

Tractivity Case Study:

Transport for the South East

Tractivity[®]



TRANSPORT FOR THE
South East

In summary...

Transport for the South East (TfSE) is the sub-national transport body for the South East of England, bringing together a number of key stakeholders to speak with 'one voice' to central government. They're dedicated to creating an integrated and sustainable transport system that makes the South East of England more productive and competitive, improving the quality of life for all residents and protecting and enhancing the environment.

Working across the whole of the South East, TfSE have a huge number of stakeholders to engage with. This could be via phone, email, physical or virtual meetings, on a one-to-one basis or to groups of individuals or organisations with similar interests. For some this could be multiple times in one week and for others less frequent. It is essential that TfSE can track all engagement with stakeholders and easily segment them where necessary.

"Tractivity did everything and more that we wanted it to do."

Lucy Dixon-Thompson

Stakeholder & Engagement Manager, Transport for the South East

The requirements

1. Secure access, safe data storage and GDPR compliance.
2. Allow users to access data at the same time and to see changes made by each user.
3. Integrate with email, events and surveys and save all feedback against stakeholder records.
4. Provide the ability to analyse and understand how stakeholders interact.

The results

- ✓ Easy access to individual stakeholder records with a click.
- ✓ Successful engagements with over 3,000 contacts.
- ✓ Clear reporting and insights with all stakeholders recorded and visible to all users.
- ✓ Time spent on manual tasks reduced to less than a quarter, improving productivity.

The situation

Transport for the South East is a partnership of 16 local transport authorities, five Local Enterprise Partnerships, 46 district and borough councils, and over one thousand town and parish councils. There are also 71 MPs in their region, as well as a huge range and number of wider stakeholders from the world of transport, business, and other sectors. As an organisation, they have around 3000 active contacts.

TfSE are a relatively new organisation, and despite the extensive number of stakeholders they engage with, until recently they didn't have any sort of formalised stakeholder management system.

The information they held on stakeholders was very basic, fragmented across about 20 spreadsheets with varying degrees of detail. Furthermore, there was no proper record of where those stakeholders had come from, the level of engagement they had had with TfSE or what they knew about the organisation. There were also hundreds of stakeholders that had attended meetings, and lots of contacts lists within Outlook that weren't captured anywhere else. As all stakeholder information had been collated by individual members of staff, managing and maintaining it was a daunting and time-consuming task.

The task

Once appointed, the stakeholder engagement team tried to address the problem by combining the multiple sources of data into one spreadsheet, and soon realised the scale of the problem. It simply wasn't going to be manageable on a day-to-day basis.

To further add to an already complicated task, working on behalf of constituent authorities and hosted by a county council, TfSE must abide by all the GDPR and data protection regulations associated with local government. And as spreadsheets are not a safe tool to store data, the team realised they needed a more suitable option to manage all stakeholder data safely and effectively.



The action taken

The stakeholder engagement team listed the features they were looking for in a system to support their work as the organisation grows and asked for the IT project team to research potential stakeholder management systems.

After researching the market and asking for recommendations, the IT team came back with their recommendation: Tractivity.

From there, the stakeholder engagement team had personalised demos and various conversations to understand if Tractivity was able to attend to all their essential and desirable needs. They thought about what they did on a daily basis and the potential Tractivity had to support all those functions for the organisation.

In parallel to that, the project manager from the IT team was having technical discussions with Tractivity's developer team to make sure that Tractivity, as a standalone cloud-based software, would work within the Council's secure IT system.

Tractivity's team ensured that all the challenges that came with the integration were dealt with, and the system was successfully implemented to be used seamlessly within the council system. The stakeholder engagement team received full support with an onboarding plan, calls and training sessions from Tractivity's customer success team.

The most challenging element was cleansing the data to make sure it was right when loaded to Tractivity. The Tractivity team helped every step of the way to guarantee the data was uploaded properly and provided an import template to facilitate the data categorisation and import.

While working on the data cleansing and gathering, the TfSE team were able to use a Tractivity stage system to explore its functionalities and get comfortable with the system before importing the official data.

That gave them the knowledge necessary to start working with the new system. Once they were confident with the organisation and contacts module, they started rolling out the other modules and this approach proved to be very effective for them.



The results

Tractivity has completely changed the way TfSE manage stakeholders and the relationships with them. They now efficiently manage 5 times the number of stakeholders they initially had when they started using the system.

By keeping everything in one place, the TfSE team can now click on a stakeholder record and easily tell all the events or information they've been sent or invited to and whether they have attended or responded.

That makes it simple for them to have a clear picture of all engagement history, evidence all the engagement activities they have promoted with their stakeholders and obtain insights.

They are also able to work more efficiently, as they've eliminated the need for multiple tools and the extra workload of copying and pasting data from one tool to another as well as the error risks that came with it.

Tractivity is adding value to TfSE and bringing clarity to their stakeholder engagement.

Testimonial

“Tractivity has been revolutionary in terms of how we manage our stakeholders and the relationships with them. It’s very user-friendly, very intuitive.

The amount of time I spend on stakeholder and contact management on Tractivity is probably less than a quarter of what it would be if I was still trying to maintain spreadsheets and Outlook contacts.

We have a very complex work programme at the moment, and it would be impossible to maintain it using spreadsheets.

I’m a big advocate for Tractivity and have recommended it to my colleagues, it absolutely has added value to the organisation, speeding up our processes and holding all data centrally.”

Lucy Dixon-Thompson, Transport for the South East

Get in touch

Discover the benefits Tractivity can bring to your organisation and daily activities. Contact us for a free, personalised demo:



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