

Tractivity Case Study:

Eliminate manual work with automated data capture



Tractivity[®]

The challenge

Our client was dealing with a lot of time and effort being put in one process: manually capturing stakeholder data.

The newsletter sign-ups and stakeholder information provided on their website would be sent to the team's emails, which then would be manually added into the system by the team members.

This process was not only time-consuming, but also prone to human error, leading to inconsistencies and inefficiencies in data management.

The plan

We suggested a more efficient way to handle the data, with Tractivity's External Forms functionality. Here's what the process looks like:

- **Automated data capture:** External Forms are embedded directly into the client's website, which allows stakeholder data to flow straight into the system without any manual input.
- **Background automation:** The system automatically subscribes users and assigns them to the correct distribution lists based on the form submissions.
- **Activity tracking:** Each form submission triggers an update to the stakeholder activity record, enabling effortless engagement tracking.
- **Automated reporting:** Monthly reports are delivered directly to the manager's inbox, providing clear visibility on form completion rates without relying on team input.

The result

The entire process, from data capture to reporting, was streamlined and is now completely automated.

This resulted in a significantly reduced manual workload, freeing up valuable time for the team, as well as accurate, reliable data and clear visibility into the monthly form submissions.

Key takeaways

Manual, repetitive tasks are often a hidden drain on team capacity and a source of errors.

By identifying these processes and leveraging automation, you can unlock significant efficiency gains.

Tractivity offers a complete range of features that can automate workflows end-to-end.

Get in touch with us to uncover new opportunities that can save you hours of manual effort while improving data accuracy and visibility.