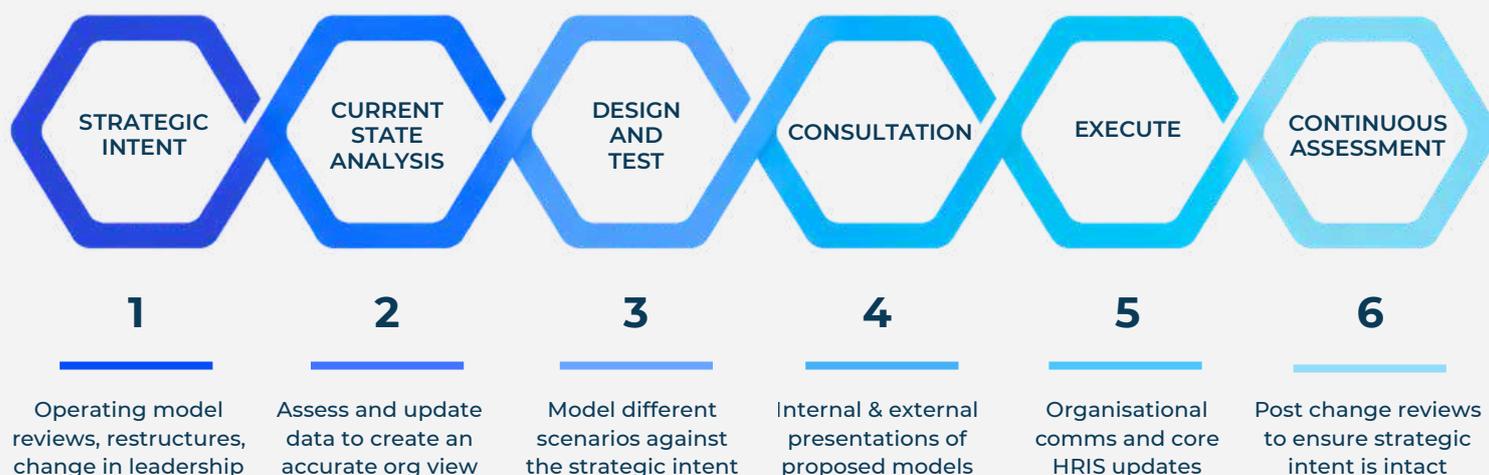# The Navigo Org Design Framework

Introduction
From Reactive Restructure to Intentional Design

The most effective organisations don't wait for a crisis to think about their structure. They design continuously, with purpose and with data.

Yet for most Australian organisations, org design is still treated as a one-off event. A response to a merger, a leadership change, a budget cut. The result is a slow, manual scramble to reconcile data from disconnected systems, producing org charts that are outdated the moment they're shared and forcing leaders to make high-stakes decisions on low-quality information.

Intentional org design works differently. It starts with clear strategic intent, builds from trusted data and treats structure as a permanent business capability rather than an emergency response.

That's what the Navigo Org Design Framework is built for. A six-stage, technology-supported methodology that gives Australian HR leaders the clarity and confidence to lead organisational change well, whatever the trigger.

STRATEGIC INTENT	CURRENT STATE ANALYSIS	DESIGN AND TEST	CONSULTATION	EXECUTE	CONTINUOUS ASSESSMENT
1	**2**	**3**	**4**	**5**	**6**
Operating model reviews, restructures, change in leadership	Assess and update data to create an accurate org view	Model different scenarios against the strategic intent	Internal & external presentations of proposed models	Organisational comms and core HRIS updates	Post change reviews to ensure strategic intent is intact

Common pain points for Australian HR leaders

- **Manual, inefficient processes:** Weeks wasted collating and cleansing data across HR and Finance, at significant cost.
- **Siloed, out-of-date data:** No single source of truth, leading to inconsistent headcount and budget numbers.
- **High execution risk:** Manual HRIS updates are slow and error-prone, breaking reporting lines, payroll and employee trust.

Strategic Intent: Anchoring Your Design to Purpose

Core Principle

Organisational design is a direct expression of enterprise strategy. Strategic intent is the "north star" that connects every design choice to the organisation's purpose.

Why It Matters

Without clear intent, org design projects drift from their objectives. They become vulnerable to departmental agendas and internal politics. Well-defined strategic intent provides objective guardrails to facilitate difficult trade-offs between agility, efficiency and cost.

Best Practice Deep Dive

Formalise a **Design Charter**. This defines the purpose, scope and "non-negotiables" of the redesign. This process involves strategic thinking about the organisation's operating model, the link between strategy and structure.

The strategic drivers of an organisation restructure broadly fall into two categories:

BAU	• Iterative operating model reviews • Ongoing departmental changes
Project Based	• Growth - new products, services, locations • Optimisation • Machinery of Government changes • Change in CEO / Leadership • Efficiency - Reduction In Force • Mergers & Acquisitions • Sequential operating model reviews • Technology transformation

Practical Step by Step Guide

1. Diagnose Strategic Drivers

Identify the core problem or purpose. Is it growth, cost reduction, agility or responding to market changes?

2. Translate Drivers into Measurable Design Principles

Convert high-level drivers into specific, measurable rules. These principles create objective criteria for evaluating future-state models.

Agility

"Maximum four reporting layers between the CEO and the frontline"

Cost

"The new structure must reduce department salary costs by at least 15%"

Efficiency

"All managers must have a minimum span of control of five direct reports"

3. Align Leadership and Formalise Governance

Secure alignment across the executive level on strategic drivers and design principles. Document this in the formal Design Charter that specifies governance roles:

- **CEO:** The ultimate sponsor, accountable for linking the design to enterprise strategy.
- **CFO:** The custodian of financial guardrails and workforce affordability.
- **CHRO/HR Director:** The process steward, ensuring alignment of people, structure and culture.
- **Business Unit Leaders:** Co-owners of the functional design.

4. Define Scope and Success Metrics

Clearly define the scope of the redesign (e.g., enterprise-wide, a single division) and timeframes.

Define 3-5 tangible metrics that will be used to measure the success of the project. These may include financial metrics (cost savings), operational metrics (reduced cycle times) and workforce metrics (improved engagement, reduced attrition).

Technology's Role

Org design technology is used to highlight strategic issues and identify areas of opportunity (organisation structure, workforce changes, resource alignment).

A modern platform encodes these principles as rules. Setting a span of control rule will automatically flag any manager in models who fall outside the target range.

Key Documents: » Organisation Strategic Plan   » Design Charter

Common Mistakes

- **Starting without Executive Alignment:** Lack of engagement from the executive team (e.g. proceeding without an agreed Design Charter) is the number one cause of failure.

- **Vague Principles:** Principles like "be more agile" lack meaning. They must be specific and measurable.

Current State Analysis: Your Single Source of Truth

Core Principle

A successful org design project starts with establishing an accurate, comprehensive and trusted view of your current state. This serves as the single source of truth for scenario modelling and decision-making.

Why It Matters

Planning on static spreadsheets creates a dangerous gap between data and reality. Errors in FTE counts, position data or cost centre allocations lead to flawed models and a loss of credibility with leadership. Taking the time to establish a clean baseline for good is the most important investment in de-risking the entire project.

Best Practice Deep Dive

This stage requires detail across multiple data categories:

Structural Data

Reporting lines, departments, locations

Financial Data

Salaries, bonuses, cost centres

Demographic Data

Tenure, age, diversity

Performance Data

Talent ratings, succession status

This data must be aggregated from source systems, validated by data owners and cleansed of inconsistencies.

Practical Step by Step Guide

1. Source HR and Finance Data

Connect all sources of people, finance and organisation data to create an enduring data source for on-demand org design.

This must go beyond a single spreadsheet export and may include multiple payroll and HR systems, finance and even offline spreadsheets or siloed data sets.

2. Data Cleanse and Consolidate

Identify and correct errors such as incorrect reporting lines, inconsistent job titles, duplicate position records and inaccurate cost centre allocations.

Do this once and implement recurring business rules to automate a daily refresh of data.

3. Define KPIs

Revisit the Strategic Intent metrics.

The core KPIs for org design often include headcount, Full-Time Equivalent (FTE), spans and layers, vacancies and cost impact.

4. Visualise and Share the Baseline

Convert data and metrics into meaningful organisation visualisations. This is about seeing the organisation structure overlaid with the Strategic Intent.

An org chart is the primary tool and should be enhanced with analytics.

5. Current State Analysis

Use visualisations and org design rules to flag problem areas.
- Where is the organisation out of alignment?
- What is the true current headcount and FTE?
- What are the current spans and layers?
- What is the gender diversity ratio by department?
- What is the total salary cost?

6. Share and Collaborate

Share these initial findings with key project stakeholders to build a common understanding of the challenges that the redesign needs to address.

Technology's Role

Technology automates this traditionally manual stage, creating an on-demand, trusted baseline of the organisation structure. Navigo's Workforce Visualisation platform connects directly to disparate systems (e.g. Aurion, SAP, Oracle, iChris, SuccessFactors, TechnologyOne), to apply your business rules and automatically aggregate data into a single view.

Visual tools like Data Quality Dashboards empower HR and Finance to instantly spot and rectify anomalies, reducing a process that took weeks to a matter of hours and creating a truly live, trusted current state.

> **Key Documents:**
> » Data clean-up, Data Quality Dashboard
> » Workforce org charts & Dashboards
> » Current State Analysis including HR metrics

Common Mistakes

- **Building on Quicksand:** This credibility-destroying event occurs when the "current state" chart is presented to business leaders, who immediately point out that it's wrong - reporting lines are outdated, people are in the wrong departments and key vacancies are missing. This often occurs due to time pressures, resourcing constraints or poor HR data.

- **Analysis Paralysis:** Don't get stuck trying to analyse everything. Focus on the metrics that directly relate to your Strategic Intent. Use the wider metrics as you work through departmental models.

- **Key-Person Risk:** Many organisations rely on a single person or manual process to extract, transform and prepare organisation data for stakeholder use. This can take days, or weeks at a time and extends the org design process dramatically. More critically, HR teams are often underprepared to meet CEO expectations around workforce planning.

Design and Test: Data–Driven Scenario Modelling

Core Principle

Designing a new organisation should be a rigorous, data-driven process of scenario modelling, not a subjective exercise in drawing boxes and lines. This "sandbox" phase is where you build and test multiple potential futures to find the optimal data-backed solution.

Why It Matters

The first design idea is rarely the best. The ability to quickly model and compare scenarios allows Managers to work towards the optimal solution.

A robust design and test phase allows you to quantify the trade-offs of different structures, pressure-test them against real-world situations and build a defensible, evidence-based case for final recommendations.

Best Practice Deep Dive

This stage is highly collaborative, involving workshops where leaders, HR and managers contribute to the future state structures. The Strategic Intent dictates the primary model to test. An efficiency goal, for instance, leads to modelling a Functional Consolidation, while a customer-centricity goal points to a Divisional Structure.

Best practice involves building this primary scenario alongside a credible "challenger" model, allowing leaders in workshops to use live data to debate the quantified trade-offs between specific, evidence-based options.

Practical Step by Step Guide

1. Form a Cross Functional Design Team

Assemble a small, dedicated team that includes representatives from HR and the key business units being redesigned.

2. Model Multiple Scenarios

Working from the clean baseline, begin modelling potential future-state structures.

Use drag-and-drop functionality to move teams, create new roles and adjust reporting lines. Crucially, create and compare multiple models in parallel.

3. Understand the Change Impacts in Real–Time

As you model, use live dashboards to instantly see the impact of your changes on headcount, salary costs, management layers and spans of control.

Compare the metrics of each scenario side-by-side against the baseline and the design principles.

4. Stress–Test the Design

Use scenario testing to validate the structure. Run "day-in-the-life" scenarios against the proposed model. These may be operational, sales or customer facing processes.

Equally as important, examine the make-up of the newly formed departments. Have you created workforce issues and how will you plan for them?

Examples include team members are lacking experience, poorly skilled, on maternity leave or set to retire.

5. Iterate and Refine

Based on the data and scenario testing, iteratively refine the models until an optimal design, one that best meets the strategic intent and design principles, is identified.

Technology's Role

[Org Design platforms](#) provide powerful "what-if" simulations that serve as a sandbox to build, compare and analyse alternative structures. It enables rapid, collaborative modelling with manager engagement, speeding up strategic decisions.

Real-time analytics and dashboards mean that with every drag-and-drop action, the full financial and structural impact is instantly calculated. Comparative reporting allows you to present two or three scenarios side-by-side, creating a powerful visual argument for the recommended design.

> **Key Documents:**
> - Modelling Impact Dashboard / Report
> - Scenario Modelling, Comparison & Recommendations

Common Mistakes

- **Designing Around Personalities, Not Positions:** Allowing the design to be dictated by the strengths, weaknesses, or political influence of specific individuals ("We need to find a role for Lisa" or "Steve won't report to him"). This creates a fragile, person-dependent structure that is not scalable and breaks the moment a key individual leaves. The discipline is to design the optimal roles and structure needed to execute the strategy first only then move to the separate task of matching people to those roles.

- **Designing in an Ivory Tower:** Involving only senior leaders in the design process ignores valuable operational insights and creates resistance from managers who feel the change is being "done to" them.

- **Fixating on the Org Chart, Ignoring the Work:** Spending too much time perfecting lines and boxes while failing to test how work actually flows across the new structure. This results in a design that looks clean on paper but creates chaos in reality, as core cross-functional processes (sales or a product development workflow) are now broken, with no clear handoffs or accountabilities.

- **Ignoring the Financial Guardrails Until the End:** Creating a theoretically "perfect" operating model in an isolated sandbox, only to present it to the CFO and discover it is significantly over budget. This wastes weeks of effort and destroys the design team's credibility. Real-time cost modelling must be a constant check throughout the design process, not an audit at the end, to ensure the structure remains financially viable.

Consultation: Building Buy–In and Compliance

Core Principle

Effective and transparent consultation is critical in the Australian workplace and often a legal necessity. It is the process of building understanding, gathering feedback and securing the necessary buy-in from executives, management and employee representatives while also meeting legal and industrial obligations.

Why It Matters

A failure to consult properly can derail even the best-laid plans. In Australia, it can trigger legal challenges under the Fair Work Act and destroy the trust between employees and leadership. Done well, consultation uncovers potential risks, improves the final design through practical feedback, reduces resistance to change and identifies potential advocates.

Best Practice Deep Dive

A robust consultation strategy is tiered and multi-channel. It includes formal presentations to executives and boards, detailed workshops with affected managers and broad-based communications for all employees. Materials must be professional, clear and data-rich, providing a transparent and defensible rationale for every proposed change. Timeliness and accuracy is critical.

Practical Step by Step Guide

1. Develop a Tiered Consultation Plan

Identify the key stakeholder groups, typically including: Executives, Senior Leaders, People Managers, Employee Representatives, All Staff. Tailor the communication message, channel and timing.

2. Prepare Professional Consultation Packs

Create clear, data-rich presentations that outline the strategic rationale, the proposed future state and the expected impacts.

This pack should include current vs. future org charts with comparative metrics.

3. Conduct Executive Reviews

Present the proposed model to the leadership team for final review and approval.

The data-informed nature of the model provides a rationale for the chosen structure, building executive confidence.

4. Engage Managers and Employees

Share the proposed changes with affected managers and employees. Explain the impacts, timelines and next steps. Provide a forum for questions and feedback.

5. Facilitate Formal Consultation

For significant restructures, engage in formal consultation with employee representatives and unions.

The clarity and data-rich nature of the consultation packs ensure these discussions are productive and transparent.

6. Design and Test Feedback Loop

Be prepared to review and update the preferred scenarios throughout this process.

That includes data, org chart, analytics and tracking real world impacts.

Technology's Role

Manually creating professional consultation packs for different audiences is incredibly time-consuming. [Org Design platforms](#) automate this proceess, saving countless hours generating charts, slides and analytics.

With a few clicks, produce data-rich, accurate, "board-ready" consultation packs that ensure consistency and professionalism across all stakeholder communications.

Leveraging Org Design tech is particularly useful during the Design & Test Feedback Loop when turnaround times are compressed.

Key Documents: » Consultation Plan » Executive Reviews

» Consultation Packs & Documentation

Common Mistakes

- **The Feedback Black Hole:** Soliciting feedback from employees and then failing to acknowledge it or explain how it was considered. This creates deep cynicism and reduces staff engagement as they feel their input is ignored.

- **Leaving Managers Unprepared:** Expecting middle managers to cascade the message and handle tough questions without providing them with dedicated briefings, a detailed FAQ and clear talking points first. This undermines their authority and transforms them from potential change champions into bottlenecks of misinformation.

- **Speaking 'Corporate-Speak':** Communicating the change using executive-level jargon focused on synergies and strategic imperatives, while failing to clearly and empathetically address the employees' primary concern: "What's In It For Me?" or more fundamentally, "What does this mean for my job?"

Core Principle

The transition from the approved design to a live, operational structure must be seamless, accurate and rapid. Execution is about "closing the loop" between the design platform and the organisation's core HR systems. Speed and accuracy are important to keep momentum and maintain project integrity.

Why It Matters

The implementation phase is where the risk of administrative error is highest. A single mistake in manually updating the master HRIS - an incorrect reporting line, a wrong start date, a flawed position number - can lead to payroll errors, broken system access and chaos on day one, immediately undermining the credibility of the entire project.

Best Practice Deep Dive

Execution requires project management discipline. A detailed cutover plan, pre-implementation data validation and a clear communication plan for "go-live" are essential. Best practice today is a "closed-loop" model where the approved design is automatically integrated with the HRIS, eliminating manual data entry.

Practical Step by Step Guide

1. Finalise the Implementation Plan

Document a clear plan that includes timelines, technical dependencies, key milestones and assigned responsibilities for the transition.

2. Prepare HR Systems

Work with your HRIS team to prepare the system for the incoming data. Ensure all necessary resources and configurations are in place. Do you need a freeze on system changes? What resources are required to make the updates?

3. Update the System of Record

Process all employee movements, changes in roles and new position creations as per the approved design. If you're using Org Design technology, generate the necessary data files from the approved model in the platform and import them into the master HRIS.

4. Communicate the Final Decision

Announce the final, approved structure to the organisation. Communications should be clear, transparent and empathetic, reiterating the strategic rationale and providing support for affected employees.

5. Manage the Workforce Transition

With the new structure formally announced and systems updated, commence the critical process of managing employee movements. This requires careful execution across several streams:

Manage Exits
Conduct necessary consultations and notifications for roles being made redundant.

Confirm Placements
Issue new employment contracts or variation letters for all employees moving into new or significantly changed roles, clearly outlining new titles, responsibilities and reporting lines.

Fill Vacancies
Initiate the recruitment process for any newly created and vacant positions that have been approved for immediate hiring.

Onboard into New Roles
Facilitate structured transition discussions between managers and their team members to set clear expectations and objectives for their first 30-60-90 days, even for internal moves.

Technology's Role

[Org design technology](#) plays a key role in execution, enabling HR leaders to proactively manage announcements and roll out the new structure. By replacing manual updates with automation, new org charts can be released at the same time as company-wide announcements.

Once approved, org design platforms generate validated data files to update HR systems, reducing risk, improving accuracy and enabling faster implementation.

Having HR systems reflect the new structure immediately supports HR teams and managers as they manage workforce transition and on-the-ground impacts.

Key Documents:
- » Implementation and Communication Plan
- » Approved org charts for HR, Executive planning
- » HR System Write-back files: Approved changes to Department, Position and Employee objects
- » Company wide org chart. Accurate and accessible at time of announcement

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Common Mistakes

- **Manual Data Entry:** Relying on a person to manually key hundreds or thousands of changes into the HRIS is a recipe for disaster.

- **Lack of a Rollback Plan:** Always have a documented plan to revert systems to the previous state if the implementation fails.

- **HR and Manager burnout:** Often organisations will attempt to treat restructures as 'another project' for HR and Managers without adequate resources. Burnout has the unintended consequence of pushing high quality employees out of the organisation when they're needed most.

- **The Downstream Domino Effect:** HR and Payroll systems feed many employee and department processes and systems. The speed, timing and accuracy of any updates must take these downstream effects into account (reporting, physical / system access)

- **Underestimating the Workforce Transition:** Depending on the size of the restructure, the time and resource required to manage exits, new contracts, IT and personnel movements can linger for months or even years.

Continuous Assessment: Sustaining the Gains and Building Capability

Core Principle

Organisational design is not a project with an end date; it is a continuous process of adapting and optimising the organisation's structure to align with an ever-changing strategy. Continuous Assessment is about embedding org design as a permanent business capability.

Why It Matters

The benefits of a restructure can quickly erode if the new design is not actively managed and sustained. Without ongoing assessment, organisations drift back into old habits, inefficient structures re-emerge and the initial strategic intent is forgotten. This stage ensures the investment in the redesign delivers long-term, compounding value.

Best Practice Deep Dive

Establish permanent governance processes for organisational management. This should include ongoing tracking of the success metrics defined in Stage 1, monitoring key organisational health indicators (like spans, layers and data quality) and using the design platform as an "always-on" workforce intelligence tool.

Practical Step by Step Guide

1. Conduct Post-Change Reviews

After a set period (3-6 months), conduct formal reviews to measure the new design's effectiveness against the success metrics defined in the Design Charter.

2. Monitor Organisational Health

Continuously monitor key workforce metrics. Are spans of control being maintained? Are talent gaps being filled? Are costs being managed? Create alerts for any deviations from the design principles - has a manager's span of control dropped below the target?

3. Establish Ongoing Governance

Implement a clear governance process for managing new positions, approval workflows and future changes to the organisation structure. Integrate org design principles into ongoing HR and management processes including strategic planning, annual budgeting and talent reviews.

4. Empower the Business

Treat the live, dynamic org chart as an ongoing strategic tool for managers to use for workforce management, talent planning and operational oversight.

5. Empower Managers with Self-Service Analytics

Provide managers with secure, real-time access to their part of the org chart and key data and analytics. This gives managers an ongoing strategic tool for workforce management.

Technology's Role

In this stage, [the Navigo platform](#) transitions from a project-specific tool to a permanent Workforce Intelligence Platform. Its live dashboards become the primary tool for leadership and HR to monitor organisational health. It provides the foundation for ongoing strategic planning and ensures that the organisation never has to start a future redesign without a clear understanding of its current state.

> **Key Documents:**
> - HR Trends Dashboard (workforce tracking over time)
> - Position Management Assessments
> - Org Charts, HR Analytics, Dashboards

Common Mistakes

- **The Abandoned Restructure:** The original success metrics from the Design Charter are forgotten and never measured. Without a formal benefits-realisation review, there is no proof that the costly restructure delivered its promised ROI.

- **Leadership Reversion to Informal Networks:** After the formal launch, senior leaders publicly endorse the new structure but privately revert to their old, informal networks to get things done. They bypass the new formal reporting lines and decision-making protocols, signaling to the rest of the organisation that the changes are merely cosmetic.

- **Failure to secure High Potentials:** When reducing headcount during a restructure, it's typically that an organisation focuses its force reduction efforts on poor performers. Without careful consideration this has the negative effect of increasing workload on high performers, who are the most capable of leaving for a new role.
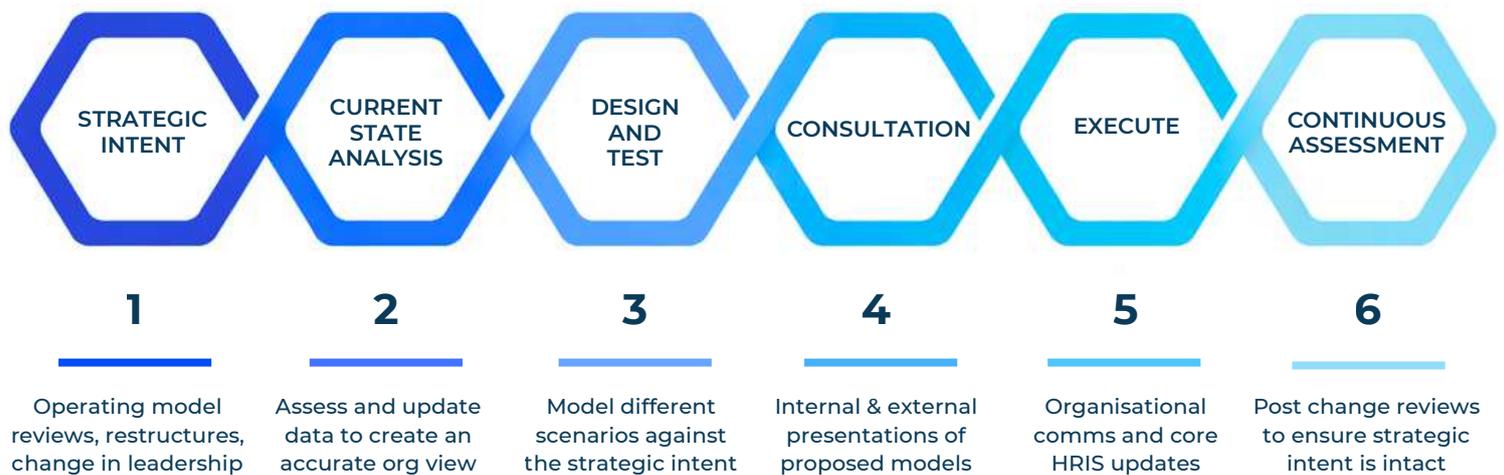
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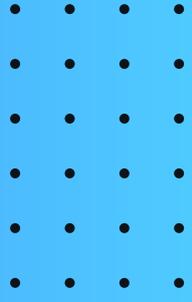
The Navigo Org Design Framework provides a clear, practical and proven methodology for Australian organisations to master the discipline of organisational design.

By sequencing the process into six logical stages and embedding technology at every step, it demystifies complexity and empowers in-house teams to lead change with confidence and precision.

Restructuring shouldn't be an emergency response to a crisis. By adopting this framework, you transform organisational design into a strategic, value-creating capability that builds a more agile and resilient organisation, ready for whatever comes next.

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How can I get started?

Want to learn more about how the Navigo Org Design Framework could work for your organisation? Get in touch with our team:

navigo.com.au   **Book a demo**   **+61 3 9879 4060**