



## **“Doing it Right”** ***Org Charting Best Practices***

### **An Organization’s Single Most Important Asset – Workforce Data**

Most organizations spend thousands, if not millions, of dollars on solutions that track critical business assets and play a critical role in the success of the business. ERP applications track financial data; CRM applications track customers; network management solutions track critical network devices. But many companies may not be effectively tracking or managing the single most important asset in every organization: workforce data.

In addition to negatively affecting financial performance, lack of workforce visibility can also create other problems for organizations, including:

- Risking violation of government and industry regulations.
- A larger volume of security vulnerabilities.
- Spending 50% more time and resources on workforce planning and budgeting processes.
- Wasting thousands of hours calculating departmental and enterprise-wide headcounts.
- Inability to manage individual roles/responsibilities and the chain of command.
- Manually compiling organizational charts that are out-of-date by the time they are completed.
- Risking serious gaps in the enterprise reporting structure.
- No efficient means to align corporate initiatives with the organizational structure of the business.

Fortunately, an organizational charting solution and a few best practices are all it takes to automate the process of aggregating, visualizing and analyzing critical workforce data within an entire organizational structure.

## Embracing Automated Org Charting

The benefits of embracing automated organizational charting can be realized without overhauling existing business processes or extensive training. Most companies already have detailed workforce data; they simply need a solution that can help put it to work. An automated organizational charting solution does just this by enabling the entire organization to view and analyze workforce data. In addition, automated org charting can:

1. *Provide instant access to an accurate view of the organizational structure.* By visualizing the entire structure of the workforce, data and structural inaccuracies can be quickly resolved and operational efficiency can be improved on a proactive basis.
2. *Improve communication from top to bottom.* By providing knowledge-workers with an accurate view of the entire organization, combined with critical human resource data, communication throughout the organization can be improved immediately.
3. *Align corporate strategy with the optimal organizational structure.* Automated organizational charts enable organizations to quickly adapt to ever-changing business requirements and market conditions by modeling strategic “what-if?” planning scenarios that can help determine the optimal structure for today and the future.
4. *Maintain compliance with government, industry and company regulations.* With an automated organizational charting solution, it’s possible to maintain accurate, enterprise-wide workforce compliance documentation and conduct compliance audits on a consistent basis.
5. *Improve and maintain workforce data integrity across the organization.* Automated organizational charts can capture and visualize data from any source, provide the entire organization with a visual representation of reporting relationships, and allow managers or team members to modify information related to their span of control. Remember: data that can’t be seen can’t be clean.

### **Automated org charts can also be used to:**

- Model and plan for successions
- Reduce ad-hoc report requests
- Communicate the structure of the organization
- Post open positions to provide internal job vacancies
- Provide a comprehensive phone and e-mail directory
- Identify dotted-line relationships
- Keep track of headcounts

## Automated Org Charting Solutions

The following are best practices to keep in mind when implementing an automated org charting solution.

- **Make it automated.** Manual chart creation and maintenance is time consuming, error prone, resource intensive and the charts are always out of date. Automate it with your operational HR Data.
- **Make it secure.** Easily provide different levels of security to different types of users and ensure only the right people see sensitive data.
- **Make it accurate and comprehensive.** Start with up-to-date information and keep information in context. Keep the entire company in the org chart, not just HQ.
- **Make it web-based** for easy access & integration into corporate computing environments. And make it front and center on the intranet, which is often the most popular site for employees.
- **Make it able to access multiple data sources.** Almost all HR environments have workforce data in more than one system, including comma-delimited text files, ODBC-compliant databases, LDAP-compliant directory servers or XML data sources.
- **Make it utilize Position-to-Position hierarchy,** to ensure that there are no orphans when people move or leave, as well as to show open positions.
- **Make it have a powerful and easy-to-use search engine.** This will allow ad-hoc questions to be answered and will reduce IT requests for the same information.
- **Make it integrate with leading desktop tools.** Easily transfer information to tools such as Adobe PDF, Microsoft PowerPoint, etc. Fully integrated – make sure it is fully integrated with HR system(s), Intranet, portal and MS Office apps.
- **Make it automatically calculate and display metrics.** Items such as headcounts, salary totals, etc should be easily viewed.
- **Make it archive and compare historical organizational structure.** Archiving improves legal compliance and historical comparisons can improve planning and budgeting.
- **Make it expandable** to provide additional succession planning and organizational modeling capabilities. Leverage the visualization engine of org charting products to improve these key business challenges.
- **Make it include the entire organization in one org chart** that is navigable to give a holistic perspective.
- **Make it green.** Ensure printing can be done with the most flexibility to avoid paper waste. Better yet, put information online so that reports don't have to be printed.