

Org Chart Buyer's Guide

How to choose the right org chart software for your organization

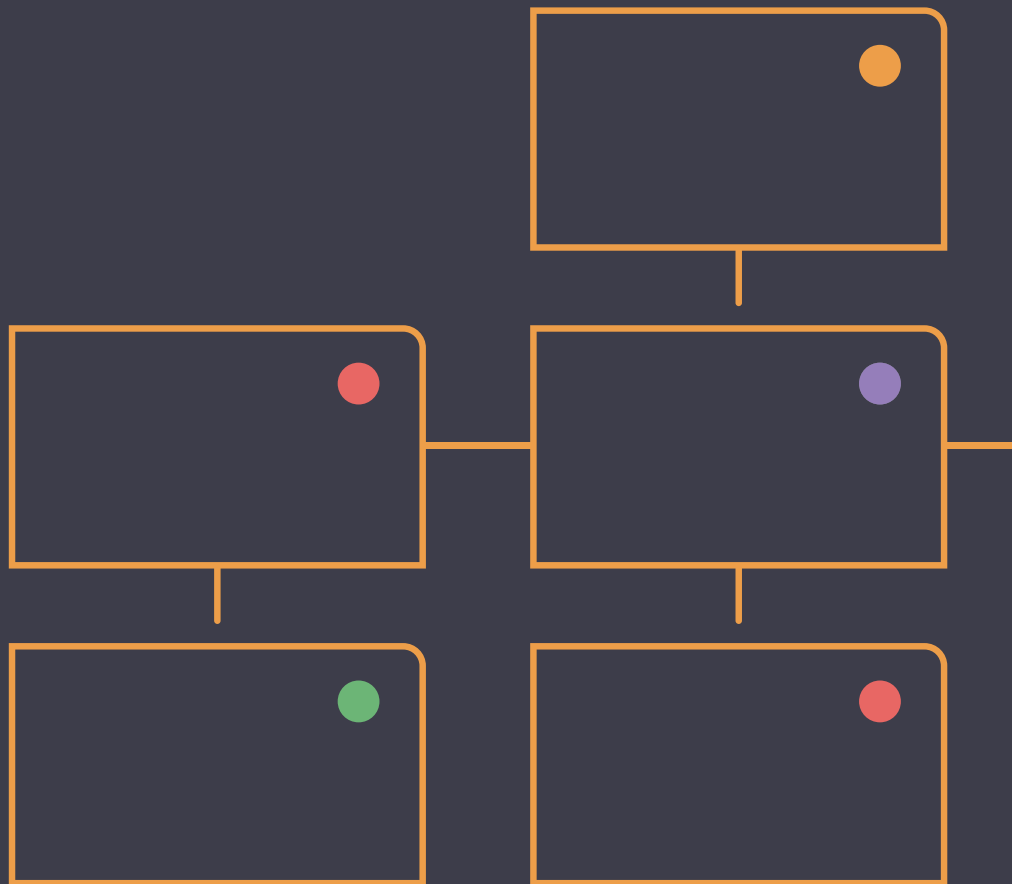


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Why Are Org Charts Critical

Org charts are fundamental to workforce planning and management. When utilized effectively, they become invaluable assets, alleviating numerous challenges faced by HR professionals and business leaders.

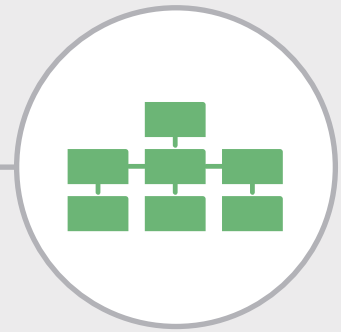
Org charts are indispensable tools for:



Gaining clarity on your company's hierarchy



Organizational analytics



Visualizing your workforce structure

Traditionally, org charts serve as visual representations of your company's hierarchy, roles, span-of-control, and relationships. They offer an intuitive, bird's-eye view of your organization's structure, enabling you to comprehend complex setups at a glance. These charts visually depict reporting relationships, including dotted-lines, various employee positions, and the connections between different departments or teams.

Visualizing who-sits-where at a glance is helpful, but an org chart can be so much more than boxes with titles and names. Spreadsheets and slides limit users, especially when they are complex to decipher or worse, when there are multiple versions floating around.

Instead, org charts should serve as critical tools to help HR leaders and organizations act strategically and intentionally. Luckily, both can happen with automated org chart software.

With the right software, leaders are empowered to better visualize teams and employees, uncover and analyze trends, report on important employee statistics, and forecast future plans. So whether you're investing in software for the first time or looking to change providers, it's necessary to do your due diligence to pick the right solution for your team.

When to Consider Automated Org Chart Software

While valuable, the creation and maintenance of org charts is time-consuming. Many organizations (even very large ones) rely on manual drawing tools that are outdated as soon as they are printed. Two main issues become immediately apparent with manual org charts: HR teams must spend valuable time consistently updating charts (over and over again), which can lead to multiple versions floating around and people using outdated information to make decisions.

Unlike manual drawing tools, automated org chart software platforms integrate with your HR systems and data so there's no manual lift. The result? HR leaders can focus on strategic planning and decision-making and people can confidently access and use information on the org chart.

Notably, the decision to start using org chart software is not reserved for a specific milestone or company size. Rather, it's a strategic move that benefits organizations at any stage of their journey.



For startups and small businesses

implementing org chart software early on establishes a foundation for transparent communication and efficient organizational management as the company grows.



Mid-sized enterprises

grappling with increasing complexity can seize the opportunity to streamline HR processes, ensuring scalability and adaptability.



Large corporations,

with intricate hierarchies and distributed teams, find org chart software indispensable for maintaining clarity and cohesion.

Ultimately, the right time for a company to start using org chart software is when it recognizes the need for enhanced workforce visibility, streamlined HR operations, and strategic decision-making.

Who Benefits From Automated Org Chart Software?

Org chart software emerges as a transformative solution with a wide-reaching impact, benefiting various stakeholders across organizations.



- **Companies of All Sizes:** Organizations of every size stand to gain from the implementation of automated org chart software. From small businesses to large corporations alike they benefit from the ability to visualize their workforces, affording them the power of informed decision-making.
- **HR Teams:** The benefits for HR teams are two-fold. Tasked with creating and maintaining the company org chart, HR teams can rely on automated org charts to provide reliable, up-to-date information. Second, org chart software elevates HR teams to a strategic seat. Armed with data at their fingertips, they can navigate the entire employee lifecycle with precision. From onboarding, through annual reviews, promotions, to succession planning and offboarding, org chart software empowers HR professionals to create a positive employee experience and optimize every stage of the employee journey.
- **Talent Acquisition Teams:** For talent acquisition teams, org chart software becomes a collaborative powerhouse. It facilitates seamless collaboration with managers to build out departments, ensuring that the right talent is placed in the right roles and that there are no gaps at key positions.
- **Leaders:** Leaders within organizations leverage org chart software for strategic initiatives. Succession planning becomes more robust, providing a clear view of potential leaders and identifying skill gaps. Opportunities for Diversity, Equity, and Inclusion (DEI) initiatives are highlighted, and the software aids leaders in navigating the complexities of company acquisitions, mergers, expansions, or downsizing with clarity.
- **Managers/Decision-Makers:** Managers and other decision-makers find org chart software instrumental in making informed decisions for their direct reports. From allocating raises to deciding on promotions and tracking employee growth, the software provides a comprehensive view of team structures and individual contributions, helping align decisions with organizational goals.
- **Employees:** Up-to-date org charts facilitate self-serve HR, allowing employees to access relevant information and resources at their convenience. Visualizing team structures helps employees understand their place within the organization, fostering a sense of belonging and promoting collaboration across departments, as well as understanding who to go to for key questions and collaboration.

Understanding Org Chart Software Features

Org chart software isn't just for mapping reporting structures – It's a dynamic solution to streamline processes and enhance organizational efficiency.



Keep the following features in mind as you consider your business' needs:

- **Automation:** Bid farewell to manual chart updates. Org chart software automates the process so your organizational structure is always up-to-date. Save time and resources for strategic HR initiatives.
- **Syncing with HR Tech Stack:** Effortless integration with your existing HR technology stack is a hallmark of advanced org chart software. Achieve a seamless flow of information across platforms for a holistic HR management experience.
- **Visibility:** Enhance visibility into your organizational structure with just a few clicks. Org chart software offers a clear and detailed view of roles, responsibilities, and relationships, empowering HR professionals to navigate the organizational landscape effortlessly.
- **Output:** Download the org chart in a variety of formats (such as PDF, PPT, and internal web links) to match stakeholders' and distribution requests.
- **Insights:** Move beyond surface-level information. Org chart software transforms raw data into actionable insights, allowing you to identify trends, talent gaps, and opportunities for improvement within your workforce.
- **Informed Decision Making and Collaboration:** Unlock the power of informed decision-making through real-time data. Org chart software provides a comprehensive view of your workforce, enabling you to make strategic decisions backed by accurate and up-to-date information.
- **Vision:** Craft a strategic vision for your organization with the help of org chart software. Visualize the alignment of your workforce with organizational goals, fostering a more cohesive and goal-oriented work environment.

Understanding Your Organization's Needs

Before selecting your org chart software, conduct a comprehensive assessment of your organization's current state, challenges, and future aspirations.



1. Assess Your Current Org Structure and Challenges

Understanding your current landscape provides the foundation for selecting org chart software that addresses specific pain points and enhances organizational efficiency.

- **Identify current succession planning roadblocks.** Without insight and visibility into your workforce, choosing high-potential employees for tailored development opportunities becomes challenging.
- **Recognize bottlenecks.** Dependency on key personnel, resource misallocation, and inefficient procedures can slow processes and lead to inaccurate decision-making.
- **Consider employee productivity.** Oftentimes, employees are spread thin with time-consuming tasks that can (and should) be automated, like updating org charts, aggregating personnel data, and analyzing critical workforce metrics.

2. Identify Key Objectives and Goals

Whether it's fostering team collaboration, streamlining HR processes, or preparing for future growth, having a crystal-clear understanding of your objectives will guide your choice of org chart software.

- Clearly define your organization's key objectives and goals.
- Consider the specific features and functionalities that align with your strategic goals.

3. Understand Budget/Resources Constraints

Know your budget so you can invest in a sustainable solution for your organization.

- Evaluate the cost implications of implementing org chart software and ensure that it aligns with your budgetary constraints.
- Consider the resources required for implementation and ongoing maintenance.
- Check for integration compatibility to ensure data migration and ongoing maintenance is minimal.
- Examine the potential cost savings and ROI of time saved with an automated solution.
- Strike a balance between functionality and financial considerations, if need be.

Evaluating Org Chart Solutions

Use this checklist to guide conversations with teammates and software providers

Company Overview

Company/product name:

Date of evaluation:

Number of customers:

Years in business:

Financial status: Stable Unstable Unknown

Accessibility Checklist

User-friendly with an intuitive interface

Cloud-based access

Secure data-sharing and permissions

Onboarding and training resources

Must-Have Features Checklist

Provides a real-time look at your workforce and org structure

Data integration and syncing with rest of HR tech stack

Org chart changes instantly after adjustments are made

Customizes to your organization's unique structure

Captures on-demand changes when needed

Easily exports into many formats including PPT, PDF, and sharable links

Scenario planning to facilitate strategic decision-making

How this software addresses our pain points and goals:

Favorite features:

Hesitations:

Getting Buy-In

Before selecting your org chart software, conduct a comprehensive assessment of your organization's current state, challenges, and future aspirations. As you begin vetting various org chart vendors, it's important to include other key stakeholders into the decision-making. That's because, even though quality org chart software provides immense value, you can still face roadblocks such as skepticism about the software's utility, concerns regarding implementation costs, and the need to demonstrate tangible ROI.

To create buy-in across leadership, make sure you:

- ✓ **Understand Stakeholder Needs:** Begin by thoroughly understanding the needs and pain points of key stakeholders, including executives, department heads, and IT professionals. Tailor your pitch for org chart software to address these specific concerns and demonstrate how the software can alleviate their challenges.
- ✓ **Build a Compelling Business Case:** Develop a comprehensive business case that outlines the benefits of org chart software in terms of improved organizational efficiency, better decision-making, cost savings, and potential for scalability. Use concrete data and case studies to substantiate your arguments and showcase the software's potential ROI.
- ✓ **Address Security and Compliance Concerns:** Assuage concerns regarding data security and compliance by thoroughly evaluating the software's security protocols, data encryption measures, and compliance certifications. Provide transparent information about how sensitive data will be handled and ensure that the software adheres to relevant regulatory requirements.
- ✓ **Invite Other Leaders to Demos and Trials:** Offer stakeholders the opportunity to experience the org chart software firsthand through live demonstrations and trial periods. Highlight key features and functionalities that are relevant to their roles and responsibilities, and encourage feedback to address any reservations or skepticism.
- ✓ **Develop a Change Management Plan:** Recognize that implementing new software often entails organizational change. Develop a comprehensive change management plan that outlines clear communication strategies, training programs, and support mechanisms to facilitate a smooth transition and minimize resistance from employees.
- ✓ **Emphasize Long-Term Value:** Shift the focus from short-term costs to long-term value by highlighting the scalability, flexibility, and adaptability of the org chart software. Illustrate how the software can evolve alongside the organization's growth trajectory and contribute to its long-term success and competitiveness in the market.

Making Your Decision

By approaching the decision-making process systematically and strategically, you can select an org chart solution that not only meets current requirements, but also positions your company for sustained success for your human resource management.

- 1 Begin by aligning the identified needs of your organization with the key components offered by potential solutions.
- 2 Carefully consider factors such as user-friendliness, customizability, and data security.
- 3 Prioritize software that seamlessly integrates with your existing HR infrastructure so all of your data can work together to present an accurate picture.
- 4 Engage in thorough product demonstrations, seek user testimonials, and evaluate the scalability of each solution to make an informed decision.
- 5 Consider the long-term benefits, such as the potential for scenario planning and the adaptability of the software to future organizational changes.

Learn More About OrgChart

Selecting the right org chart software is a pivotal step for HR professionals seeking to enhance organizational efficiency and strategic workforce management. OrgChart, with its commitment to delivering user-friendly, dynamic, and secure org chart solutions, stands as a noteworthy option.



OrgChart has many features you'll love, including:

- **Real-Time Auto-Updates**
Say goodbye to outdated org charts. OrgChart syncs your HR data in real time.
- **Collaborative Planning**
Develop and execute plans with key stakeholders in real time.
- **Planning and Archiving Charts**
Simulate organizational changes and their impact, and archive past ones to revisit anytime.
- **Customizable Structure and Reports**
Tailor your org charts to reflect your organization's true structure and needs. Create formulas unique to your organization to identify gaps and spot trends.
- **Metrics That Matter**
Get visibility into crucial metrics to measure the effectiveness of your strategies.
- **Export and Go**
Quickly export your org chart and reports to PPT, PDF, and other formats to easily share information with anyone in your organization, at any time.
- **Data Security and Privacy**
Sleep soundly knowing your employee company data is private and secure.

To learn more about OrgChart, or to schedule a personalized demonstration, visit our website today:

[Learn More](#)

OrgChart Integrates with 50+ HR Systems



ADP



Workday



iSolved



UKG



Paychex



Bamboo HR



Paylocity



Dayforce



“Extremely easy to implement and use. Easy and fast to create charts, allowing the information to be always updated and even better, customized.”

Carolina F.
Sales Operations Lead

“OrgChart is taking our very manual org chart creation and making it easier to make changes. We were also able to easily add the new photos we took of all employees.”

Jacqueline W.
Mid-Market (51-1000 employees)