observable capabilities and validate evidence; do not confuse course attendance with skill.
3. Build psychological safety: employee development is not covert surveillance or an automated ranking.
4. Make learning happen in work, with support from managers, peers and accessible opportunities.
5. Start small, measure changes in work quality, and iterate before scaling.

Choose your route

- **Owner / CEO** — Start with Chapters 1, 2, 7 and 8. Select a business-critical pilot without creating an HR department.
- **HR / L&D** — Start with Chapters 2, 3, 4 and 5. Provide fair processes and easy-to-run learning routines.
- **Team / department leader** — Start with Chapters 1, 3, 5 and 8. Limit the pilot to one team and two useful outcomes.
- **Nonprofit / social organization** — Start with Chapters 1, 2, 5 and 7. Include volunteer capabilities, service continuity and mission impact.
- **Employee / representative** — Read Chapters 4, 5, 6 and 7. Check transparency, evidence rights, accessibility and development opportunities.

Boundaries and safeguards

This is an educational method, not a legal, psychometric or compliance certification. Respect local employment and data-protection law, consult workers and their representatives where required, and keep legally mandated qualifications when safety or regulation requires them. AI suggestions are hypotheses for human review—not proof of competence.

Working definitions

Prompt / field	Your notes / decision
Job / role	A bundle of responsibilities; roles change as work changes.
Skill	An ability to perform a meaningful task in a defined context.
Proficiency	How independently and reliably a skill can be demonstrated.

Prompt / field	Your notes / decision
Evidence	An observable work product, demonstration or other relevant proof.
Learning organization	An organization that routinely discovers, shares, applies and improves knowledge in its work.
Skills-based	A decision approach that considers demonstrated capabilities alongside the requirements of work, rather than relying only on job labels or credentials.

Contents

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- 12-question organizational starting check
- Three fictional examples
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Chapter 1 — Connect skills to outcomes

Transformation step 1/8

Why this matters

A skills project without a business problem quickly becomes an expensive inventory. Begin with two measurable outcomes: faster service, safer delivery, less dependence on key people, higher quality, stronger mission impact or better adaptation to AI. Interview the people who actually deliver the work. Ask what regularly slows them down and what must change in the next 12 months.

How to run it

1. Write down the organization’s top three outcomes for the next year, including at least one customer, service or mission outcome.
2. For each outcome, list the work that determines it; separate a task (what people do) from the skills (what makes the task reliable).
3. Choose a pilot group that owns one important workflow; prefer committed managers and accessible evidence over a fashionable department.
4. Assign one sponsor, one operational owner and at least one employee voice. Agree what will stop or be simplified to create time for learning.
5. Set a starting baseline, target, review date and explicit scope. Declare what the pilot will not do.

Workshop prompts

- If this succeeds in 90 days, which observable business result will improve?
- Which work depends on knowledge held by just one or two people?
- Who may be excluded unless they are invited to shape the pilot?

Adapt it to your organization

- Small business: focus on the single workflow that creates the most rework.
- Nonprofit: state the mission outcome and service-user protections.
- Business unit: obtain authority to run a pilot without waiting for an enterprise-wide framework.

Illustrative example

A 35-person maintenance company chooses first-time repair quality rather than “digital transformation”. Its pilot covers six field technicians and one dispatcher. It measures repeat visits, demonstrates troubleshooting tasks and trains backup coverage.

Common failure to avoid: Do not start by mapping every employee or by using AI forecasts as certainty. Keep the first pilot narrow enough for a manager to support.

What to measure: Baseline and change in workflow quality, service continuity, number of critical roles with an owner and weekly learning time protected.

Deliverable and exit test: A one-page charter stating outcome, pilot team, sponsor, two metrics, employee involvement and review date.

Worksheet 1.1 — Business-outcome charter

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Business or mission problem	_____
Who is affected and how	_____
Baseline evidence (date and source)	_____
One 90-day target	_____

Prompt / field	Your notes / decision
Critical tasks behind the outcome	_____
Sponsor and employee voice	_____
One thing we will stop doing	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Worksheet 1.2 — Pilot-selection decision

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Candidate team or workflow	_____
Importance to organization (1–5)	_____
Manager commitment (1–5)	_____
Ability to observe results (1–5)	_____
Workload and inclusion risks	_____
Chosen pilot and reason	_____
Review or stop condition	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Chapter 2 — Understand how the organization works today

Transformation step 2/8

Why this matters

A learning organization cannot be built from an idealized process chart. Map where roles, skills and learning are currently defined: hiring, onboarding, work assignments, supervision, reviews and informal knowledge sharing. People often know much more than records suggest, while managers may assume that training equals proficiency.

How to run it

1. Hold short interviews with leaders, two managers and representative workers or volunteers. Ask for concrete recent examples of errors, handoffs and learning moments.
2. Audit the smallest existing set of materials: job descriptions, onboarding instructions, certificates, evidence of work, process metrics and learning resources.
3. Mark what is known, unverified, contradictory or missing. Avoid assigning a performance label to individuals.
4. Identify three recurrent friction points: a bottleneck, a skill bottleneck, and an access problem for learning.
5. Choose a baseline that does not require new surveillance or collection of unnecessary personal information.

Workshop prompts

- How do people learn a task for the first time?
- How do we know the task was learned?
- Where is knowledge trapped in someone’s head or in inaccessible files?

Adapt it to your organization

- Small business: use existing job checklists and short conversations.
- Nonprofit: include staff and volunteers with distinct responsibilities.
- Business unit: review dependencies on central IT, HR and operations.

Illustrative example

A nonprofit community service discovers that volunteers are trained informally, but handovers between shifts are inconsistent. It documents two critical service procedures and introduces a short observed handover checklist.

Common failure to avoid: An audit of process maturity is not a justification for collecting every individual’s history or producing a secret “talent ranking”.

What to measure: Onboarding time, repeated errors, documentation availability, employees reporting access to learning and role coverage.

Deliverable and exit test: A current-state map with three constraints, existing resources and two baseline measures.

Worksheet 2.1 — Current-state audit

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
How roles are documented	_____
How skills are recognized today	_____
Where evidence is stored	_____
How newcomers learn	_____
How managers give feedback	_____

Prompt / field	Your notes / decision
Where learning opportunities are unequal	_____
Three gaps to investigate	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Worksheet 2.2 — Workflow friction log

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Work step or handoff	_____
Observed problem and frequency	_____
Consequence for quality / mission	_____
Capability or process root cause	_____
Existing evidence	_____
Low-cost experiment	_____
Owner and review date	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Chapter 3 — Define a shared, usable skills language

Transformation step 3/8

Why this matters

A competency framework must be understandable to the people doing the work. Translate a small number of priority roles into essential tasks, then into skills with definitions and observable proficiency levels. Distinguish skills from tools, personal attributes, credentials and responsibilities. Use simple terms before adopting a sophisticated taxonomy.

How to run it

1. For each pilot role, choose five to ten tasks central to success, including tasks affected by automation, new tools or regulatory change.
2. Translate tasks into six to twelve essential skills per role; combine duplicate labels and explain each in plain language.
3. Define what “supported”, “independent” and “advanced” look like in the actual context. Use the same wording for everyone in the role.
4. Check definitions with employees, managers and subject-matter experts; invite counterexamples.
5. Version the framework, give it an owner and schedule its review when work changes. Keep legal qualifications separate.

Workshop prompts

- Could a new employee tell from this definition what good work looks like?
- Does “communication” mean a specific observable action in this role?
- What should change when AI performs part of the task?

Adapt it to your organization

- Small business: keep role definitions to one page.
- Nonprofit: distinguish paid and volunteer tasks and required safeguarding.
- Business unit: reuse approved terminology where it is genuinely useful.

Illustrative example

A customer-support team replaces “excellent communicator” with “explains an issue in plain language, confirms understanding, and documents the agreed next step”. Reviewers can now observe the same behavior.

Common failure to avoid: Beware skill inflation: hundreds of generic labels, inconsistent level scales and “advanced” ratings based solely on seniority.

What to measure: Share of priority roles defined, role profiles reviewed by workers, ambiguous skills removed and time to update a changed role.

Deliverable and exit test: An approved pilot role-to-skills matrix with definitions, examples and a named maintainer.

Worksheet 3.1 — Role-to-skills matrix

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Role and major responsibilities	_____
Critical task / outcome	_____
Essential skill (plain-language label)	_____
What competent delivery looks like	_____
Required proficiency (0–3)	_____
Regulated credential, if any	_____

Prompt / field	Your notes / decision
Reviewer and next review	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Worksheet 3.2 — Proficiency anchor card

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Skill and context	_____
Level 1: supported behavior	_____
Level 2: independent behavior	_____
Level 3: advanced behavior	_____
Accepted evidence examples	_____
Potential bias or accessibility concern	_____
Employee and manager sign-off	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Chapter 4 — Make capabilities visible and trustworthy

Transformation step 4/8

Why this matters

An inventory is useful only when people trust it. Self-declarations can surface hidden abilities, but must be complemented by relevant work evidence and fair review. Distinguish “not yet observed” from “unable to do”. Establish who may see an employee profile, why it exists, and how errors can be corrected.

How to run it

1. Invite pilot participants to identify capabilities they use in work, projects, community contributions and learning; do not force disclosure of private activities.
2. Choose proportionate evidence: completed tasks, demonstrations, supervisor observations, portfolios, licenses or relevant coursework; record context and date.
3. Give employees a chance to comment or contest manager judgments. Use more than one source where the consequences are significant.
4. Map required-versus-demonstrated coverage at team level first; flag unknown data rather than treating missing entries as zero.
5. Agree access, retention, correction and deletion rules before storing individual records; use only the data needed for development.

Workshop prompts

- What evidence would convince a fair observer?
- Where can someone demonstrate a skill without holding a formal title?
- What mistakes in this record could disadvantage a person?

Adapt it to your organization

- Small business: start with team coverage rather than granular ranking.
- Nonprofit: protect beneficiaries and volunteer privacy in examples.
- Business unit: coordinate access controls with existing policies.

Illustrative example

A project assistant without a formal data role provides a recent dashboard, explains how it was built and receives confirmation of a reporting skill. A lack of evidence for another skill remains “unknown”.

Common failure to avoid: Avoid unreviewed AI scoring, permanent labels and automatic decisions about pay, promotion or dismissal based on skills predictions.

What to measure: Percentage of role-critical skills with recent evidence, unresolved disputes, unknown coverage and time spent reviewing records.

Deliverable and exit test: A transparent, rights-aware pilot skills matrix and an agreed process for updating it.

Worksheet 4.1 — Skills evidence record

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Skill and task context	_____
Evidence type and date	_____
Link / description (minimal data)	_____

Prompt / field	Your notes / decision
What can be observed	_____
Suggested level and confidence	_____
Employee comment or correction	_____
Human reviewer and decision	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Worksheet 4.2 — Coverage and resilience map

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Critical task / role	_____
Minimum coverage needed	_____
People with validated capability (authorized view)	_____
Unknown or expiring evidence	_____
Single-point-of-failure risk	_____
Backup / development action	_____
Review date	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Chapter 5 — Turn everyday work into continuous learning

Transformation step 5/8

Why this matters

A course catalogue alone does not change a workplace. People learn when new knowledge is applied, rehearsed, supported and reviewed. Create small, repeatable routines inside existing meetings and project cycles. Offer multiple formats so shift workers, part-time staff, remote teams and volunteers can participate.

How to run it

1. Select one high-priority gap connected to a real work task and define a safe opportunity to practice it.
2. Pair learning resources with an application: shadowing, job rotation, coaching, guided practice, peer demonstration or an accessible short lesson.
3. Create a predictable rhythm: a ten-minute retrospective, a fortnightly peer exchange, or monthly demonstration.
4. Ask managers to make time, give specific feedback and remove barriers. Recognize people who teach others.
5. Collect evidence of application after two to six weeks; change the activity if work outcomes do not improve.

Workshop prompts

- Where can practice happen without risking customers or service users?
- Who has access to learning despite shifts, disability, distance or workload?
- What will managers stop doing to protect learning time?

Adapt it to your organization

- Small business: include practice in existing shift handovers.
- Nonprofit: offer asynchronous options to volunteers.
- Business unit: integrate with team rituals rather than adding meetings.

Illustrative example

A 12-person community charity pilots a 15-minute biweekly case review. Staff agree one improvement to volunteer onboarding and check whether handover errors decline.

Common failure to avoid: Do not use course completions, hours watched or certificates as the only signal that a capability improved.

What to measure: Practice opportunities taken, skill demonstrations, learning transfer, participant accessibility and workflow results.

Deliverable and exit test: A learning routine with an owner, an application task, an evidence rule and the next review.

Worksheet 5.1 — Learning-in-the-flow experiment

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Critical skill gap	_____
Real work task for practice	_____
Learning method and accessibility adaptation	_____
Frequency and time protected	_____
Coach or peer supporter	_____

Prompt / field	Your notes / decision
Evidence after 30 days	_____
Continue / change / stop decision	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Worksheet 5.2 — Individual development agreement

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Skill to strengthen and why	_____
Current evidence / uncertainty	_____
Specific development goal	_____
Practice assignment and support	_____
Accessibility / time needs	_____
Evidence to review after 30–60 days	_____
Employee choice and manager support	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Chapter 6 — Use skills in fair talent decisions

Transformation step 6/8

Why this matters

Skills data becomes useful when it changes a decision: who gets a project, who needs support, which capability is missing in a team, or how hiring requirements are phrased. Introduce one transparent decision process at a time; do not replace professional judgment or legal requirements with a score.

How to run it

1. Choose one decision to improve—project assignment, hiring, cross-training, internal opportunity or succession coverage.
2. Translate the decision into required skills, evidence rules and non-skill constraints (availability, safety, licenses, preferences).
3. Open access to opportunities and explicitly examine whether part-time staff, volunteers or less visible people are overlooked.
4. Use structured conversations and human review. Record why a decision was made and allow correction of outdated data.
5. Review outcomes after one cycle; ask both selected and non-selected participants whether the process was understandable and fair.

Workshop prompts

- Do we privilege job title, tenure or a manager’s familiarity unnecessarily?
- Could someone demonstrate the capability through projects or prior experience?
- What minimum qualification is legally necessary and cannot be waived?

Adapt it to your organization

- Small business: improve cross-training and backup coverage first.
- Nonprofit: include mission-critical service continuity and safe volunteer assignments.
- Business unit: test one internal project selection process, not a global talent marketplace.

Illustrative example

A manufacturer appoints a temporary process-improvement team based on documented problem-solving and quality skills, while keeping safety authorizations compulsory. People can express interest before manager selection.

Common failure to avoid: Never promise automated hiring or internal-mobility recommendations as a current Hilighter function; those modules may be future product capabilities.

What to measure: Transparency of criteria, opportunity participation, time to staff a project, skill application and fairness complaints.

Deliverable and exit test: One documented, auditable skills-informed people decision, with worker feedback.

Worksheet 6.1 — Decision redesign canvas

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Decision to redesign	_____
Work outcomes and skills required	_____
Evidence accepted and legal requirements	_____
Employee choice and accessibility	_____
Who decides / reviews	_____
How people can correct data	_____

Prompt / field	Your notes / decision
Fairness and outcome measures	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Worksheet 6.2 — Opportunity and mobility card

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Short project or learning opportunity	_____
Skills needed and useful to develop	_____
Time and location constraints	_____
How to express interest	_____
Selection criteria and feedback	_____
Manager support / backfill	_____
Results and learning evidence	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Chapter 7 — Lead the change and protect trust

Transformation step 7/8

Why this matters

Skills-based transformation changes everyday authority: employees gain a voice in what they can demonstrate, managers must give feedback, and leaders need to protect time for development. It will fail if employees see the initiative as hidden downsizing, if managers feel judged or if data rights are vague.

How to run it

1. Write an honest statement of purpose: what the program is for, what it is not for, and which decisions remain human.
2. Appoint an accountable sponsor and a small working group including management, workforce representatives and, where relevant, volunteers.
3. Explain what data is recorded, who can access it, how long it is retained and how employees can correct records; seek legal and worker-representation review as appropriate.
4. Train managers in evidence-based conversations, inclusive feedback, and how to discuss an unknown skill without discouraging people.
5. Make learning and improvement visible through monthly demonstrations, questions and course corrections; do not hide failures.

Workshop prompts

- Which employee concerns are reasonable and how will we address them?
- What happens if a manager and employee disagree about a skill?
- What time and support have leaders genuinely allocated?

Adapt it to your organization

- Small business: the owner can sponsor; a manager runs the pilot.
- Nonprofit: involve safeguarding and worker / volunteer voices.
- Business unit: communicate clearly with HR and employee representatives.

Illustrative example

A social-service director tells staff that the pilot does not automate employment decisions, publishes the access policy and holds an open Q&A before collecting evidence.

Common failure to avoid: Announcing a “skills revolution” without employee participation, privacy rules or managerial capacity damages trust.

What to measure: Participation, trust feedback, manager coaching practice, unresolved corrections and accessibility of learning.

Deliverable and exit test: A signed change charter, stakeholder map, communication plan and clear accountability model.

Worksheet 7.1 — Stakeholder and trust map

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Group affected / voice needed	_____
Expected benefit and concern	_____
What data may be processed	_____
Who can access and correct it	_____
Communication and consultation action	_____

Prompt / field	Your notes / decision
Responsible leader	_____
Feedback / escalation route	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Worksheet 7.2 — Manager learning ritual

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Meeting or 1:1 cadence	_____
One skill to practice this month	_____
Feedback question based on observed work	_____
Peer learning or coaching slot	_____
Time to protect	_____
How improvements will be recognized	_____
Escalation for unfairness or overload	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Chapter 8 — Measure outcomes, improve and scale

Transformation step 8/8

Why this matters

If the scoreboard counts only courses and profile completions, the transformation may look successful while work stays unchanged. Separate activity measures from evidence of improved capability and actual organizational outcomes. Review results with staff, compare against the baseline and keep learning costs visible.

How to run it

1. Set a short balanced scorecard: one outcome measure, one capability measure, one participation/fairness measure and one workload measure.
2. Record baseline and data source before interventions; avoid inventing precise attribution to learning from a small pilot.
3. Run a 30-, 60- and 90-day review. Ask what changed, what did not, and what unintended harm appeared.
4. At day 90, decide explicitly: scale, revise, pause or stop. Specify which practices can be copied and which require local adaptation.
5. For the next year, assign ownership for skills framework updates, onboarding, manager training, data review and recurring checks of new technology and work.

Workshop prompts

- Can we show changed work outcomes, not only more recorded skills?
- Whose voice is missing from the results?
- Is maintaining the process proportionate to its value?

Adapt it to your organization

- Small business: keep at most four measures.
- Nonprofit: measure service-user outcomes as well as volunteer participation.
- Business unit: check consistency without claiming enterprise-wide representativeness.

Illustrative example

A 70-person operations team sees fewer repeat escalations after a skills pilot but also higher manager workload. It simplifies evidence reviews before expanding to the next team.

Common failure to avoid: Do not advertise statistical causality from a tiny, self-selected pilot or publish cross-company rankings from inadequate samples.

What to measure: Business outcome trend, evidence-based coverage, time to proficiency, participation equity, manager workload and monthly review completion.

Deliverable and exit test: A 90-day evidence summary, scale/no-scale decision and a 12-month ownership roadmap.

Worksheet 8.1 — Balanced scorecard

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
Business or mission outcome + baseline	_____
Capability / evidence indicator	_____
Learning application indicator	_____
Fairness and access indicator	_____
Time / administrative burden	_____

Prompt / field	Your notes / decision
Source and cadence	_____
Owner and decision threshold	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Worksheet 8.2 — 90-day decision review

Copy and fill in this template during a working session. Name an owner, use verifiable facts and record the next review date.

Prompt / field	Your notes / decision
What improved with evidence	_____
What failed or was not used	_____
Unexpected employee concerns	_____
Cost and managerial workload	_____
Keep / change / stop decisions	_____
Next team and prerequisites	_____
Sponsor decision and next review	_____

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____

Your first 90 days

Choose one real business challenge and one pilot team. Work through Chapters 1–8 in order for the first pilot, or jump to the chapters suggested by the optional 12-question check. Use a 60–90 minute workshop per chapter, assign an owner, and revisit your decisions every month. Complete the templates with real evidence—not aspirational statements.

Days 1–15 — agree

Sponsor, worker input, business challenge, pilot scope, baseline and privacy assumptions.

Days 16–30 — map

Critical tasks, five to ten tasks per role, required skills and observable levels.

Days 31–45 — evidence

Invite employees; assess available evidence; resolve uncertainty without over-scoring.

Days 46–60 — practise

Launch one practical learning routine and protect manager time for feedback.

Days 61–75 — decide

Apply the information to one transparent staffing, learning or continuity decision.

Days 76–90 — review

Compare with baseline, hear concerns, record overhead, decide whether to scale or revise.

Suggested action	Owner	Review date	Evidence / result
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

12-month expansion roadmap

Months 1–3

Run pilot; fix evidence and governance rules; decide whether to continue.

Months 4–6

Extend to two related teams; train managers; test reuse of skill language; remove duplicate administration.

Months 7–9

Connect onboarding and one staffing or internal-project decision; review equitable opportunity access.

Months 10–12

Update framework for changing work and AI; publish internal lessons; decide next year’s priority outcomes.

Proficiency example: common four-level language

- **0 — Not yet demonstrated** — No usable evidence yet; not a judgement of potential.
- **1 — Supported** — Can perform the task with guidance or an example.
- **2 — Independent** — Can deliver the task reliably in a normal situation.
- **3 — Advanced / enables others** — Handles exceptions and helps others improve their practice.

12-question organizational starting check

Optional and free. Answer for your current organization—not your aspiration. Scale: 0 = not in place; 1 = ad hoc; 2 = partly established; 3 = consistent in pilot areas; 4 = consistently applied and reviewed. Use “Not sure” instead of guessing. This is a prioritization aid, not a validated benchmark or an employee score.

Q01. We can name two business or mission outcomes that developing skills should improve.

Strategy and sponsorship — Chapter 1

0 / 1 / 2 / 3 / 4 / ?

Q02. An accountable sponsor and a realistically sized pilot team have been identified.

Strategy and sponsorship — Chapter 1

0 / 1 / 2 / 3 / 4 / ?

Q03. We understand how people currently learn, share knowledge and handle critical work.

Current state — Chapter 2

0 / 1 / 2 / 3 / 4 / ?

Q04. Our priority roles have a concise list of skills tied to observable tasks.

Skills language — Chapter 3

0 / 1 / 2 / 3 / 4 / ?

Q05. We use shared, behavior-based proficiency descriptions rather than vague ratings.

Skills language — Chapter 3

0 / 1 / 2 / 3 / 4 / ?

Q06. Important capabilities are supported by recent, relevant work evidence.

Skills visibility and trust — Chapter 4

0 / 1 / 2 / 3 / 4 / ?

Q07. People can view, comment on and correct information about their own skills.

Skills visibility and trust — Chapter 4

0 / 1 / 2 / 3 / 4 / ?

Q08. People have regular chances to practise and apply what they learn in work.

Learning in work — Chapter 5

0 / 1 / 2 / 3 / 4 / ?

Q09. Managers protect learning time and give specific, useful feedback.

Learning in work — Chapter 5

0 / 1 / 2 / 3 / 4 / ?

Q10. We use relevant skills and transparent criteria when assigning opportunities or hiring.

Talent decisions — Chapter 6

0 / 1 / 2 / 3 / 4 / ?

Q11. People understand the purpose, limits and data safeguards of the approach.

Governance and trust — Chapter 7

0 / 1 / 2 / 3 / 4 / ?

Q12. We measure change in work outcomes, fairness and capability—not only training activity.

0 / 1 / 2 / 3 / 4 / ?

Interpreting the check

For each dimension, average its answered items and multiply by 25 to obtain a 0–100 self-reported indicator. If a dimension has no answered items, show “Insufficient information”. The overall indicator is the unweighted average of available dimension scores, provided at least six answers are available; otherwise show priority hints without a total. Recommend the three lowest-scoring dimensions, breaking ties with prerequisites: strategy, governance, skills framework, visibility, learning, talent practices, measurement. Never claim a peer benchmark without a sufficiently representative dataset.

Prompt / field	Your notes / decision
Strategy and sponsorship	___ / 100 → Chapter 1
Current state	___ / 100 → Chapter 2
Skills language	___ / 100 → Chapter 3
Skills visibility and trust	___ / 100 → Chapter 4
Learning in work	___ / 100 → Chapter 5
Talent decisions	___ / 100 → Chapter 6
Governance and trust	___ / 100 → Chapter 7
Measurement and scaling	___ / 100 → Chapter 8

Three fictional examples

SME — 28-person distributor

Problem: order errors. Pilot: warehouse and customer operations. Skills: order validation, exception handling, communication. Evidence: observed order checks. Learning: weekly peer practice. Outcome: fewer corrected orders; do not presume the cause without checking other changes.

NGO — 45 employees and volunteers

Problem: inconsistent beneficiary handovers. Pilot: one service location. Skills: privacy-aware handover, service escalation, listening. Evidence: simulated and observed cases. Learning: short case reviews. Outcome: clearer continuity with safeguards for vulnerable people.

Business unit — 80-person internal support team

Problem: slow incident resolution. Pilot: one shift. Skills: troubleshooting, documentation, stakeholder updates. Evidence: reviewed incident records. Learning: paired diagnosis. Outcome: lower repeat escalations while tracking manager review workload.

References and further reading

- OECD (2026), A Skills-First Labour Market, especially skills-first talent management: https://www.oecd.org/en/publications/a-skills-first-labour-market_2e1b85f0-en.html
- CIPD (2025), Learning and development: How to develop and deliver effective learning: https://www.cipd.org/en/knowledge/guides/learning-and-development/
- CIPD (2025), Learning evaluation, impact and transfer: https://www.cipd.org/en/knowledge/factsheets/evaluating-learning-factsheet/
- European Commission, Principles of the GDPR: https://commission.europa.eu/law/law-topic/data-protection/information-business-and-organisations/principles-gdpr_en
- World Economic Forum (2025), Future of Jobs, Skills Outlook: https://www.weforum.org/publications/the-future-of-jobs-report-2025/3-skills-outlook

Your next move

Pick one pilot team, name the accountable sponsor and book the first 45-minute workshop. The outcome of the first month is not a complete taxonomy: it is agreement about the work that matters, which capabilities enable it, and how you will observe progress.

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