

# Stakeholder Mapping Module

Tractivity® Help Guides

# Stakeholder Mapping

**Tractivity's Stakeholder Mapping** module will provide you with a clear view of your stakeholders and a better understanding of the impact they have on your projects

With this module you can:

- Assess your stakeholders and assign scores against a series of attributes
- Monitor changes and track their scores using charts and tables
- Analyse evolution and refine your engagement strategy accordingly

# Create your Attributes

The first step in utilising Stakeholder Mapping is to set up the attributes you'll use.

These attributes can be made specific to your needs. To set this up, you'll require **System Admin** access.

1. Go to **System Admin**
2. From the left-hand menu under **Configuration** click **Stakeholder Mapping Attributes**

**Tractivity** 1 [System Admin](#) | [Help Center](#) | [Archive](#) | [My Settings](#) | [Log-out](#)  
 Logged-in as: Luke Gratton | Last log-in: 12:00 on 15/01/2024  
 You are currently viewing: Luke's Project

HOME CALENDAR BUILDINGS ORGANISATIONS & CONTACTS ENQUIRIES ISSUES STAKEHOLDER MAPPING STRATEGY PLANS SURVEYS  
 LAND PARCELS LIBRARY DISTRIBUTION LISTS EVENTS EMAIL MAILSHOTS REPORTS WORKFLOW

System Admin: View Client Q

**Add New:**  
 - Add User  
 - Add Project

**Client:**  
 - View Client  
 - Edit Client

**Communication:**  
 - Send Preferences Email

**Stakeholders:**  
 - Import Stakeholders  
 - Merge Stakeholders  
 - Share Stakeholders

**Configuration:**  
 - Field Configuration  
 - Global System Data  
 - Project System Data  
 - Email Configuration  
 - Subscription Preferences Configuration  
 - Event Configuration  
 - External Forms  
 - Stakeholder Mapping Attributes 2

Name	Client Name
Allow Project Tiering?	Yes
Address	Systems House Ashford Road Bakewell Derbyshire DE45 1GT
Multi-Factor Authentication ?	Optionally apply per user

Users (55)		Projects (43)				
Title	Last Access	Account Status	System Admin	Edit	Remove	
Adamson, Vicky	16/1/2024	Active	Yes	Edit	Remove	
Bloggs, Joe		Locked (Requires password change)	No	Edit	Remove	
Boothman, Nicki	24/11/2023	Active	No	Edit	Remove	
Brook, Dan	20/12/2023	Active	Yes	Edit	Remove	
Brown, Craig	12/1/2024	Active	Yes	Edit	Remove	
burns, joanne		Locked (Requires password change)	No	Edit	Remove	
Casewell, Steve	26/10/2023	Active	Yes	Edit	Remove	
Craig	01/4/2022	Active	No	Edit	Remove	
Edwards, Ebony	30/3/2023	Active	Yes	Edit	Remove	

# Stakeholder Mapping Attributes

Inside this screen you'll see attributes we have set up to help determine the type of information you may wish to record against stakeholders.

1. You'll be able to **Add Attributes**
2. You can add a unique attribute **title**, a brief **description** and select which **Projects** the attributes are visible in (if you have multiple in the system)

You can have as many attributes as you'd like.

## System Admin: Stakeholder Mapping Attributes

Add New:

- Add Attribute

1

Client:

- View Client

Configuration:

- Field Configuration
- Global System Data
- Project System Data
- Email Configuration
- Email Servers
- Subscription Preferences Configuration
- Event Configuration
- External Forms

Engagement

How committed the stakeholder is towards the project, topic, policy or department.

## System Admin: Add Stakeholder Mapping Attribute

Client:

- View Client

Configuration:

- Field Configuration
- Global System Data
- Project System Data
- Email Configuration
- Email Servers
- Subscription Preferences Configuration

2

Title \*

Description \*

Projects Visible Within

Select options

SAVE

CANCEL

# Edit Existing Attributes

You can create new attributes but also edit them later should you need to.

1. In the **Stakeholder Mapping Attributes** screen you have the option to **Edit** and **Archive** existing attributes.
2. You can then edit any prior title, description and project visibility you set up. Click **Save** when you're happy with the changes.

**Please note:** anything you Archive will appear in your Archive section of the system (the very top right)

**You can un-archive anytime**

## System Admin: Stakeholder Mapping Attributes

Add New:

- Add Attribute

Client:

Title

Description

Projects

Edit

Archive

Administration

Example for stakeholder mapping.

Luke's Project

Edit

Archive

## System Admin: Edit Stakeholder Mapping Attribute

Client:

- View Client

Configuration:

- Field Configuration

- Global System Data

- Project System Data

- Email Configuration

- Email Servers

- Subscription

Preferences

Configuration

Title \*

Administration

Description \*

Example for stakeholder mapping.

Projects Visible Within

1 selected

2

SAVE

CANCEL

# Making Attributes Visible

As a System Admin user you'll be familiar with Field Configuration

Field Configuration allows you to switch on/off categories, interests and demographics which are then tagged against stakeholders.

You can choose which attributes are **visible** and **mandatory** for each project you have.

1. Go to **System Admin**
2. Under **Configuration** on the left-hand menu click **Field Configuration**
3. Select the relevant **project**
4. Open up **Stakeholder Mapping**
5. If you wish for attributes to be **visible**, click the check box next to each attribute

If you do not have System Admin access, please contact your dedicated CSM.

Client Confidential

Tractivity®

1 System Admin | Help Center | Archive | My Settings | Log-out  
Logged-in as: Luke Gratton | Last log-in: 11:14 on 19/01/2024  
You are currently viewing: Customer Success Team Train

HOME | CALENDAR | BUILDINGS | ORGANISATIONS & CONTACTS | ENQUIRIES | ISSUES | STAKEHOLDER MAPPING | STRATEGY PLANS | SURVEYS  
LAND PARCELS | LIBRARY | DISTRIBUTION LISTS | EVENTS | EMAIL | MAILSHOTS | REPORTS | WORKFLOW

### System Admin: Field Configuration

Client: Projects Luke's Project 3

Communication: Please note that any changes made on this page are saved immediately. However logged in users will need to log out and then log back in for the changes to take full effect.

Stakeholders: Luke's Project

- Import Stakeholders
- Merge Stakeholders
- Share Stakeholders

Configuration:

- Field Configuration 2
- Global System Data
- Project System Data
- Email Configuration
- Email Servers
- Subscription Preferences Configuration
- Event Configuration
- External Forms
- Stakeholder Mapping Attributes
- SMS Configuration
- IP Configuration
- Manage API Credentials
- SSO - Identity Providers

Activity +

Building +

Contact +

Distribution List +

Enquiry +

Event +

Issues +

Organisation +

Stakeholder Mapping +

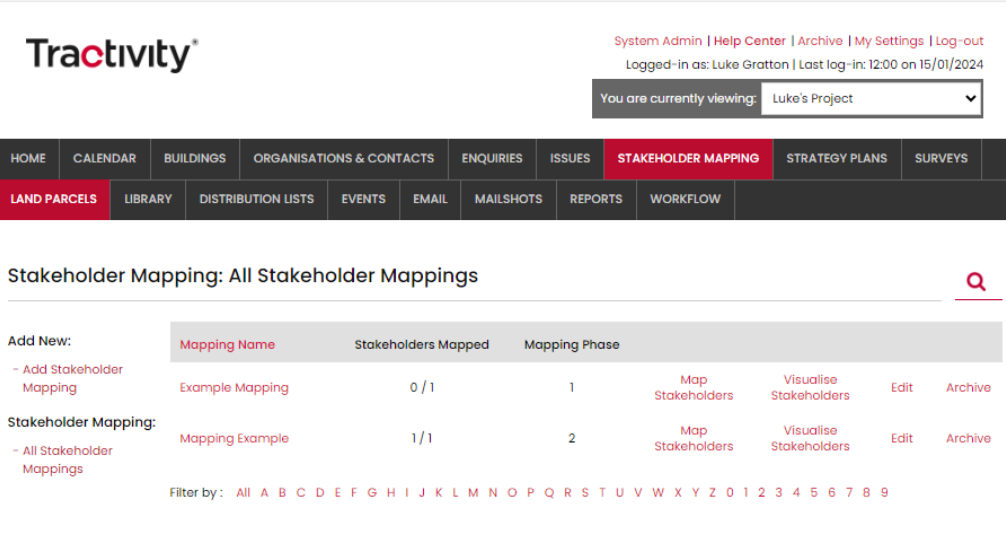
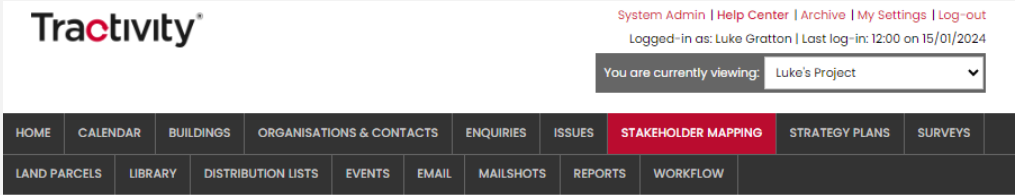
### Stakeholder Mapping

Field Name	Field Type	Visible	Mandatory
Description	text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mapping Comment	text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sub Project	select-single	<input type="checkbox"/>	<input type="checkbox"/>
Attributes 5			
Administration	select-multiple	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Engagement	select-multiple	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Engagement Work	select-multiple	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# Start Mapping (1/2)

Once you have set up your attributes, you can start mapping stakeholders.

You'll see any existing Mappings you have set up inside the module, and from the left-hand menu you'll be able to **Add Stakeholder Mapping**



## Start Mapping (2/2)

Select your **Mapping Name** – this may be related to a piece of work you’re completing.

A **Description** will help steer the stakeholders and the attributes you should be mapping.

Select your **Phase 1 Start Date**. This is the date you will start mapping.

(You will have the ability to create additional phases later, if you wish to see attribute changes over a period).

Select the **Attributes** you wish to map against in this specific mapping. You can include a **Target Average**, e.g. 5 out of 10.

**Owner Teams** allows you to select which Tractivity license holder(s) can edit/add information.

Stakeholder Mapping: Add Stakeholder Mapping Q

Stakeholder Mapping:  
- All Stakeholder Mappings

Mapping Name \*

Description

Phase 1 Start Date \*  
(dd/mm/yyyy)

17/01/2024

Attributes		Include in Mapping?	Target Average
Engagement ?		No <span>▼</span>	--select-- <span>▼</span>
Engagement Work ?		No <span>▼</span>	--select-- <span>▼</span>
ESG ?		No <span>▼</span>	--select-- <span>▼</span>
Expertise / Knowledge ?		No <span>▼</span>	--select-- <span>▼</span>
Sentiment ?		No <span>▼</span>	--select-- <span>▼</span>

Owner Teams \*

2 selected ⊗

SAVE

CANCEL

# Adding Stakeholders

Once you’ve created your mapping, you’ll be able to start adding stakeholders.

Within our Stakeholder Mapping module, you can map **both organisations and contacts** in the same mapping.

1. The option to **Add Organisations** and **Add Contacts to Map** is visible in the top left-hand menu.
2. Using Tractivity's Search functionality, you can find specific stakeholders based on the categories they have against them.

## Stakeholder Mapping: View Stakeholder Mapping

Add New:

- Add Organisations to Map
- Add Contacts to Map
- Add Stakeholder Mapping

Stakeholder Mapping:

- View Stakeholder Mapping
- Edit Stakeholder Mapping
- Archive Stakeholder Mapping
- All Stakeholder Mappings

Map Name	Top 100 Stakeholders Mapping	
Description	This mapping will analyse the engagement we are having with our Top 100 Stakeholders that we have identified.	
Owner Teams	Luke's Project : Luke's Project Luke's Project : Gratton, Luke	
Total Number of Stakeholders	0	
Current Mapping Phase	1	
Last Edited	Gratton, Luke - 17/01/2024	
Created	Gratton, Luke - 17/01/2024	
	Stakeholders Mapped	Stakeholders Not Mapped
Total	0	0
Phase 1 - 17/01/2024 <span>Edit Date</span>	0	0

### ATTRIBUTES & SCORES

EXPORT

Attribute	Average Score from:	Change from:	Target
	Phase 1 (Current) ▼	Phase 1 (Current) ▼	
Engagement ?		0.00	5
Engagement Work ?		0.00	5
ESG ?		0.00	5
Expertise / Knowledge ?		0.00	5

## Stakeholder Mapping: Add Contacts to Mapping

Stakeholder Mapping:

- View Stakeholder Mapping
- All Stakeholder Mappings

2

Organisation Name	<input type="text"/>	Organisation Stakeholder Categories	Select options *
Organisation Sectors	Select options *	Organisation Account Handlers	Select options *
Contact Name	<input type="text"/>	Contact Stakeholder Categories	Select options *
Contact Project Interests	Select options *	Contact Categories	Select options *
Mapping Name	--select-- ▼		
<div>SUBMIT SETTINGS CLEAR</div>			

# Mapping Stakeholders – Option 1

There are two options for scoring stakeholders. This is Option 1:

When you’ve added your Contacts/Organisations you’ll be able to map attributes & scores.

- 1. You can do this by clicking **Map Stakeholder**

You will be able to map stakeholders individually using the **Engagement Summary** and even see their **View Contact** page by opening the details in a new tab.

You can use the radio buttons to map your stakeholders 1 -10 – 1 being Low, 10 being High.

When you’re happy with the scores provided, click **Save & Exit**

You can repeat this process for each stakeholder in the mapping.

Stakeholders (1)

Search for

SEARCH

Name / Organisation

Mapped Current Phase

Last Mapping Phase

Last Mapped By

Gratton TRAC, Luke

Map Stakeholder

Remove

Filter by:

All

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

0

1

2

3

4

5

6

7

8

9

Stakeholder Mapping: Map Stakeholders

Stakeholder Mapping:

Stakeholders Mapped

0 / 1

Current Mapping Phase

Phase 1 - 17/01/2024

View Stakeholder Mapping

All Stakeholder Mappings

Luke Gratton TRAC

Open in new tab

ENGAGEMENT SUMMARY

Enquiries

0

Activities

0

Survey Responses

0

Events (Attended / invited)

0 / 1

Issues Tagged

0 Positive / 0 Neutral / 0 Negative

Last Engagement

MAP STAKEHOLDER

1 = Low, 10 = High

N/A

1

2

3

4

5

6

7

8

9

10

Engagement

Engagement Work

ESG

Expertise / Knowledge

Sentiment

Add Comment

SAVE & EXIT

CANCEL

- Top Tip:** option 2 is beneficial if have a lot of stakeholders to map, but you won't have the Engagement Summary visible here.

Stakeholder Mapping: [View Stakeholder Mapping](#)

<b>Add New:</b> <a href="#">- Add Organisations to Map</a> <a href="#">- Add Contacts to Map</a> <a href="#">- Add Stakeholder Mapping</a>	<b>Map Name</b>	Top 100 Stakeholders Mapping	
	<b>Description</b>	This mapping will analyse the engagement we are having with our Top 100 Stakeholders that we have identified.	
	<b>Owner Teams</b>	Luke's Project : Luke's Project Luke's Project : Gratton, Luke	
<b>Stakeholder Mapping:</b> <a href="#">- View Stakeholder Mapping</a> <a href="#">- Edit Stakeholder Mapping</a> <a href="#">- Map Stakeholders</a> <a href="#">- Visualise Mappings</a> <a href="#">- Export Mappings</a> <a href="#">- Import Mappings</a> <a href="#">- Archive Stakeholder Mapping</a> <a href="#">- All Stakeholder Mappings</a>	<b>Total Number of Stakeholders</b>	1	
	<b>Current Mapping Phase</b>	1	
	<b>Last Edited</b>	Gratton, Luke - 17/01/2024	
	<b>Created</b>	Gratton, Luke - 17/01/2024	
		Stakeholders Mapped	Stakeholders Not Mapped
	Total	0	1
	Phase 1 - 17/01/2024 <a href="#">Edit Date</a>	0	1

## Stakeholder Mapping: Import Mappings

Stakeholder Mapping:

View Stakeholder Mapping

Export Mappings

All Stakeholder Mappings

Mapping Name:Top 100 Stakeholders Mapping

1: Download Template

Select phase to import mapping

Phase 1

▼

from:

DOWNLOAD TEMPLATE

2

2: Upload updated Template

document was uploaded successfully.

You will be informed via email when the processing is complete.

IMPORT ANOTHER FILE

3

[illegible]

# Additional Phases

Our Stakeholder Mapping module allows you to use phases

Additional phases are beneficial if you have a project that has a longer timeline, giving you the opportunity to compare stakeholder scores with what was given in previous phases.

1. Click **Map Stakeholders**
2. From the dropdown, select **Phase X (Start New Phase)**
3. Select your **Phase X Start Date** and click **Map Stakeholders**

You'll then be able to amend scores provided in phases and see a **+** or **-** change in the averages and **Export** results.

Stakeholder Mapping:

- View Stakeholder Mapping
- Edit Stakeholder Mapping
- Map Stakeholders
- Visualise Mappings
- Export Mappings
- Import Mappings
- Archive Stakeholder Mapping
- All Stakeholder Mappings

Total Number of Stakeholders	1
Current Mapping Phase	1
Last Edited	Gratton, Luke - 17/01/2024
Created	Gratton, Luke - 17/01/2024
	Stakeholders Mapped

1

Map Stakeholder

Which Phase would you like to apply mappings to?

Phase 2 (Start New Phase) ▼

Phase 2 Start Date 17/01/2024

CANCEL

MAP STAKEHOLDERS

2

3

ATTRIBUTES & SCORES			EXPORT
Attribute	Average Score from: Phase 1 ▼	Change from: Phase 2 (Current) ▼	Target
Engagement ?	7.00	+4.00	5
Engagement Work ?	6.00	+2.00	5
ESG ?	5.00	+1.00	5
Expertise / Knowledge ?	6.00	+5.00	5
Sentiment ?	6.00	+3.00	5

# Visualise Stakeholders (1/2)

You can see your attribute scores for stakeholders on a graph with Y and X axis.

1. Click **Visualise Mappings**
2. Choose an Attribute for both the X and Y axis, and which Phase data you'd like to see and click **Update Graph**

1

### Stakeholder Mapping: View Stakeholder Mapping

**Add New:**

- Add Organisations to Map
- Add Contacts to Map
- Add Stakeholder Mapping

**Stakeholder Mapping:**

- View Stakeholder Mapping
- Edit Stakeholder Mapping
- Map Stakeholders
- Visualise Mappings
- Export Mappings
- Import Mappings
- Archive Stakeholder Mapping
- All Stakeholder Mappings

<b>Map Name</b>	Top 100 Stakeholders Mapping	
<b>Description</b>	This mapping will analyse the engagement we are having with our Top 100 Stakeholders that we have identified.	
<b>Owner Teams</b>	Luke's Project : Luke's Project Luke's Project : Gratton, Luke	
<b>Total Number of Stakeholders</b>	1	
<b>Current Mapping Phase</b>	2	
<b>Last Edited</b>	Gratton, Luke - 17/01/2024	
<b>Created</b>	Gratton, Luke - 17/01/2024	
	<b>Stakeholders Mapped</b>	<b>Stakeholders Not Mapped</b>
<b>Total</b>	1	0
Phase 1 - 17/01/2024 <a href="#">Edit Date</a>	1	0
Phase 2 - 24/01/2024 <a href="#">Edit Date</a>	1	0

### Stakeholder Mapping: Visualise Mappings

**Stakeholder Mapping:**

- View Stakeholder Mapping
- Export Mappings
- All Stakeholder Mappings

<b>Map Name</b>	Top 100 Stakeholders Mapping	
<b>Total Number of Stakeholders</b>	1	

**Choose axis values**

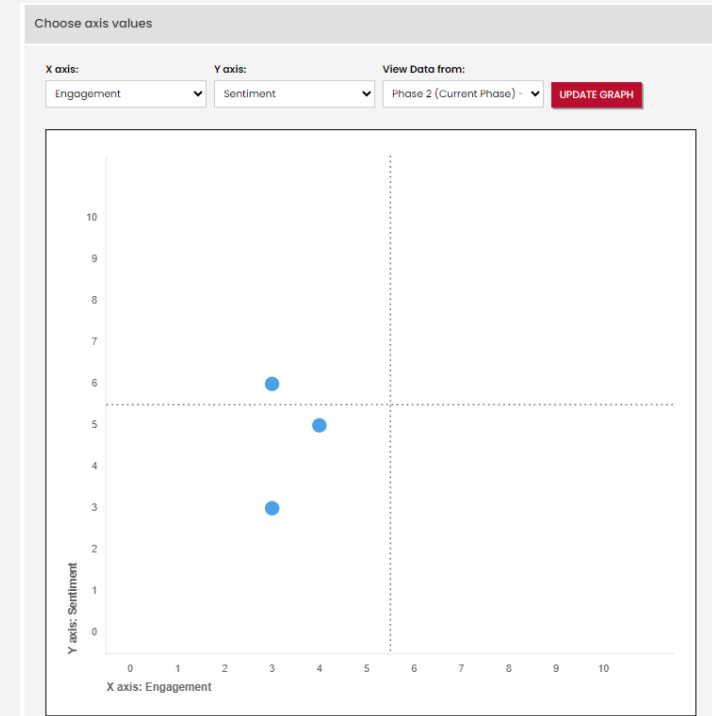
**X axis:** 
**Y axis:** 
**View Data from:** 
[UPDATE GRAPH](#)

# Visualise Stakeholders (2/2)

**You can choose 1 attribute for the X axis and another for the Y axis as well as the phase data you'd like to view.**

A PDF export provides a visual of the graph you can see in Tractivity

**The different bubble options on your X/Y Graph is detailed on the following page.**



Export data as:

PDF DOCUMENT

EXCEL DOCUMENT

## Additional Filters

At the bottom of your X/Y graph you'll see 3 additional filter options.

This gives you the ability to see a third attribute in your graph.

**Include Bubble Attribute** will show enlarged bubble icons to indicate the scores for stakeholders.

**Include Colour Attribute** assigns different colours based on the scores for stakeholders

You won't see a third attribute option here. **View Shift From** allows you to see two phases and the changes across these phases.

☐ Include Bubble Attribute
 ☐ Include Colour Attribute
 ☒ View Shift From

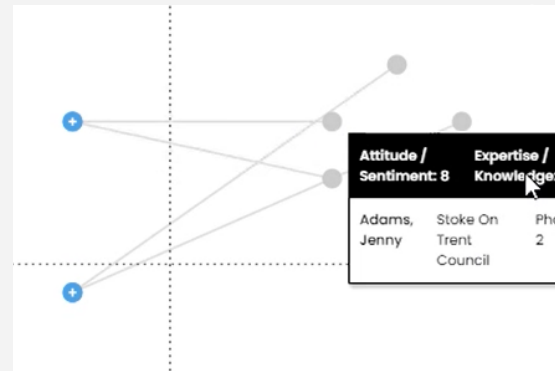
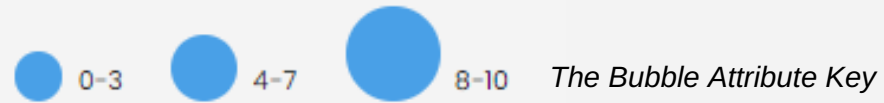
--select--

--select--

--select--

APPLY SELECTION

CLEAR



Your axis view with 'View Shift From'

# Use Mappings to create Distribution Lists (1/2)

Once you have created a Mapping, you can use this to send specific comms, such as stakeholders who have below average scores.

1. Head over to **Distribution Lists** and create a new list
2. Click **Add Organisations/Contacts to List**
3. From the **Search** screen click **Settings**
4. Select **Stakeholder Mapping** from the **Record Type** dropdown
5. Add Mapping Name to **Selected fields**
6. Click **Confirm**

1

HOME CALENDAR BUILDINGS ORGANISATIONS & CONTACTS ENQUIRIES ISSUES STAKEHOLDER MAPPING STRATEGY PLANS SURVEYS

LAND PARCELS LIBRARY **DISTRIBUTION LISTS** EVENTS EMAIL MAILSHOTS REPORTS

Distribution Lists: View Organisation Distribution List

2

Add New:

- Add Organisations to List
- Add Activity
- Add Distribution List

Title	Data - Org	Format	Mailshot
Type	Organisation	Distribution List ID	5
Created	Gratton, Luke - 05/12/2023		

Distribution Lists: Attach Organisation Recipients

Distribution List:

- View Distribution List

Distribution Lists:

- All Distribution Lists

Contact Name	<input type="text"/>	Contact Created Date	<input type="text"/> to <input type="text"/>
Organisation	<input type="text"/>	Organisation Account Handlers	Select options

SUBMIT SETTINGS CLEAR

3

Search Settings

Record Type: Stakeholder Mapping

Search fields to display

Mapping Name

5

Add

Selected fields

No search fields to display

6

CONFIRM CANCEL

## Use Mappings to create Distribution Lists (2/2)

7. You'll now see the field **Mapping Name**. You can use this to identify the stakeholders you wish to add to the Distribution List.

8. You can then choose a particular **Phase** and **Attribute Scores** so you can be specific on the stakeholders you pull through to your list.

For example, you could pull in all stakeholders who have scored below Average in certain Attributes and email them directly to increase this.

Client Confidential

on Lists: Attach Organisation Recipients

on List

s:

Lists

7

Contact Name

Organisation Name

Contact Created Date  to

Organisation Account Handlers

Mapping Name

SUBMIT SETTINGS

Top 100 Stakeholders

Top 250 Stakeholders

Contact Name

Organisation Name

Contact Created Date  to

Organisation Account Handlers

8

Mapping Name

Phase

Impacted  to

Interest  to

Apply Search To

Attitude / Sentiment  to

Influence / Power  to

SUBMIT SETTINGS CLEAR



For any questions around this or other User Guides, please contact your dedicated CSM or the wider team at: [customersuccess@tractivity.co.uk](mailto:customersuccess@tractivity.co.uk)

[www.tractivity.co.uk](http://www.tractivity.co.uk)