AI Skills Matrix and Training Plan

Define what people need to know, check what they can do and plan the next step.

Use this resource for general users, managers, system owners, governance teams and technical implementers. It covers everyday AI use and the additional responsibilities of people overseeing or building AI-enabled systems.

1. Set the scope and assign roles

Planning details	Complete
Organisation / team	
AI tools, systems and tasks in scope	
Plan owner / review date	

Role	Responsibilities used in this matrix
General users	Use approved tools, protect information, check outputs and report problems.
Managers	Set team expectations, supervise use, assess benefits and arrange training.
System owners	Own the business use of a system, its limits, performance, support and ongoing review.
Governance teams	Coordinate policy, risk, privacy, security, procurement and approval requirements.
Technical implementers	Configure, connect, test, secure, monitor and maintain the technical solution.

How to use the resource

1. Assign roles by actual duties. One person may hold several roles. Include contractors who use or operate systems on your behalf.

2. Adapt the suggested targets on page 2. Consider the system, data, affected people and consequences of error. Add any sector-specific skills.

3. Assess each person using the tasks on page 3 and the record on page 4. Self-assessment starts the conversation; practical evidence supports the rating.

4. Use page 5 to plan training for each priority gap. Agree what successful performance looks like before training begins.

5. Reassess in the workplace. Keep restrictions in place until the relevant skills are demonstrated and the responsible manager approves the task.

Keep the review practical

Use approved tools and fictional, redacted or otherwise authorised practice data. Do not put credentials or unnecessary personal information into this document. Restrict access to individual assessment records.

The targets, levels and exercises are Repautomate planning suggestions. They are not mandatory standards, qualifications or a certification scheme. Training should reflect the actual work and risks involved.

2. Suggested role skills matrix

Each number is a suggested target, not an assessment of current ability. Adjust targets before assessing people. For overlapping roles, start with the highest relevant target and confirm it against the person's duties.

Level	What the person can demonstrate
0 — Not yet demonstrated	No reliable evidence of the skill yet. This is a current rating, not a training target.
1 — Understand	Explain the concept, recognise the risk and know when and where to seek help.
2 — Apply	Perform the relevant task correctly and independently within approved rules.
3 — Oversee or implement	Set up, evaluate or oversee the practice within the person's responsibility, and guide others.

Level 3 builds on levels 1 and 2. For governance staff it may mean evaluating controls; for implementers it may mean building and testing them. It does not grant decision authority or replace specialist expertise.

ID / skill	User	Mgr	Owner	Gov	Tech
S01 AI basics and limitations	2	2	3	2	3
S02 Approved use and accountability	2	3	3	3	2
S03 Data protection and information handling	2	2	3	3	3
S04 Task instructions and workflow use	2	2	2	1	3
S05 Output checking and human oversight	2	3	3	3	3
S06 Fairness, accessibility and affected people	1	2	3	3	2
S07 Security, permissions and misuse	2	1	3	2	3
S08 Purpose, impact and value assessment	1	3	3	3	2
S09 Testing and acceptance criteria	1	2	3	2	3
S10 Monitoring, incidents and fallback	2	2	3	2	3
S11 Supplier review and applicable obligations	1	2	2	3	2
S12 Documentation, change and support	1	2	3	2	3

User = general users; Mgr = managers; Owner = system owners; Gov = governance teams; Tech = technical implementers.

Adapt the matrix to the work

A user handling confidential information may need deeper data-handling knowledge. A manager approving consequential outputs may need stronger testing and oversight skills. Add skills for specialist contexts such as recruitment, health, finance or safety.

Use N/A only when a skill is outside the person's assigned work, with a recorded reason. Do not use N/A to mean "not trained".

3. Learning outcomes and practice tasks

Use these exercises to design learning and collect evidence. For level 1, ask the person to explain the task and risks. For level 2, observe performance. For level 3, ask them to design, review or oversee the relevant practice and justify their decisions.

Skill	Practical learning and assessment exercise
S01	Explain what the actual system does and cannot reliably do. Distinguish generated content, predictions and automated actions. Identify a confident but incorrect answer and explain why confidence is not proof.
S02	Choose between an approved and unapproved use case. Identify who owns the decision, which actions need approval and when the task must be referred to someone else.
S03	Classify sample information and decide what may enter the selected tool. Redact unnecessary details. Explain where data is stored or shared and when to consult the data owner.
S04	Complete a realistic task with clear instructions, context and output requirements. For non-conversational systems, use the approved input and workflow controls. Recognise when AI is unsuitable and use the alternative process.
S05	Check a draft, prediction or recommendation against trusted evidence. Find planted errors, unsupported claims or wrong calculations. Demonstrate correction, rejection and escalation before the output is relied on.
S06	Review an example that disadvantages a group or excludes a user. Identify who is affected and what needs checking. Explain how to obtain human review or raise a concern.
S07	Recognise suspicious instructions in a document or message, protect credentials and follow access rules. At level 3, demonstrate that permissions and approval controls prevent unauthorised access or actions.
S08	Describe a business problem and compare AI with a simpler alternative. Define a baseline, intended benefit, likely harms and measures that include checking time, errors and operating costs.
S09	Write a test with a clear pass criterion. Include normal, unusual and failure cases. At level 3, evaluate release evidence, investigate failures and justify whether further testing is needed.
S10	Practise responding to an incorrect output, data exposure or outage. Demonstrate the reporting route and safe fallback. Owners and implementers should rehearse alerts, stopping actions and controlled recovery.
S11	Identify when supplier terms, data practices, content rights or local requirements need specialist review. At level 3, assess a supplier scenario and document approval conditions and unresolved questions.
S12	Find the current instructions and support contact. Explain when a change needs review. At level 3, document a change, its tests, user communication, support handover and reassessment needs.

Record the exercise, tool/version, result and reviewer. Define pass criteria appropriate to the task; a course attendance record alone does not show that the person can perform it safely.

4. Individual skills assessment

Copy this page for each person. For a group assessment, retain individual evidence before granting individual responsibilities. Use the matrix and exercises to agree targets and assess current competence.

Assessment details	Complete
Name / role or combination of roles	
System / task scope / assessment date	
Assessor / evidence folder reference	

Target: 1–3, or approved N/A. Current: 0–3; leave blank if not assessed. Gap = target minus current, with a minimum of 0. A blank rating means assessment is needed, not that the gap is zero.

Skill	Target	Current	Gap	Priority	Evidence / finding
S01					
S02					
S03					
S04					
S05					
S06					
S07					
S08					
S09					
S10					
S11					
S12					

Set priorities by consequence, not just gap size

P1 — Before independent work: a missing skill could expose information, cause an unauthorised action, miss an essential review or prevent a safe response. Restrict the task or arrange supervision until verified.

P2 — Before wider responsibilities: the person can perform their current restricted work, but needs training before using additional features, information or decision authority.

P3 — Planned improvement: development that can be scheduled while current work remains within demonstrated competence and approved controls.

Do not average away a critical gap. Strong task instructions cannot compensate for unsafe information handling. Record the reason for each priority and any N/A in the evidence column.

Assessment outcome	Complete
Priority gaps / training action IDs	
Current task limits / supervision / owner	
Assessor and manager agreement / date	
Next assessment date / trigger	

5. Training plan and verification

Copy this record for each training action. One action may address several related skills. Choose coaching, a workshop, guided practice, self-study or a simulation according to the gap; set the time needed after assessing the learner.

Training action	Complete
Action ID / learner or group / role	
Skill IDs / current levels / target levels	
Specific learning outcome	After training, the learner will be able to:
Priority / reason / interim restrictions	
Method / practice task / materials	
Trainer or coach / accountable owner	
Planned date / effort / budget or resource needs	
Assessment task / agreed pass criteria	
Completion date / evidence reference	
Result / reassessed levels / assessor and date	
Manager decision / remaining limits / follow-up	
Workplace follow-up date / review trigger	

Example of a specific training outcome

Illustrative example — S03, general user, current 1 and target 2: correctly classify five realistic sample inputs, remove prohibited details and explain the approved route for uncertain cases. Practise with a coach, then assess with fresh examples. Agree the pass criteria in advance and record the result.

Close the gap, then check it holds

Mark training complete when the learning activity is finished. Mark the skill verified only after the agreed assessment is passed. If it is not passed, record the remaining gap and next action. Review again after relevant tool, task or policy changes, incidents, or evidence that the skill is no longer being applied.

Sources and scope

The role targets and assessment method are adaptable planning guidance informed by broader AI literacy, competence and risk-management principles. They are not a clause-by-clause standards mapping.

NIST AI RMF Playbook — governance and role-based training

European Commission — AI literacy questions and answers

ISO/IEC 42001 — AI management systems

General educational guidance, not legal advice or a qualification. Adapt to your systems, responsibilities and applicable requirements. Completion does not establish certification or legal compliance. Obtain specialist review where needed.