**[Company name]**

How to use this document: delete this paragraph before saving, sharing, or circulating it. Every part shown in blue is yours to replace: type your own details over each blue **[field]** until no blue remains. Add or remove table rows to fit your needs. Then select all (Ctrl+A) and set the font colour to the same dark colour throughout. What is left is your finished document.

# Organizational Chart

## [Company name]

A clear picture of how **[Company name]** is organised: who leads each department, who reports to whom, and where each role sits.

## Document control

| | |
|---|---|
| **Document** | Organizational Chart |
| **Prepared by** | **[Name and role]** |
| **Owner** | **[Name and role]** |
| **Version** | 1.0 |
| **Date** | **[DD Month YYYY]** |
| **Review date** | **[DD Month YYYY]** |

## How to read this chart

Read the chart from the top down. The higher a box sits, the more senior the role. Each box names one role and the person who holds it. The reporting lines table below the chart states, for every role, who that role reports to. If a box and the reporting lines table ever disagree, the reporting lines table is the correct record until the chart is updated.

- One box per role. If two people share a role, give each person their own box.
- A role with no name yet is shown as **[Vacant]**. Do not leave a box blank.
- Job titles and department names are shown in blue. Type your own titles over them.
- Keep this chart with the reporting lines table. Update both together, on the same date.

## The chart

## Top level

| **[Board of Directors]**<br>**[Chair name]** |
|---|

Reports to: no one. The board is the highest level of **[Company name]**.

| **[Chief Executive Officer]**<br>**[Name]** |
|---|

# [Company name]

Reports to: **[Board of Directors]**

## Department heads

| | | | |
|---|---|---|---|
| **[Head of Operations]**<br>**[Name]**<br>Reports to: **[Chief Executive Officer]** | **[Head of Finance]**<br>**[Name]**<br>Reports to: **[Chief Executive Officer]** | **[Head of Sales and Marketing]**<br>**[Name]**<br>Reports to: **[Chief Executive Officer]** | **[Head of People and Administration]**<br>**[Name]**<br>Reports to: **[Chief Executive Officer]** |

## Teams

| | | | |
|---|---|---|---|
| **[Warehouse Supervisor]**<br>**[Name]**<br>**[Production Supervisor]**<br>**[Name]**<br>**[Logistics Coordinator]**<br>**[Name]** | **[Management Accountant]**<br>**[Name]**<br>**[Accounts Assistant]**<br>**[Name]** | **[Sales Executive]**<br>**[Name]**<br>**[Marketing Executive]**<br>**[Name]** | **[HR Officer]**<br>**[Name]**<br>**[Office Administrator]**<br>**[Name]** |

Each team box sits under its department head. Add a box for every role in the team, and remove the boxes for roles that do not exist in your organisation.

## Reporting lines

This table is the formal record of reporting lines. Every role on the chart appears here once, with the role it reports to.

| Role | Reports to | Department |
|---|---|---|
| **[Board of Directors]** | No one | **[Board]** |
| **[Chief Executive Officer]** | **[Board of Directors]** | **[Board]** |
| **[Head of Operations]** | **[Chief Executive Officer]** | **[Operations]** |
| **[Head of Finance]** | **[Chief Executive Officer]** | **[Finance]** |
| **[Head of Sales and Marketing]** | **[Chief Executive Officer]** | **[Sales and Marketing]** |
| **[Head of People and Administration]** | **[Chief Executive Officer]** | **[People and Administration]** |
| **[Warehouse Supervisor]** | **[Head of Operations]** | **[Operations]** |
| **[Production Supervisor]** | **[Head of Operations]** | **[Operations]** |
| **[Logistics Coordinator]** | **[Head of Operations]** | **[Operations]** |
| **[Management Accountant]** | **[Head of Finance]** | **[Finance]** |
| **[Accounts Assistant]** | **[Head of Finance]** | **[Finance]** |
| **[Sales Executive]** | **[Head of Sales and Marketing]** | **[Sales and Marketing]** |
| **[Marketing Executive]** | **[Head of Sales and Marketing]** | **[Sales and Marketing]** |

# [Company name]

| | | |
|---|---|---|
| [HR Officer] | [Head of People and Administration] | [People and Administration] |
| [Office Administrator] | [Head of People and Administration] | [People and Administration] |

## Departments

| Department | Head | Main responsibilities |
|---|---|---|
| [Operations] | [Head of Operations] | Day to day running of [warehousing, production and logistics]. |
| [Finance] | [Head of Finance] | Budgets, accounts, payroll support, and financial reporting. |
| [Sales and Marketing] | [Head of Sales and Marketing] | Finding customers, winning orders, and promoting [Company name]. |
| [People and Administration] | [Head of People and Administration] | Recruitment, staff records, and the running of the office. |

## How to adapt this chart

- Add a role: copy a box in the chart, type the new job title and name over it, then add a matching row to the reporting lines table.
- Remove a role: delete its box from the chart and its row from the reporting lines table. Check that no other role still reports to it.
- Change a reporting line: change the "Reports to" entry in the reporting lines table first, then move the box under its new manager in the chart.
- Rename a department: change the department name everywhere it appears, in the chart, the reporting lines table, and the departments table.
- Add a whole department: add a head box, add team boxes underneath, and add the department to the departments table.
- Mark a vacancy: type [Vacant] where the name goes and add the date the role became vacant. Fill it in as soon as the role is filled.
- Keep it current: review the chart whenever someone joins, leaves, or changes role, and at least every [6 months]. Record each review in Document control above.

## Approval

| | |
|---|---|
| **Prepared by** | [Name and role] |
| **Approved by** | [Name and role] |
| **Date approved** | [DD Month YYYY] |
| **Next review** | [DD Month YYYY] |

# [Company name]

## Completion checklist

| ✓ | Check |
|---|---|
| | Every box on the chart has a job title and a name, or is marked **[Vacant]**. |
| | Every role on the chart appears once in the reporting lines table, with the correct manager. |
| | Department names, job titles, and names match in the chart, the reporting lines table, and the departments table. |