

Tractivity Case Study:

# How to drive better system adoption



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## The challenge

Low user adoption is one of the biggest causes of a platform failing to deliver its potential. Our client came to us for support to improve their system adoption – their team was showing resistance to learn how to use it, seeing it as an extra administrative burden rather than helpful.

## The plan

The goal was to help them simplify the process and clearly demonstrate the value of capturing data within Tractivity. To help with this, we developed a phased adoption strategy with a focus on ease-of-use and quick wins:

- **Simplified data entry:** users were encouraged to adopt the Outlook Add-in, enabling them to log conversations directly from Outlook with just a few clicks.
- **Perceived value:** with all activity data centralised, users could see the benefit of unlocking immediate visibility into the engagement activities and easily demonstrate the value of the collected insights.
- **Progressive engagement:** once the basic adoption process improved, we provided targeted training sessions to users interested in exploring the platform further.
- **Expanded feature awareness:** training sessions highlighted the system advanced capabilities, which led users to use more functionalities and sped up their work.
- **Enhanced efficiency with AI:** users were then introduced to AI-powered features, helping them extract insights much faster when compared to spreadsheets or email records.

## The outcome

The introduction of the Outlook Add-in was a big win, and led to a significant increase in the platform usage. The volume of recorded activities and data grew substantially, providing richer insights.

As engagement increased, more users opted into training sessions, leading to broader adoption of additional modules.

The result was **a steady expansion of platform usage across the organisation.**

## Key takeaways

**Driving adoption of a new system isn't about forcing change; it's about reducing friction.**

For time-constrained teams, even valuable tools can feel like an unnecessary burden if they disrupt existing workflows.

Introducing a simple, low-effort entry point, such as integrating with tools like Outlook, makes it easier to demonstrate immediate value without overwhelming users. Once users experience the benefits firsthand, they become far more open to deeper engagement.

This phased approach, **start simple – prove value – expand usage**, helps overcome resistance to change, builds user confidence, and leads to more sustainable, long-term adoption.

**Contact our team at [Tractivity](#)** to find out more about our approach to system adoption and how we can help your team succeed.