

# TOP 10 WAYS

TO SUPERCHARGE YOUR ORG CHART

# ORG CHARTS ARE AN ESSENTIAL TOOL OF MANAGEMENT.

Organisational charts (or org charts) are an essential tool of management. As companies become larger they facilitate organisational and operational discipline to ensure the customer is being taken care of in the most efficient and accountable manner. Organisation charts reveal a company's structure and consist of names and titles within boxes, connected by lines, in order to display the functional structure of a workplace. Management uses these charts to ensure the best organisation of human resources for accomplishing a company's strategic goals.

Often a single employee within the company is assigned to create and maintain the company org chart. It is a task commonly performed by a person in HR and is done using drawing tools such as Excel, Powerpoint or Visio. Charts are manually updated as staffing changes occur. The process of drawing or maintaining charts is done monthly and can be very tedious and time-consuming. The more a business changes, the more its staffing is likely to change and thus the more frequently these charts require updates.

With the introduction of new technologies the org chart becomes a tool to rapidly model the best organisational structure to support corporate business goals and changes. In addition, the ability to model org changes with financial and performance information enables management to test and evaluate trade-offs that best meet company goals. As these charts are further enriched with business cost and performance data they empower better decision support.

Fortunately these new technologies allow this to be done with minimal human intervention.

This article highlights ways to improve your business through a more agile workforce plan using org chart technology. Naturally, we recommend our own brand, the **OrgChart** suite of applications, for workforce planning and automated organisational charting and modelling.



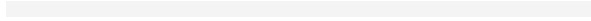


# 1

## INCLUDE MORE DATA

Typically, professionals creating an org chart manually confine themselves to displaying the name and title of each employee. When you move to an automated solution you are only limited by the data you collect in your HR system. That can include salary, location and performance metrics to list just a few. Key employee information can then be viewed at a glance. OrgChart Now can pull your existing data from a huge variety of HR systems to display in an automated org chart.

Configuring your org chart to show certain metrics to certain audiences, for example salary and location, can create a powerful visual presentation which can be used for benchmarking. Enhance your org chart by including key metrics and see how they make sense in the company structure.



## 2

# MAKE IT INTERACTIVE

With org chart software you can present your org chart with the look you want and the information you need without hassle. By unlocking interactive PDF and PowerPoint capabilities you can navigate large charts using drill up/down arrows. Something you can't do with a static document.

Add company logo, legends, tables to your charts with a single click to make it more easily comprehensible and navigable.



# 3

## PLAN AND MODEL WORKPLACE SCENARIOS

Rather than just using org charts to capture a static view of the organisation as it is today, use your chart to create a vision of the future. Create what-if scenarios to plan and model your organisation. Use drag & drop editing, modification and filtering of charts to test and visualize different organisational scenarios. Add dynamic calculations to your org charts like salary, span of control or departmental headcount.



# 4

## HIGHLIGHT OPEN POSITIONS

Identifying and filling open positions quickly and effectively is a priority for the HR department of any organisation. Employees come and go constantly, not just with resignations but retirements, promotions, and relocations. Gaps in the organisation need to be identified in real-time and a strategy for filling them put in place immediately. Org chart software can help to manage the complex task of identifying and filling open positions. New functionality allows gaps in the organisation to be easily highlighted and visualized:

- Import entire lists of candidates into a staging area from a spreadsheet to visualize the options for filling an open position.
- Display which metrics of potential candidates are important; employee rating, salary, years at the company.
- Transport employees to different groups within the organisation and slide them into different positions in the reporting structure.

You can rise to the challenge of filling open positions by easily recognizing, monitoring and planning changes to their workplaces using an org chart.

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# 5

## PLAN SKILLS TRAINING



Many organisations see value in giving employees varied exposure within the organisation to build bench strength and work experience. Companies will move employees into different job functions to increase the quality of their background and depth of experience. Job mobility and the opportunity to use skills is reported to be a key factor in job satisfaction according to the Society for Human Resource Management.

Org charts can be instrumental in visualizing and identifying employees who are ripe for a change by highlighting metrics such as work experience and tenure.

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# 6

## ADD A FACE TO A NAME

Forgot the name of a colleague you've already been introduced to? Need to look up the boss of an employee you met at a trade show? Humans are better at recognizing faces than recalling names. In fact, there's an entire section of the brain dedicated to the task. Benefit from your brain's innate ability to recognize faces by including photos in the boxes of your org chart to display an employee's visual identity alongside other key info. It's a time-saving idea for both new employees trying to orient themselves or seasoned HR staff conducting specific searches on their employees.



# 7

## MAKE IT VISUALLY APPEALING

### **Add a Background**

Add a 3D background to your basic chart. OrgChart Now has a selection of templates to choose from that sit nicely behind the lines and boxes of your chart. A simple way to give your chart a facelift.

### **Add Color**

Coloring a chart and its components can make the various segments and levels of the organisation you are attempting to communicate even clearer. You can reinforce company branding by using your company's color scheme. OrgChart Now automates this task by allowing you to apply themes to your layout.

### **Add a Title**

Adding a chart title takes a couple of seconds but can help orient a new viewer to what they are looking at. Again, you can use your company approved font to maintain brand consistency.

Tidy up your org chart with in-built software tools and switch to a more professional-looking chart for both presentations and internal sharing.

# 8

## ADD A 9-BOX GRID FOR PERFORMANCE ANALYSIS

A 9-box grid provides a visual display of employee performance and is commonly used for succession planning. A 9-box is a way of assessing employees using their current performance and future potential within the organisation.

OrgChart offers built-in 9-box support, allowing you to import your employee data to provide a snapshot of performance across your organisation and how it relates to the span of control. Color-coded by green, yellow and red it provides an easy visual snapshot of the talent of each employee.



# 9

## USE IT FOR SUCCESSION PLANNING

In today's fluid employment market it's becoming more and more crucial to plan for movement in your organisation. Simply reacting to your key personnel leaving or being promoted is costly and inefficient. Forward-thinking organisations can't wait until key personnel leave, due to retirement, transfer or resignation, to have a plan to replace them. Succession planning can help identify organisational groups that could use support by providing skills training and management opportunities to potential successors.

Key metrics you want to consider for a solid succession plan include, number of positions to be filled by succession candidates, years in the position, flight risk and skills.

Org charts can help you in this often complex task by pulling key metrics direct from your HRIS, or other data source, and presenting them in a visual snapshot making it easy to make informed judgments and identify points of weakness. Further, the data is able to be manipulated, with simple drag and drop functionality, to test how different organisational scenarios would play out.

Analyzing skill and performance metrics visually in an org chart can help find employees who may eventually be called upon to replace critical members, or identify groups where management potential needs reinforcing.

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# 10

## SHARE ON THE INTRANET

You've gone to the trouble of maintaining a useful org chart but you're sharing it on-demand as an email attachment or as a static image. Use the cloud to your advantage and make your chart more accessible to stakeholders. Org chart software allows embedding of dynamic charts in company websites or portals like SharePoint. Save time responding to requests for an updated chart by creating a real-time view of your organisation, available at any time, on your website or internal portal.

Have sensitive information, like salary, you don't want to be shared? Lock those parameters down using permissions and get the right information to the appropriate people in your organisation without creating multiple versions. Now you've supercharged your org chart, give it maximum exposure.





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