

Tractivity Case Study:

Driving system adoption through executive buy-in

Tractivity®

A man with short brown hair and glasses, wearing a dark blue suit jacket over a light-colored button-down shirt, is sitting at a desk. He has his hands clasped in front of him and is smiling warmly at the camera. A laptop is open on the desk to his right, and a mouse is visible in the foreground. The background is a blurred office setting with blue and white tones.

The challenge

Many organisations aim to roll out a stakeholder relationship management (SRM) system across multiple teams, but adoption often doesn't go as expected.

One common scenario is when the person responsible for the rollout is not the direct manager of the users expected to adopt it. And, without active advocacy from senior leadership or line managers, users see the system as optional rather than essential.

As a result, teams continue to rely on personal spreadsheets or siloed records of stakeholder interactions. While these methods may feel sufficient, they create fragmented visibility across the organisation and prevent a complete understanding of stakeholder engagement.

In many cases, even well-established Superusers and System Admins struggle to drive adoption on their own. While they play a critical role in managing and promoting the system, their success is heavily dependent on visible support from CEO or top-level management to reinforce expectations and priorities.

The plan

- **Executive sponsorship:** leadership, including CEO-level support, clearly communicated the importance of the system and set the expectation that all stakeholder interactions should be recorded.
- **Supporting key roles:** Superusers and System Admins were empowered with clear backing from senior leadership, ensuring their guidance and requirements were taken seriously across teams.
- **Mandating usage:** capturing interactions was positioned as a required business process, ensuring consistency across teams rather than leaving adoption to individual preference.
- **Highlighting organisational value:** emphasis was placed on the collective benefit—moving from isolated, individual records to a shared, organisation-wide view of stakeholder engagement.
- **Breaking down silos:** users were shown how individual spreadsheets limit visibility, whereas a centralised system enables transparency across teams.
- **Demonstrating insight through AI:** users were introduced to the ability to generate instant AI summaries of recent interactions, providing a quick, comprehensive overview of conversations, key topics, and sentiment across multiple touchpoints.

The outcome

With strong top-level endorsement, adoption levels increased significantly across the organisation. Users understood that contributing to the system was not just an administrative task, but a critical part of delivering a unified stakeholder strategy.

Superusers and System Admins were far more effective in their roles, as leadership backing ensured that processes were followed and expectations were clear.

As more teams consistently logged interactions, the organisation gained a true 360-degree view of stakeholder engagement. Instead of relying on fragmented insights, teams could access a consolidated history of meetings, calls, and communications.

The introduction of AI-powered summaries further enhanced engagement, allowing users to quickly understand recent interactions and sentiment without needing to review multiple records. This improved the organisation's ability to respond proactively and strategically to stakeholder needs.

Key takeaways

Driving SRM adoption requires more than just functional rollout—it depends heavily on leadership alignment and clear expectations.

Superusers and System Admins are critical to success, but without visible support from CEO or senior leadership, their ability to influence behaviour is limited. When backed by top-level endorsement, they become far more effective in embedding the system into everyday processes.

When system usage is optional, adoption is often low and data remains fragmented. However, when senior leadership actively champions the system and embeds it into core processes, it becomes a shared responsibility across the organisation.

Individual tracking methods may feel adequate, but they limit visibility and collaboration. A centralised system creates a complete picture, enabling better informed decisions and more coordinated engagement strategies.

By securing executive buy-in, empowering key system roles, and demonstrating the power of shared insights, organisations can unlock the full value of their SRM system and move from isolated data to a truly connected, strategic approach to stakeholder management.

Get in touch with our team at Tractivity to uncover new opportunities to drive adoption across your organisation, saving you time on manual tracking while improving visibility, consistency, and stakeholder insight at every level.