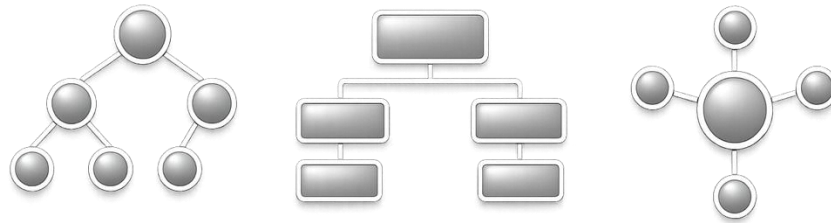


Org Structures / Cost Centers

Research Results & Next Steps

What users need to trust, adopt, and operationalize structural change



04/21/2026

Gayle Denney, Principal UX Researcher

About Org Structures/Cost Centers

What this is

- A foundational structure that supports payroll, time, reporting, permissions, and compliance
- A critical part of how customers define, organize, and manage their workforce
- Especially important for enterprise customers with complex hierarchies and business rules

Why it matters

- Cost center complexity is a major source of implementation friction
- Poor structure setup creates manual work, confusion, and downstream risk
- Customers need confidence that changes are accurate and won't disrupt other workflows
- This impacts adoption, trust, data integrity, and long-term scalability

What we're trying to do

- Create a structure customers can trust
 - One that is easier to manage today
 - One that is flexible enough to support the complexity of enterprise organizations over time



Prototype Walkthrough



Executive Summary

The current concept shows promise but faces adoption hurdles due to insufficient trust. The primary barrier is ambiguity in understanding changes and their downstream impact.

This round of research clarified that:

- Users are not just building structure—they are validating reality before acting.
- The biggest barrier is not usability—it is confidence in consequences.
- Users rely on visuals as a source of truth, not just representation.
- Validation currently happens outside the system (Excel).
- Trust breaks at key moments such as entry, view interpretation, review, publish, and import.
- We are not designing a structure builder- we are designing a system for safe org decision-making.

Short-Term Focus (Building Trust):

- Enhance clarity in communication and documentation.
- Implement preview capabilities for changes.
- Establish robust safeguards and rollback mechanisms.
- Develop model translation for better comprehension.

Long-Term Vision (Sustaining Growth):

- Incorporate greater flexibility into the system.
- Leverage Artificial Intelligence (AI) for advanced insights and automation.



Major Themes Identified

Key patterns observed across participants that shape recommendations

- 1 Entry Point & Onboarding Confusion**
Participants expressed uncertainty about where to begin or how to navigate into the system or process.
- 2 Views and Scope Clarity**
There is a need for clearer understanding of different views presented and the scope of information each view encompasses.
- 3 Draft, Review, and Publish Confidence**
There are concerns regarding the process of drafting, reviewing, and confidently publishing content or changes.
- 4 Source of Truth Concerns**
There are questions and uncertainties about where the definitive or most accurate information resides.
- 5 Terminology and Structure Variance**
There are inconsistencies in language used and the organizational structure across different parts of the system or documentation.



Theme 1: Entry Point & Onboarding Confusion

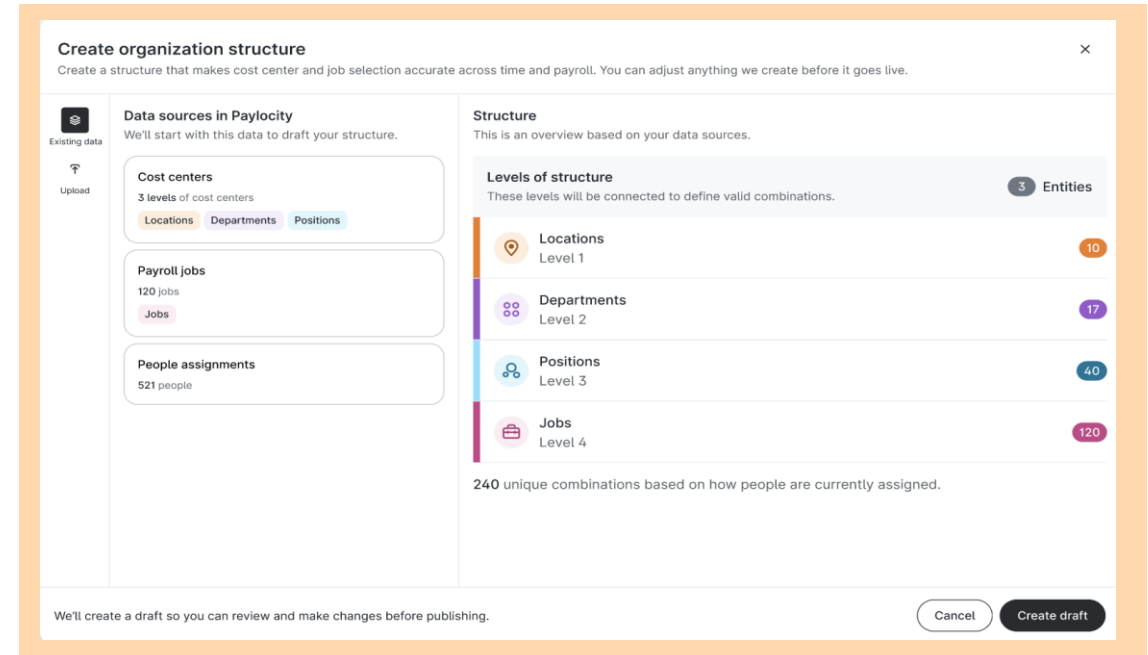
Participants expressed uncertainty about where to begin or how to navigate into the system or process.

Observed behaviors:

- Users attempted to click and edit directly from the landing page
- Users asked: *“Am I creating something new or editing existing?”*
- Some expected existing structure to already be present and editable.

What this tells us:

Users assume they are interacting with live data unless explicitly told otherwise.



“

How does this thing work? Am I creating it from scratch? – Paylocity client



Theme 1: Entry Point & Onboarding Confusion

Why it matters?

That ambiguity creates hesitation immediately and weakens trust before users even begin.

Recommendation(s)







- Users need low-risk setup – clarity on what's being generated and why.
- Reduce cognitive load upon entry. Don't dump everything at once onto users.
- Make the starting state explicit on entry.
- Clarify whether the user is creating, editing, or mapping.
- Make the first required action visually obvious.
- Remove cues that imply editing is possible before draft mode is established.

Key Takeaway:

The entry point should immediately orient users to what they are doing, what they are starting from, and what happens next.




What's Changing for Phase 1A

Apex Holdings Inc.    

[← Back to company set](#)

Organization structure

View and update how your organization is structured to better support payroll, timekeeping, and more.



We'll create a draft of your organization structure

A draft is created using your existing cost centers and jobs with relationships based on current people assignments.

If you prefer to define relationships yourself, [upload using a spreadsheet.](#)

[Learn more](#) [Create draft](#)

We are creating a draft of your organization structure.
This may take a few minutes. If you leave, we'll keep working on it.

- Organize cost centers and jobs**
| Levels and units set
- Review people assignments**
| Connections verified
- Create relationships**
- 4 Finalize structure**

Stop and exit

Simplified Onboarding

- Zero state to draft generator stepper
- Clear entry points (draft, import, learn more)
- Clarity of what creates the draft without editable elements before draft creation



What's Changing for Phase 1A

Apex Holdings Inc.

paycom

← Back to company set

Organization structure Draft Autosaved Review and publish

Levels of structure
Review and customize levels of your structure

A draft has been created — review and make edits before publishing

Apex Holdings Inc. 3 Entities

[Company A] (#####)
[Company B] (#####)
[Company C] (#####)

Levels

- Locations Level 1 10
- Departments Level 2 17
- Positions Level 3 40
- Jobs Level 4 120

Reordering levels is only available while this structure is a draft

Chart Columns Import Bulk add

Apex Holdings Inc.

Atlanta Austin Boston Chicago Denver Hous

3 departments
4 positions
13 jobs
Expand

3 departments
4 positions
13 jobs
Expand

3 departments
4 positions
13 jobs
Expand

3 departments
4 positions
13 jobs
Expand

3 departments
4 positions
13 jobs
Expand

3 d
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13 j

100%

Simplified Onboarding

- Draft structure summary with chart view
- View and editing where the user expects it to be



Theme 2: Views & Scope Clarity

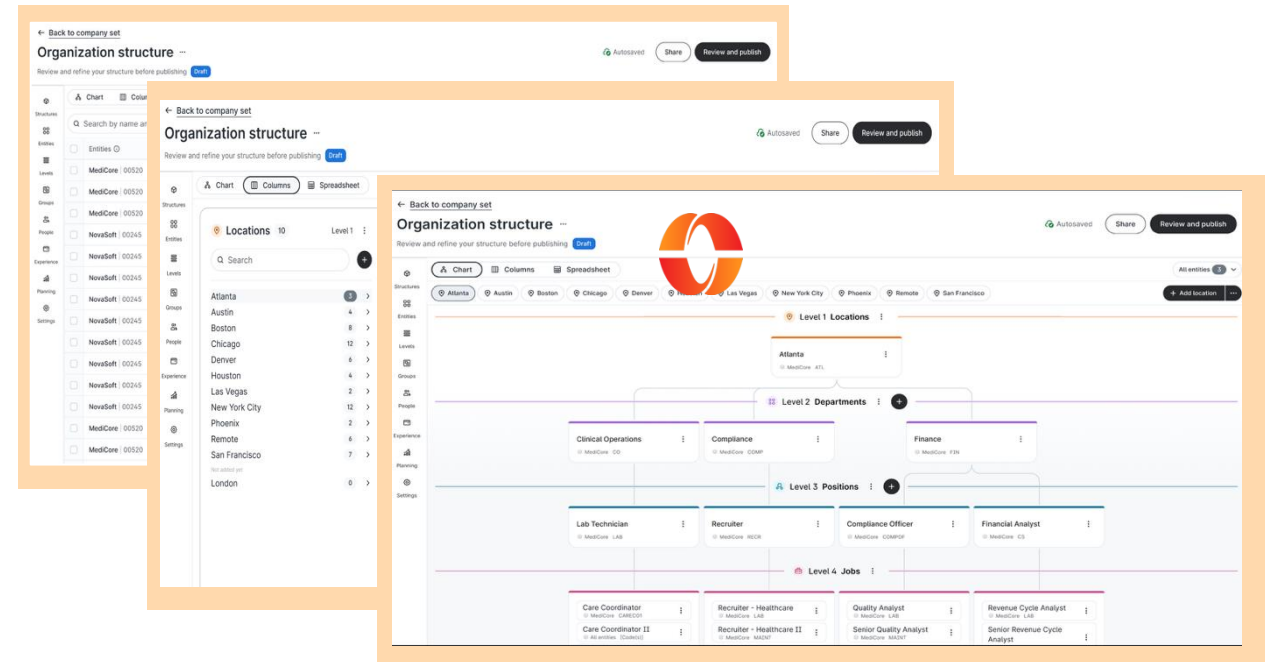
There is a need for understanding of different views presented and the scope of information each view encompasses.

Observed behaviors

- Users bounced between views.
- Users interpreted chart view as “the real org structure- trust dropped immediately when they realized it was only a slice (e.g., location).
- Users switched to spreadsheet view when confused, but reported it as overwhelming.
- Users missed how to expand levels in column view.

What this tells us:

Users are using views to validate reality, not just explore data.



“

I'm not sure what I'm looking at here. I expected this to show the whole organization. – Implementation consultant



Theme 2: Views & Scope Clarity

Why it matters?

If users misunderstand scope, they may draw the wrong conclusions or lose confidence in the structure.

Recommendation(s)



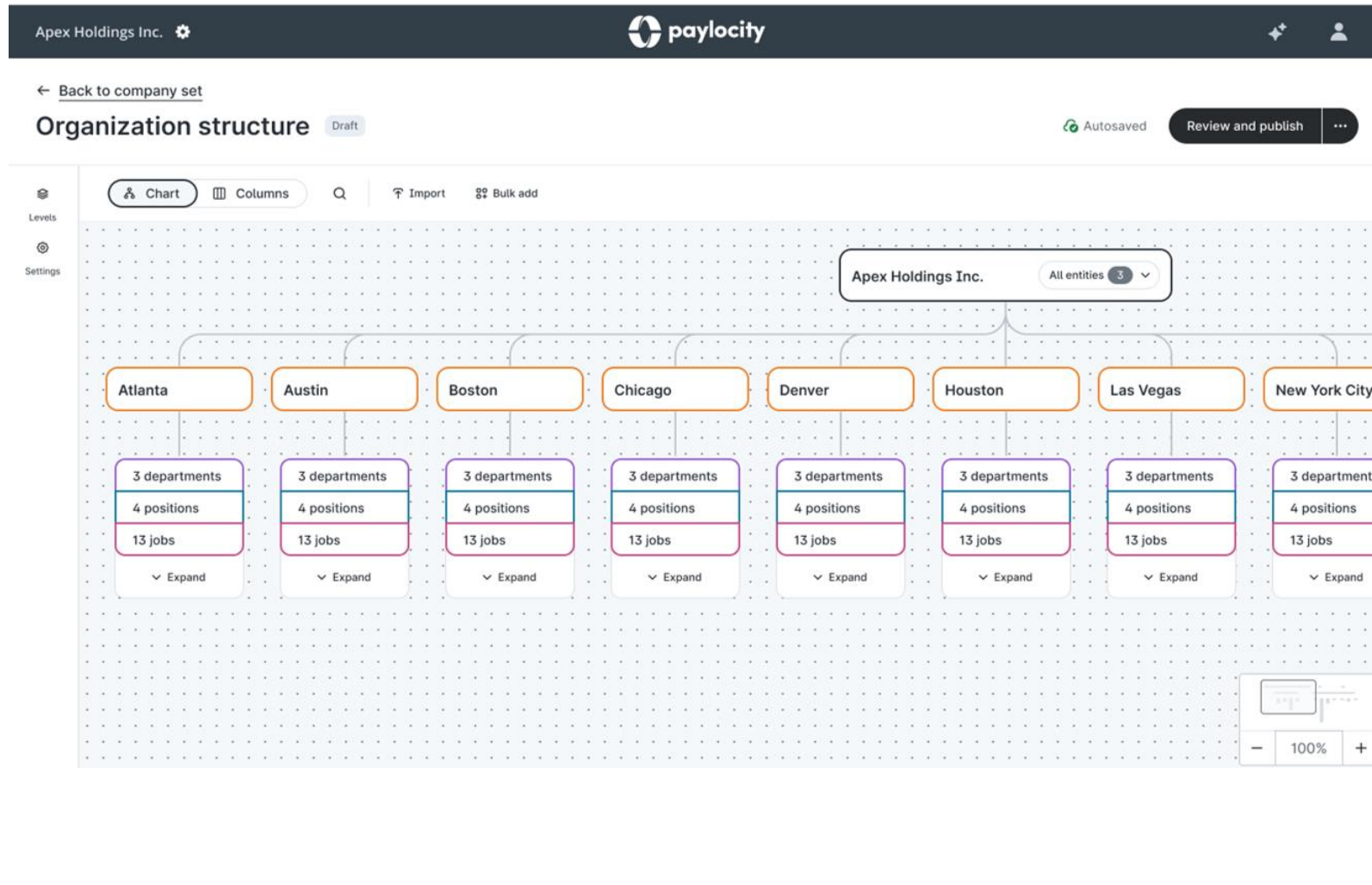
- Add a short purpose statement above each view.
- Show what is included and excluded in each view.
- Tie views to likely tasks, not just formats.
- Make scope boundaries more explicit, especially in chart and by-location views.
- Keep mental model for views consistent since users will bounce between the views.
- For chart view, use full view as default when possible + explicit guidance when only a slice can be shown due to size limits.
- Provide clearer progressive disclosure + inline guidance targets (callouts/tooltips).

Key Takeaway:

Views should help users understand structure — not make them guess what they are looking at.



What's Changing for Phase 1A



Full Chart View

- Show full chart view, when possible, with collapsed lower levels when not
- Scroll + zoom on an open canvas
- Entities filter is associated to company set/ organization
- Onboarding guidance will be incorporated



What's Changing for Phase 1A

Apex Holdings Inc.

← [Back to company set](#)

Organization structure Draft Autosaved Review and publish

Chart Columns Import Bulk add All entities 3

Locations 10 + Add ...	Departments 3 + Add ...	Positions 1 + Add ...	Jobs 1 + Add ...
Level 1	Level 2	Level 3	Level 4
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
Atlanta · [Code] 3 >	Administration · [Code] 1 >	Coordinator · [Code] 1 >	Receptionist · [Code]
Austin · [Code] 3 >	Clinical Operations · [Code] 1 >		
Boston · [Code] 8 >	Facilities · [Code] 1 >		
Chicago · [Code] 12 >			
Denver · [Code] 6 >			
Houston · [Code] 4 >			
Las Vegas · [Code] 2 >			
New York City · [Code] 12 >			
Phoenix · [Code] 2 >			
Remote · [Code] 6 >			
San Francisco · [Code] 7 >			
Not added yet			
London - >			

Columns View Onboarding

- Stronger zero state while still keeping progressive disclosure so we don't default to "one slice"
- Stronger zero state and onboarding guidance to better inform this not-as-familiar view



Theme 3: Draft, Review, & Publish Confidence

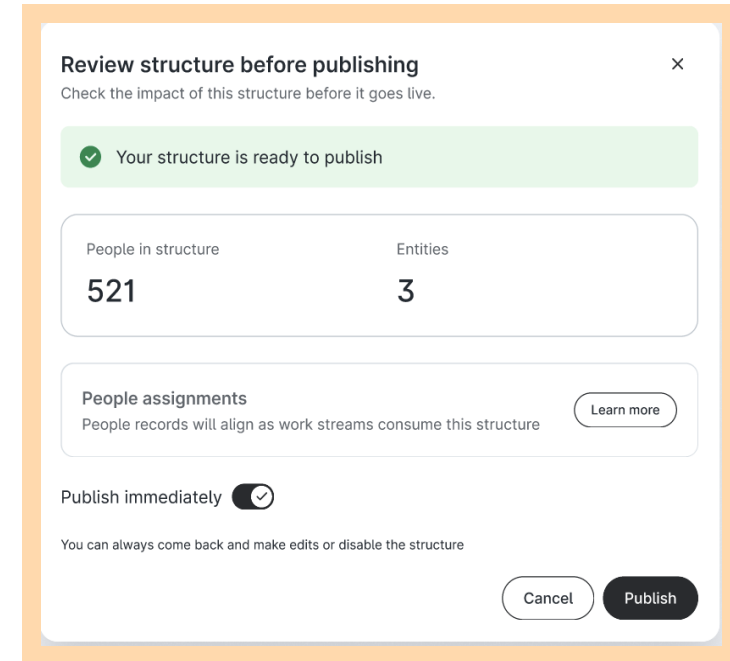
There are concerns regarding the process of previewing, reviewing and confidently publishing content/changes.

Observed behaviors

- Users hesitated or stopped entirely at “Publish.”
- Some assumed publish = immediate, irreversible change.
- Others assumed “Review & Publish” might already commit changes.
- Users explicitly asked:
 - “What changed?”
 - “What already existed?”
 - “What will this affect?”

What this tells us:

Users are not lacking a button- they are lacking confidence to act.



“

I want to know exactly what changed before I publish. What are these changes affecting? - Paylocity client



Theme 3: Draft, Review, & Publish Confidence

Why it matters?

This was the clearest trust barrier in the study and the biggest blocker to confident action.



Recommendation(s)

- Maintain momentum toward publish but adjust expectation-setting (labeling + microcopy + step signaling).
- Clearly distinguish existing state from proposed changes.
- Show before/after states where possible.
- Add a true review step before publish.
- Surface downstream impacts before anything goes live.

Key Takeaway:

Publishing should feel safe, making changes, consequences, and next steps obvious.



What's Changing for Phase 1A

Apex Holdings Inc.

← [Back to company set](#)

Review before publishing

Locations	Departments
10	17
Positions	Jobs
40	120

Structure review
This structure will be published and visible to people in these areas: **Time and Labor** and **Mobile**

- Incomplete combinations 1
- People with missing or incorrect assignments 2
- Active items not connected to structure 7
- Items with the same name 2

Structure | People

Apex Holdings Inc.

Atlanta | Austin | Boston | Chicago | Denver | Houston

3 departments | 4 positions | 13 jobs | Expand

3 departments | 4 positions | 13 jobs | Expand

3 departments | 4 positions | 13 jobs | Expand

3 departments | 4 positions | 13 jobs | Expand

3 departments | 4 positions | 13 jobs | Expand

3 departm | 4 position | 13 jobs | Expand

100%

Cancel Publish

After publishing, you can return here to make changes or disable this structure at any time.

Trust is most important

- Answering **What** with summary + full structure view for confidence
- Answering **Where** as we roll out integrators in phases
- Running check/cleaner of structure to surface downstream impacts
- Keep "safe rollback" messaging



What's Changing for Phase 1A

Apex Holdings Inc.

[← Back to company set](#)

Review before publishing

Locations 10	Departments 17 1 changed
Positions 40 1 added	Jobs 120 2 removed

Structure review
This structure will be published and visible to people in these areas: **Time and Labor** and **Mobile**

- Incomplete combinations **1**
- People with missing or incorrect assignments **2**
- Active items not connected to structure **7**
- Items with the same name **?**

Structure | **People**

Chart view

Full 100%
Zoom in and out

- Highlight changes in chart
- Click to view list of changes in side panel

After publishing, you can return here to make changes or disable this structure at any time.

[Cancel](#) [Publish](#)

Trust is most important

- Publishing new versions explicitly explains changes made so that they can publish with confidence.



Theme 4: Source of Truth Concerns

There are questions and uncertainties about where the definitive or most accurate information resides.

Observed behaviors

- Users asked if import would overwrite existing data.
- Users wanted to stage and inspect data before committing.
- Users looked for ways to undo or rollback changes.
- Import triggered questions about:
 - Payroll impact
 - Accounting impact
 - Reporting impact

What this tells us:

Import is perceived as a high-risk system-level action, not a setup step.



“

What is the source of truth? Will it overwrite what's already in the system? - Paylocity client



Theme 4: Source of Truth Concerns

Why it matters?

Import is not just a convenience workflow- it is a major trust moment that can make or break adoption.



Recommendation(s)

- Show a pre-import summary of what will be created, changed, matched, or overwritten.
- Add validation before anything is pushed live.
- Allow users to stage imports as draft before applying changes.
- Make source-of-truth rules explicit.
- Add rollback or version protection.

Key Takeaway:

Import needs to feel guided, transparent, and reversible to be trusted.



What's Changing for Phase 1A

Theme 4: Source of Truth Concerns

- Clear content and resources to guide them through various data source options
 - Pre-import impact summary
 - Validation before application
 - Rollback capabilities



Theme 5: Terminology & Structure Variance

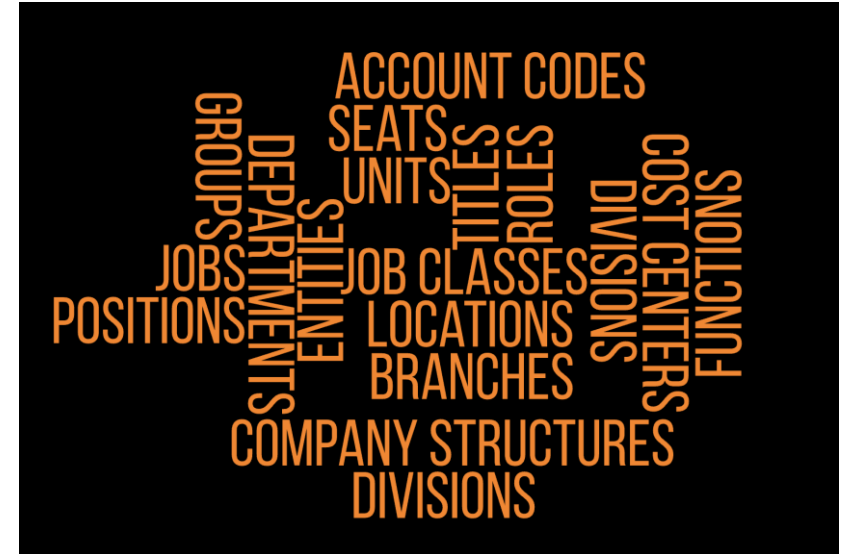
There are inconsistencies in language used and the org structure across different parts of the system and documentation.

Observed behaviors

- Users confused jobs vs positions vs cost centers.
- Users attempted to map their own structure mentally.
- Users questioned how entities relate to each other.
- Users did not trust that different views were showing the same underlying structure.

What this tells us:

This is not a labeling issue- it is a model comprehension problem.



“

This doesn't match how our organization is set up.

- Paylocity client



Theme 5: Terminology & Structure Variance

Why it matters?

If the product assumes one vocabulary or one model, customers will have to translate the system instead of the system adapting to them.



Recommendation(s)

- Support terminology mapping rather than one fixed vocabulary.
- Allow flexible attribute relationships behind the scenes.
- Use guided setup to help customers map their model into the system.
- Avoid assuming one universal hierarchy.

Key Takeaway:

The system should adapt to customer language and structure, not force customers into ours.



What's Changing for Phase 1A

Apex Holdings Inc.

← Back to company set

Organization structure Draft Autosaved Review and publish ...

Levels of structure ×
Review and customize levels of your structure

Levels

Settings

A draft has been created — review and make edits before publishing ×

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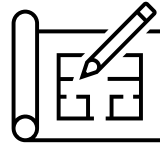
100%

Guidance with terms and data sources

- Terminology explanations upfront and inline
- Turning on/off lower levels plus built-in customization as we go along



Design Response to Behavioral Triggers from Research



Behavioral Trigger from Research	Design Response for Phase 1A
Users clicked into charts expecting full org	Default to full structure view when possible and label scope when not.
Users tried to validate outside the system	Add In-product validation (Review step + diff view).
Users hesitated at "Publish"	Separate draft vs. Review vs. Publish states.
Users tried to edit directly from the landing page before understanding the structure	Require Draft state before edits. System should clearly signal that user is working in a draft.
Users missed how to expand structure or add levels	Add clearer affordances for "add level" + progressive disclosure.
Users questioned data ownership	Add explicit source-of-truth messaging + pre-import summary.



Our Path Forward

Near Term

- 1) Simplify the onboarding step and clarify what comes next.
- 2) Give users a clear way to validate changes before they go live.
- 3) Show what people, systems or data will be affected before changes are applied.
- 4) Prevent errors with validation, clear messaging and rollback options.

Post-MVP

- 1) Enable clients to map their existing org model into our system with guided steps.
- 2) Match system terminology where applicable.
- 3) Support shoring and validation across teams before changes go live.
- 4) Enable naming and assignment rules.

Future

- 1) Leverage AI to detect errors and suggest organization mappings.
- 2) Recommend relationships based on patterns and data.
- 3) Support advanced structures.
- 4) Allow deeper rule and level customization when needed.

Next Steps:

- 1) Apply findings to next design iteration
- 2) Align triad on priorities and sequencing - MVP vs. Future
- 3) Plan targeted follow-up validation for next design iteration
- 4) Stakeholder feedback

Appendix



Study Overview

Understanding User Needs Through Moderated Interviews and Prototype Usage



10 Moderated interviews

across clients, internal proxies, implementation specialists, and competitor-system users



Broad organizational complexity represented

to test fit across different structures and needs



Captured both qualitative and directional quantitative signals

Including confidence, hesitation, terminology variation, SUS, and task confidence.



Directional Metrics

Usability and confidence data reinforce the qualitative story.

- SUS and Task Confidence

These provide useful directional indicators for usability and user confidence.

- Reinforce Qualitative Findings

The data supports qualitative observations such as high interest, coupled with high ambiguity.

- Trust Erosion During Critical Stages

Trust diminishes most significantly during the create, preview/review, publish, and import stages.

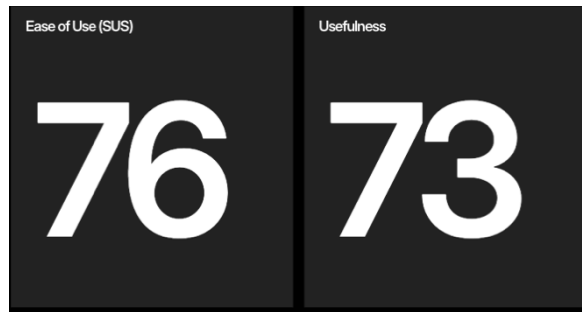
- Metrics Support Narrative

Quantitative data should complement and reinforce the story told by qualitative insights, not replace it.



System Usability Scale

SUS measures users' perceived learnability, usability, and value of an experience



Understanding Scores

SUS Scoring

- Scores range from 0-100
- 80+ is Excellent - continue to maintain and scale
- 74-79 is good - Usable and useful, room for improvement
- <74 is Misaligned, poor, or failed - Challenges that need to be addressed through attention, intervention, or redesign.

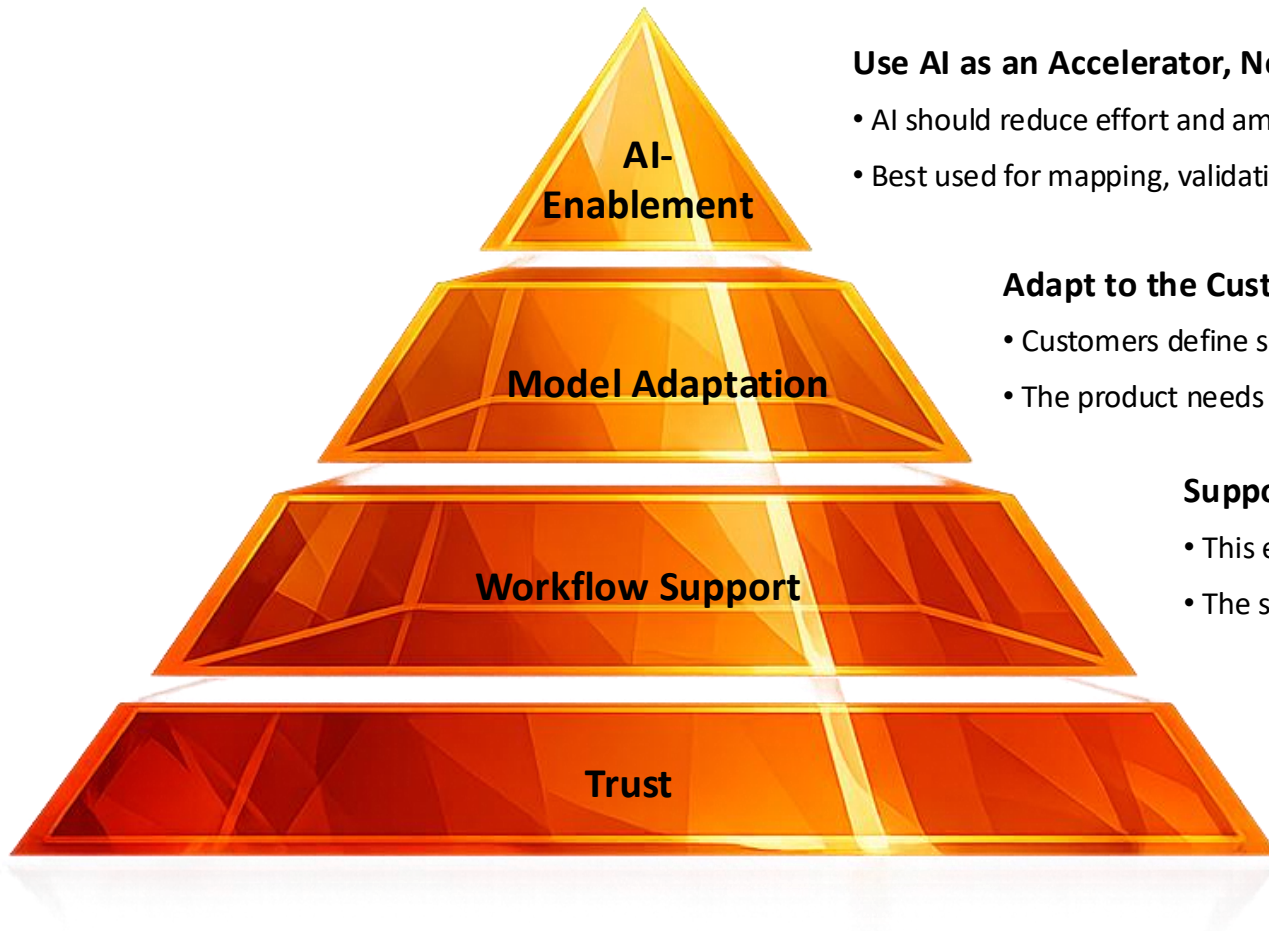
Grading curve

SUS Score	Summary
A 80-100	Excellent
B 74-79	Good
C 65-73	Misaligned
D 52-64	Poor
F 0-51	Failed

- **Potential Exists, But Trust Is a Barrier:** The current concept shows potential but is hindered by low user understanding and trust.
- **Usable, But Not Yet Adoptable:** The concept has a solid usability foundation, but adoption may be limited until understanding and trust improve.
- **Usability Improving, Value Communication Needed:** Usability is trending in the right direction, but the current experience still needs refinement to deliver clearer benefit.



What This Means for the Product



Use AI as an Accelerator, Not the Foundation

- AI should reduce effort and ambiguity after the core workflow is already clear and trustworthy.
- Best used for mapping, validation, and explaining impact.

Adapt to the Customer's Model

- Customers define structure differently.
- The product needs to support different customer language, structures, and relationships.

Support the Full Workflow

- This extends beyond visualization into import, validation, sharing, and real use.
- The system must work across the entire lifecycle (import, validation, sharing).

Build Trust First

- Users won't engage with flexibility until they trust the system.
- Clarity, safeguards, and preview must come before advanced capabilities.



Recommendations: Four Priorities

What the team should focus on to make this successful



Clarify the workflow

Make entry state, next steps, and system state obvious.



Make changes reviewable

Show what changed, what already existed, and downstream impact before publish.



Make import safe

Add validation, transparency, and rollback.



Adapt to customer's model

Support terminology mapping, flexible relationships, and guided translation into the system.



What Success Looks Like

Empowering users to operationalize their organizational model safely.



Seamless Import

Users can import their structure without rebuilding from scratch.



Validation

Sharing before publishing enables validation.



Customizable Mapping

Their terminology and attributes map to a usable system model.



Impact Awareness

Downstream effects are understood before changes go live.



Preview & Refine

Users can preview the full structure, understand changes, and refine directly.

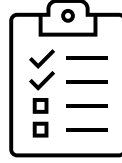


Integration

The system integrates into organizational management, rather than existing in isolation.



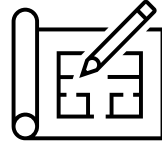
Requirements Drafted as a Result of Research



- Company and Company Sets in setup
- Companies that are newly added to a set
- Company or Company Set that is deleted during setup
- Cost Center assignment to Positions
- All file processing and upload requirements
- Ability to enable or disable a Cost Center level or jobs



Future Considerations (Deferred for 1A)



- Rules and automation layer (naming rules, dedupe rules, assignment rules) vs. Naming every combination
- Employee assignment to org structure
- Advanced configurability/term customization



Next Steps

- Apply findings to next design iteration (Phase 1 handoff + refinements)
- Align triad on priorities and sequencing (MVP vs. Future)
- Plan targeted follow-up validation (focused evaluation on new iteration)
- Stakeholder feedback

