How ChartHop Helps InVision Visualize—and Manage—Its Global, Fully Distributed Workforce
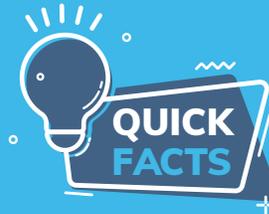
ChartHop

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invision

*in*VISION

InVision is the leading product design and development platform for teams building world-class digital products.

It was founded in 2011 and today they have over 600 employees across more than 20 countries.

QUICK FACTS

Founded: 2011
Employees: 600
Countries: 20+
Fully distributed

Shelby Wolpa is InVision's Vice President of People Operations

The digital product design and development platform InVision had approximately 200 employees in May 2017 when Shelby Wolpa became the company's VP of People Ops. Over the past three and a half years, hundreds have joined from more than 40 states in the U.S. and 20 countries, making InVision one of the largest fully distributed companies in the world.

As a rapidly growing, fully distributed company, InVision tasked the people ops team with solving several unique challenges. They were responsible for everything from structuring global compensation and benefits programs to navigating the complexities of international employment and regulatory compliance guidelines.

In addition to the considerable operational challenges they faced every day, the team had two much-bigger obstacles to overcome—defining an industry-leading workplace culture in a completely virtual environment and designing an engaging, rewarding experience at every step of the employee journey.

Reimagining workplace culture on a global scale

Shelby brought a wealth of experience with her when she joined InVision. She had scaled people operations at several major companies, including Instacart, Palantir, and One Medical.

"In every company, I want the people team to live and breathe the ethos of the company and champion the company values," Shelby explains. "At InVision, design thinking, integrated workflows, and frictionless collaboration across teams are what we build every day. I take that mission and say, 'how can we apply that to the employee experience?'"

"While company culture isn't a top-down initiative that can be planned and implemented, it is something that leaders should pursue with intention, design well, and treat with care—especially in a remote environment," Shelby says. "In an office environment, you can 'sense' what a company is about by observing the physical environment, how people interact with one another, the way meetings are conducted—the culture comes alive in these everyday interactions. In a remote world, you have to be much more explicit in the ways in which culture 'shows up'—especially with how leaders demonstrate your culture and norms with the company and their teams."

For some companies, distributed work is little more than a perk or a temporary shift. At InVision, it has always been integral to the employee experience and informs every decision made by the people team.

"I feel closer and more bonded to my InVision coworkers than I have felt working for 15 years in my career," says Shelby. "That's because

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we're always in one another's homes. We're breaking down those barriers and bringing our whole selves to work and therefore creating deeper bonds. The whole company is living and breathing this remote life, and so, as a People team, we've been able to truly empathize and make the best decisions for our employees."

'Building the plane as we fly it'

For every competitive advantage offered by a fully distributed company, there are just as many operational obstacles to be overcome.

The ability to work with the very best candidates at the top of their game has helped InVision build world-class teams, but hiring from a global talent pool also poses significant challenges in

preparing employment contracts and structuring compensation and benefits packages.

Additionally, scaling rapidly has allowed InVision to create a world-class design platform used by brands including Netflix, American Express, and Slack, but **rapid growth in a fully distributed company can also lead to employee isolation, fragmented teams, and communication problems**. While distributed work empowers employees to take greater control over their work/life balance, it makes accurately gauging employee morale that much harder.

Shelby relishes these kinds of challenges. But as she and her team can attest, tackling these issues head-on is anything but easy when there is no blueprint from which to work off of for distributed teams. "We are 'building the plane as we fly it' when it comes to building a world-class culture for a fully distributed company at scale," Shelby explains.

One key win was ensuring teams have everything they need to do their best possible work. **A large part of this involves what Shelby describes as a frictionless, "self-service" information model**.

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Shelby Wolpa
Vice President of People Operations

things done," Shelby says. "We have robust, ever-evolving information on our company intranet for employees and managers to get the answers they need."

One of the biggest challenges Shelby and her team had to solve was how to actually design and build those systems. **Keeping track of how InVision was growing as an organization and visualizing those relationships was becoming increasingly complex**. Ensuring these changes were fully integrated with InVision's human resource information system (HRIS), payroll solution, and equity management platform complicated matters even further.

That's when Shelby and her team set out to find a solution that could help them solve these challenges.

Simplifying people analytics in real time

Shelby and her team knew that visualizing relationships between individual employees and larger teams across InVision and keeping that up to date as the organization changed, was the first step toward managing the inherent complexities of a growing company.

The problem was that very few solutions featured this kind of functionality—something Shelby and her team found surprising.

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> **Shelby Wolpa**
> Vice President of People Operations

"We were using our HRIS org chart and people complained that it did not provide the information they needed or the user experience they expected." Shelby explains, "I pride myself on bringing in great tools that create great employee experiences. If anything is subpar, I take it personally and want to fix it. We were searching for an org chart solution, and given this seemed like a simple problem, we were

frustrated that there were very few tools out there and none that met our needs," Shelby said.

InVision
was wasting

Time

Money

Productivity

After evaluating a handful of solutions, Shelby discovered ChartHop.

Almost immediately, it was clear that ChartHop didn't just meet Shelby's expectations; it also offered a great deal more than simple org charting capabilities.

"ChartHop wasn't an org chart company, but had the best org chart on the market," Shelby says. "We were looking for an org chart and ended up getting this robust tool with functionality we knew we needed, but didn't realize existed."

Before InVision became a ChartHop customer, Shelby's team spent around 15 hours every month—roughly four hours every week—just keeping InVision's org chart up-to-date. **ChartHop's automatic org-chart updating feature alone saved InVision $60,000 annually– the equivalent of a full-time junior-level hire–** and freed up Shelby's team to solve more complex problems that couldn't be easily automated.

The benefits of ChartHop extended far beyond cost savings. Prior to implementing ChartHop, InVision employees typically spent at least an hour every week searching for the answers to basic questions about their colleagues. Who a person's manager was, which time zone someone was in, when an employee last received a promotion—even simple questions took valuable time to answer. ChartHop made finding the answers to such questions easy and aligned perfectly with InVision's self-serve information model. This wasn't just more convenient and efficient for InVision's staff; it also saved the company the equivalent of $2.5M in lost productivity across the organization.

Gaining greater insight into a global workforce

For InVision, ChartHop wasn't just a way to visualize relationships between teams, managers, and employees— **it became a living document that underpinned the organization's growth and a critical tool used by employees at all levels on a daily basis.**

ChartHop integrated seamlessly with InVision's other back-end systems, saving Shelby and her team hours of manual data entry and manual reporting.

"We're hiring new people and reorganizing often," Shelby says. "We can't possibly communicate every single change or it'd be way too noisy. ChartHop has become a great resource for people finding one another, understanding how the organization is designed, and how the organization has changed over time."

ChartHop integrated seamlessly with InVision's other back-end systems, saving Shelby and her team hours of manual data entry and manual reporting. The integrations also allowed Shelby and her team to start thinking about how to customize ChartHop for their needs right away, rather than worrying about difficult, time-consuming technical overhead.

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They created entirely new ways for new hires and long-tenured InVisioners alike to find the information they needed quickly and intuitively.

"We had cash compensation data in our HRIS and then equity data in our equity management platform," Shelby says. "Before, the only way we could bring those two compensation components together was with a manual spreadsheet and resources on my team reporting and auditing on that data. That's how we would run our compensation planning cycles and share total compensation with our leaders."

Thanks to ChartHop's seamless integrations with all major HRIS, payroll, and equity management platforms, Shelby and her team were able to save themselves hours of work and gain unprecedented insights into data they'd never been able to visualize in context before.

"With very little effort, we were able to bring cash and equity together in an automated system for the very first time, articulate the value of that equity, and then be able to take action on the insights," Shelby says.

Putting the 'people' in People Ops

ChartHop empowered Shelby and her team to streamline how InVision's People Ops division supports the entire organization.

"Frictionless programs and anticipating the needs of our global distributed workforce before being asked to solve a pain point are our goals," Shelby says. "We're doing our job well when people don't actually think about people ops."

Now InVision can

Empower data-informed decisions

Access and share accurate data

Prioritize and budget workforce changes

Derive insights to inform people strategy

ChartHop

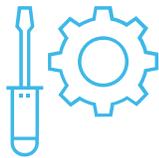# The people analytics dashboards you've always wanted

Easy to create
Build or edit pre-made reports to gain insights in seconds.

Always up to date
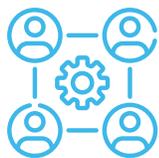Integrate your existing systems for seamless, daily updates.

Highly customizable
Personalize reports with custom data, filters & complex calculations.

Centralize your data
Report across any HR system. Integrate data from your HRIS, ATS, Equity, Performance and Identity Management tools.

Visualize your team
Go beyond the the spreadsheets and graphs. Bring People data to life like never before.

Analyze your trends
Understand your evolution through time-tracked changes. Dissect data across any dimension.

ChartHop

The first scenario planning platform that puts people first

Plan with context
Centralize current and historic data to create informed plans, without the manual work.

Visualize changes
Build plans visually and understand the structural implications from the get go.

Track impact
Measure how every change impacts people analytics metrics, operational KPIs & budget.

Streamline workflows
Create scalable processes for headcount approvals, compensation reviews & more.

Centralize changes
Iterate on plans with stakeholders and keep all discussions within the platform.

Save hours of time
Easily consolidate plans with the click of a button, no copy and paste needed.

The planning platform for any plan.

- ✓ Annual headcount plans
- ✓ Continuous adjustments
- ✓ Compensation plans
- ✓ Layoffs & restructures

- ✓ Promotion plans
- ✓ M&A integrations
- ✓ Contingency plans
- ✓ Succession plan

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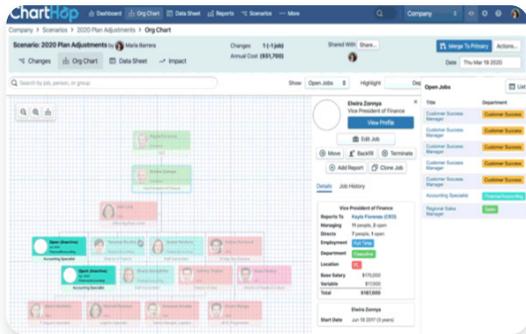
Plan out your team

Understand the structural and budgetary impact of any change across your organization:
- Create and close open roles
- Plan departures
- Propose promotions
- Restructure teams
- Merge teams & so much more

Collaborate seamlessly

Centralize your changes and discussions in one place.
Collaborate with stakeholders all within the platform, without emailing spreadsheets and powerpoints back and forth.
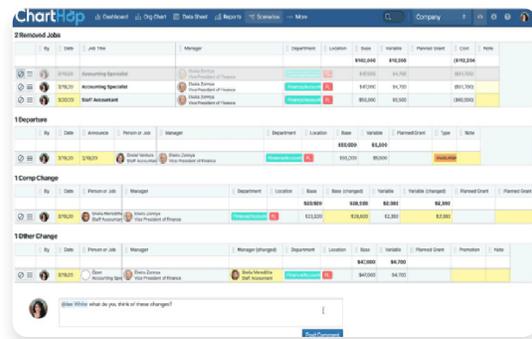
Analyze impact

Forget manual spreadsheets filled with complex models.
Build your future team visually and understand the impact across all your KPIs. Finally align People, Finance, Recruiting and hiring managers.

ChartHop - everything you need in one platform

Data Centralization	Org Chart	People Analytics	Performance Reviews	Headcount Planning