



Tractivity Case Study:

Strategies for change management and successful system deployment

Tractivity[®] nationalgrid

In summary...

National Grid, a large energy company operating in the UK and the US with around 22,000 employees globally, manages electricity and gas networks on both sides of the Atlantic.

With a vast array of stakeholders, including domestic and business customers, National Grid plays a pivotal role in delivering essential energy to countless homes and businesses, powering communities and fostering sustainable energy practices.

Gary Stokes, the Global Head of Stakeholder Engagement, has provided insights into the organisation's stakeholder engagement operations. Focusing on internal enablers to enhance external engagement, Gary shares his learnings on National Grid's journey in managing change and deploying Tractivity's system across the organisation.

The challenges

Managing change and deploying new systems in a large organisation like National Grid pose specific challenges. Implementing new ways of working and making changes is time-consuming, and treating the transformation as a change programme brings its own intricacies, from system adoption to behavioural shifts and process alignment.

In Gary's words:

"When we consider our goal of enhancing the effectiveness of our external engagement, we view it as a change programme. Like any change initiative, it inherently involves intricate complexities, and it takes time. Systems, of course, play a pivotal role."

National Grid's initial challenge lay in the **fragmentation of systems used across the organisation.**

The requirements and needs

According to Gary, *"We were managing stakeholder information through a multitude of spreadsheets, emails, scribbled notes, and SharePoint – so a whole range of different data sources, which we recognised needed to be pulled together into a unified system across the business."*

National Grid determined that the primary requirement was a comprehensive solution that could cover all aspects of stakeholder relationship management (SRM).

Recognising that the success of any system hinges on user adoption, they also prioritised user-friendliness.

User experience was a top priority for Gary and his team, ensuring that stakeholders at all levels could easily utilise the system – *"If the system isn't intuitive, people won't use it. We needed a system that could cover all the core SRM functionalities while being user-friendly."*

Flexibility in system management was also a crucial requirement.

The selected system had to allow for customisation without unnecessary complexity. **"The ability to make changes within the system without complex processes was vital."** Some systems require lengthy IT involvement for simple modifications. *We wanted the flexibility to manage it ourselves".*



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The deployment process

Instead of taking the more conventional approach to system deployment, where a large number of users are trained simultaneously, National Grid opted for a different strategy: they started with a small group of early adopters or pioneers, about 25 people, and worked with them really closely.

This was based on previous experiences, as mentioned by Gary: *"We could have launched the system to 200 users on day one, but in six months, that could have dwindled to 100, and in nine months we might be down to 50. What you tend to find **with a 'big bang' approach is that it often falters in providing the post-deployment support that people need.**"*

The National Grid approach allowed for a structured introduction of the system, minimising the risk of overwhelming users with sudden changes, whilst making sure the deployment team were able to answer questions and offer the right levels of user support.

Gary describes this process: *"As soon as users start on a new system, they've got questions, **but our model has been working really well. It shows people you're listening to them.** If they've got a question, they can message me or one of our System Admins, we can share screens for ten minutes and fix their problems right away. Or if we don't know the answers, we can talk to Tractivity and then go back and talk to the users."*

It also enabled National Grid to collect valuable feedback from users in real-world scenarios while showing them that their opinions and views matter – *"Feedback from users was crucial. We learned from each phase and made improvements. It's an iterative process, and we're committed to continuous improvement based on user experiences."*

They began this process with 25 users, and then applied the same strategy with another 25, and so on. The plan is to carry on until they have properly introduced Tractivity to all users, which will be several hundred in total.

Taking it slowly is key to increasing the chances of succeeding and having users stick with the system. *"A deployment programme spanning seven, eight, or nine months is a significant investment. But the idea is that a year later you'll have retained 90% of users. So far, the approach resonates with users, and they appreciate our ongoing availability for support."*

Another valuable lesson learned from previous experiences by National Grid is that **deploying the system to entire teams rather than individual users was the most effective way to move forward.**

In Gary's words *"Having only one or two people in a team utilising the system creates difficulties for everyone. One of the main reasons for deploying a system like Tractivity is information sharing, so if only a few adopt it while others persist with alternative methods, it doesn't work well"*

Managing change

In any transformative initiative, the challenge often lies in managing resistance to change.

Gary sheds light on the varying responses encountered during the implementation process. Feedback has been positive, but as expected, stakeholders approach the transition with different attitudes.

“Those people who are really keen to get started are great. They go through the training process and start using the system, and they pick it up straight away. Then we have the ones who, for a variety of reasons, think it’s going to be more work than it is, and are hesitant to embrace change.”

For the latter group, it’s really important to work on one-on-one engagement to understand their concerns and apprehensions and highlight the benefits to them, aligning with the principles of a change programme. *“We work with them to understand why they’re reluctant to use the system. We invest substantial one-to-one time to identify issues, address daily tasks and find optimal solutions.”*

The process also involves allowing for flexibility and holding off deployment if needed: *“The worst thing you can do is try and impose something which someone doesn’t want to do or doesn’t see the benefit of.”*

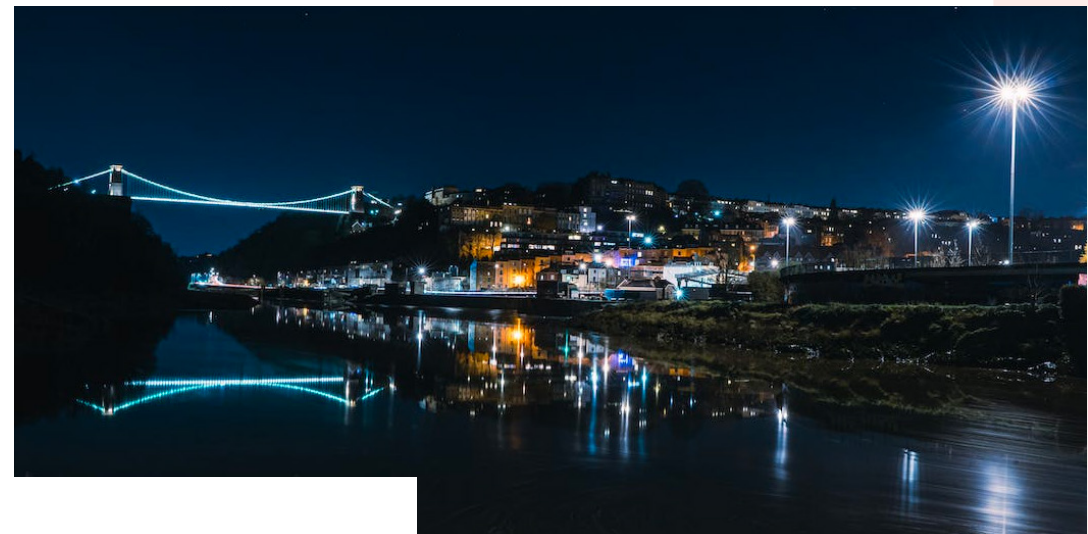
“We have deferred deployment when somebody wasn’t ready to adopt the system just yet. We didn’t force them, we let others get onboard first and then, hopefully, they see the benefits and want to get onboard as well.”

Outcomes and results

Managing change is not just about implementing new systems; it’s a strategic and empathetic process that involves understanding, support, and a mindful pace of transformation.

National Grid is achieving a smooth transition; feedback from users has been positive and the phased deployment approach is proving successful, allowing the organisation to adapt and refine the Tractivity system based on user feedback.

They’re on track to reach their deployment goals, and the continuous improvement mindset ensures that the system evolves to meet changing needs over time. As of the current status, National Grid has successfully deployed to more than 80 users, with plans to reach a total of around 250 users by the end of the first phase of deployment.





Lessons learned

National Grid's experience offers valuable lessons for organisations considering looking for and deploying a new system:

- Understand your needs: every business is different. Be clear with what your organisation needs, and then match your requirements with the system that you need.
- Start small, grow gradually: Initiate with a small, supportive user group before expanding to larger teams to ensure smoother adoption.
- Prioritise user experience: The success of a system depends on its usability. Prioritise systems that are intuitive and align with user needs.
- Flexibility in timeline: Be as flexible as possible with deployment timelines. The time required for data cleansing and user onboarding might be longer than initially planned.
- Effective communication: Maintain clear and consistent communication to manage expectations and ensure understanding across all levels of the organisation.

National Grid's journey with Tractivity exemplifies how a well-matched system, combined with strategic deployment, contributes to enhanced stakeholder engagement and organisational efficiency.

Testimonial

“What we found is that Tractivity can do all the core SRM functionality really well, but it also has features like mailshots, surveys, and land parcels. It’s not just a basic product. It provides advanced capabilities in a simple intuitive way, which is massively important for those using the system on a day-to-day basis.”

Gary Stokes, Global Head of Stakeholder Engagement - National Grid

Get in touch

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



[+44 \(0\)1629 815 928](tel:+441629815928)



enquiries@tractivity.co.uk



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