

Tractivity®



74 Stakeholders Mapped



230 Mailshots Sent



PDF Report Created



780 Activities Logged

SRM Service Definition Document

Overview

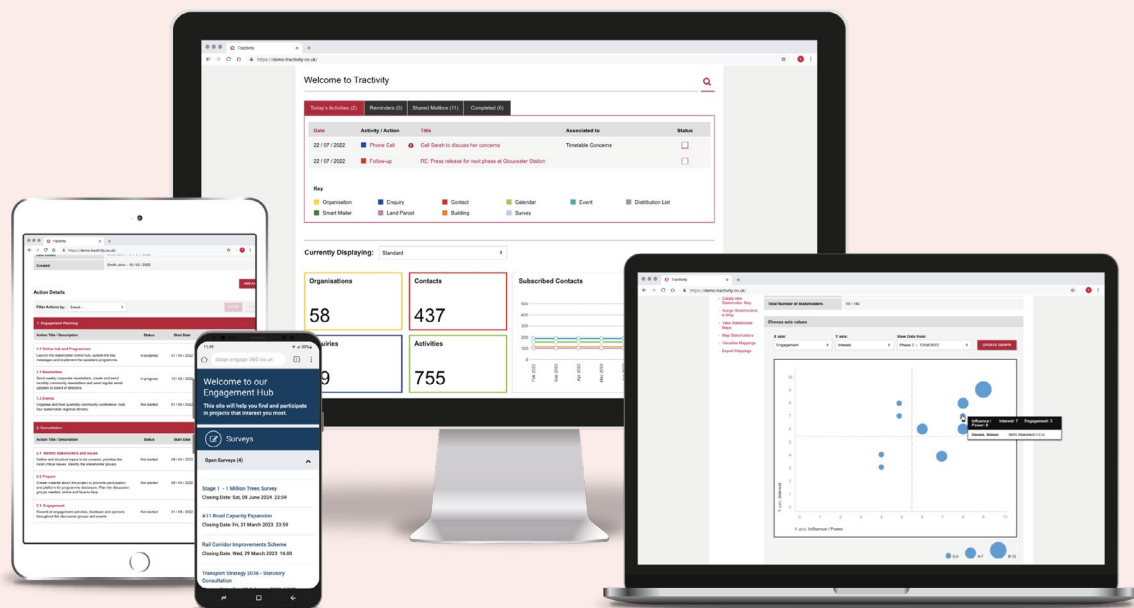
Tractivity is the UK's leading online stakeholder relationship management (SRM) platform, designed to streamline one to one engagement and communication within a single, secure system.

A key advantage for our clients is that Tractivity is fully UK based – from secure data hosting and technical expertise to our Client Success team. This ensures that support is always available during your working hours, with assistance tailored to your needs.

Trusted across both public and private sectors, Tractivity enables organisations to manage and maintain effective digital engagement by storing, viewing, and analysing all stakeholder details, feedback, and interactions.

The platform delivers a comprehensive end to end process, including:

- Stakeholder mapping and management
- Event planning and coordination
- Newsletter communications
- Surveys and feedback capture
- Advanced analysis and reporting tools



Tractivity helps organisations overcome common cultural and technological challenges, such as:

- Teams and departments working in silos
- Limited visibility and poor coordination of engagement activity
- Insecure or inadequate stakeholder data management
- Fragmented communication tools

We address these issues by providing:

- A secure, centralised database of all stakeholders, organised by teams and departments
- Integrated survey, newsletter, and event management tools to capture and communicate feedback
- Full onboarding, training, and ongoing support
- Continuous software upgrades, free updates, and a channel for requesting new functionality
- Dedicated account management and an online support hub with regularly updated guides and resources
- Unlimited records, newsletters, and survey responses

Our solution supports organisations worldwide in managing projects while building trusted relationships with communities and stakeholders.

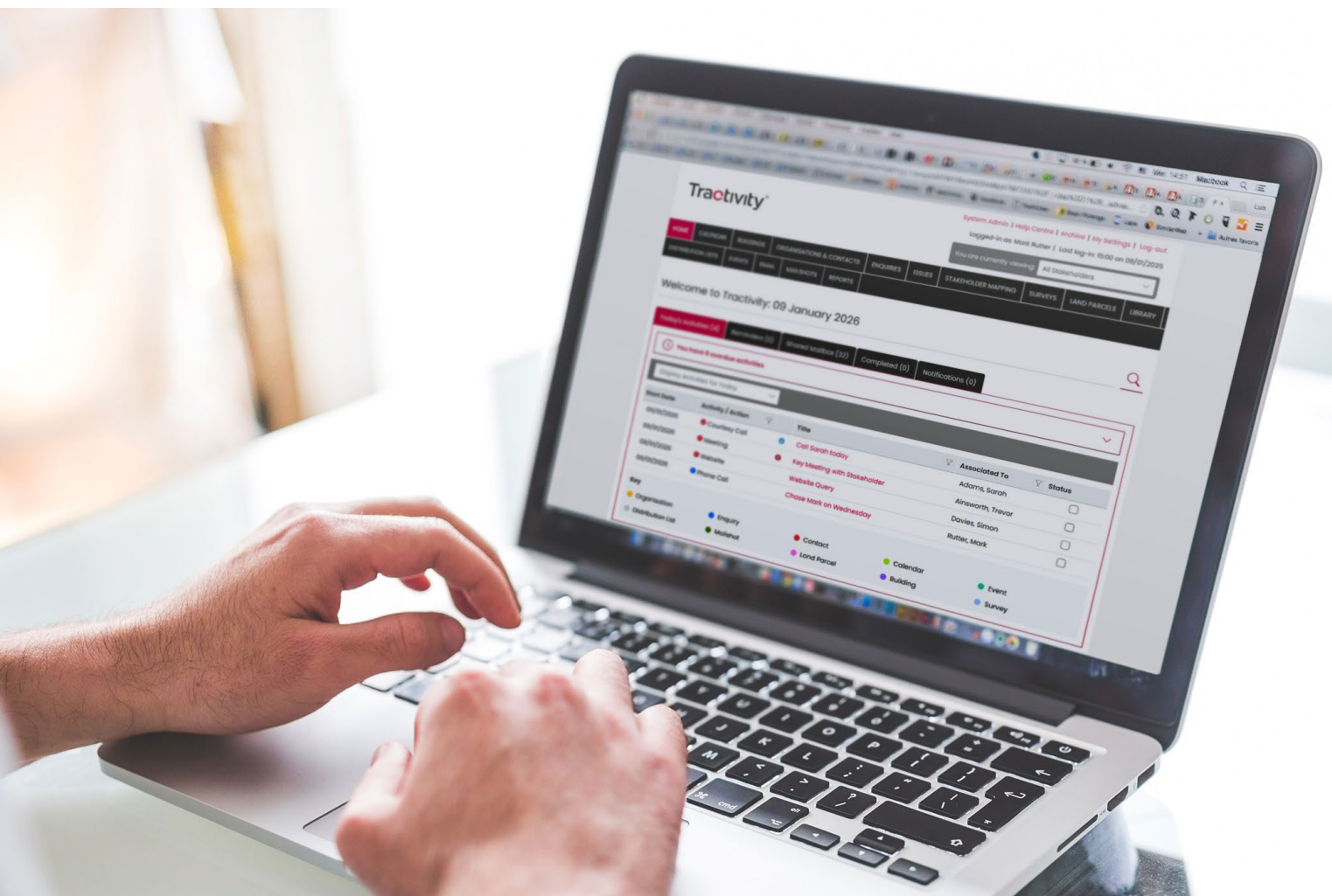
Tractivity has been successfully adopted by leading organisations including **National Grid, Scottish Power Renewables, Anglian Water, EDF Energy, the BBC, the NHS**, and is trusted by the UK Government, where reliability, security, and exceptional customer service are paramount.

Tractivity Modules

Tractivity's Stakeholder Management System provides a comprehensive suite of modules to organise, map, and categorise stakeholders. With integrated communication tools, it makes engagement management simple – capturing feedback and interactions seamlessly across projects.

Unlike many providers who charge extra for add ons or modular pricing, **Tractivity offers full and unlimited access to all modules and functionality as standard.** Our approach is straightforward: clear pricing, easy access, and flexible subscriptions.

As part of onboarding, clients can fully tailor data fields and options to suit their teams and departments. This ensures Tractivity feels customised to your organisation, displaying only the most relevant modules and information – a key factor in its simplicity and ease of use.



Organisations & Contacts

Tractivity's **Organisation & Contact Module** provides a centralised, secure environment to capture, categorise, and manage all stakeholder information. It is designed to give organisations complete visibility and control over their stakeholder relationships.

Organisations & Contacts: Search

Add New

- Add Contact
- Add Organisation

Search

- Organisations & Contacts

Organisation	Name	
	Account Handlers	-- Please select --
	Created Date	to
Contact	Name	
	Stakeholder Categories	-- Please select --
	Account Handlers	-- Please select --

SEARCH

SAVE SEARCH

SETTINGS

CLEAR

Contacts (2609)Organisations (613)Buildings (860)Saved Searches (2)

EXPORT RESULTS

	Contact	Email	Telephone	Edit	Archive
☐	Abbott, Dan			Edit	
☐	Abbotts, Jane	jane.abbotts@eastmids.gov.uk	01823 058550	Edit	
☒	Abbotts, Reece	reece.abbotts@eastmids.gov.uk	07917 453814	Edit	
☐	Aberley, Jack	jack.aberley@staffscom.gov.uk	07908 179255	Edit	
☐	Abraham, Michael	mike.abraham@redvalley.co.uk		Edit	
☐	Abraham, Jason	jak.abrahams@gostaffs.co.uk	01209 273505	Edit	Archive
☐	Ackrill, Robert	robertackrill@sky.com	01264 446109	Edit	
☐	Aykroyd, Juliann	juliann.aykroyd@leicester-shireforward.co.uk	01238 635289	Edit	Archive
☐	Ahmed, Ali	ali.ahmed@southnotts.gov.uk	07814 278144	Edit	

<<<123...>>>

Showing 1 to 10 of 2609 results

GENERATE ACTIVITY

Tractivity®

5

Organisations & Contacts continued...

Key capabilities include:

- **Comprehensive data capture:** Record essential contact details such as names, roles, organisations, addresses, phone numbers, and email addresses.
- **Advanced categorisation:** Classify stakeholders by influence, interest, role, project involvement, sentiment, location, and other custom fields tailored to your organisation.
- **Flexible data entry:** Add stakeholders via multiple channels – through the Engage 360 portal, website integration using the Tractivity API, bulk Excel uploads, or manual entry within the platform.
- **Powerful search & filtering:** Use sophisticated search functions to quickly locate stakeholders, group them by shared attributes, and link them to relevant organisations, affiliations, or projects.
- **Relationship mapping:** Associate stakeholders with multiple organisations, assemble them into known groups, and track linked affiliations to build a clear picture of networks and influence.
- **GDPR compliance built in:** Contacts can automatically opt in or out of mass communications, with a full audit trail stored as evidence to support compliance requirements.
- **Engagement tracking:** Monitor interactions, feedback, and sentiment over time, ensuring that every engagement is logged and connected to wider project activity.
- **Customisation:** Tailor data fields and module views to reflect the needs of specific teams or departments, ensuring relevance and simplicity for end users.

By consolidating all stakeholder information into one module, Tractivity enables organisations to move beyond fragmented spreadsheets and disconnected systems. The result is a secure, transparent, and highly efficient way to manage stakeholder relationships across projects and departments.

Activity Interactions

Tractivity enables organisations to capture and manage every stakeholder interaction, from meetings to emails and telephone calls – as **Activities** within the system.

Full Details

Addresses (4)

Social Media

Organisations (1)

Enquiries (4)

Activities (108)

Activity Attachments (36)

Issues (9)

Mapping (2)

Events (19)

Survey Responses (2)

Mailshots (0)

Filter(s):

Activity Type

Sentiment

SUMMARISE & EXPORT ACTIVITIES

	Start Date	Activity / Action		Title	Creator	Status	Issues	Edit	Delete
	09/01/2026	Courtesy Call		Call Sarah today	Rutter, Mark			Edit	Delete
	28/10/2025	Meeting		Meeting held with Sarah and team	Rutter, Mark		0	Edit	Delete
	04/08/2025	Email Sent		Introduction with Sarah	Rutter, Mark			Edit	Delete
	04/08/2025	Phone Call		Call Sarah to discuss application	Rutter, Mark			Edit	Delete
	04/07/2025	Email Sent		Make a call with Sarah	Rutter, Mark			Edit	Delete
	03/07/2025	Meeting		General Meeting	Rutter, Mark			Edit	Delete
	27/03/2025	Email Received		Re: Office Visit.	Rutter, Mark			Edit	Delete
	18/03/2025	Email Sent		Survey response published	Rutter, Mark			Edit	Delete
	08/01/2025	Meeting		Attend Tele Call Meeting	Rutter, Mark			Edit	Delete

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Key

Organisation

Enquiry

Contact

Event

Activity Interactions continued...

Each Activity records key details including:

- The type of engagement
- Who was involved
- When it took place
- What was discussed or agreed
- Any required follow up actions

Activities are automatically sorted in descending date order, ensuring the most recent information is always visible. They can also be exported into multiple formats such as **Word, Excel, or PDF**, making it easy to share or archive engagement records.

This functionality is particularly valuable when working with high influence or high interest stakeholders, providing a clear audit trail of interactions. Combined with Tractivity's reporting tools, Activities can be analysed to track engagement frequency, identify gaps, and ensure regular touchpoints are consistently maintained.

Calendar

The newly revamped **Calendar Module** provides a clear and integrated view of all stakeholder engagement activities, past and future. As the most cross-referenced module within Tractivity, it consolidates activities recorded against Organisations, Contacts, Enquiries, and Events, giving users a holistic picture of project activity in one place.

Calendar: View Calendar

Add New

Add Calendar Activity

Calendar

View Calendar

Calendar

☒ My Activities

☐ Team Activities

☐ Project Activities

☒ Events

☒ Surveys

Filter Activities

Activity Type

-- Please sel... ▾

Allocated To

-- Please sel... ▾

Activity Status

-- Please sel... ▾

Filter Events

Event Type

-- Please sel... ▾

Event Administrator

-- Please sel... ▾

FILTER

RESET

< > January 2026 ▾ Today Day Week Work Week Month Agenda

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5 16:00 Revie...	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26 09:00 Expor...	27	28	29	30 12:00 Com...	31

Key

● Organisation

● Enquiry

● Contact

● Calendar

● Event

● Distribution List

● Building

● Survey

Activity Overview

Meeting: Review Agenda Notes

Date

05/01/2026 16:00 - 05/01/2026 16:30

Priority

Low

Activity Type

Enquiry

Status

Pending

Allocated To

Rutter, Mark

Associated To

Naylor, Anthony

VIEW DETAILS

Tractivity®

9

Calendar continued...

Key features include:

- **Comprehensive activity tracking:** View past interactions and highlight upcoming engagements directly within the calendar.
- **Events & surveys integration:** Access scheduled events and surveys seamlessly within calendar views, ensuring nothing is missed.
- **Advanced filtering:** Apply filters to focus on specific projects, stakeholder groups, or activity types for tailored visibility.
- **Shared visibility:** Access other users' activities to maintain transparency and coordination across teams.
- **Multiple views:** Choose from monthly, weekly, or daily agenda formats to suit your working style.
- **Outlook integration:** Pending activities can be added to Microsoft Outlook calendars via autogenerated ICS files, eliminating duplicate data entry and requiring no additional software.
- **Data export:** Export calendar data into common formats such as Word, Excel, or PDF for reporting and sharing.

By combining activity tracking, event management, and survey scheduling into one central view, the Calendar Module ensures teams have complete visibility of stakeholder engagement, supporting better planning, coordination, and accountability across projects.

Enquiry & Feedback Management

The **Enquiries Module** acts as a central hub to organise and “folderise” all engagement activity with a stakeholder. It allows teams to manage multiple interactions on different topics, handled by different relationship managers, while maintaining full visibility of what discussions are taking place, their current status, and the individual activities linked to each enquiry – from meetings and emails to follow up actions.

Key capabilities include:

- **Versatile enquiry management:** Handle all types of enquiries, from complaints and grievances to project feedback or Freedom of Information (FOI) requests.
- **Flexible input options:** Enquiries can be added directly into Tractivity, uploaded via the API from public websites, or entered manually.
- **Structured categorisation:** Each enquiry is date stamped and can be categorised by project phase, issues raised, source, reason, sentiment, and assigned account handler.
- **Activity tracking:** Record associated phone calls, emails, meetings, and other interactions for a complete communication audit trail. Attach meeting notes, letters, and supporting documents to ensure all context is captured.
- **Status management:** Update enquiry progress from initial receipt through to resolution, providing clarity on current state and next steps.
- **Shared visibility:** Enable multiple team members to see topical discussions and contribute, ensuring coordinated responses across departments.
- **Reporting & analysis:** Generate reports based on filtered activities, giving teams the ability to extract exactly the information required for oversight, compliance, or performance monitoring.

By consolidating stakeholder enquiries into one structured module, Tractivity ensures that organisations can manage complex, multi topic engagements efficiently, maintain transparency across teams, and provide a clear audit trail from start to finish.

Central Mailbox (Shared Inbox)

Tractivity's **Shared Mailbox Integration** allows clients to connect their existing generic email address and mailbox to the platform in just a few simple steps. Once connected, all inbound and outbound emails can be accessed and administered directly within Tractivity, ensuring every interaction is captured, shared, and tracked.

HOME

CALENDAR

BUILDINGS

ORGANISATIONS & CONTACTS

ENQUIRIES

ISSUES

STAKEHOLDER MAPPING

SURVEYS

LAND PARCELS

LIBRARY

DISTRIBUTION LISTS

EVENTS

EMAIL

MAILSHOTS

REPORTS

Welcome to Tractivity: 09 January 2026

Today's Activities (4)

Reminders (0)

Shared Mailbox (32)

Completed (0)

Notifications (0)

REFRESH

Received	Subject	From	Status	Spam
19/11/2025	Re: Local Community Hall Meeting	amanda.collelan@tractivity.co.uk	☐	☐
19/11/2025	Noise Issues with Workers	luke.gratton@tractivity.co.uk	☐	☐
19/11/2025	Concerns regarding proposed power station	daniel.page@tractivity.co.uk	☐	☐
19/11/2025	Objection to Proposed Housing Development (Green Space)	daniel.page@tractivity.co.uk	☐	☐
19/11/2025	Request for information on road closure	thom.rodgers@tractivity.co.uk	☐	☐
12/11/2025	Re: Train Delays	luke.gratton@tractivity.co.uk	☐	☐
10/11/2025	Timetable Changes	luke.gratton@tractivity.co.uk	☐	☐
20/05/2024	RE: Shared Service Changes	craig.brown@tractivity.co.uk	☐	☐
09/05/2024	Proposed brown belt development	andy.stanier@tractivity.co.uk	☐	☐
10/09/2015	Please tell me more about the Visual Impact!	mark.rutter@re-systems.co.uk	☐	☐

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Central Mailbox (Shared Inbox) continued...

Key benefits include:

- **Centralised access:** Emails sent to a generic address are automatically collected and displayed via an inbox on the Tractivity homepage.
- **Seamless association:** Each email can be linked to the relevant stakeholder, organisation, or enquiry, providing full visibility of topical discussions across the team.
- **Collaborative workflow:** Emails can be responded to directly from Tractivity or referred to another team member, ensuring accountability and coordinated communication.
- **Audit trail:** Every inbound and outbound interaction is logged, creating a complete record of engagement activity.
- **Efficiency for external/public affairs teams:** Speeds up response times and ensures that information is shared consistently across departments.
- **Templated responses:** For trending or recurring enquiries, teams can create and use templates to deliver consistent, professional replies at scale.
- **Simple setup:** Mailboxes can be connected in a few straightforward steps, with no additional software required.

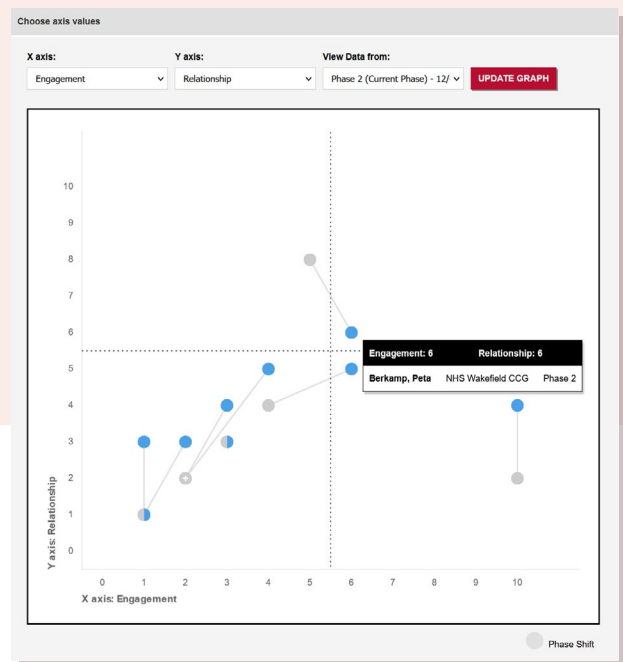
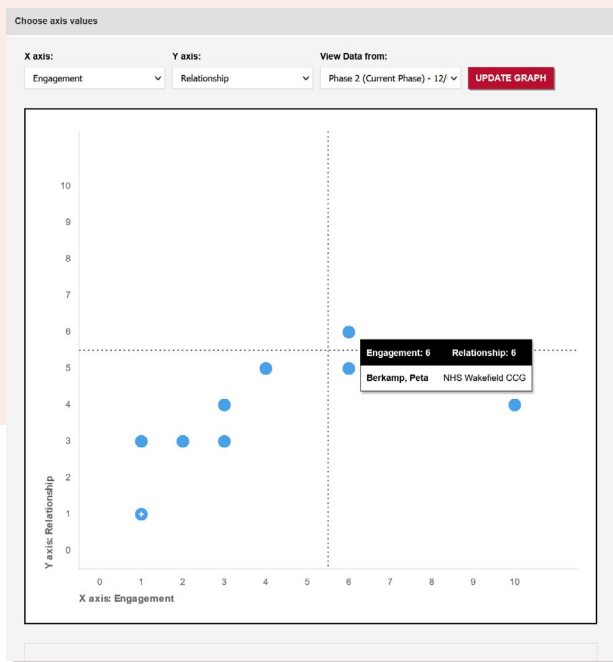
By centralising email management within Tractivity, teams eliminate duplication, streamline workflows, and maintain a clear, shared view of all stakeholder communications in one secure system.

Stakeholder Mapping

The **Stakeholder Mapping Module** enables organisations to identify, track, and evaluate stakeholders, helping you understand the influence they hold and the impact they can have on your project. This insight allows you to determine the most effective type of engagement each stakeholder requires.

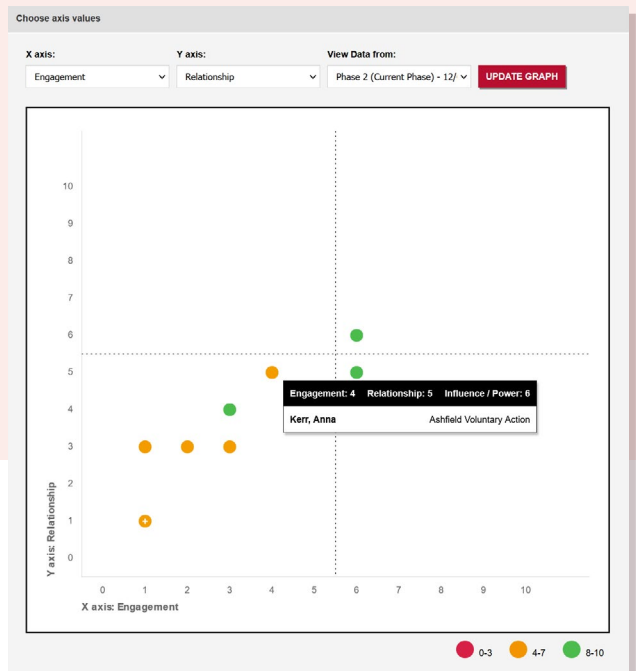
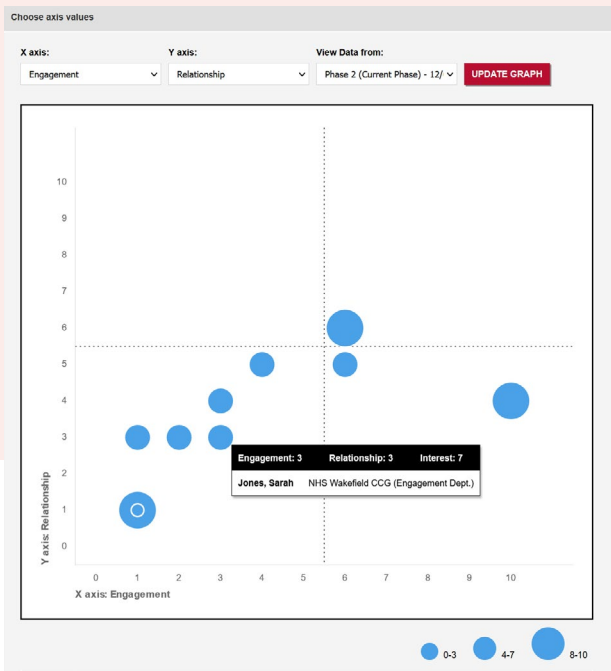
Key capabilities include:

- **Flexible mapping techniques:** Analyse stakeholders using a wide range of factors such as issues raised, relationship strength, interest levels, influence, sentiment, and more.
- **Unlimited attributes:** Add as many attributes as needed to build a detailed profile, with target scores applied to track stakeholder evolution over time.
- **Grouping options:** Organise stakeholders by campaign, project, or specific categories such as MPs, statutory bodies, or community groups.
- **Multi phase scoring:** Score stakeholders across different project phases to monitor how their position or influence changes.
- **Visual analysis:** Easily interpret stakeholder dynamics with clear four quadrant charts that highlight shifts in interest and influence over time.



Stakeholder Mapping continued...

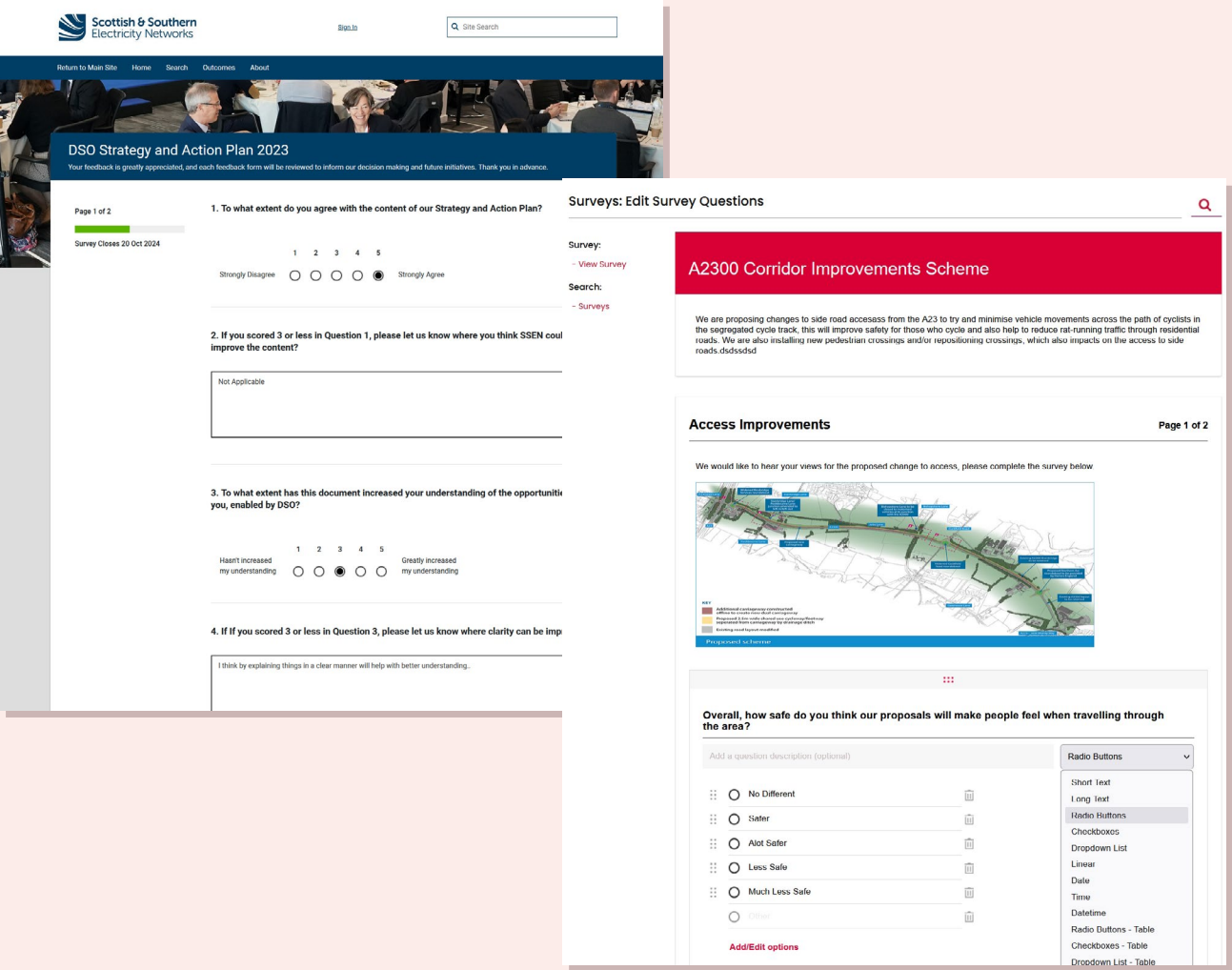
By combining flexible categorisation with powerful visualisation tools, the Stakeholder Mapping Module provides a dynamic way to monitor stakeholder relationships, anticipate changes, and plan engagement strategies with confidence.



Additional attributes can be included within the z-Axis either by size or colour, all of which are fully reportable in a range of common formats such as Excel or PDF.

Branded Surveys

Tractivity's **Survey Module** enables organisations to design fully customised surveys and link responses directly to existing stakeholder records, or create new records to organically grow the database. Each survey can be tailored to suit specific requirements - from anonymous submissions to the collection of stakeholder details alongside GDPR compliant communication preferences.



Branded Surveys continued...

Key features include:

- **Flexible distribution:** Every published survey is assigned a unique URL that can be embedded on your website, emailed to stakeholders via Tractivity, or shared across social media channels.
- **Comprehensive response management:** Responses can be reviewed, tagged against common issues, and analysed for sentiment, providing a clear picture of stakeholder views.
- **Advanced reporting:** Generate a wide range of reports, from summary overviews (quantitative and qualitative) to detailed issue and trend analysis, presented in graphical formats.
- **Community engagement portal:** For clients requiring broader public participation, surveys can be published to a fully branded portal via the integrated Engage360 website, supporting large scale community engagement beyond targeted communications.
- **Proven adoption:** The Survey Module is trusted by major UK consultations, including nuclear power stations, grid connection projects, new NHS hospitals, and other high profile initiatives — ensuring consultations are delivered effectively and transparently.
- **Unlimited use:** This in built facility requires no third party subscriptions and offers unlimited surveys, responses, and usage.

By combining flexibility, compliance, and powerful reporting, Tractivity's Survey Module provides organisations with a reliable and scalable solution for capturing stakeholder feedback and ensuring consultations run smoothly.

Feedback & Issue Management

With Tractivity's analysis tools, all feedback can be reviewed, organised, and placed into themed issues, giving you a clear understanding of stakeholder views. Whether the feedback comes from survey responses, emails, scanned letters in PDF or Word format, or face to face communication, the system ensures that every interaction is captured and categorised. Each response can be tagged with a coded theme or issue and its sentiment recorded as positive, negative, or neutral, creating a structured and meaningful dataset.

Themed issues can then be explored at multiple levels – by project, organisation, stakeholder, survey, or individual piece of feedback and searched or filtered through the issue management module to generate real time reports. These insights are further enhanced by a wide range of graphic dashboards, making complex data easy to interpret and act upon.

This approach is particularly valuable during consultations, where issue reports provide clear evidence of stakeholder feedback and demonstrate how that feedback has influenced decisions. In cases where applications are subject to judicial review, these reports serve as a transparent record of engagement and the changes made as a direct result of stakeholder input.

Tag Issue

+ **Tag New**

Select Question * Do you have any comments on the proposals, or any other issue within the scope of the scheme **UPDATE**

PREVIOUS **NEXT**

1 of 1 Automatic Zoom

Issue *
Transport - Capacity

Transcript * **COPY + PASTE**
I think the proposals are just what we need at a time when the volumes of traffic are increasing within the UK. The rail proposal, quicker journey times, and larger capacity will certainly benefit everyone.

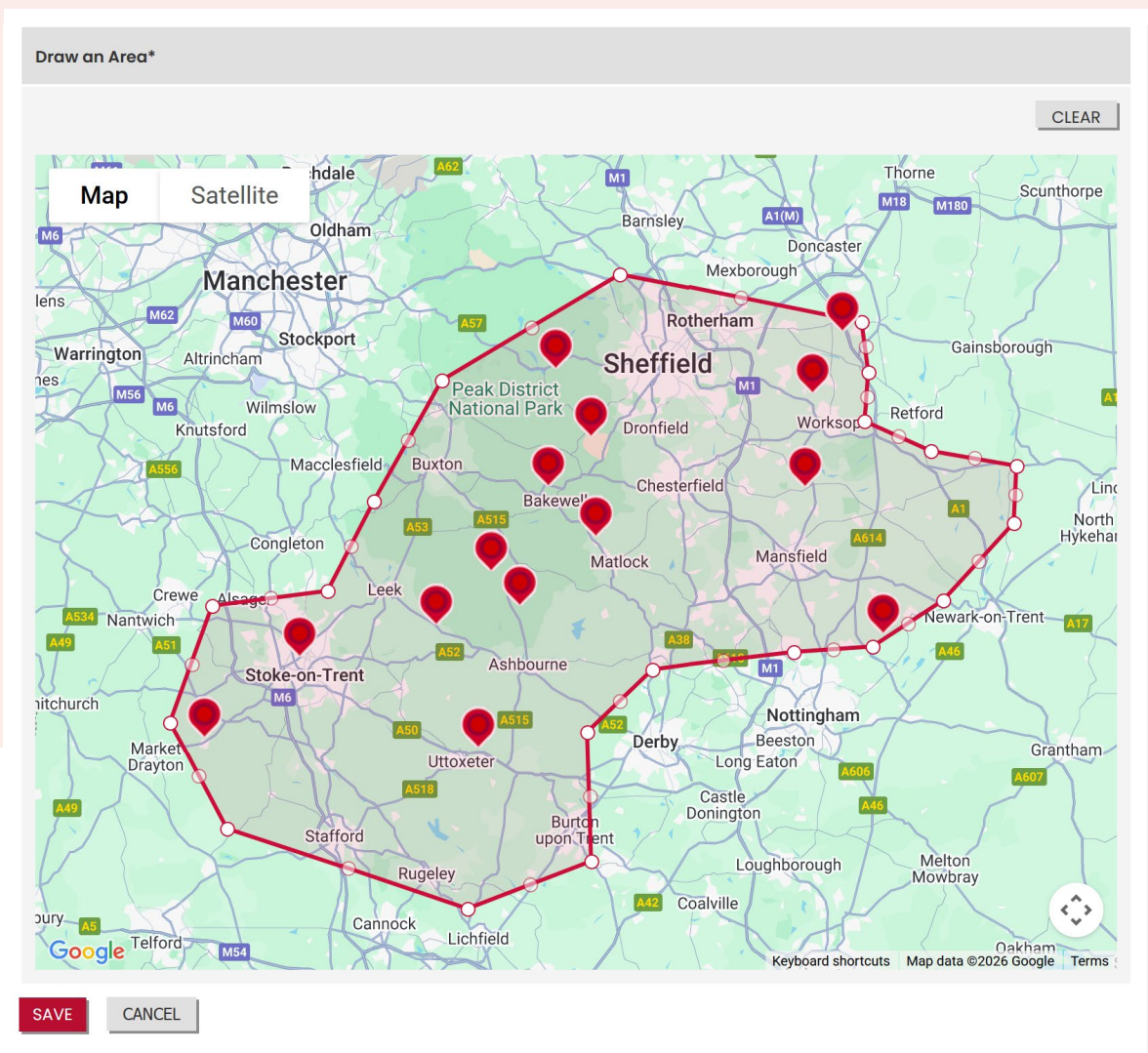
Sentiment *
Positive

SAVE **CANCEL**

Land Parcels

Effective stakeholder engagement often depends on location. Whether it's sending invitations in relation to a local event, sharing updates about a community project, notifying residents about service disruptions, or communicating changes to shared services, geography plays a crucial role in ensuring the right people receive the right information.

The **Land Parcels Module** provides a powerful way to target stakeholders based on their address and geographical position. Once an address is added, Tractivity automatically generates latitude and longitude coordinates, enabling precise targeting. This can be achieved through several integrated services, including the Royal Mail Address Finder and Google Places, ensuring accuracy and ease of use.



Land Parcels continued...

Fully integrated with Google Maps, the Land Parcels Module allows stakeholders to be segmented into relevant groups for communication and feedback capture on a geographical basis. Users can visualise stakeholders across a map, identify clusters, and manage engagement by location.

Tractivity's intelligent mapping functions go further by enabling users to draw custom boundary areas directly on the map. This means stakeholders can be grouped together by land parcel, targeted by a specific street, or selected within a user-defined radius of a project site. These flexible tools make it simple to tailor communications to those most affected by or interested in a particular initiative.

By combining accurate address data with advanced mapping and segmentation, the Land Parcels Module ensures that organisations can deliver highly targeted, location-specific communications, strengthen community engagement, and capture geographically relevant feedback to inform decision-making.

Email Tool

The **Email Module** provides a seamless way to manage all stakeholder communications directly within Tractivity. Every email sent through the system is automatically saved against the relevant stakeholder's record, ensuring that a complete history of engagement is captured without any additional effort. This creates a transparent and auditable trail of communication that can be accessed by the entire team.

Enquiries: Email Contact

Enquiry:

- View Enquiry

Search:

- Enquiries

- Organisations & Contacts

From:

PR Team (Enquiries@Yourdomain.com) ✓ SPF

Reply To:

PR Team (Enquiries@Yourdomain.com)

Recipients

ADD RECIPIENT

ENTER EMAIL ADDRESS

To:

Ben Price (ben-price@tamworth.gov.uk) ✕

Cc:

Jessy.Mountford@tamworth.gov.uk ✕

Bcc:

Bcc Me:
(Project Email Address)

☒

Content

Priority *

High ▼

Subject*

RE: Concern around new timetable changes.

Body*

B I U ☰ ≡ ≡ ≡ ⋮ ▾ ⋮ ▾ ↻ ⇄ ◀ ▶

Arial ▼ 12pt ▼ A 🖌️ ▴ ▾ 🔍 ×

Hello Ben.
Thank you for getting in touch with us with regards to the new timetable changes that are currently being discussed.
We would like the respond to your immediate query around
Kind regards,
Simon Davies
Public Relations Officer

Attachments

ATTACH FILE FROM TRACTIVITY

Email Tool continued...

Email sender addresses are easily configured through the email settings section, giving users the flexibility to send messages from their own individual email accounts or from shared group or project addresses. To guarantee reliable delivery, Tractivity employs SPF records and DKIM authentication, meaning emails sent via the system's secure server are consistently delivered and rarely flagged as spam.

For users who prefer working within Microsoft Outlook, emails can be created in Tractivity and transferred directly into Outlook, maintaining flexibility while still ensuring that all correspondence is logged within the stakeholder record.

Inbound emails are equally well-managed. When dealing with recurring themes or frequently asked questions, tailored email templates can be created and shared across the team. This ensures that responses remain clear, consistent, and professional, while significantly reducing the time required to handle high-volume enquiries. Templates also help external affairs and public engagement teams deliver a unified message across multiple stakeholders.

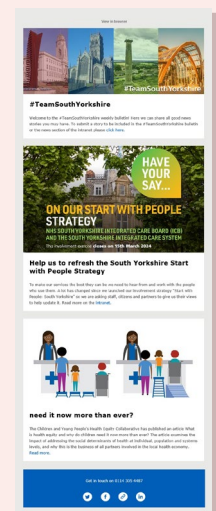
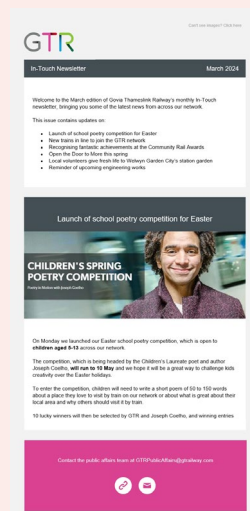
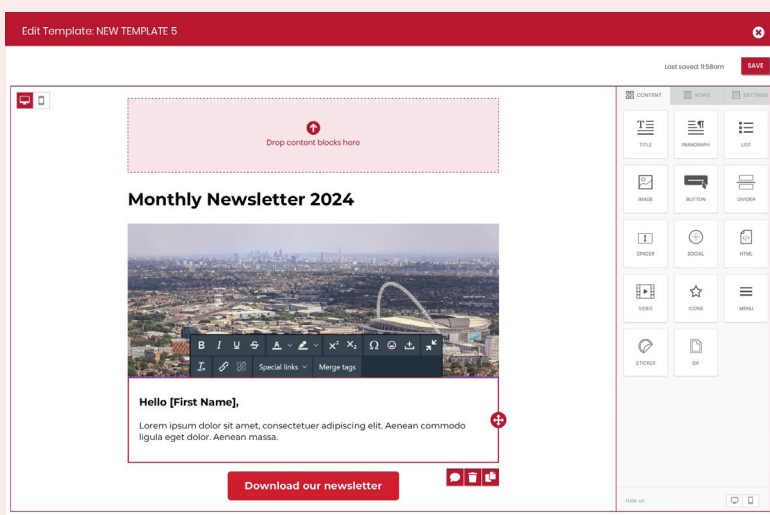
By centralising email communication within Tractivity, organisations eliminate the risk of fragmented records or missed interactions. Every inbound and outbound message is tracked, every engagement is captured, and every team member has visibility of the communication trail. This not only speeds up workflows but also strengthens accountability and ensures stakeholders receive timely, consistent, and well managed responses.

Mailshots & Distribution Lists

Keeping stakeholders informed about the latest news, project updates, or community developments is essential – but many organisations struggle when using third party email tools that sit outside their stakeholder management system. These external platforms often create unnecessary complexity: GDPR compliance becomes harder to manage, integrations are fragile and prone to failure, extra subscriptions add to costs, and teams lose visibility of which communications each stakeholder has received.

This is where Tractivity sets itself apart. **Unlike other platforms, Tractivity's Mailshot Module is fully integrated into the system**, combining stakeholder data and communications in one secure environment. It delivers everything you would expect from a professional mailshot tool – customised template creation, rich content design, personalisation, detailed reporting, and GDPR compliance, but with the added advantage of seamless integration with the data already stored in Tractivity.

Creating and sending newsletters is simple: select your distribution list, add content, upload graphics, and the newsletter is ready to go. There are no extra charges for this feature, meaning organisations can eliminate costly third party newsletter subscriptions. With Tractivity, you benefit from unlimited templates, unlimited newsletters, and unlimited stakeholder reach.



Mailshots & Distribution Lists continued...

To ensure accuracy and compliance, the system automatically validates every stakeholder email address before use and checks that each stakeholder has opted in to receive communications. Templates can be designed with both desktop and mobile views in mind, allowing lighter, mobile-friendly versions to be delivered when the system detects a stakeholder is reading on a smart device.

By embedding newsletters directly within the stakeholder management platform, Tractivity ensures that every communication is tracked, every engagement is visible to the team, and every stakeholder receives a consistent, professional message. Competitors may offer email tools, but only Tractivity combines them with full stakeholder data, compliance, and unlimited usage, making it the smarter, more cost effective choice.

Event Management

From online webinars to face-to-face gatherings, the **Events Module** in Tractivity empowers users to seamlessly manage the entire event lifecycle with minimal manual effort. Every stage from invitations and registrations to attendee tracking and reporting is streamlined within a single, centralised system.

Contacts stored in the Organisations & Contacts module can be invited to closed events through personalised, branded email invitations, ensuring a professional and consistent stakeholder experience. For open events, organisers can publish details online, enabling stakeholders to self register and book their place with ease. Venue capacities, accessibility requirements, and special requests can all be recorded against each event, ensuring that logistical details are captured and managed effectively.

The module automatically tracks the status of invitations – whether ‘awaiting confirmation’, ‘confirmed’, or ‘declined’ and updates in real time as invitees respond. Attendees can conveniently save event details directly into their **Microsoft Outlook Calendar**, reducing the risk of missed appointments. Email reminders can be sent to non responders, while confirmed participants can receive tailored communications such as guest speaker information. Additionally, organisers can generate branded name badges, sign-in sheets, delegate lists, and documentation for special requirements, all at the click of a button.

For virtual events, Tractivity integrates seamlessly with **Microsoft Teams**, while also supporting other web conferencing platforms. Joining details are automatically displayed upon confirmation, ensuring participants have everything they need to attend.

By leveraging Tractivity’s event management capabilities, organisations eliminate the need for tedious manual workflows such as emailing stakeholders individually or tracking responses in isolated Excel spreadsheets. Instead, all event intelligence is consolidated in one central hub, accessible to colleagues across the organisation. This not only saves time and reduces administrative burden but also enhances collaboration, transparency, and the overall stakeholder experience.

Interactive Dashboarding

Tractivity is supported by a powerful interactive dashboard, conveniently displayed on the Home Screen. These dashboards act as a central hub, summarising the most important information in real time and providing users with a clear, visual snapshot of engagement activity across the organisation or within a specific project.

- **Executive-level overview**

Dashboards deliver an immediate, high-level view of all stakeholder engagement. Whether you're monitoring organisation-wide initiatives or drilling down into a single project, the Home Screen presents the data you need at a glance.

- **Key insights at your fingertips**

From recent activities and top issue trends to survey response volumes and sentiment analysis, dashboards transform complex data into easy-to-read visuals. Upcoming events, invitation acceptance and decline counts, and even individual daily activities are all displayed in one place, ensuring nothing is overlooked.

- **Action-oriented design**

Each dashboard includes deep links, allowing users to move from summary data to detailed records with a single click. This reduces time spent navigating the system and ensures that intelligence is not only visible but actionable.

- **Event & engagement tracking**

Upcoming events are highlighted alongside attendee response rates, giving organisers instant visibility of participation levels. This helps teams proactively manage logistics, communications, and stakeholder expectations.

- **Collaboration & transparency**

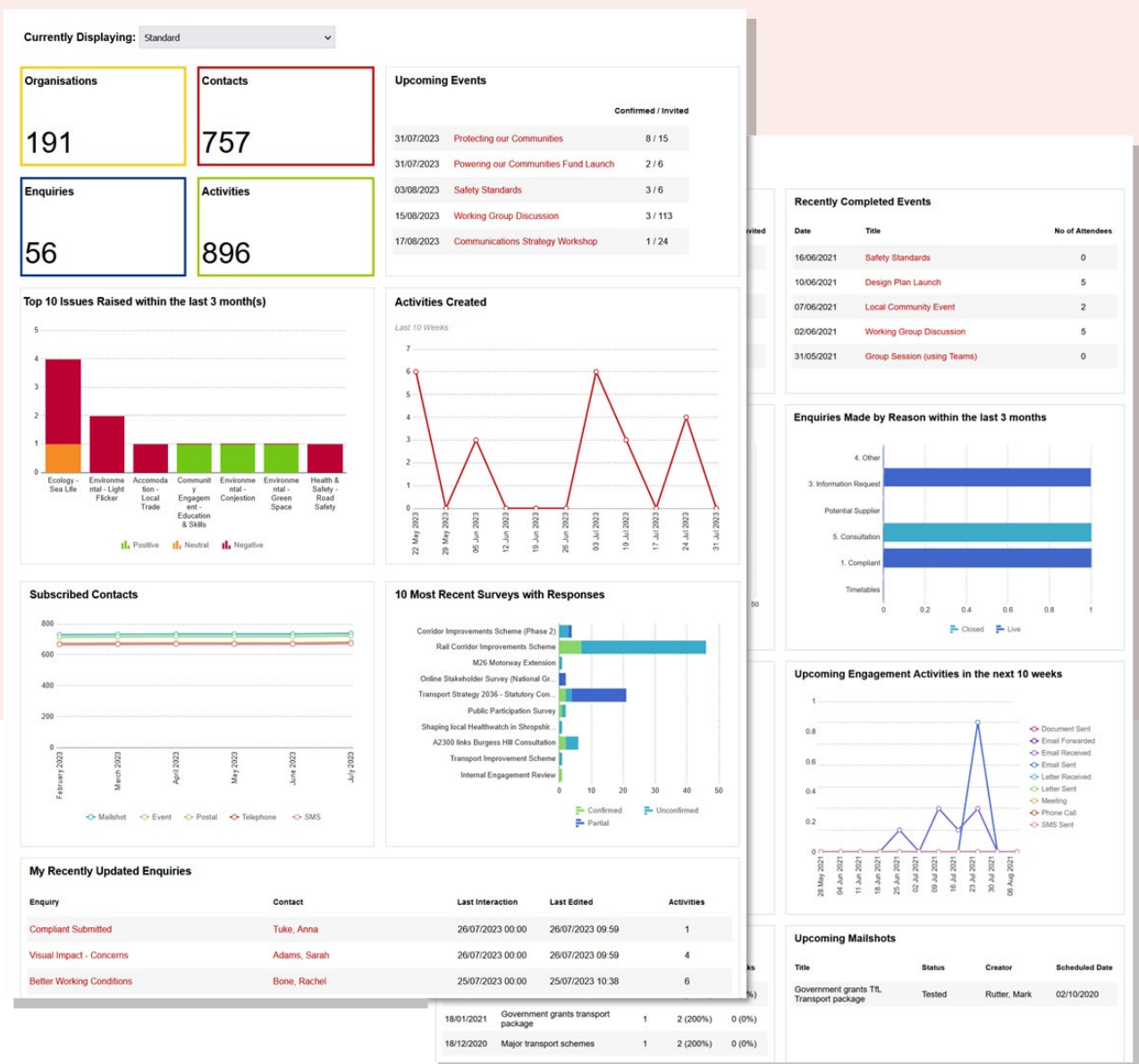
By consolidating engagement intelligence into one central view, dashboards eliminate the need for manual reporting or siloed spreadsheets. Information is easily shareable across teams, fostering transparency and collaboration.

- **Ease of use & productivity**

The Home Screen becomes a personalised workspace where users can quickly see what requires attention today—whether that's following up on survey feedback, preparing for an event, or responding to stakeholder queries.

Interactive Dashboarding continued...

In essence, Tractivity's interactive dashboards transform raw data into meaningful intelligence. They provide clarity, save time, and empower users to make informed decisions, ensuring that engagement activities are not only tracked but strategically managed.

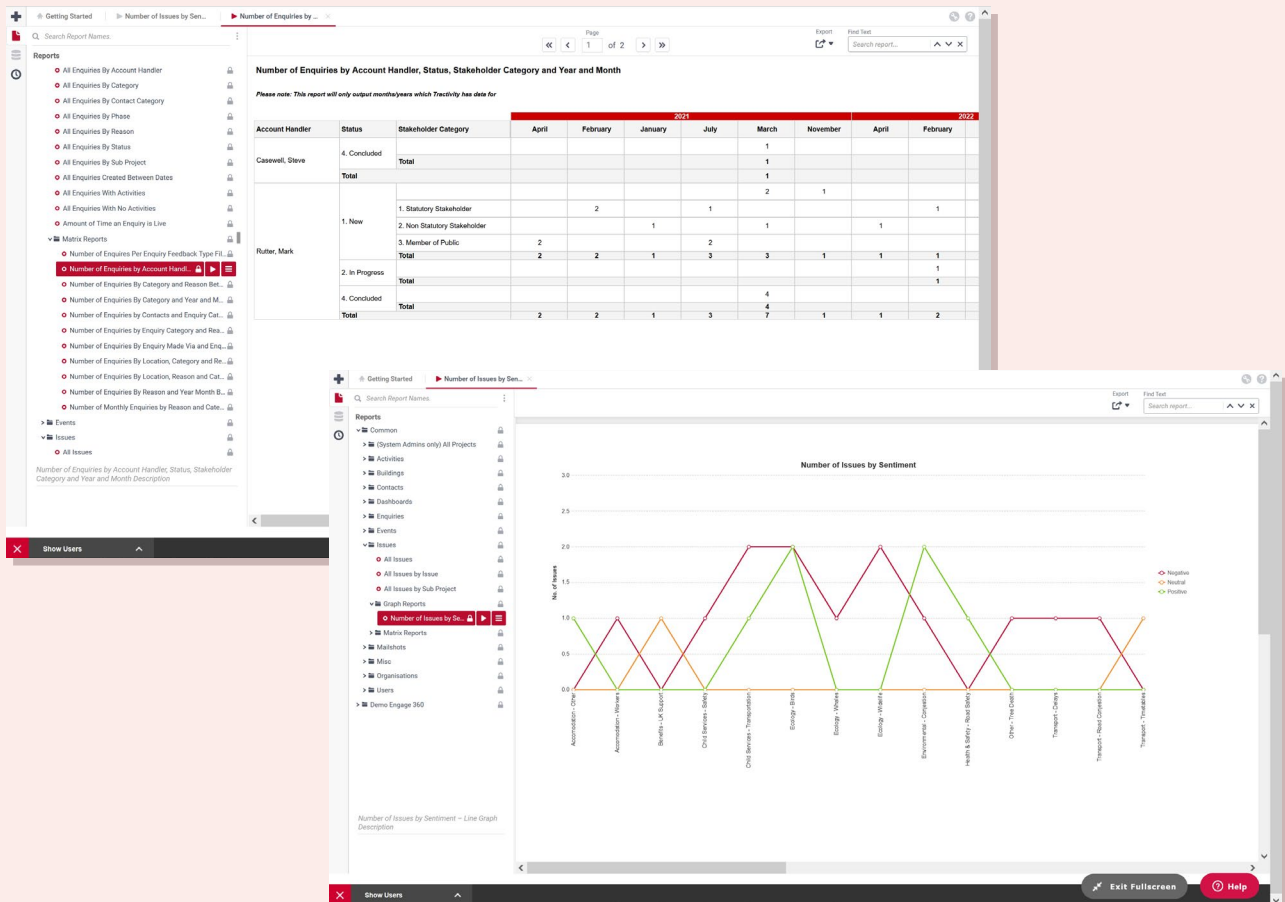


Reporting

Quickly gain meaningful insights into stakeholder feedback with the Reports module, designed to help you identify common themes, areas of consensus, and points of dissent with ease. Instead of spending hours manually summarising data, your team can act confidently on the intelligence provided.

With over 170 pre-built reports, all exportable in widely used formats such as PDF, Excel, and CSV, information is always accessible to anyone with the appropriate permissions. This ensures transparency, consistency, and efficiency across your organisation.

Tractivity's powerful reporting capabilities combine **qualitative, quantitative, and sentiment analysis** to transform raw data into actionable knowledge. This allows your team to focus on building stronger stakeholder relationships rather than being bogged down in data processing.



Reporting continued...

Key features include:

- **Drill-down functionality:** Explore individual comments in detail to uncover deeper insights.
- **Geospatial analysis:** Plot issues by location to identify regional trends and emerging issues.
- **Flexible visualisation:** Display results in tables, matrices, or graphs for clear and tailored reporting.
- **Advanced search and filtering:** Apply multiple filters across modules to generate highly relevant reports.
- **Trend monitoring:** Track statistics around emerging issues, feedback patterns, and stakeholder sentiment over time.

Automation further enhances efficiency: reports can be scheduled to be sent automatically to selected recipients at user-defined intervals. For organisations looking to enhance their reporting capabilities, Tractivity supports seamless use of **Microsoft Power BI** through scheduled data exports. Reports can be generated in standard formats such as CSV and automatically delivered to a designated location, enabling Power BI to ingest and visualise the data with ease.

Further enhancements to our Power BI integration, allowing users to create, customise, and save reports directly within the Tractivity workspace are planned for release in 2026.

Artificial Intelligence in Tractivity

Artificial Intelligence is transforming the way organisations manage stakeholder engagement, and Tractivity is at the forefront of this evolution. Our AI features are designed not to replace human expertise, but to empower teams by streamlining repetitive tasks and surfacing insights that would otherwise take hours to uncover.

From automatically identifying stakeholders to summarising past engagement activity, Tractivity's AI ensures that your team can quickly understand who you are engaging with, what has been discussed, and how stakeholders feel about key topics and issues. Sentiment analysis highlights areas of support or concern, enabling proactive communication strategies and helping you stay ahead of emerging trends.

Summarise & Export Activities

EXPORT SELECTED ACTIVITIES

AI Summary *

The meeting addressed multiple topics, including dissatisfaction with the visual design changes of a planned wind farm project, expectations for cost reductions due to available funding, and concerns about project completion by May 31, 2028. Residents voiced their unhappiness about not being consulted on the wind farm, emphasizing the need for timely communication. Sarah agreed to follow up on issues related to parking and expressed concerns about the development's impact on traffic flow and wildlife in the greenbelt area. Meeting minutes will be attached for further

* AI summary is based on the 25 most recent activities.

	Activity
✓	28 / 10 / 2025 - Meeting held with Sarah and team The meeting brought together residents and project representatives to discuss several emerging concerns. Attendees expressed frustration with recent visual design changes to the proposed wind farm and highlighted expectations for cost reductions now that additional funding is available. A major point of tension was the lack of early consultation with the community, prompting calls for clearer and more timely communication. Questions were also raised about whether the project could realistically be completed by 31 May 2028. Sarah committed to investigating ongoing parking issues and noted worries about traffic flow and potential effects on wildlife in the surrounding greenbelt.
✓	03 / 07 / 2025 - General Meeting A general meeting on the project covered community concerns about the wind farm's design, funding expectations, and the ambitious 31 May 2028 completion date. Participants stressed the importance of clearer communication, while also

CLOSE

Artificial Intelligence in Tractivity continued...

Importantly, we believe that human review remains essential. AI within Tractivity is built to assist, not to take over responsibility. Every feature is fully configurable, switched off by default, and activated only with your consent. This ensures that your organisation maintains full control over how AI is applied, while benefiting from its ability to reduce workload and enhance efficiency.

Looking ahead, Tractivity's development roadmap is packed with innovation. We are working closely with clients to expand AI capabilities that will further reduce repetitive actions, automate workflows, and deliver even deeper insights. Planned releases in 2026 and 2027 will introduce advanced features such as predictive analytics, smarter stakeholder categorisation, and enhanced reporting.

Best of all, every AI feature and upgrade is included as part of your subscription. Unlike other providers who charge extra for advanced tools, Tractivity ensures that cutting-edge technology is available to all clients without hidden costs. By combining AI with human oversight, we deliver a platform that is both powerful and responsible, helping your team focus on meaningful engagement while the system takes care of the heavy lifting.

Integrations

One of the most powerful aspects of the Tractivity platform is the breadth of integrations available to every client as part of their subscription. Unlike other providers who charge extra for essential connections, **Tractivity includes these integrations as standard, ensuring that your team can work seamlessly without hidden costs or add-ons.**

Among the most widely used integrations is the connection to **global address databases**. This feature automatically links accurate address information to known stakeholders, whether they are based in the UK or anywhere else in the world. By removing the need for manual data entry, teams save valuable time and reduce errors, while maintaining a single, reliable source of truth for stakeholder records.

Google Maps integration further enhances stakeholder management by allowing you to visualise relationships geographically. Issues can be tracked by location, communications can be targeted to specific areas, and alerts can be issued around events or potential disruptions. This spatial awareness provides a deeper understanding of stakeholder engagement and helps teams act quickly and effectively.

For organisations looking to streamline digital engagement, Tractivity's documented **API** offers a simple way to connect your website directly to the platform. Registrations, complaints, and topical enquiries can be captured automatically, ensuring that every interaction is logged, tracked, and available for reporting and analysis. This creates a complete workflow that strengthens accountability and transparency.

Political and governmental engagement is also supported through pre built integrations with **trusted political database providers**. These ensure that your team always has access to the most up to date information when communicating with key stakeholders.

Finally, Tractivity integrates effortlessly with **Microsoft** software. Reports can be exported in familiar formats, meetings scheduled through **MS Teams**, and emails or calendar items transferred directly from **Outlook** using the dedicated plug-in. Combined with Tractivity's built in communication tools for events, surveys, and branded newsletters, clients benefit from a fully streamlined system without the need for additional subscriptions.

Engage360

Engage 360 is a flexible, user-friendly platform that enables the public and your wider community to take part in surveys, open consultations, events, and a range of engagement activities. It integrates seamlessly with key Tractivity modules such as Surveys and Events, creating a powerful and cohesive engagement ecosystem.

The platform allows you to fully brand your public facing site, where all live surveys, consultations, and upcoming events can be promoted. Stakeholders can easily submit ideas, share feedback, and raise issues directly with you and your team.

The screenshot displays the UK Energy Co. Stakeholder Engagement Portal. The header includes the company logo, a 'Sign In' link, and a site search bar. A navigation bar contains links for 'Return to Main Site', 'Home', 'Search', 'Outcomes', and 'About'. A large blue banner welcomes users to the portal, stating it will show upcoming events and engagement opportunities. Below this, the 'Events' section is active, showing a table of upcoming events (15), past events (290), and event outcomes (94). The table lists four upcoming events, all online, with a 'Spaces Available' status. A link to 'View All Upcoming Events' is provided. The 'Surveys' section is also visible, showing a table with one open survey (1), 55 closed surveys, and 0 survey outcomes. The open survey is the 'DSO Newsletter Stakeholder Survey', closing on 31 March 2028.

Event Title	Date	Location	Status
LCT, Energy Efficiency and Fuel Poverty Think Tank	Mon, 19 January 2026 13:00	Online	✓ Spaces Available
Service Based PSR Think Tank	Thu, 22 January 2026 13:00	Online	✓ Spaces Available
Connections Surgery	Wed, 28 January 2026 09:00	Online	✓ Spaces Available
Future of Installers Think Tank	Wed, 28 January 2026 09:30	Online	✓ Spaces Available

[View All Upcoming Events >](#)

Survey Title	Closing Date
DSO Newsletter Stakeholder Survey	Fri, 31 March 2028 23:59

Engage360 continued...

Built to meet the latest WCAG accessibility standards, Engage 360 delivers an engaging and inclusive experience for every user. Intuitive navigation, robust search tools, and rich media content – including maps, videos, and imagery – enhance the introductory pages of each survey, ensuring a smooth and informative journey from start to finish.

All stakeholder responses and details captured through Engage 360 are automatically transferred into Tractivity's Survey, Event, or Enquiry modules for further review and analysis. Providing clear feedback on engagement outcomes is widely recognised as best practice and reinforces transparency in decision-making.

With the combined power of Tractivity and Engage 360, you can easily notify all relevant stakeholders of final decisions, whether via email, branded mailshots, letters, or directly through the Engage 360 portal.

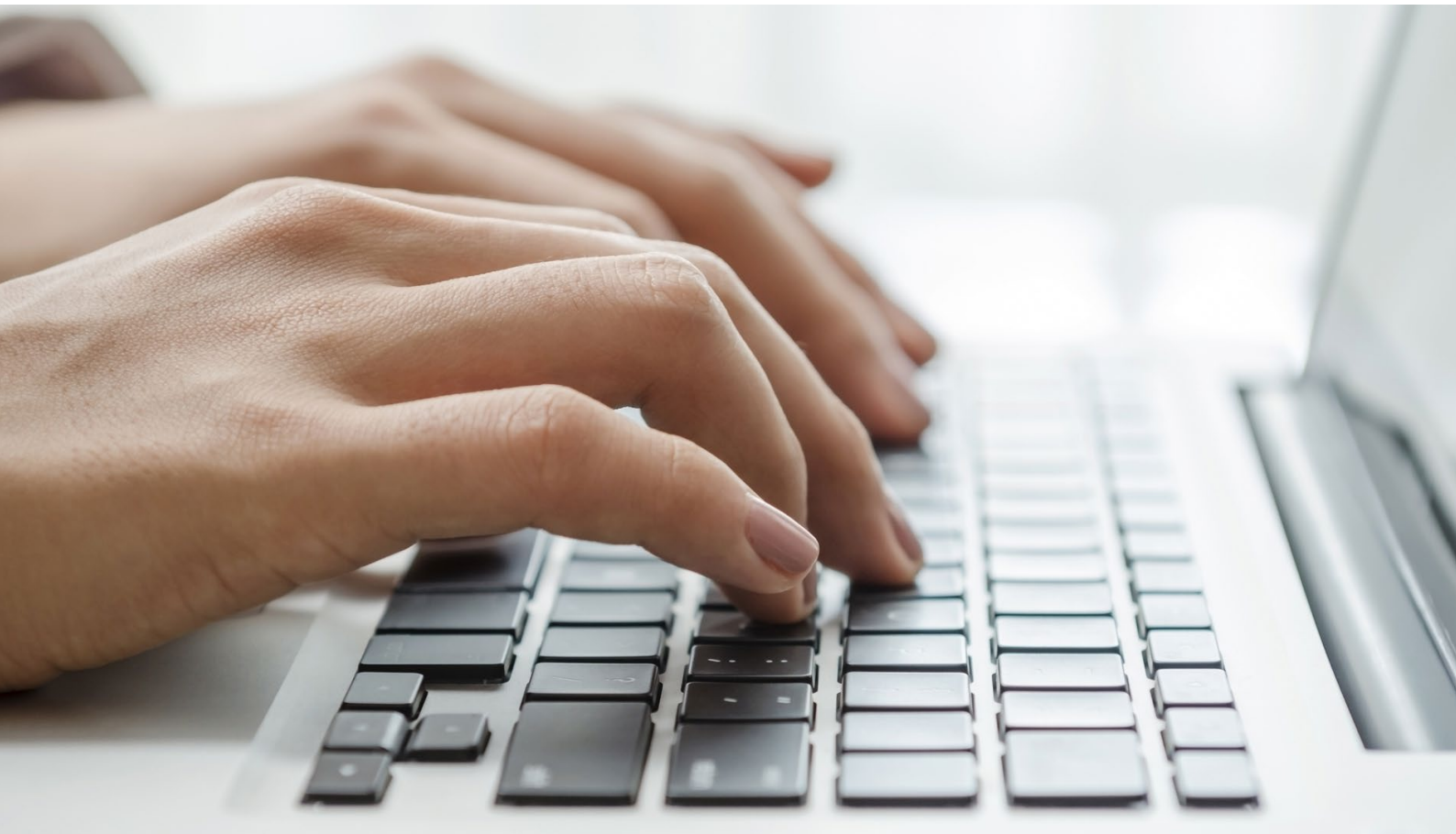
Deliver a 360° engagement process and set your project or consultation up for success.

Onboarding

A dedicated Tractivity Implementation Manager will support you throughout the whole setup and configuration process, providing all the assistance required to make sure Tractivity is streamlined to your key objectives.

A series of planning calls will be scheduled with the nominated client contact(s) where the key uses, deadlines and client deliverables will be discussed to make sure onboarding is fast and simple as possible.

Once Tractivity has been configured, brand guidelines applied and stakeholder data imported, an agreed training package will be provided prior to the go-live of the platform.

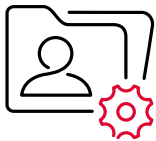




Implementation Plan

The complete Tractivity implementation usually takes between 2 and 4 weeks. Detailed implementation plans can be provided upon request, however, these are generally client specific.

The first step in the Onboarding process is to hold a planning call where the client's requirements and availability will be discussed. A full project plan will be produced immediately after and provided to the client for approval.



Account Management

From the go-live of your Tractivity platform, you will be provided with a dedicated account manager who will support you throughout your subscription.

We hold monthly webinar sessions for all users with Tractivity access, covering various topics, including further training and support, use of enhanced features and new software releases.

An online knowledge base with product guides, manuals and webinar tutorial videos is available within the Tractivity platform for easy access at any time.

We're constantly striving to improve our product for our clients based on feedback. Your Account Manager is on hand to discuss any feature requests that you may have so that we can add them to the Tractivity Development Roadmap where appropriate.

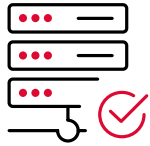


Support

Email and telephone support are available from our dedicated account managers, with all emails being recorded using our integrated support system. We are happy to accept support requests from any named system user or via a single point of contact.

We ask our clients to indicate the response time that is appropriate to their request – ranging from a minor tweak that can be made as part of the next software release to a 'showstopper', to which we will respond immediately. We have an established escalation procedure should any problems not be resolved within the normal support arrangements.

Technical



Server Maintenance

Server maintenance is scheduled to run between 11 pm and 1 am. This includes general server updates, Windows updates and other security patches.

Tractivity is offered as an off-the-shelf product, meaning that feature upgrades and bug fixes are easy to roll out to all clients.



Data Backup, Restore and Disaster Recovery

Tractivity data is backed up daily. Backups are encrypted and stored digitally in an alternative secure location for 30 days.

Backups are tested weekly by conducting a file integrity check and manual restore. Weekly testing is signed for by a systems engineer and the Technical Director.

Virtual machines and environments are backed up daily and when changes are committed and can be restored within 60 minutes. Backups are stored in an alternative location.



Outage and Maintenance Management

Tractivity virtual machines, environments and databases are monitored 24/7 with interruption alerting routed through to an on-call systems engineer.

Maintenance is conducted monthly between 00:01 and 04:00 GMT by systems engineers. This is a documented process with a rollback plan, testing is first carried out in a staged environment before deployment into the live environment.

Critical updates are tested and applied within 24 hours of release in an out of hours maintenance window (GMT) following the aforementioned procedure.



Technical Specifications and Requirements

Tractivity is an entirely cloud-based product. It can be accessed from any computer or device with a modern web browser.

Tractivity does not require the installation of any software onto local machines.



Security Details

Tractivity is hosted in a highly secure environment that meets the latest PCI DSS, HIPAA and ISO27001 standards. Tractivity is proactively monitored 24/7/365 by an experienced security operations team (SOC), which provides systems engineers with real-time visibility and actionable threats intelligence.

- Antivirus and malware protection
- Intrusion Detection
- Web Application Firewall (WAF)
- Regular Vulnerability Scanning
- OS file integrity monitoring
- OS level patch monitoring
- Managed portal & dashboard interface (Security and ticketing)
- ISO27001 Certified
- Cyber Essentials PLUS Certified



Integrated Services

Tractivity includes a fully functioning API which can be used by a client to build integrations such as Newsletter Sign Up Forms, Enquiry Forms or Event Search and Registration functionality.

The Engage 360 Survey Portal is sold as an add-on to Tractivity, costs for this are included within the Tractivity Licence Agreement.



Business Continuity Statement/Plan

Tractivity has a fully documented Business Continuity and Disaster Recovery plan which is tested regularly. A copy of the plan is available upon request.



Development Life Cycle

Tractivity systems are all upgraded regularly, with large feature releases happening every 3 to 4 months, and smaller bug fix updates happening between these. Releases are always completed outside of working hours, usually starting after 7 pm and clients are always informed when their system will be unavailable.

Key Facts Summary

Pricing model

Tractivity Licence Agreements are provisioned by a simple annual subscription, with payment taken upfront. All licence agreements detail what is included and what is an optional extra.

Browser support

Tractivity supports all standards-compliant web browsers including Chrome, Firefox, Safari and Microsoft Edge. No additional software or plugins are required by public or admin users.

Cookies

The Tractivity platform does not set any intrusive or non-essential cookies. The Cookies page found within the publicly accessed application clearly explains cookie use to respondents and can be tailored by the client accordingly.

Hosting

Included:

- Hosting fully managed by Tractivity, with a 99.95% up-time guarantee and 24 hours, 7 days a week, 365 days per year monitoring.
- All backups and maintenance are taken care of by us.
- All data is stored in secure datacentres.

Optional extras

- Additional user access packages.
- Additional online training.
- Access to the Engage 360 Online Portal.

Theming and branding

- Ability to brand communication activities such as newsletters, event invitations and surveys through the Tractivity platform.
- Site-wide theming of the Engage 360 platform to meet your organisation's brand guidelines.
- Ability to brand individual consultations and involvement exercises on a case by case basis, to support project or partnership initiatives.

Procurement

- Invoice billing.
- Range of payment methods accepted, including BACS and IBAN.

Deployment time

The platform typically takes between 10 and 25 working days to deploy from the agreement of the contract.

Further Information

We know Tractivity can transform how you manage stakeholder relationships and engagement as we have a proven track record and an ever-growing list of clients.

Should you require any further information or would like to discuss your requirements then please do get in touch either by email at enquiries@tractivity.co.uk or contact us through our website: www.tractivity.co.uk.

