Organizational Chart Template and Position Data Sheet

Complete Part 1 once per chart. Complete Part 2 for every position in scope, including vacant and approved-but-unfilled positions. Use the position data to draw the chart in your HRIS, slide software or diagram tool. Part 3 shows a sample layout; Part 4 is the build and review checklist.

PART 1: CHART DETAILS

Organization / unit name

Chart scope

☐ Whole company ☐ Division ☐ Department ☐ Site ☐ Single team

Top position on this chart (title)

Chart type

☐ Hierarchical (top-down) ☐ Functional ☐ Matrix (solid and dotted lines) ☐ Flat / team-based

Show names or positions only

☐ Names and titles ☐ Titles only ☐ Titles and position IDs

Data source (HRIS report name and run date)

Chart owner (HR contact)

Effective date of this version

Version number

Audience

☐ Internal: all employees ☐ Internal: managers and HR only

☐ Leadership only (includes planned changes) ☐ External (clients, auditors)

PART 2: POSITION DATA SHEET (REPEAT FOR EACH POSITION)

Position ID

Position title

Job grade / level

Department / team

Location / site / shift

Reports to (position ID and title)

Dotted-line reporting to (if any)

Incumbent name (blank if vacant)

Position status

☐ Filled ☐ Vacant: open requisition ☐ Vacant: on hold ☐ Approved for future date
☐ Interim / acting

Employment type

☐ Full-time ☐ Part-time ☐ Temporary ☐ Contractor / agency

FTE value

Number of direct reports

Notes (e.g. backfill pending, role changing on date)

PART 3: SAMPLE LAYOUT (CUSTOMER SUPPORT OPERATION, ONE SITE)

- Site Director
  - Operations Manager, Day Shift
    - Team Lead 1 (14 agents)
    - Team Lead 2 (14 agents)
    - Team Lead 3 (13 agents, 1 vacancy)
  - Operations Manager, Evening Shift
    - Team Lead 4 (15 agents)
    - Team Lead 5 (12 agents)
  - Quality Assurance Lead
    - QA Analysts (3)
  - Training Manager
    - Trainers (2)
  - Workforce Management Analyst
  - HR Business Partner (dotted line to Site Director; solid line to Regional HR Director)

Represent agents as a count in a single box per team lead rather than as individual boxes. Show vacancies with a dashed outline and interim roles with "(Acting)" after the title.

PART 4: BUILD AND REVIEW CHECKLIST

- [ ] Pull a current position and reporting-line report from the HRIS on the day you build the chart
- [ ] Confirm every position has exactly one solid-line manager
- [ ] Mark vacancies, interim appointments and approved future positions clearly
- [ ] Check for managers with only one or two direct reports and for spans above the agreed maximum
- [ ] Draw dotted lines only where the relationship is real and recurring (e.g. HRBP to site leader)
- [ ] Use official titles from the job architecture, not informal names
- [ ] Remove personal data the audience does not need (no salaries, ratings or personal contact details)
- [ ] Add the version number, effective date and data source in the footer
- [ ] Have each department head confirm their section before publishing
- [ ] Set a review date (monthly for fast-changing operations, quarterly otherwise)