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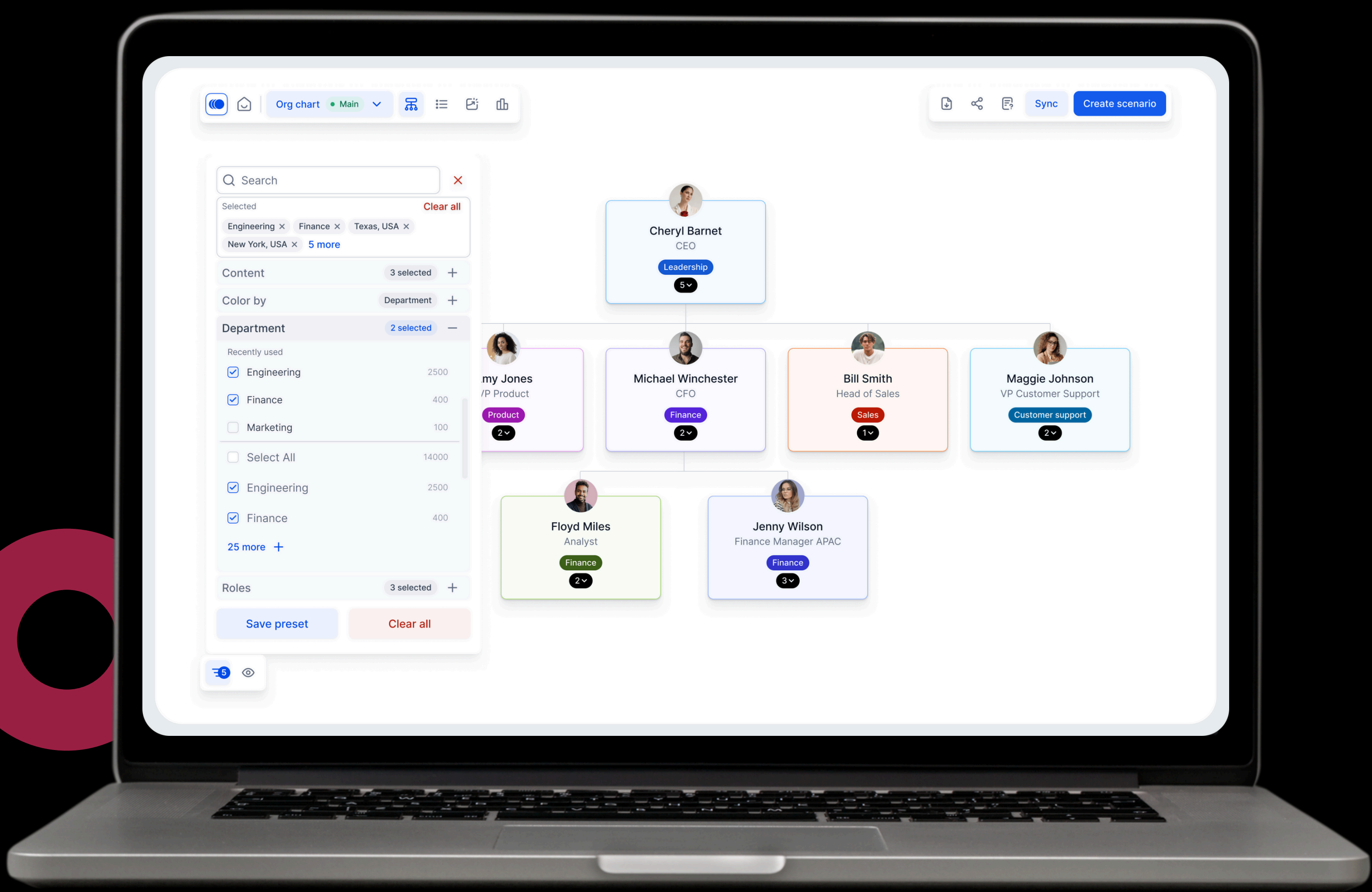
Org chart best practice checklist



Org Chart Best Practices: Checklist

☑ **Define your objective, purpose and scope:** Think about what problems you're trying to solve. Ask yourself questions like:

- ☐ How many different org charts do I need?
- ☐ What am I trying to achieve with each chart? Is it a company directory or do I need it to plan a restructure?
- ☐ Who needs access to each chart? Is it company-wide or based on role / department?
- ☐ What information do I need to display in the chart boxes? Tip: less is more.
- ☐ Is there sensitive data in any of my charts? Do I need to restrict certain fields?

☑ **Which platform is best for your org charting requirement:** This depends on the level of complexity you want and the number of positions you're looking to chart.

- ☐ **<50 employees** - Manual tools like PowerPoint or Visio should get the job done.
- ☐ **50-1,000 employees** - You can invest in affordable options like our latest org design tool to help eliminate admin work and get your money's worth. Say goodbye to manual org charting!
- ☐ **>1,000 employees** - Investing in a org design tool like org.manager is crucial as it fully automates and streamlines workforce charting and HR reporting, with an added functionality for workforce modelling if required (easy drag-and-drop and maintains an audit trail of changes for updating back to core HRIS).

☑ **Plan for ongoing updates:** Make sure you have a plan in place to ensure your org charts remain relevant and accurate. The following strategies could be helpful:

- ☐ Choose an org chart or org design platform that offers automatic data refresh as it'll ensure your data is always up-to-date.
- ☐ Create a single source of truth so you can see all your data in one place and feel more confident that it's accurate.
- ☐ Ensure all incoming data is correct & complete. A good data profiling tool like ataccama will come in handy for quick data quality check.

Want to learn more? Visit **navigo.com.au** or message us at **info@navigo.com.au**.

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