

8 principles for union digital transformation

At the TUC Digital Lab, we seek to develop solutions for the union movement, in the most sustainable and effective way. These are the 8 principles we try to follow in our work (v1.0).

Be driven by data

- Making better use of data offers unions huge benefits in understanding and optimising our operations. But we need to approach it strategically.
- Collect the right data. When starting on a problem, we should take time to understand what data we already have, and what its quality is. We should have a reason to gather any pieces of new data, only asking for something if we have a plan on how it will be useful to us, and to our users. Sometimes that could mean collecting different data from different people, rather than trying to get everything on everybody.
- Improve data quality. We should look at the methods we use to collect data. Offer our users the means and the incentive to keep data up-to-date.
- Structure databases thoughtfully. When starting a new project, we should see if there is an opportunity to standardise systems. Can everyone who needs access to a piece of data to do their job do so?
- Develop data skills in the union. This could mean building our basic data training for those who need to access or input data. And it will mean more advanced data science training for colleagues who structure or visualise data for others.
- Be secure, but not too risk averse. All unions need to have processes to ensure the security of member data, and to safeguard the people we work with. But for non-sensitive information, opening access up to more colleagues could help better inform work across the union.
- Our policy should be informed by our data. We should seek to use data to make and validate choices wherever we can.

Commit realistic resources

- Digital doesn't always need to involve huge and costly new systems. But it does need a strategic commitment from the outset, of money, staff and time.
- Establish and commit to a vision. This will make it clear upfront that your digital programmes are a longer term thing. It will help people understand better why resource is being allocated in this area.
- Secure sustainable financial resources. Projects that show promise will need money to scale.
- Build the right teams. Focus on the roles and the skills we need to make our digital teams sustainable. Invest in digital practitioners' skills to provide core technical expertise. Bring domain experts in different parts of the organisation into digital project teams.
- Balance in house capacity with external skills. Make sure that bought-in expertise also builds your internal capacity wherever possible. Exposing staff directly to all stages of

tech projects will help build their skills and put you in a better place for doing more in house next time.

- Seek out projects that can bring savings. Simple projects to digitise processes can be done in a way that frees up other staff members to do more important work. It helps show digital as an investment rather than a cost. This is always important when we're spending money that comes from our members' pockets.
- Reuse and improve. Where we already have simple solutions that can help us prototype a new product, we should use them in the first instance.

Start with user needs and keep them involved

- When trying to solve a problem, we need to start from the perspective of the people who will be the end users or beneficiaries of any changes, be they reps, members or potential members.
- Listen to user experience. We need to devote time to seeing how users perceive the problem. Our own understanding will often differ, based on the different insights we have. Designing for the user first makes any new project much more likely to be successfully adopted.
- Establish user needs. What is it that will help the user in any given situation? We can help our teams get a shared understanding of our users by documenting more about them. What are their personas and needs? What are the journeys they take in their interactions with us, and where might the problems lie from their perspective?
- Keep users involved during development. Users should be directly involved in the process, from research through validating assumptions and testing prototypes and products.

Take small steps and learn as you go

- Rather than building big projects all at once, breaking them into steps where possible helps minimise risk and cost, and increases valuable learning.
- Build one minimum useful step at a time. Technology is changing so fast that treating huge projects as one piece brings significant risks, and may miss opportunities. Projects can be broken down into many separate demonstrable concepts.
- Test each step with real users and listen. If we can identify the minimum feature that can be prototyped, we can quickly run a test to find out if our plan works, and whether it should be scaled further, or whether something needs to change.
- Don't go longer than 3 months without delivering something. It doesn't matter if they're small, but keep the iterations coming to keep momentum with users and stakeholders.

- Fail better. All projects will run up against failures. If we're working only in small steps, we can more quickly find out what didn't work and revise plans, before we invest too heavily.
- Refine the plan's activity based on what you learn. Sometimes a test may throw up a new line of enquiry that may be better to explore further before continuing. By holding to an overall vision, but keeping day to day plans flexible, we can adapt to deal with side-steps.
- Be honest about what's not working. Following what the data tells us will help us judge when is right to try something else.

Understand the problem before creating solutions

- Getting a shared understanding is crucial. Otherwise you may end up making something that doesn't fix the problem as your users see it.
- Research the problem before researching the solution. Look at how other people affected by the problem perceive it. Are you trying to answer the right question, or can you make it clearer before you start? You may need to widen your hypothesis before you can narrow it down.
- Focus on intended outcomes instead of outputs It's easy to fixate on a new technology and want to see how it might have application for a user. Instead, start from the user need and pick the most appropriate technology.
- Use quantitative and qualitative research Checking the numbers will help validate and refine ideas, but there is no substitute for detailed interviews in helping to surface new insights.
- Keep an open mind Be prepared to have assumptions challenged by the evidence and adjust course accordingly.

Everything we do helps build the union

- The reason we embark on any tech project is ultimately to further our mission to empower working people. We should ask ourselves how each project can help get people active and engaged in the union.
- Sense check your hypotheses. Sometimes we may follow a path and find the solution no longer really fits with our mission. If that happens we may need to stop and find another path.
- Define your values. When everyone has a shared understanding of the union's values, it'll be easier to ensure new products fit them every time.
- Focus on meaningful metrics. When setting our targets, we should try to choose ones that give us insight into our progress towards our goal. It's best to understand what any engagement we measure actually means for us.

- How we build technology is as relevant to our values as what we build. Empowering our users and our members to have a voice in how we change is core to who we are.

Make things usable and familiar

- We are seeking to solve problems first and create technology second. We want to make things that will seem natural to help our users get the job done.
- Build something that can be practically used (by both officers and members). Understanding the context your users are operating in will make it more likely that the product you design can do its job at the right time and in the right place.
- Run more focussed projects. It can be easy to overextend a new service and put in too many features. But then you run the risk of making core features too complicated to find and use.
- Follow common and recognised design patterns. It's generally better to use a tried convention that works, rather than invent a brand new way of doing something.
- Consistent look and feel. We should aim to make things feel a consistent part of the union experience.
- Develop for accessibility. When we roll out new services, we want them to be accessible to as many people as possible. Try to find ways to bring in people who may otherwise find it hard to access your new service.

Collaborate widely

- Digital is naturally suited to sharing and networking, which should be second nature for unions. Collaborating as much as possible internally and with allies helps us move faster on our journey.
- Find your allies. When you are seeking to change things that have been done a certain way for a long time, you'll likely encounter resistance at first. Build up a network of people who can give you good insight and help make the case for change.
- Find user champions. Look for ways to help amplify the voice of users at all points of the process.
- Communicate processes well With fast moving projects that have lots of moving parts, there is always a risk that the ball might get dropped. Bringing people into discussions and keeping open communications channels will help minimise confusion.
- Share your learning Taking the time to document and share your work and its results will help bring others up to speed for the next project. Building a sharing culture across unions could help us speed the take up of things that work for everyone.
- Seek to become more representative at every point. We should seek to build things that help all our members and potential members. If we are not doing enough to include everyone's perspectives, we are missing the insights and evidence that will help us.

Why define principles for this?

Often we set goals when we embark on a new project – clear targets so we know when we've met them and whether the project worked.

That works well where big areas of the scope are defined and under our control – where we know we'll largely be able to use the methods that have worked for us in the past to get the job done. The work is a good fit for the culture we already have to get this kind of thing done.

It becomes more difficult in digital change projects though. The changing environment increases the unknown factors. The number of moving parts that we need to keep an eye on increases. And the speed and responsiveness we're able to bring to bear in the project means we have new opportunities to change course as we go.

It's still obviously important for us to have a vision and a goal in these cases, but where the work doesn't fit our culture so well, we also need to consciously think about how we are going to do it, not just what we are going to do.

One tool that many companies and voluntary or government organisations are using to help them here is a set of digital principles.

These principles set the broad direction we want to be taking in our digital transformation. They help us to know what good might look like in areas where we don't yet have a complete picture of the terrain.

The principles aren't designed to be exact rules for digital work – we can't be that prescriptive. But if we use them as a sense check, they can help us correct course where we might be deviating down less useful paths for us.

Many organisations find that being overt about their digital principles has useful outcomes in changing culture. For example, in early 2019 the TUC Digital Lab took some union colleagues to visit Co-op Digital's offices in Manchester. There we found tastefully designed posters all over the walls, reminding the teams of different aspects of the Co-op's own set of digital design principles. That kind of conscious effort means that over time, doing things in a new way becomes a new part of the organisation's culture.

Familiarity with the principles helps everyone stay on the same page. That's particularly helpful where methods like user research or an iterative approach as new concepts for an organisation's core work.

Armed with a common language in these areas, team members can better understand why others are doing something, and have a framework for resolving differences of understanding.

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1/ Be driven by data

2/ Commit realistic resources

3/ Start with user needs and keep
them involved

4/ Take small steps and learn as you go

5/ Understand the problem before
creating a solution

6/ Everything we do helps build the union

7/ Make things usable and familiar

8/ Collaborate widely