An analytics guide for unions

A practical framework for analysing data on union members and the membership experience.

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Executive summary

Doing more with data is a huge opportunity for unions. This report sets out the basis for a common framework for using data that can be adopted by unions to understand, report on, and improve the way they serve members across the entire member lifecycle.

Analytics can help unions:

- Find and attract more non-members,

- Increase the rate at which people join,

- Improve member participation in campaigns, meetings and trainings,

- Increase uptake of and satisfaction with union services,

- Reduce member attrition,

- Improve members' happiness and willingness to recommend the union to others.

The report explains how to collect and analyse the right data, understand what positive and negative trends look like, as well as how to use data to tell a story that brings about improvements in the union's operations.

Introduction

"If we have data, let's look at data. If all we have are opinions, let's go with mine."
- Jim Barksdale, former CEO of Netscape

Unions are organisations moved by stories. When we hear about members standing up for what they believe in, we're inspired to listen and spread the word. The same can be true of union operations. When we hear of a colleague doing work that's successful, we're inspired to follow their lead and try it for ourselves. It's great to be inspired by others' work, but we also must be aware of when we're being moved by individual stories - anecdotes - rather than a collection of them - data.

This is a report about how (and which) data analytics are likely to be useful for unions.

"Analytics" is often associated with digital, but as digital became part of everything, everything became part of digital too. The result is that the analytics described in this report aren't really about the performance of websites or emails or social media, but are instead about the performance of unions as organisations. The numbers and measures described are really the study of what union members do, how that can be observed in aggregate and what these observations tell us about what we should try and do for the union.

The first goal of this report is to organise these analytics into a framework that helps unions gauge their own health and make decisions accordingly. The utility of a common framework is consistency. Measuring the same things over time allows you to observe change, and put it in context. It also makes it much easier to compare one union with another and learn what each other is doing to improve performance (imagine the benefit to the movement if this was repeated 48 times over).

The second goal of the report is to start explaining 'how' to get started building out your own analytics framework and which tools are useful for specific jobs.

The final goal is to explain how this framework can act as a communication tool. If a union gathers and updates this data once a month or once a quarter, and it's shared with colleagues to highlight the successes as well as the areas of concern or for improvement, you give yourself a chance of finding allies who can help move things in the right direction.

The report won't act as a checklist or step-by-step guide, in part because although unions have a common thread running through them, none is perfectly alike. But also because, in speaking to many unions about their analytics and data over the years, we know that many unions will have to start gathering certain types of data, as well as offering new services for the first time if they're to become more analytics-driven.

Who is this guide for?

Whilst it is on the increase, most unions still don't have a role for dedicated data analyst or data scientist. Instead, digital analysis is often performed by people working in digital comms or membership.

There are two ways to enact the recommended framework set out below.

The first is to entrust a single member of staff with the task of collecting the data, performing the analysis and developing the recommendations. It will be a bit of a task to start with, going to lots of different people asking for them to help to get the data, letting them know you'll be coming back for more in the near future, working through what it all means, thinking about what to do, presenting it back, getting buy-in, moving forward. It's absolutely doable, but it'll take some time.

The second (and we think superior) way is to assign responsibility for a stage of the member journey to an individual (or two or three stages if your union is smaller) and then come together for a conversation about how to present the data to the rest of the union, which actions to take and a plan that prioritises what to work on first.

The member journey as our framework for analysis

Models help us explain the world, simplifying the complexity that comes from running organisations with thousands, or even millions of members. By looking at the memberships of many union members across a journey that starts with becoming aware of unions, passes through the moment of joining, engages in campaigns, uses services before ultimately retiring or leaving, we can try and understand what success looks like at each stage.

	1. Not yet a member	2. Joining	3. Using services	4. Taking part	5. Happy or leaving?
What is the user doing?	People who could join the union but haven't.	Applying to join, being welcomed, and onboarded into the union	Looking for support, updating membership details, accessing training	Attending a meeting or event, researching issues at work, becoming a rep.	Happy with the union, would recommend to others. Changing industry, retiring, no longer want to be a member.
What could success look like for the union?	Increased awareness of the union. More enquiries about membership. More engagement with union-specific content	More new members. More referrals. More members joining online	Members taking advantage of a wider range of self-serve online services. Lower support costs. More accurate member data.	More active members. More trained reps Bigger campaigns	Satisfied members. More members recommending the union. Lower churn

Looking at this framework, you'll notice that "success" isn't generally measured in terms of digital activity. Website unique visitors, email open rates, video watch time or social media engagement can be important, but they are rarely a business goal in themselves, and they are generally not a particularly useful way of communicating with other parts of the union, who don't use the same terms.

A digital marketer will know that more website visitors generally results in more new members, but colleagues might not. The fact that your email rates hold up or improve over time shows that members are engaged and paying attention, but it's the second piece of information that's important - a 40% average open rate means nothing on its own.

The objective here is to think in terms of a union's goals - how more members means more leverage, how better services lead to better trained, happier, better supported members.

Common analytics tools

Web analytics software

Google Analytics is the industry standard for tracking and analysing user behaviour on a website (a more privacy-friendly alternative is Matomo). It is quite likely that Google Analytics is already installed on your website. If not, installing it is easy (though make sure to check and update your privacy policy before doing so).

Specialist analytics software

Mixpanel is particularly useful for understanding user behaviour around "funnels" (journeys along a specific set of steps, such as joining the union). These could include your online join form or signing up for a campaign or event - anything where you want to know how many people started, and how many people finished a particular task. Again, installation is straightforward.

Surveys

Some data, like members' happiness with the union, or to what extent they'd recommend it to others, is best gathered using surveys. There are many popular tools with SurveyMonkey and Typeform being the best known. AskNicely is specifically built around the concept of the "net promoter score" (a loyalty and satisfaction score based on how inclined a member would be to recommend the union).

Reports created within your membership database

Most modern membership databases and CRM (Customer Relationship Management) systems include the ability to define reports and generate new versions of them automatically, so you can keep track of exactly the same view at regular intervals. You'll particularly want to know about things such as the number of members joining, the number of records updated and the average subs paid.

Reporting features built into your marketing tools

All modern marketing tools offer some reporting features. Mailing systems will tell you about signup, open, click and unsubscribe rates, social media tools will tell you about views and engagements, events systems will let you know how many people signed up, and so on. Some of these metrics are directly, or at least directly proportional to a union's business goals, while others will have an indirect effect.

Excel or Google Sheets

The more you use spreadsheets, the more powerful they become. Investing time in developing a spreadsheet to bring together your data and automatically interpret it, to highlight direction of travel over time and help you make decisions is invaluable.

PowerPoint and Keynote

Both provide excellent tools for charts and graphs and telling the story of your analysis and recommendations. Once you've created a presentation template, it's usually just a matter of pasting in the data to populate your charts.

Business Intelligence and Visualisation software

There is a huge range of business intelligence tools and visualisation software. Many promise the earth, including all sorts of automated analysis, complex dashboards, predictions and alerts. Tools like Microsoft Power BI or Tableau can be used to take data from a variety of different systems in order to present more regularly or clearly.

Most unions will not benefit from going all-in on these tools from the very start, but when you're ready, you can start to explore this market. Note that, the types of data and analytics discussed below are generally not 'big data', which is what these specialist tools often focus on (e.g. by plugging directly into databases and other sources).

Some notes…

…on tracking codes

The industry standard approach to knowing where web traffic is coming from is the UTM code. By adding UTM codes to links, you can see which ones lead to positive results. The technical implementation of UTM codes is simple, and many tools will automatically create them for you. The difficult part is finding the organisational discipline to use them religiously, on as many of your marketing links (email, social media, ads, inbound links from 3rd parties) as possible. Everyone who creates content on your website, sends bulk emails, runs social media accounts or ads should be trained to use UTM codes in a way that's standardised across the union.

…on goals

Most of the digital services unions offer have a clear goal. Members join, sign up for benefits or training. All web analytics software (such as Google Analytics) allows you to create goals and funnels (the series of pages or steps people take to reach the goal). You should spend some time setting up goals for the main services you offer online. Primarily, these will be 'destination goals', where the user reaches a final step (such as a thank you page). Alternatively, you can add an "event" to your "submit" button and

track these instead. This can be useful for tracking the performance of a type of goal (e.g. an event signup) that has no single final page.

…on privacy and data protection

To do analytics, you need to collect and use data. As unions, under the GDPR, we have special responsibilities to protect member's data. Most analytics tools use data that is largely anonymised and this is particularly true for the statistical reports they produce.

But this isn't always the case. Some analysis will require direct access to membership systems or marketing platforms that do contain members' data. At other times, you might find yourself exporting data from one system to another. If you're doing this, remember to keep track of it. Don't leave files containing data lying around the place. *Always obey the law* (and if you're not sure what it says about what you want to do, obey your Data Protection Officer instead).

…on statistics

There's no getting around it, analytics is a bit mathsy. But only a bit. You'll need some basic maths concepts (percentages, averages, the sum of a range), most of which can be handled for you by standard spreadsheet software.

The main thing to remember is that data analytics, despite what you'd hope or expect, is inherently noisy and absolute attribution can be hard. Some effects are big, but short lived and have relatively little impact overall, while others are small but persistent, ultimately making them important. If 10% of people visiting your website become members, and when you check again a month later it's 11%, that sounds like a good thing. But why did it happen? Can you attribute it to something you changed? If you go back in a year, will it still be 11%?

Having numbers is not necessarily the same as having answers. Hunt for the 'why?'

…on time

Data collected during a recruitment week will look better than data collected during the weeks leading up to Christmas. Fewer people will visit your website at night or over the weekend. The summer might be a bit quiet with more people on holiday. People cancel memberships when money is tight at the beginning of the year. Try and take this into account by comparing like-with-like or using longer periods of time that smooth out any short-term effects.

Furthermore, if you are using UTM codes reliably, you can filter out the effects of specific marketing and campaign activity, so you can understand the 'background' levels of organic activity and hold everything else constant.

Measuring the member journey

Moving through each stage of the member journey through time, we can look at what to measure, how to measure it, what results you want to see and what action(s) you might take as a result.

The list for each step isn't exhaustive and you should feel free to add or subtract measures that are more or less relevant to your union (you're also likely tracking a number of these already in one form or another). The thing to remember as you do so is that each measure should push towards an organisational goal - a greater number of members, happier members, better communications, and stronger relationships, improving the quality of member data and lowering the cost of serving members.

Getting started: The essentials

Researching and setting up a new analytics framework will take some time, as will developing new services to meet members' needs, but there are a few numbers you can use to create benchmarks immediately, so you're able to compare current with past performance straight away.

These are:

Average number of new members per month

Proportion who join online

Average age of members

Conversion rate of online join form

Average lifetime subs of an additional member

Average number of people who leave or retire each month

For example, if 1 is higher than 2, your union is growing. If 4 is improving, then so should 1, all things being equal. 4 can be used to calculate the total benefit of increases in 1 and 4. An increase in 2 results in reduced costs for the union. If the average age of people joining is lower than 3, the union is getting younger. And so on.

Armed with these essential facts, you will have a story to tell, and the power to start conversations that lead to change.

Now, let's jump into that member journey.

Member journey step 1: Awareness and consideration among non-members

No union has 100% density in the industries and jobs it represents. There are always people who aren't members but could be. The analytical challenge is trying to understand who and where those people are, so your communications and campaigns can try to reach them better and bring them closer to membership.

Note: It's important to use UTM tracking codes on all your member communications. This will help you more easily filter out traffic associated with members, so you can focus on everyone else.

If using Google Analytics, you should also make sure "Search Console" is connected and enabled. This will help you understand the search terms people are using to find your content. You can then focus on improving the performance of a number of items.

Here are some examples of what we could measure for this stage of the journey, and how we could go about it:

Item	How to measure	Metric	Example activity
Webpages focused on getting people to join (e.g. landing pages)	Web analytics tools	Increasing unique visits	Ensure people can find the "join" button and that there's a route to it from almost everywhere, particularly on pages which get a lot of search traffic
Online campaigns	Signups or conversion rate within the petition software (or web analytics)	More non-member signups in industries you represent	Try broadening campaign language so they're inclusive to a wider range of workers Ask "are you a member?" and "what industry do you work in?" in petitions.

Ads, particularly those that don't target members (e.g. Facebook Custom Audiences that exclude your membership list).	Via the ad platform and web analytics	Increased click through rate (e.g. average is under 1% for Facebook ads)	Testing and iterating messages and visuals, experimenting with keywords and targeting.
Website content that answers questions people might have about specific situations at work ("what do I do if…?" or "how much should I get paid for doing X?")	Web analytics (filter out/ignore your homepage, news, join online form - anything that isn't answering a question someone might have).	More unique visits and referrals from search (normally this is at least 1/3 of total traffic)	User testing these pages to ensure they're successfully answering these questions. Further search engine optimisation.
Non-branded search traffic (i.e. searches not referencing your union name)	Web analytics (see above note)	Increased proportion of website visits from non-branded search (i.e. being successful for industry related content that people are searching for, without necessarily knowing a union can help).	Research good keywords, create relevant content.

In each case, higher numbers (more traffic, more signups, more clicks), over the longer term is better. If you can show these numbers increasing month on month, year on year, you will be driving more awareness and consideration of the union among non-members.

This isn't to say that high-performing tactical activity isn't useful (getting good press hits or regular spikes in social media engagement certainly is) but the items mentioned above are evergreen and sustainable. Continuous improvement of them raises your baseline performance.

Member journey step 2: Joining the union

If you're able to increase the number of relevant non-members who are both aware of the union and considering joining, you'll also want to focus on making the joining itself as efficient as possible.

Overall, this means creating a join service that more people in the union are happy to use (e.g. even for face to face recruitment), uses language and images that are persuasive and asks for the members' details in a way that they can't fail to supply it, reducing the cost of processing.

Item	How to measure	Metric	Activity
Proportion of members joining online	Members joining online divided by total joins	Proportion increasing (online applications reduce cost to process and increase accuracy of data). Baseline is generally above 80% for most unions, though some recruit more face-to-face.	Ensure online joining is as efficient and effective as possible. Train reps to use their phones when signing up new members in the workplace.
Landing page visitors who start the join form	Percentage of clicking through from your landing page(s) to the join form.	Increasing the click through rate, suggesting you've done a good job of attracting the right people and selling them on the idea of joining the union. About 30-50% of people should click through.	Research your landing pages, optimise.
End-to-end join form completions	Form conversion rate, using a service like Mixpanel (or Google Analytics), set up the "funnel" for your join form.	Increase the conversion rate. Anything below 20% suggests you should be able to find quick wins.	Optimise each stage, starting with worst-performing questions. If a 1-step form, run user research sessions or heatmap to identify hard-to-answer questions.

Applicants needing assistance	Track the number of calls and emails to membership team and the effort needed to deal with queries	The membership team is dealing with fewer calls and questions, meaning more time to spend on complex queries.	Quantify what leads to enquiries, improve language and design.
Onboarding comms	Engagement rates with onboarding emails/SMS	Increased proportion of new members engaging with and acting upon comms. Email open rates should be very high for these first few messages - above 80%.	Iterate and improve messages. If open rate is low, check deliverability /mail server reputation.
Areas of new growth	Look for fast-growing workplaces or branches	Quick identification of growth that seems out of the ordinary	Flag with relevant organisers
Member referrals	Use a specific UTM code to track referrals through the online join form	Increasing proportion of members referred by someone else. Expect this number to be small but remember that it's "free" recruitment.	Improve the user journey for referrals, language, and design as well as incentives.
Age of new joiners	Asking for date of birth on the application form	Reducing the average age of membership	Younger members are members for longer. Research the union's proposition with younger members, target people earlier in their careers.

An efficient join form has compounding benefits. A new member might pay thousands of pounds in subs over their career, so each additional member is worth a lot to the union, and to fellow members.

Conversely, the 'cost' of a join form failure, where a potential member gives up, never to return, is very high. Putting a lot of effort into understanding how your online join process works will deliver significant rewards.

Member journey step 3: Accessing union services

People's expectations of digital services are high. They expect things to work, quickly and accessibly, whether on a computer, phone, or tablet.

When you meet those expectations, you have happier members. When things don't work, or are inefficiently hand-cranked, members' opinion of the union falls, and the perceived value they get decreases, making retention more difficult.

Item	How to measure	Metric	Activity
Signing up for member benefits and/or training	Take up rates for membership benefits and training opportunities.	Increased proportion of members signing up for optional member services	User research to make the signup pathways easier. Work with colleagues or benefits providers to get them relevant information accurately and quickly for processing.
Updating address, contact or job details	On average, people move house 5-8 times in their lifetime, most often when under 30. You should expect members who have been with you a few years to have moved house. Use your CRM to learn how many change of details requests are processed each year.	Increasing the number of change requests over time. Fewer lost ballots. Higher turnout rates. More engagement with member comms. More subs revenue from Direct Debit (where salary increases)	Develop a comms programme encouraging members to keep their details updated. Work to create more efficient ways of updating member details. Work to automate or reduce time taken to process changes.
Requesting support for an issue at work	People are able to submit a request efficiently. That request is directed to the appropriate rep or staff member, who closes	Decreasing need for follow up requests for more information about the issue.	Research, develop and improve an online support request service.

the loop and contacts the member.	Time taken to contact member decreases.
	More members satisfied with the support they get.

Member journey step 4: Participation

A happy union is a busy, engaged union, full of busy, engaged members. Every union will benefit from increasing the level of engagement and activity amongst the membership. Here are some of the ways you might look at measuring this:

Item	How to measure	Metric	Activity
Attending events	Use a common platform for events (either built into your website, or a 3rd party tool such as Eventbrite).	Increasing average signup rate for regular events. (It's harder to measure one-off events, as they'll have very different levels of appeal).	Clear signposting on website. More marketing, email, and social media references. Improve value proposition for the events, social proof, reviews from other members. Ask members to recommend.
Engagement with campaigns	Signup rates for online petitions (create a goal in web analytics). Look at which channels perform well for signups.	The number of members who regularly sign petitions. Increasing signup rates.	Give members more opportunities to join campaigns. Look at the profile of people who don't participate. Why was that?
Signing up for Rep training	Signup rates for rep training (create a goal in web analytics). Completed rep trainings.	Increasing signup ages over time.	Improve discoverability. Find out if members were previously reps in other unions. Market more actively to members, particularly in member onboarding.
Indicative ballot participation	Turnout in online indicative ballots.	If the success of an indicative ballot is to predict success in a formal one, then you should hope to see turnout above 50%.	Use results to understand and segment the membership. Who voted? Who didn't? Why? What were the barriers? Do you have issues with member data quality? Are too many members inactive or uncontactable?

Member journey step 5: Is the member happy… or leaving?

One goal of a union is to have, wherever possible, more people joining than leaving. There are two things to consider here:

1. Happier members are less likely to leave.

2. Many members who leave can be persuaded to reconsider and reactivated. Sometimes as customer service "save" is the most powerful thing of all.

Both require listening to your data.

Understanding member satisfaction

It's important for unions to know how you're perceived by members. While it's true that some members see membership as an insurance policy to be cashed in when they've an issue at work, it's still the job of the union to show that they're helping others and that there are a large number of ways to get involved. If the union is unable to help, or expectations weren't accurately set, serious disappointment is likely to follow.

It's impossible to track members' perceptions with anecdotal evidence. The data needs to be collected, interpreted, and acted upon.

Item	How to measure	Metric	Activity
Positive Net Promoter Score (NPS)	On a regular basis (e.g. annually), email members to ask them to rate the union on a 1-10 scale. 9s and 10s are "recommender", 7s and 8s are passive. Everyone below is a detractor. *NPS = % of recommenders - % of detractors*	You want to find, and increase, a positive net promoter score.	A negative or neutral score is a sign that members do not feel they're getting value from the union. Initiate research to work out why, as well as which types of members are most affected.

Engagement with comms and "lost" contacts	Track and average your email open rates over time. Track the proportion of members who show low or no activity.	The proportion of disengaged members to fall over time.	Give members regular opportunities to update contact details. Be more creative with your messages (less "May update" in your subject lines). Timely, personalised, segmented. And many more…
Reviews on 3rd party sites	Trustpilot score.	Many people use Trustpilot to complain publicly. Consequently, many unions' Trustpilot scores are low and present a one-sided view of membership.	Encourage members with positive experiences and outcomes to leave positive reviews.

Understanding why members leave

Members leave unions. What matters is knowing why. Only then can you develop an appreciation of their situation, and an approach to keeping them on board.

Item	How to measure	Metric	Activity
Churn	From the CRM, get the number of members leaving or lapsing each month.	Obviously it's better for this number to go down, not up (though there may be seasonal effects).	It may sound counterintuitive, but you should consider building a service for people who want to leave (including asking them why they want to leave and asking if they'd like a call from membership to discuss).
Successful 'saves'	The number of people who return to being in good standing with the union after stopping paying subs.	Response rates to reactivation comms.	Optimise the timing and content of these communications to increase the return rate.

Reasons for leaving	The proportion of people who leave prepared to say why.	Response rate to these comms. Relative rates of different reasons given.	Focus on reasons that are 'saveable' (e.g. not "retired", "left the industry" or "moved country"). Develop tailored comms programme and/or phone script for each.

Communicating the data (for action)

Senior management won't have the same specific knowledge as someone working on digital analytics, so you'll want to communicate in a clear and simple way that focuses on what you're learning and the proposed actions the union should take in response.

The objective is to ensure that leadership understands and supports the changes the union needs to make, as justified by the data. This support could be purely organisational (assigning responsibilities and resources to solving a problem), or financial (finding budget to do something new).

You don't need a fancy dashboard, you can start with a simpler, reusable template.

Unions aren't power stations or railway networks. You don't need 3 x 40" displays full of blinking lights to manage them. "Dashboards" can look pretty (they can also look awful), but they're almost certainly a bad way of communicating data to colleagues who you need to help you make decisions and take actions.

Similarly, emailing a spreadsheet with the subject "This month's numbers" is unlikely to get you the engagement you'll need to make improvements stick.

The best format for communicating data can be simple. Take the data you have and create a presentation using charts and graphs to show change over time. If you need to, take a few screengrabs from Google Analytics or Mixpanel. Illustrate and draw attention to your points.

Don't spend time just "running through the data", but instead focus on what you've learned and why it matters. Throughout, keep language plain and avoid technical jargon where possible. Be prepared to anticipate and answer questions.

The sorts of things you want to be able to say are:

- *"We identified three pages on the site that perform really well for organic search. We noticed we had no 'join now' call to action on them, so we added one."*

- *"Our join form had a big drop off at step 2. We realised we were asking for people to create a login before they knew what it was for, so we removed that and now ask for it at the end. We've seen a 2.5% increase in conversions since then, which is worth about £15,000 to us this year."*

- *"We don't have much visibility into attendance at our webinars. We're working with the organisers and education folks to see if we can get some data from them."*

- *"We found that younger members were less likely to recommend the union to their colleagues. We're setting up some interviews to talk to them and try to work out why."*

- *"We got a spike in people leaving because they're feeling hard pressed with prices rising. We either need to talk about our rates, or how we do a better job of communicating the value of membership. How do you think we should approach this?"*

The purpose of presenting data in this way is to facilitate decisions that positively affect the union's ultimate goals and outcomes. By showing data that supports your conclusions, you'll also help the union understand the value of the data it creates and justify further investment in analysis.

Depending on the structure of the union, you might want to present your data once per month or quarter, and take a reasonable amount of time over it (around an hour would make sense if there are relatively few actionable items, more if you need to propose some significant changes).

Again, your goal is to make this time useful and interesting for everyone involved. Many people fear numbers, statistics, and charts, but when they tell a compelling story, you'll find engagement levels going through the roof.

Going deeper: Business Intelligence

When your union starts to feel comfortable with data, and the discussions that follow from it, then you can start to explore some more advanced tools and visualisations (while remembering that the purpose is to communicate, not confuse).

The benefits of using advanced business intelligence tools (such as Microsoft's Power BI or Tableau) are fourfold (and we've include a cost) at the end:

1. Reducing time taken to produce reports by moving from collection to connection

Initially, as you explore which metrics you want to measure and how to measure them, you'll use some manual techniques - importing and exporting, spreadsheets and slides. Once you're confident in the data you're collecting, many 'business intelligence' tools allow that data to be connected directly.

For example, both Power BI and Tableau have simple connectors allowing you to directly access Google Analytics or Mixpanel data and reports. Salesforce has similar connectors too. With these, you can then run your queries directly from the business intelligence software, and use it to populate tables, charts, and reports automatically.

Furthermore, as you talk with colleagues, you can start to look at bringing the reports and data they already create into the BI system, so more organisational data ends up in one place.

2. Sharing custom reports with key people

All of the major business intelligence platforms allow for sophisticated workflow and team management, including the creation of custom reports and dashboards for key individuals and teams.

For example, you could take the group of metrics most relevant to colleagues in Membership or Organising, create a custom report and share it with them automatically before their regular check-in meeting.

3. Business intelligence as a single source of truth - and culture change

Once you're finally set up with a live dashboard, make sure to refer colleagues to it. Run some short training sessions on how to 'read' it, how to filter data and discuss insights.

By integrating new tools into your organisational workflow, you democratise the ability for people to drill down into data, ask different questions, propose new solutions and

cut across departmental boundaries. Doing this will help the union move collectively towards a more data-informed way of making decisions and doing so on a shorter cycle.

4. Access to new, AI-powered analysis and tools

The hype around AI means that large-language-models are quickly being added to most enterprise software. In theory, this should make data and analytics considerably more accessible, replacing queries, formulas, and technical terms with plain-english instructions. This could further democratise analysis and may even result in such tools making recommendations and providing you with plans for how to carry them out.

The upside benefits are potentially huge, particularly for organisations who have hereto been unable to directly hire for the technical skills needed for data analysis. But - these tools aren't quite here yet.

5. A downside: cost

Business intelligence is relatively expensive. As they're cloud services, most offer various tiers of pricing per user, per month.

Tableau requires a "Creator" at $70/month, while an "Explorer" is $42/month. Just to view dashboards, you'll pay $15 per user per month. If a union has a creator, five explorers and ten viewers, the annual cost will be around $5,100+VAT. Microsoft Power BI is $20/user/month (around $3,200 plus tax for the same number).

You will need to be careful with the number and type of licences you get, and make sure those licences are used, if the purchase is to be cost-efficient.

Communicating across the movement for shared learning

Every union is the same, apart from their differences. Where their potential memberships overlap, there is healthy competition. While specific numbers (e.g. revenue or recruitment) might be commercially sensitive, more generic numbers such as conversion rates, and the methods you will use to improve them are not.

By developing this report and the idea for a common analytical framework, we hope unions will get better at using data to cooperate, learn from each other and raise standards across the movement.

Taking your knowledge further

The ideas above are relatively simple to accomplish. They require no particular statistical or technical skills or the use of any complicated or expensive software. For many unions, who still have many opportunities for optimising their existing digital tools and services, there will be plenty to get on with.

For those who want to take their knowledge further, here are some ideas:

- Read Avinash Kaushik's blog, which has hundreds of posts on how measurement can help you decide on a course of action.

- Read a book on presenting data. Edward Tufte is the most famous author of these, but there are many.

- Take a short online web analytics course. Many business schools also offer short paid courses in web analytics and business intelligence.

- Explore and trial the use of business intelligence software, which can help you join together different sources of data, observe, and predict patterns and automate your reporting. Products range from free/cheap and simple, to highly complex, expensive enterprise solutions. Tableau is often recommended, as it has a relatively shallow learning curve and lots of capabilities, particularly when it comes to visualisation.

- Join one of the many Slack and Discord communities for data analysts (as well as aspiring ones).