

Organizational Chart **Buyer's Guide**

Helping you get the org chart you need,
whenever you need it!

Now is the time to be ready for anything.

Dear reader,

Before Covid-19, [research conducted by McKinsey & Company](#) found many companies were “in a nearly permanent state of organizational flux.” Over half of the global executives McKinsey & Company surveyed in 2015 underwent an organizational redesign within the past two years; an additional one-quarter of respondents did so three or more years ago.

Fast forward five years: the pandemic caught many organizations off-guard, requiring them to be nimble when their underlying systems and processes were anything but. It proved difficult for executives to lead through crises and make informed strategic business decisions without a holistic and drilled-down view of their corporate structure — and the ability to manipulate this data in real time.

From static technology to privacy and permissions issues, leadership teams and HR departments face myriad barriers to successfully understanding the makeup of their organizations. Perhaps you've faced some of these roadblocks at your own company:

- Poor data quality
- Inaccessible data silos
- Data integration issues
- Technical limitations
- Closed organizational culture

We're in a new world of work, so why are outdated and ineffective tools still the norm at many organizations large and small?

According to a [trends report by McLean & Company](#), even among high-performing HR departments, “a proficiency gap remains between relational and technical skill sets.” Facing fresh challenges in workforce planning, organizations must embrace new technology to maintain momentum, lest they be left behind for lacking the technical capacity and know-how to support a modern workforce. As McLean & Company explains, “successful HR digitization can be a differentiator between transactional HR and HR strategic business partnership.”

Cementing this strategic partnership is no easy feat. We're here to help.

Our goal with this guide is simple: make it easy for you to choose an org chart and workforce planning solution that connects the dots between management priorities and business outcomes. We'll outline the top questions to ask providers, and cover the features and functionality required to improve organizational visibility, accelerate actionable insights, and empower strategic vision — so you can be ready for anything.

Sincerely,
Tom McCarty
CEO, OrgChart



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Why should I use org chart automation and workforce planning software?

From the 1980s heyday of word processing until only recently, most organizations used PowerPoint and Excel to analyze their workforce data and manually create and share org charts. Several years later, with the development of client-server architecture and web-based technology, HRIS (Human Resources Information System) became more accessible and user-friendly.

Now, a broader range of HR functions could be managed more efficiently. HRIS software has become an essential tool for HR departments in organizations of all sizes and industries. The latest HRIS typically includes many features and capabilities, including employee self-service portals, mobile access, and analytics and reporting.

However, even if an organization has all of its data housed in one HRIS, the reality is that HR must work with multiple systems to create reports. For example, one might want to compare salary information, held in a payroll system, with performance data, located in a separate performance management.

Furthermore, despite an organization's dynamic nature, HRIS software includes highly inflexible org chart functionality. The HRIS org chart data is static — it doesn't update in real-time to provide an accurate holistic and drilled-down view of the organization — and it's difficult to modify and share.

Introducing the modern, fully-automated org chart.

In the past, org chart software was typically installed on a local computer and accessed through a standalone application. Today, most solutions are cloud-based, and therefore accessible from anywhere with an internet connection. The result: dynamic, data-driven org charts that provide an accurate, real-time representation of your workforce in minutes.

Quickly becoming the industry standard for facilitating workforce collaboration and planning, modern org chart software often includes advanced features such as data import/export, automation and filtering tools, and integrations with other software platforms, such as project management tools and HRIS software previously discussed.

There are myriad benefits to simplifying and streamlining your HR data via a single access point, your org chart, in order to:

- Answer questions about reporting relationships
- Maintain and update org charts
- Generate complex analytics
- Discover a deeper level of insights
- Provide role-level visibility and security
- Collaborate, iterate, and share with your organization's people leaders
- Improve data accuracy
- Model future business scenarios

Leverage your people data to facilitate workforce planning like never before. Read on to learn how to choose the right org chart software solution for your organization.



Which organizations benefit the most from org chart automation and workforce planning software?

Simply put, every organization can benefit from the insights of an organizational chart.

Enterprises with complex structures, multiple departments, and a large workforce can clearly benefit from org chart automation and workforce planning software to streamline their HR processes, ensure compliance, and manage their talent pool effectively. However, small to medium-sized businesses (SMBs) are beginning to realize the benefits of HR automation as well.

Across diverse industries, HR professionals are using “people information” to impact business strategy by...

Improving visibility.

HR professionals must capture, codify, produce, manage, and present information about their organizations' people. They also must allow a wide range of stakeholders to easily consume, share, and use that information. Showing and communicating the current state of the organization — including reporting relationships, functional areas and responsibilities, and top-level information — is a central, and endlessly challenging, part of the HR professional's role to improve visibility.

Accelerating insights.

HR professionals also serve as sense-makers, relating to massive amounts of people-related and organizational data that reside within and outside their enterprises. From budget and headcount to DEI metrics and geolocational data, all of this information filters through HR professionals who connect the dots and provide leadership with actionable insights. Only then can people leaders make informed decisions on where to invest time and resources, what actions to prioritize, and how the organization's people can best support its strategy.

Empowering vision.

Finally, HR also shoulders the responsibility of establishing a compelling vision for the future. This transformative and challenging mandate demands that HR professionals have an informed view of the current state, rigorously analyze numerous factors such as market dynamics and competitive demands, and methodically explore multiple scenarios.

In all three cases, there is one tool that unfailingly supports the work of HR professionals — the org chart. Although it can assume countless forms, the org chart invariably remains essential to this work. Here in this guide, we'll dive more deeply into each of these pillars, and how to choose the right charting and workforce planning software for your organization.



How can I determine the right org chart automation and workforce planning solution for my organization?

Evaluating available solutions can be daunting, especially when there are free options available that, on the surface, appear to get the job done. It's important to note that these free solutions have limited options for data visualization, business case and department customization, and scenario planning, to name a few. This is crucial functionality for forward-thinking organizations.

Before you spend any time testing an org chart solution, there are six initial questions you should consider:

Is the solution scalable?

Are you increasing the headcount in a new office location? Is your organization going through a merger or acquisition? Is a reduction in force imminent? And do you want to manually re-create your org chart with every change?

Companies are dynamic — don't expect anything less from your org chart software. To proactively manage changes to organizational size and structure, a scalable solution is paramount. Scalability enables HR to maintain efficiency and ensure clear lines of communication and decision-making, even as the number of employees and departments increases.

Is the solution secure?

Single sign-on. Granular access control. Encrypted databases. Now more than ever, it's easy for sensitive information and data to fall into the wrong hands. Protect your data — including information about the structure of the company, the responsibilities of individual employees, and details about internal processes and systems — with secure org chart solutions. A secure org chart can also help to ensure information is shared only with those who need it, reducing the risk of mistakes or miscommunications.

Can you customize org charts according to your needs?

Do you want to add employees' photos or emails? What about differentiation among full-time, part-time, and contract workers? Are you able to see where vacant positions are by department? This level of customization is hard to come by in free or limited software solutions — if you're charting manually, it will cost you more time than it should.

Having the flexibility to include data points important to your organization's top-line goals is particularly valuable during the growth, restructuring, or realignment of departments and locations. As organizational planning takes shape, you'll want to easily share the outcome to ensure both leaders and employees:

- Understand their roles and responsibilities
- Can effectively communicate and collaborate
- Can support HR in decision-making and strategic planning

Does the solution enable real-time collaboration?

Cross-department collaboration is essential for growth. From mapping out future states to planning company-wide DEI initiatives, leaders and employees at all levels need to understand the impact of change in real time.

With this level of collaboration, everyone can access the latest org chart, increasing the speed, efficiency, and accuracy of decision-making while fostering a more inclusive work environment. Real-time collaboration in org chart software is also vital to organizations with remote or hybrid workforces.

Does the solution enable easy integration of disparate data from other sources, such as payroll management and HR information systems?

Your org chart software should allow you to interact with multiple data variables, via API integration, without logging into multiple systems. Importing from an existing HRIS or spreadsheet should be seamless, with the ability to update anytime with a single click.

API integration is essential to automating HR processes, while also reducing the risk of human error. Automatically importing employee data from your organization's HRIS and payroll management systems, for example, ensures the org chart is always up-to-date, improves data accuracy and consistency, and creates a more streamlined and efficient workflow.

How does the solution fit into your tech stack?

When evaluating any enterprise software solution, compatibility with your existing tech stack is critical. As previously discussed, functionality, ease of integration, data security, scalability, and vendor support are some key factors to consider.

Org chart automation and workforce planning software typically fall under the category of Human Resources (HR) or Talent Management solutions in a tech stack. They are specifically designed to assist HR departments and management teams in visualizing and managing the structure, roles, and responsibilities of an organization's workforce.

In terms of integration within your tech stack, org chart automation and workforce planning software can be positioned in several ways:

- Standalone software. You can deploy the software as a standalone solution that operates independently. It will have its own user interface, data storage, and functionality, allowing HR teams to create and manage org charts and perform workforce planning tasks.
- Integrated HR suite. Many comprehensive HR software suites include modules or functionalities for org chart automation and workforce planning. If you already have an HR system in place, you may be able to add these capabilities by integrating them with the existing suite. This integration enables data sharing and provides a unified user experience across various HR functions.
- Integration with collaboration tools. Org chart automation and workforce planning software can integrate with collaboration tools such as project management platforms, team communication tools, or intranet systems. This integration allows you to leverage the workforce data and organizational structure within your existing collaboration environment, enabling seamless coordination and alignment between teams.
- Integration with ERP/HRIS. If your organization uses an Enterprise Resource Planning (ERP) system or a Human Resources Information System (HRIS), you can integrate org chart automation and workforce planning software with these systems. This integration ensures that employee data, job roles, and reporting hierarchies remain synchronized between the systems.

What are the key features and functionality I should look for in an org chart automation and workforce planning software solution?

When evaluating org chart automation and workforce planning software solutions there are several key features and functionalities to consider. On the following checklist, you'll find the top charting software capabilities that will improve visibility, accelerate insights, and empower vision at your organization.

To improve visibility, I need...

My org chart employee data to update automatically.

The software solution directly integrates with your HRIS. Sync your data at your desired frequency. Set your charts to automatically sync daily, or choose to manually refresh at any time.

Solution requirement: Automation

The presentation of my org chart to update as my employee data changes.

The software enables users to create views that are driven by data. Org charts are always formatted correctly, even as your organization changes.

Solution requirement: Automation

An updated PDF of my org chart at designated times.

The software allows administrators to configure auto-export capabilities. Receive regularly-scheduled, updated org charts, delivered right to stakeholders via email.

Solution requirement: Automation

To know what my organization looked like at a specific point in time.

The software allows you to manually archive your charts or set them to automatically archive at your desired frequency. Pull up an org chart from any point in time for auditing purposes, or to compare to the current state.

Solution requirements: Automation, Workforce Planning

To integrate this application with our SSO platform.

The software is SAML 2.0 compatible and integrates with most identity management platforms. Map your iDP security group and roles so permissions are synced.

Solution requirement: Access/Security

To give access to other users so they can pull the information they need.

The software allows you to share your charts in multiple ways. Embed them directly in your intranet, or you can integrate them with your SSO platform so that people can get the chart they need when they need it.

Solution requirement: Access/Security

To restrict certain users from seeing certain information.

The software has granular security options, allowing administrators to control who sees what. Restrict access to certain fields, sections, or pages of the chart — or even certain fields for certain sections of the chart.

Solution requirement: Access/Security

To embed this chart in my intranet.

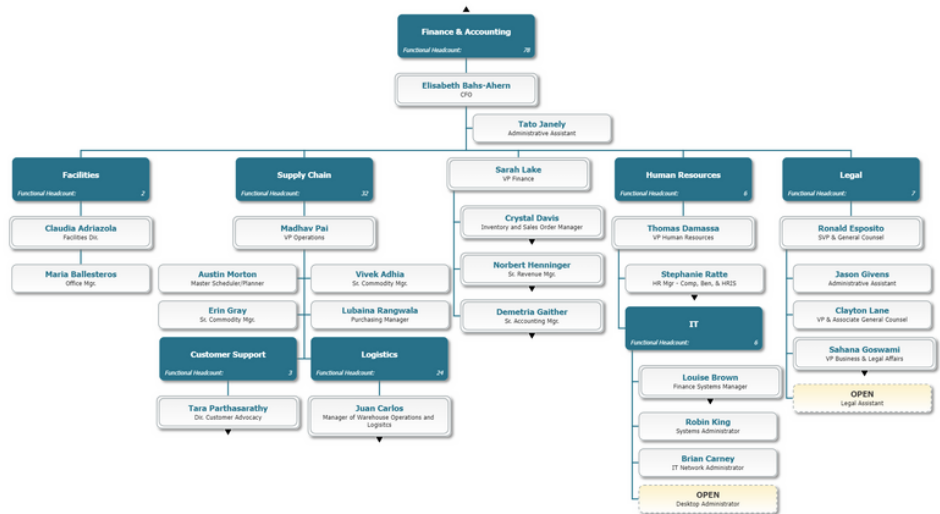
The software allows you to generate web links that can be embedded into your intranet. Create restricted links that are only accessible from certain web pages, or public links that can be embedded anywhere.

Solution requirements: Access/Security, Automation, Workforce Visibility

To see an org chart for each functional area.

The software allows you to create functional org charts using any field in your dataset. Visualize the functional structure of your organization, without having to make any manual edits to do so.

- o Solution requirement: Workforce Visibility



To improve visibility, I need...

To show employees that report to more than one manager.

The software allows you to map employee records to more than one manager, even if your HR system doesn't. Automatically account for these employees in headcount formulas, so that your roll-ups remain accurate.

Solution requirements: Customization, Workforce Visibility

To see all of my employees who work remotely.

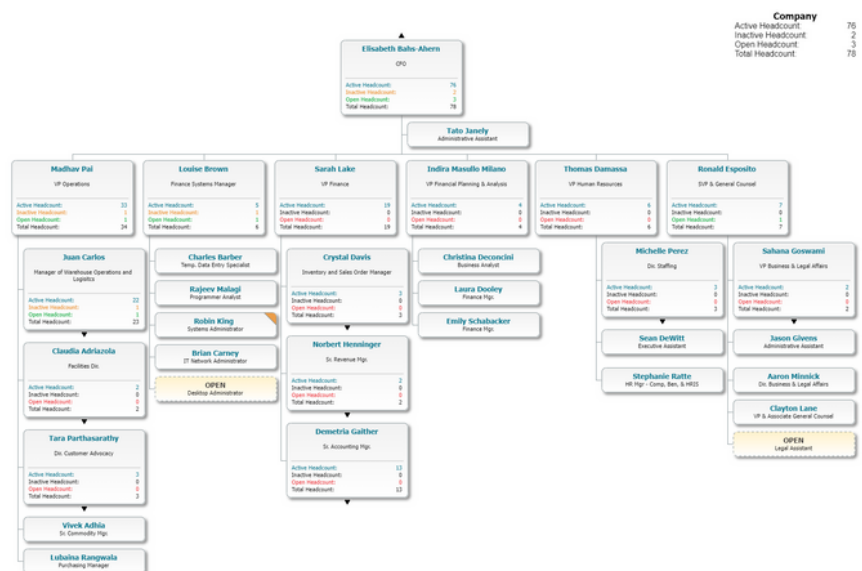
The software enables multiple filtering options, which allow you to control which records you see at any time. Create custom views that highlight or mark employee records that match specific criteria. For example, you can give remote employees a red flag, or color all employees at a certain location blue.

- Solution requirement: Customization, Workforce Visibility

To know how many open/vacant positions we have.

The software integrates with your Applicant Tracking System so that it can display your open/vacant positions on your chart. Create custom formulas, so that you can keep track of the metrics you care about.

- Solution requirements: Customization, Workforce Visibility



To improve visibility, I need...

To override data from my HR system.

The software gives you the flexibility to override, supplement, and filter your HR data so that you get the chart you need without having to modify those 'special case' records in your core system.

Solution requirement: Customization, Workforce Visibility

To filter out specific employee types.

The software allows you to filter records by any data field so that you only see the records that you want. Filter records at any time, or create charts that don't include certain records based on your defined criteria.

Solution requirement: Customization, Workforce Visibility

To accelerate insights, I need...

To know the average span of control for each manager.

The software allows you to create custom formulas using any field in your dataset. Gain complete control over the parameters and scope of your formulas, so that you can tailor your metrics to your needs.

Solution requirement: Customization

To show Contractors or records that don't exist in my Core HR System.

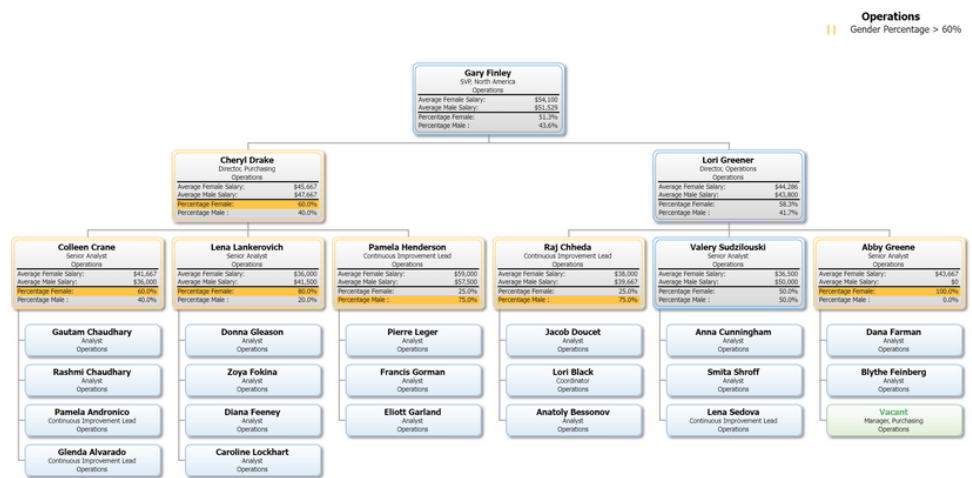
The software has robust data aggregation capabilities, meaning that you can combine data from multiple sources. Display records on your org chart that don't exist in any system, adding manually or importing from Excel.

Solution requirement: Customization

To review DEI charts for each department.

The software allows you to create custom formulas using any field in your dataset. Create and display formulas that calculate the gender percentage breakdown for each department, and control who can and can't have access to these information-sensitive charts.

Solution requirements: Access/Security, Customization, Workforce Visibility



To empower vision, I need...

To see the position structure of my organization.

The software allows you to map positional data from your core HR system or synthesize it so that you can always visualize the position structure of your organization. Control the presentation of boxes on your chart, so if you don't want to synthesize positional data, you can always produce a standard chart.

Solution requirement: Customization, Workforce Visibility

To empower vision, I need...

To know how much headcount I can afford to add at a certain location.

The software allows users to create custom metrics, set plan targets, and measure progress toward those targets as you model changes. Define reference tables and lookup formulas that allow your org chart to handle multiple variables while planning, so if job level and location influence a position cost, the proper calculations are made.

Solution requirement: Customization, Workforce Planning

To know the current and budgeted headcount for each department.

The software allows you to track your progress toward your plan goals compared to the starting (current) value. Synchronize your plans with your source data anytime, so you can keep planning as your organization changes.

Solution requirement: Workforce planning

Technology
■ Above Budget
■ Under/At Budget



To know how my proposed changes differ from the current state of my organization.

The software allows you to review any of the changes you've made in your plan by date or change type. Export plan changes to Excel, PDF, or PPT, and include graphical depictions so that you can see a summary of the proposed changes on each page.

Solution requirement: Workforce planning

No two organizations are exactly alike. By considering these key features and functionalities, however, you can select an org chart automation and workforce planning software solution that best meets your goals and needs.



What level of org chart software implementation support should I expect?

Customer support, especially during the integration process, can make or break your team's experience with workforce planning tools. Always compare the support offerings provided by software vendors, and also consult business software and review sites such as [G2](#) for professional, third-party reviews. Due diligence now will ensure that the onboarding and implementation experience aligns with your organization's needs and expectations. Be on the lookout for:

- Easy-to-access online documentation and resources. Most org chart software vendors provide detailed documentation, user guides, and online resources such as FAQs, tutorials, and knowledge bases. These resources aim to assist users in understanding the software's features and functionalities and guide them through the implementation process.
- Customer support. Software firms usually offer customer support channels such as email, live chat, or phone assistance, but the options often differ depending on product and pricing tiers. The quality of customer support can also vary, so it's worth checking reviews or testimonials to gauge responsiveness.
- Onboarding and training. Some org chart providers offer onboarding and training programs to help users get started with the software. This may include personalized training sessions, webinars, or video tutorials that cover various aspects of the software's implementation and usage.
- Implementation assistance. You may have access to implementation assistance depending on the provider and package you choose. This can range from basic guidance on setting up the org chart structure to more extensive support, including data migration, system integration, and customization options. It's important to be realistic about how much assistance you have in-house; if time and resources are limited, work with a provider who offers implementation guidance.
- Dedicated account manager. In some instances, organizations that purchase higher-tier plans or enterprise-level packages may be assigned a dedicated account manager. This individual can provide personalized assistance, strategic guidance, and ongoing support throughout the implementation process and beyond.

Support is just as important as features and functionality when evaluating different org chart software solutions. You may want to contact the providers directly to inquire about their specific support levels and discuss any concerns or requirements you have regarding the implementation process.

Conclusion

It's an exciting time for organizations of all sizes — we're adapting to a post-pandemic world while planning for a hybrid future. Your ideal org chart automation and workforce planning software will grow and change with you, offering a comprehensive set of features and functionality to streamline and optimize workforce management according to your unique set of needs and goals.

Not only should the org chart solution allow you to create and maintain visual representations of your org structure, but it should also provide a robust set of customization tools to track and manage employee data. Integrated with your HRIS, your org chart software provides one point of access to reporting and analytics functionalities to generate insights into workforce trends, performance metrics, and HR planning.

Overall, org chart and workforce planning software greatly enhance organizational efficiency, promote effective decision-making, and facilitate strategic workforce management, so you can be ready for anything.

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About OrgChart

OrgChart empowers HR professionals to produce sophisticated org charts and better facilitate workforce planning initiatives. Unlike manual diagramming tools, impersonal org chart solutions, or inflexible HCMS, OrgChart provides purpose-built, scalable capabilities.