

# 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** - Affordable org charting tools like [orginio](#) will always make their money back by eliminating admin work that would go into creating manual charts.
- >1,000 employees** - Investing in a org design tool like [org.manager](#) is crucial as it streamlines the workforce modelling function, maintains a complete audit trail of every change, plus allow you to access important HR insights for more informed decisions.

**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 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 [orginio.com.au](https://orginio.com.au) or message us at [info@navigo.com.au](mailto:info@navigo.com.au).