

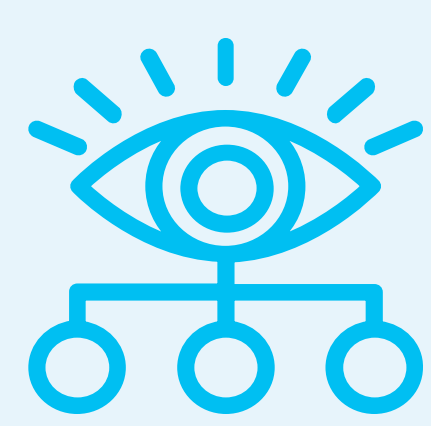
ChartHop

The Org Management Platform

Preparing your data for upload

We're excited to help you better understand what your organization looks like today and develop scenarios for how it may need to adjust in the future.

While ChartHop usually integrates with your existing platforms to pull all current, historic and future data, we're providing this manual upload functionality as a free offering to help you adjust your plans now.



Preparing your org chart

Visualize your whole team within seconds.

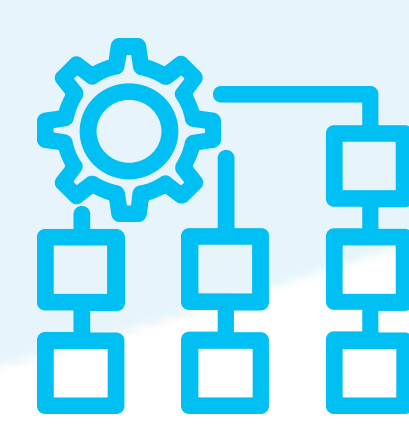
Download template at: charthopp.in/template-headcount

Required Fields: Without these, your data won't upload

- **Email:** This is used as the unique identifier
- **Name:** Format can be either First Last or Last, First
- **Title:** Each employee needs to have a title
- **Manager:** Manager's email (not name or title).
 - Each employee needs to have a manager, except the CEO.
 - For the CEO, leave the manager field blank.
 - ChartHop will make sure that all managers are also employees.Ensure every email on the manager column matches an employee's email exactly.
 - If manager position is not currently filled, place them under someone else and you can move them over after adding the open role.
- **Start Date:** Format should be MM/DD/YYYY

Recommended Fields: Get the most out of scenario planning

- **Location**
- **Department**
- **Base Comp**
- **Variable Comp**
- **Team:** This can be squad (I.e. Mobile), company-wide (I.e. GTM) or any other team structure you have in place. List them using a semicolon.
- **Gender**
- **Ethnicity**
- **Date of Birth**



Preparing your hiring plan

Understand your growth plans within context.

Download template at: charthopp.in/template-hiring-plan

Required Fields: Without these, your data won't upload

- **Title:** Each employee needs to have a title
- **Manager:** Manager's email (not name or title).
 - ← See additional guidance on the left
- **Location:** A location must be listed for each employee. We recommend using a consistent format for core locations or office locations (e.g. "City, State"). Denote "Remote" for distributed employees.
- **Department**

Recommended Fields: Get the most out of scenario planning

- **Start Date**
- **Base Comp**
- **Variable Comp**
- **Team:** This can be squad (I.e. Mobile), company-wide (I.e. GTM) or any other team structure you have in place. List them using a semicolon.



Your data is safe.

ChartHop, Inc. has successfully completed a SOC 2 Type 1 examination by an independent CPA firm.



For a copy of our security statement, email security@charthop.com.



Final Checklist

Before our call, check these items off to ensure you're ready to start hoppin'!

- .csv format:** Ensure your document is in CSV format, not XLSX
- Missing data:** If there are any missing data in the document, the import will not process. This means that each employee (each row) must have a value entered in each column in your upload (the only exception to this is that your CEO should not have a Manager)
- Spelling errors:** Check your sheet for any spelling errors
- Don't use commas in Teams:** You can upload multiple Teams or Departments attached to one person, but must do so by separating groups with a semicolon and one space (I.e. Sales; Account Executives).
- Custom fields:** If you have columns/fields listed in your .csv that are not tied to a built-in field in ChartHop, the data will not upload. You'll need to create a Custom Field first.
- Field names:** Double check the field names! If the name of a field in a column header is off by even one letter, the upload will not be able to match it to the desired field and the upload will not work.
- Check Managers:** This is the number 1 reason for failed uploads! Check the requirements for this field above.



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