

Tractivity Case Study:

Data preparation is key during onboarding

Tractivity®

The challenge

When organisations begin their journey with Tractivity, they often bring with them large volumes of existing stakeholder data. This data typically sits across multiple locations, individual spreadsheets, shared files, and team-specific records, each structured differently and capturing varying levels of detail.

This lack of consistency creates a significant challenge. Trying to review, clean, and organise this information into a unified format can be both time consuming and overwhelming.

Without investing the necessary time at this stage, organisations risk implementing a system that feels disconnected from their needs. This often leads to low adoption, with users perceiving the platform as an additional administrative burden rather than a valuable tool that supports their work.

The plan

The goal was to establish a strong data foundation from the outset, ensuring the system reflected the organisation's needs and delivered clear value to users. To achieve this, we encouraged a structured and collaborative approach:

- **Audit and rationalise existing data:** review all current data sources and identify what information is valuable, removing duplication and inconsistencies where possible.
- **Define what matters most:** create clear mappings of key data points, what information is essential to capture, and what categories will make stakeholders easy to find and segment.
- **Establish stakeholder classifications:** agree on core stakeholder types (e.g. MPs, councillors, advocates, staff) to ensure consistent categorisation across the organisation.
- **Capture meaningful insight:** identify key information to collect during initial stakeholder interactions, data that provides long-term value for engagement strategies.
- **Standardise ongoing data capture:** ensure that when conversations are logged, the same key questions and fields are consistently completed to build comparable and reliable data.
- **Work backwards from reporting needs:** design reports that reflect the insights the organisation wants to see, then configure the system to ensure the required data is captured to support them.
- **Collaborate across teams:** engage different departments and management to gather their input, ensuring the system meets a wide range of needs.
- **Enforce consistency through configuration:** configure mandatory fields and structured formats within Tractivity to ensure data is not only captured but captured consistently.

The outcome

By investing time in structuring and standardising their data during onboarding, the organisation created a strong foundation for long-term success.

Users experienced a system that reflected how they worked and delivered relevant, actionable insights. As a result, engagement with the platform was higher, and the quality of data improved significantly over time.

Consistent, structured data enabled the organisation to generate meaningful reports, better understand stakeholder relationships, and make informed decisions with confidence.

Rather than feeling like an additional task, the system became a trusted source of insight that supported teams in their day-to-day work.

Key takeaways

Data preparation during onboarding is not just a technical step, it is a critical success factor for long-term adoption.

While it can be tempting to move quickly through this stage, the time invested in organising, structuring, and aligning data will directly impact how useful and intuitive the system is for users.

A well-defined data model ensures that information is consistent, searchable, and meaningful across the organisation. It also allows reporting and AI-driven insights to deliver real value.

In contrast, inconsistent or poorly structured data leads to frustration, low confidence in the system, and reduced adoption.

By taking a considered approach, defining what matters, involving key stakeholders, and embedding consistency from the start, organisations can transform their SRM platform into a powerful, insight-driven tool that supports smarter engagement and better decision-making.

Tractivity supports organisations from day one, with a dedicated Customer Success team to guide you through onboarding and help you build a data foundation that delivers lasting value. Whether you're migrating existing stakeholder data or starting fresh, get in touch to see how Tractivity can help you create a system your teams will trust and use.

Get in touch with our team to discover how Tractivity can set your organisation up for success, with expert guidance to ensure your data is consistent, accurate, and delivering real visibility across your stakeholder relationships from the start.