



Your 8 Step Guide to Selecting Org Chart Software



Step **0** ***Introduction***

Organization charts help employees do their jobs. It helps in onboarding, when someone is looking for a resource, and to better understand the organization as a whole. In fact, an org chart is one of the most utilized tools that a company provides. The Sift Data Report showed that users accessed the interactive org chart an average of 4 times per week.

But what are the major considerations you should think about as you define the requirements for your internal org chart? This workbook will give you an overview of some of the major elements that you should consider to select the right tool for your organization. There are spaces throughout this ebook for you to fill out information to aid you in making a decision.

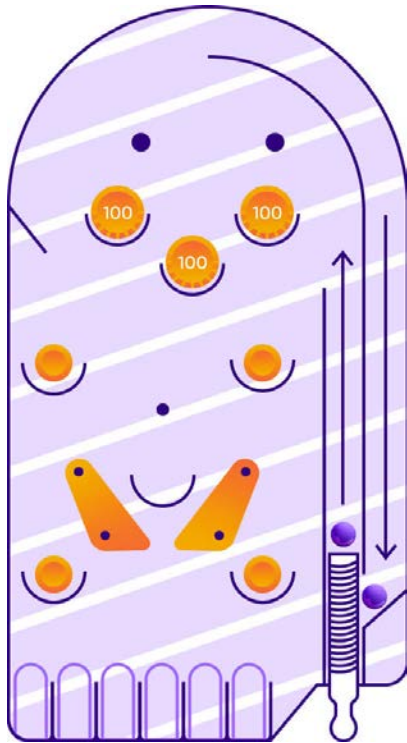
You've Outgrown Your Current Org Chart Solution

With new pressures being placed on organizations to become more collaborative and faster, the need for employees to quickly and effortlessly understand the organization structure has outstripped the tried and true solutions of the past.

The Manual Org Chart

In many organizations the org chart is a document posted on an intranet page as a reference. Often created by the HR or internal communications team in PowerPoint or Visio, these static org charts require a frustrating amount of work to keep current as new hires, internal transfers, and attrition cause constant changes in the reporting hierarchy.

These snapshots are also challenging for end users to parse and leverage, especially for users on mobile devices who have to deal with tiny fonts on a large document via their mobile phone (if they can even access it on mobile!)

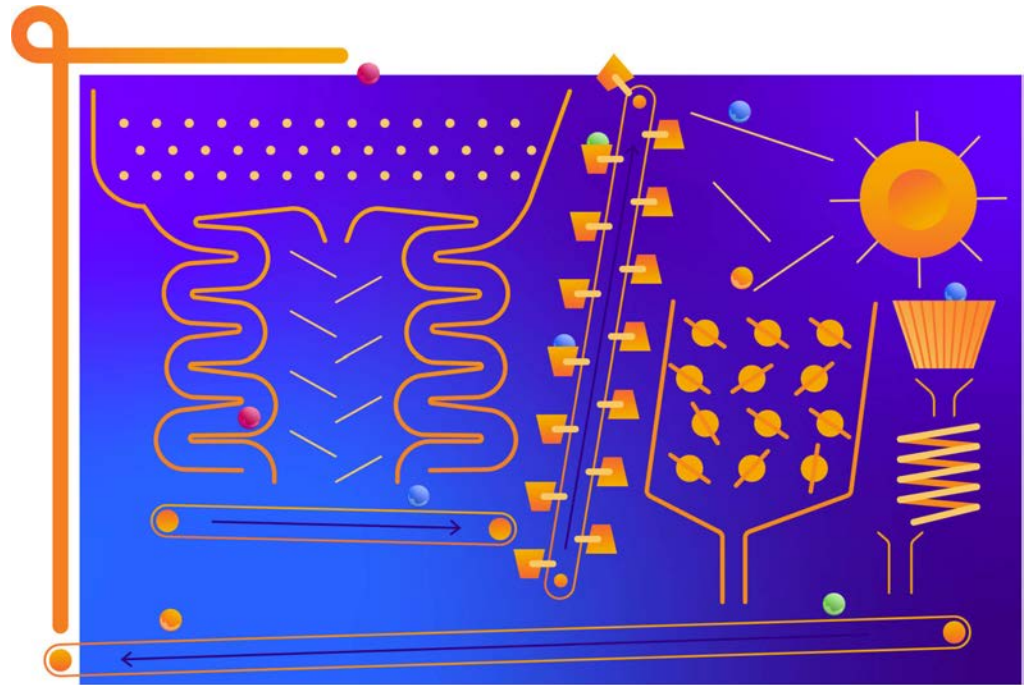


The Bundled Org Chart

Today, many HR systems include a simple org chart as part of their product suite. These tools are helpful for HR practitioners when navigating the organization, however they rarely serve the needs of the broader work-force. Often, these tools are rigid and don't allow customization. They also don't integrate well with other collaboration tools, requiring users to bounce between their HR system and chat or email solutions to effectively communicate. Lastly, these tools are often buried deep in the HR tools, making it a challenge to access quickly (and often completely inaccessible from mobile devices) and the user interface is well below consumer grade. These challenges often prevent end users from using the tool, or even know it exists in the first place!

A better way

Technology has advanced and made access to information easier across a range of business areas so it makes sense to be looking for new options—especially ones that do the creation work for you. What else should org chart software do? Let's find out.



Step 1 **Define your goals for org chart software**

Before you shop features, you need to consider your objectives for org chart software.

Most importantly, what you want to accomplish with the purchase and who needs access in order to achieve the goals.

What can you do with org chart software?

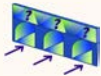
The most obvious thing that most people want to do when shopping for org chart software is to build an organization chart. But let's take a step beyond that and ask yourself, "What do I want the organization chart to do for my company?"

Use the chart on the next page to determine which use cases are important to your organization, and reflect on which ones deserve priority.



The key to most of these use cases is the integration. Org charts are rather limited as a standalone output. They need to be linked to employee profiles with pictures and deeper information for users to truly understand who's who and amp up collaboration and productivity. Be wary when looking at vendors who say they can do this. Ask if this functionality is in one product or separate products. If separate, users will get frustrated with a clunky, limited experience.

Organization Chart Use Cases and Required Features For Success

Use Case	Description	Features Needed
 Onboarding	When a new employee starts work they are instantly overwhelmed. Part of this feeling comes from the fact that they have no idea what their place is in the organization. They need to have a way to: • Discover who reports to who • See how big the teams are that they'll be working with • Find where their colleagues are located • Put names to faces • Explore their career path	To make onboarding successful, make sure the org chart software: • Keeps the chart current • Displays things like names, faces, titles and report counts at a high level • Allows users to click-thru to get deeper information on each new colleague
 Understanding the Org	Organizations continue to evolve and even the most senior employees need to understand the changes and who makes up each team. Employees need to see: • Changes in team structure • Direct and indirect report counts • New titles and promotions • New job responsibilities	To make it easy to see changes in a large organization, make sure the org chart software: • Can show summary information like direct and indirect reports so a user knows where to dive deeper • Is easy to manipulate (pan, zoom, click-thrus, etc.)
 Finding Known Colleagues	We've all had situations where we need to reach out to a colleague but we can only remember who they report to or their job function. Employees need a way to: • Quickly access the org chart • Utilize search functionality to quickly navigate to the person or team they are looking for • Access deeper information (like headshots and responsibilities) to validate it is the right person • Quickly contact the person once they have been found	To make finding colleagues simple, make sure the org chart software: • Has easy-to-use search functionality • Has the ability to search throughout an employee profile (not just name) • Is tied to employee profiles for easy matches • Is connected to communication tools for one-click IM, email, call, etc.
 Finding Unknown Colleague	There are many times when people may be looking for colleagues based on skills or job function—such as when looking for help to solve a problem or internally recruiting. Users need a way to: • Utilize search functionality that can search on skills, interests, or any other information a company wants to be listed in an employee profile • Access deep enough information to determine which of the employees they should contact • Understand the role and reporting structure of the employee to determine the best way to get connected	To make finding <i>unknown</i> colleagues simple, the org chart software needs to have the functionality listed above. Just make sure the search is comprehensive enough and tied to profiles so you can get the highest value from your org chart solution.
 Resource Allocation / Optimizing Operations	Initiatives and their priorities change quickly. Leaders need to understand what skills their employees have and how they are being utilized in order to be successfully agile. Leaders need to: • Understand the number of resources in each team • Evaluate the skills and experience of resources • Make connections with other leaders to discover untapped potential	To optimize operations effectively, make sure the org chart software: • Can show summary information like direct and indirect reports so leaders know where to dive deeper • Allows leaders to click-thru to get deeper information on employees • Is connected with all collaboration tools to easily connect
 Report Creation	Often org chart information is needed for internal and external reports. Report creators need to be able to quickly: • Visualize reporting paths • Add or remove context to each member of the org chart • Take org chart details into report building tools	To support the creation of reports, ensure the org chart software: • Can allow the customization of data displayed • Export into a variety of formats

Who needs access to the org chart software?

Initially, many people searching for org chart software are thinking about an individual use case where they need to see the organization structure for a point-in-time project.

If this is you, then a basic, manual-build option is right for you.

However, many of those same people quickly start to realize that an always on, ubiquitous org chart accessible to the entire organization has incredible value for the rest of the use cases above.

In fact, when companies deliver modern org chart software to their entire workforce, data shows that employees access the org chart software 4.5 times each week. So consider carefully if you want to limit access or make it available to everyone.

Users of a Modern Org Chart Software
Accessed It On Average



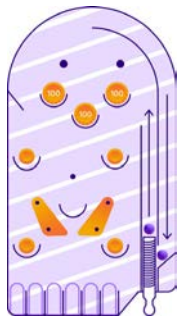
Some org chart software is built for small companies while others are scalable for infinitely large organizations. Be sure to ask if there is a limit on the number of employees that the software can handle.

Step 2 **Consider org chart build and maintenance**

The manual versus automated comparison comes into play in two different areas with org chart software—the original build and maintenance. You'll want to talk through both with any org chart software vendor to ensure you can handle the workload.

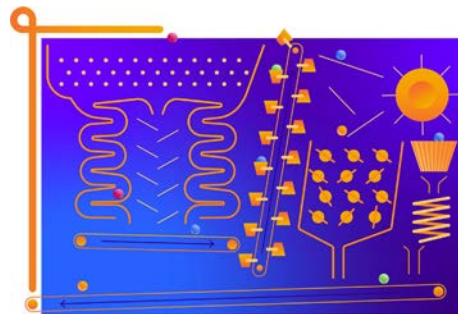
How much work will it take to create an organization chart?

The work involved to build your org chart will depend on if the process is manual or automated and of course the size of your organizations. Automated will always be faster assuming there are no lengthy IT projects for this to happen. That said, sometimes manual is the best fit. Determine which approach is best for you from these guidelines.



Build manually if . . .

- You have a very small organization (less than 100 employees)
- You only need the chart for a point-in-time project or evaluation
- Deep information is not needed
- Access will be static – no search or connection to employee profiles



Automate the build if . . .

- You have a medium to large organization (250+ employees)
- Accuracy is important
- Access to deeper information to get maximum value from the chart is desired
- Connection to other data and tools is desired

How much work will it take to keep the org chart updated?

In order to keep your organization chart current, there are three approaches—manual, automated and a hybrid option where updates are made automatically, but only when an admin uploads a current directory from another system. Let's explore these options.

UPDATE MANUALLY IF

Your organization rarely changes

USE A HYBRID APPROACH IF

Real-time accuracy is not important to your organization

FULLY AUTOMATE UPDATES IF

Employees depend on accurate information to discover and collaborate with colleagues



Beware of promised integrations that end up being more work on your IT team than on the vendor. Make sure admins from all employee data systems and collaboration tools are part of the discussion to determine the relative ease or difficulty of each approach.

What data is needed to make the org chart accurate?

Many org chart software solutions only allow you to bring in data from a single source, such as your HR system. However, most companies find they need to bring in data from multiple systems to have an accurate and complete organizational chart. This can be multiple HR systems, IT systems, collaboration tools, etc. Look for org chart software that can accept multiple inputs—particularly when looking for full automation so there is no maintenance needed.

Use the chart below to take stock of what systems would you like to sync your people data from and include the admins and owners of those systems so they can be involved in the decision making process.

What systems hold our employee data?	Owner/Admin

Step 3 **Determine how users will access the org chart**

There are more options for where and how to access an org chart than most people think. We'll list here the various options and the benefits of having each. Select those you would like to have and don't worry, there is org chart software that can do all of these.

Where do you want people to access the organization chart?

 APPLICATION DOWNLOADED ON WORK COMPUTER BENEFIT Every employee would have access from their managed work devices—even if internet service was not available.	 APPLICATION VIA WEB BROWSER BENEFIT Every employee would have access from any device provided the internet was available.	 APPLICATION ON MOBILE DEVICE BENEFIT Every employee could access org structure and search whether on the way to a meeting or when travelling to a customer site.	 EMBEDDED INTO INTRANET (OR SIMILAR INTERNAL PORTAL) BENEFIT Every employee would have seamless access via a system they already use. Bonus – org charts are also known to increase visits to intranets!
 VIA COMMUNICATION TOOLS (LIKE MICROSOFT TEAMS) BENEFIT Being able to access the org information within the communications tools your company already uses is an easy way to boost adoption and satisfaction with those tools.	 DIGITAL EXPORT BENEFIT Users can export the chart to popular image and document formats to share, print, or modify for presentations. Be sure to ask about modification if desired—very few solutions can do this!	 ALERT! No single access option is perfect. Make sure that any org chart software you select can deliver a majority (if not all) of these access points to ensure that your people can utilize your investment and reap the benefits.	

Step 4 ***Decide what you need the org chart to do***

Static org charts are so 2000's. Much of today's org chart software can provide dynamic capabilities to quickly peruse the organization or dive deep into a team. Review these features and determine which are important for your users.

Use the chart on the next page to compare what vendors your organization are considering, focusing on what features they do and don't provide.



As org chart software vendors added functionality, sometimes performance suffers. Be sure to test this functionality for yourself and check user reviews as poor performance will inhibit your organization from reaping the benefits of this investment.



Functionality like this is great, but only if it is within an intuitive and appealing interface. Younger employees will expect a beautiful and simple experience or they won't use it.

What features do your users want?

		Vendor 1	Vendor 2	Vendor 3
Feature	Functionality			
 PAN AND ZOOM WITH CURSOR	Similar to a mapping program, the user can intuitively click to move through the org chart or reduce and expand their view			
 PAN AND ZOOM WITH TOUCH (FOR MOBILE AND TOUCHSCREEN DEVICES)	With many devices moving to touchscreen, it is important to check that the org chart software can be utilized effectively on these devices.			
 DISPLAY OR HIDE DIRECT AND INDIRECT REPORTS	Information such as reports, titles, headshots can be customized to display or be hidden on a person within the chart			
 CLICK INTO PERSON TO VIEW PROFILE	Information deeper than name and title can be accessed by linking the org chart to employee profiles			
 SCALE ORG DISPLAY	Intelligent scaling will show more or less of the organization as a user pans and zooms			

Step 5 **Determine information you want included**

While today's org charts are still lines and boxes, there are many options for more information that can be included to both humanize the organization as well as make it efficient for users to quickly find the information they need.

What information do you want on your org chart?



1 Headshot

The best way to make a box represent a person is to add a picture! This also helps put faces to names.

2 Title

This is a high level way to understand the person's role within the organization.

3 Company

Today's org chart software can be shared with partners and sister companies so that users can connect and collaborate farther.

4 Department

Understanding the department or special team name can help people orient and navigate within the chart.

5 Contact info

Add a quick way for users to connect that is linked to your communication tools so it is simple to IM, email or call.

6 Direct reports

Displaying the number or direct reports can be helpful for high level views and to determine if a click-thru is warranted to see their team.

7 Indirect reports

Displaying indirect reports provides a larger understanding of the size of the team.

8 Profile link

High level information is great, but being able to have quick access to deeper information such as skills, experience and interests is highly valuable.

Step 6 ***Define level of customization needed***

When shopping for software that will be utilized by all employees, there are inevitably aspects that an organization will want to customize so it fits the way they work. This could be anything from branding to specific fields that need to be added. Here are some options to check with vendors for availability.

Use the charts on the following pages to note what you want your admins to customize and what your end users to customize. There are spaces for you to fill out information from your research of different vendors.

What do you want admins to globally customize on your org chart?

Customization		What My Org Needs	What Vendor Can Do
 BRANDING	Brand colors and logos should be able to be applied to make the org chart yours		
 WHITE LABELING	Vendor branding should be removable as desired, particularly when functionality is embedded within your intranet		
 CONFIDENTIALITY	Not all users should see all information from HR systems that flow into your org chart. You should be able to select which information is displayed for which users		
 PROFILE FIELDS	Make sure the fields that appear on employee profiles are changeable. Fields should be added or removed to meet the needs of your organization		
 PEOPLE CARD FIELDS	Similar to profiles, you should be able to select which information you want displayed on your people cards (or boxes) of your org chart		

What do you want users to locally customize on their view of the org chart?

	Customization	What My Org Needs	What Vendor Can Do
 ORG STRUCTURE	Users should be able to change the format of the org chart so that the front line team members are at the top, left, right, or bottom of the chart		
 REPORTS	People cards should be able to include direct and indirect report counts so it's simple to understand the span of control or hide them for a more simplified view		
 DISPLAYED INFORMATION	Users can have the ability to customize their org chart experience by choosing which elements appear on their people cards so that just the right information is available		



Customization is the biggest fail point with org chart software and it often isn't discovered until late in the buying process or during implementation. Be sure to ask about these capabilities early so you know you can create a chart that will fit your business.

Step 7 ***Evaluate systems to integrate with org chart software***

With each internal system that is connected to the org chart software, the more powerful and valuable it becomes. From people data integrations to collaboration connections, there are many options to consider. With each system you identify that you want connected, be sure to ask vendors the depth and breadth of the integration. Use the table on the next page to think through the options and create your integration wish list.



Integrations is an area where a few org chart software solutions shine and many fail miserably. That said, they all claim to have integrations. Make sure you have a knowledgeable IT resource question the vendor on how strong the connections and integrations are, how much information is passed, if the integration is already built or an extra service charge and/or if an API is available.

What systems to integrate with org chart software?

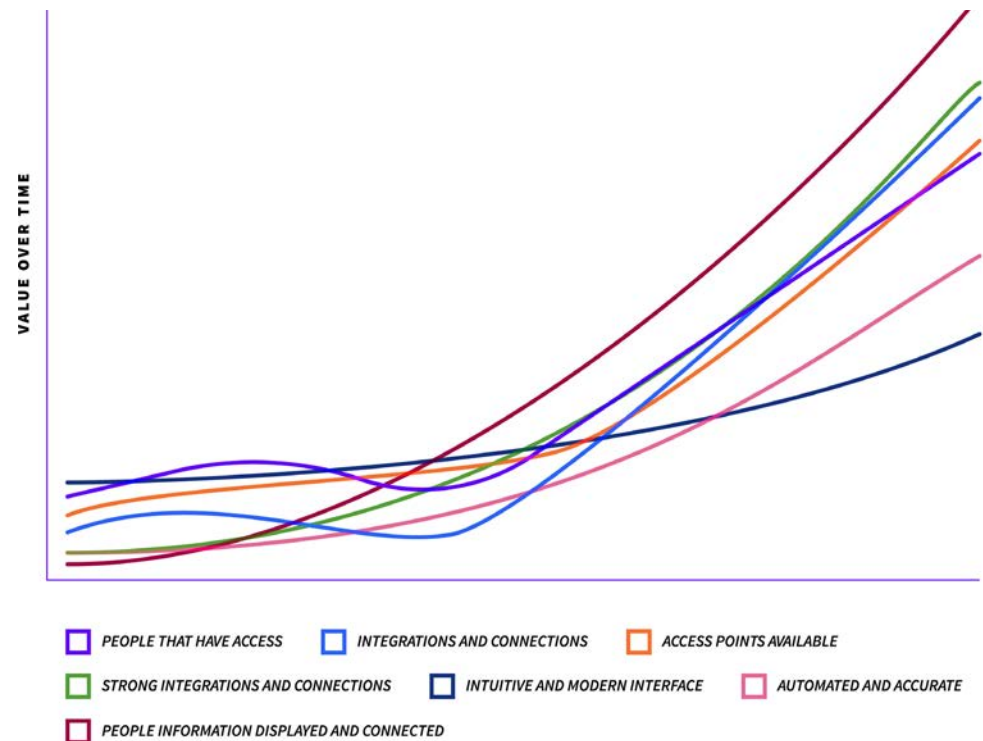
Applications to Integrate	Connection Benefits	Systems/Tools to Integrate
 HR SYSTEMS	Integrating the data from HCM and Identity Management systems allows your org chart to be complete and accurate	
 COLLABORATION TOOLS	Being able to dive into an IM chat or start a Skype, Slack or Zoom call is a powerful way to boost collaboration. The reverse is also true. Being able to search the organization at a deeper level from within tools like MS Teams provides a more valuable experience	
 COMMUNICATION TOOLS	Users can have the ability to customize their org chart experience by choosing which elements appear on their people cards so that just the right information is available	
 INTRANET	Users can have the ability to customize their org chart experience by choosing which elements appear on their people cards so that just the right information is available	

Step 8 **Consider org chart software cost versus value**

There is no ROI equation that can be used to calculate the value an organization will see relative to the cost of the org chart software. However, there are some logical assumptions and some clear organizational benefits to consider.

What org chart features are important for organizational value?

Intuitively, we know that while manual org chart software is relatively inexpensive, it adds little value to the organization as a whole. The reverse is also true, the better the functionality and useability of the org chart software and the easier the access by employees, the more it will be used and the higher the positive impact will be on the organization.



What is the value we should expect from org chart software?

Assuming you purchase org chart software that meets the majority of the requirements listed in this guide, you can expect some significant benefits. The biggest of which is employees working better together. Particularly when the workforce is distributed and partially (or fully) remote. But let's think about how org chart software that includes a powerful directory search with deep profiles can impact each department.

Using the chart on the next page, write down someone from that department who benefit from having a complete org chart and share this information with them.

The larger the organization, the more important it is to have powerful solutions like modern org chart software that can help your people feel connected to their colleagues and improve their work experience. But when it also saves time and drives revenue, it just makes sense to invest in the most powerful org chart software you can get.

What features do your users want?

Department	Use	Value	Who do you want to share this with?
 SALES	Find the right person to answer customer questions and move opportunities forward	Close deals faster and keep them happier	
 SERVICES	Quickly find the right people with the right skills for the project	Improve people utilization and project outcomes	
 SUPPORT	Quickly escalate issues to the right expert	Reduce TTR (time to resolution)	
 IT OPS	Employees are better utilizing existing communication and collaboration tools	Improve adoption and satisfaction of existing tool	
 ENGINEERING	Find employees with the right skills and experience for projects	Increased innovation and process improvement	
 DATA MANAGEMENT	Easily aggregated data from disparate HR solutions for a unified view of employee data	Gain a single source of truth for employee data	
 RECRUITING	Find more employees with the right experience to promote from within	Reduce costs	
 HUMAN RESOURCES	Give employees an easy way to understand the organization and connect with colleagues	Faster onboarding	
 EMPLOYEE EXPERIENCE	Employees learn about each other and interactions are humanized and engagement improves—even when WFH	Increase employee satisfaction	
 COMMUNICATIONS	Utilize trends in employee interests to improve communications and easily create lists to email the right information to the right people	More effective internal communications	

Start Shopping

Congratulations! Now that you know the factors involved in selecting org chart software and have determined your requirements, you're ready to shop. Get started by seeing what Sift can provide to make your org chart a truly valuable tool for your organization.



Work better, together. The powerfully simple people search engine that speeds collaboration and your pace of business.

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