

# Using WhatsApp in union organising and communications

A TUC Digital Lab guide

# Introduction

WhatsApp is the most used app in the world, with an estimated 30.1 million users in the UK alone.

While WhatsApp is best known as a messaging service, it is also possible to make and receive audio and video calls, send voice messages, and share photos, files and links.

The service also allows group communication as well as marketing communication. Shared conversations are possible within small interest groups or up to hundreds of people at once.

Based mainly around a mobile app, and requiring a phone number to hold an account, WhatsApp is closer to text messaging than to email in terms of engagement. Typically, 90% of recipients will view a message, and they will do so much more quickly than they would with an email.

WhatsApp has the potential to be a powerful tool for organising, helping trade unionists to connect, spread their message and organise members and supporters.

But at the same time, engaging on the platform holds a number of significant risks for trade unions, which will need considerable thought in mitigation.

This guide includes some best practice tips and suggestions for making the most of WhatsApp.

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# Choosing the right format for your purpose

There are three main ways of using WhatsApp to connect with members and supporters in your network:

## WhatsApp group

A shared space where members can communicate in real-time. Like a group of friends sitting in the same room - everyone can see and hear everything that is being said and anyone can speak (on default setting – though moderators can disable open replies for a group).

## WhatsApp community

This allows you to bring related groups under one umbrella. Community admins can send important updates to all the groups in the community at the same time.

## WhatsApp broadcast

This allows you to send a message to multiple contacts at once. The message sent by you will appear as an individual message in the recipients chat and they can individually reply to you.

## How to choose

When deciding which type to use, consider the following:

- What is the purpose?
- What type of communication is needed: one-to-many or peer-to-peer?
- How many people will I need to add?
- Who will be able to join?

This table outlines some of the key differences between the three formats.

	<b>Group</b>	<b>Community</b>	<b>Broadcast</b>
<b>Purpose</b>	Engagement and dialogue with a group who have a shared identity or interest.	Multiple related groups as part of a wider organisation or campaign, with direct announcements.	Updates and announcements to a list of individuals.
<b>Type of comms</b>	Peer-to-peer dialogue between all group members.  Anyone in the group can send messages (if moderation settings allow).  Polls and surveys.	Hybrid of one-to-many and peer-to-peer.  Admins can send announcements to the whole Community.  Members can send messages in the groups they are part of.	One-to-many.  Only the owner of the Broadcast list can send messages.  Members can reply to the list owner, but not each other.
<b>Size</b>	1024 people per group.	Up to 50 groups per Community.  Up to 5,000 members can receive announcements.	256 people per Broadcast list.
<b>Who joins?</b>	Open groups - anyone can join with a link.  <i>or</i>  Closed groups - admins must add members or grant permission.	Admins can create a link to share with people to join the Community.  Members can then join the Groups they want within that Community.	The Broadcast creator can add people in their phone's contacts to the list.  Members can opt out of Broadcast messages.

## WhatsApp for business

It is worth noting that all these three formats are personal services rather than business ones. They are free to use, but only in comparatively small scale, and the pay-off for WhatsApp comes in sharing personal data with WhatsApp and its parent company Meta (Facebook).

There are also business services, paid for on a per message basis. These offer greater data protection compliance and ease of management. But they are focused more on marketing and servicing conversations and do not include a group conversation model.

## Some examples

### **BFAWU - Networking workers together**

BFAWU used WhatsApp group as part of their furlough pay campaign at pub chain Wetherspoon in 2020. Their aim was to reach workers at pubs where they did not yet have membership, and encourage them to join an organising call to become campaign contacts in their pub.

They recruited workers via a Megaphone petition and used an online form to sign 250 of them up to join a WhatsApp group.

The union set the group to only allow posting by admins, keeping workers up to date with developments in the fast-moving campaign, and encouraging them to join the upcoming organising call.

But the group also helped establish social proof in the campaign – that workers could see they were not alone in this situation – which was important in encouraging them to action. The union ran regular “happy hours”, where they temporarily switched the group to all-member posting, and kicked off conversation with a question.

This caused an explosion of messaging, with workers across the country talking to each other about what they were seeing and feeling. Limiting the window in this way helped to make the conversation more energetic, but also meant it didn't inconvenience workers with a busy group all the time, which might cause them to unsubscribe.

In this campaign, it was important that the group was managed by young activists from the union's Wetherspoons branch. They were able to talk to the pub workers directly, from a shared understanding, and with a lively and informal tone.

### **RMT – Co-ordinating a project with reps**

In the run up to their national industrial action ballot in 2022, RMT worked with a group of 50 reps to hold peer-to-peer SMS conversations with 40,000 members. The reps used the peer-to-peer tool ThruText to check if members had received postal ballot papers correctly, and to answer any questions they had about the ballot.

This was a new experience for everyone involved. So, a WhatsApp group was set up between the volunteers and staff organising the project. This helped them to co-ordinate replies to any difficult questions that reps received back from members. As a result, members received a rapid reply and reps were able to feel supported in unexpected parts of the task they were undertaking.

The group was only needed for the period of the text campaign and could easily be deleted afterwards.

## **CWU – Building an action channel for activists**

The CWU have a sophisticated social media operation as a key part of their campaign communications to members and activists.

In a fast-moving industrial campaign, notifying active members is important, and social platforms' algorithms can't be relied on to show them all the latest content in a timely way. WhatsApp's notifications help cut through much more quickly than emails or social posts, which members don't check as often.

The union have ongoing WhatsApp broadcast lists to send to some of their most active members. These help distribute key social content that the union needs shared and amplified. That might be Facebook posts, YouTube videos, key Tweets, or notifications of upcoming online Live events.

Across the union that links up with hundreds of locally maintained branch WhatsApp groups. Content can be forwarded and reused, making everyone aware of the more urgent moments in a campaign.

It's especially helpful in mobilising reps and activists to turn out for live briefing events. Having a local presence at these events helps ensure locally focused questions in the chat can be followed up where they need to.

# Before setting up on WhatsApp

Once you have chosen the best option for your purpose, you can follow WhatsApp's instructions for creating your group, community or broadcast.

For groups and communities, you may also want to consider the following:

## **Clearly define the purpose and goals of the group or community.**

Is the group for a one-off event or do you want it to be on-going? If it's for a one-off event, will the group be closed down after the event?

Write the purpose down clearly and add it to the description of the group.

Choose a name that clearly expresses the purpose of the group.

Choose a photo or image to set as the icon for the group.

## **Define the expected standards of conduct.**

You will want to ensure that a group is a safe space for all members to collaborate, free from abuse or discrimination. One way to support this is to set expected standards for conduct.

This should be written in a positive and welcoming tone and include what type of conversation and content is encouraged and how you want people to engage. Add your guidelines to the description of the group.

It should also clearly state that no form of personal attack, hate speech, or discrimination will be tolerated, and that people will be removed from the group if they breach the guidelines.

## **Create a moderating team.**

Recruit people to help you moderate the group. Moderation involves supporting users in using the group, but also interpreting and enforcing standards of contact.

For larger WhatsApp groups or groups that you want to develop over time, having a team of moderators is key to cultivating and maintaining a positive culture.

This is important to prepare in advance. Moderators might not have much work to do if things go well, but if problems arise, a community can be damaged very quickly if there's nobody ready to act.

Be explicit about the role of moderator and ask people to make a firm commitment to the role. Make your moderators group admins so they have the power to add and remove people and delete inappropriate content.

Check in with your moderators more regularly, to ensure they're still able to keep up with the role.

The moderators should:

- Actively welcome people when they join the group and ask them to introduce themselves.
- Respond to messages and/or use the emojis feature to acknowledge people's messages.
- Share periodic content that is of interest or relevance to the group.
- Get conversations going by asking open questions, using the polls feature or encouraging people to share their ideas on particular topics.
- Remind the group of its purpose and the guidelines if people start using the group for other types of content. Follow up directly if people persist in using the group for other purposes.
- Remove spam, offensive language, hate speech, or any content that may cause harm or discomfort to group members.
- Be prepared to intervene if arguments escalate in the group and message/call people directly (not in the group) to de-escalate and resolve the situation.

For bigger groups, it may be a good idea to have a specific additional group just for moderators, so they can discuss together how they can respond to anything that happens.



# Creating a positive culture and engagement

An online community can be very powerful, but also quite fragile, and it needs tending over time to give it the best chance of working.

An ideal community forms a virtuous circle:

1. A user adds a question or request.
2. They get a timely response or acknowledgements from other community members.
3. That means they have a positive experience of the community.
4. That makes them more likely to respond to another's post.
5. The next user also has a positive experience.

You need to be aware of how active your group is, and intervene yourself where necessary, to avoid a vicious circle:

1. A user adds a question or request.
2. They don't receive any acknowledgement or support.
3. That means they have a negative experience of the community.
4. That makes them less likely to respond to another's post.
5. The next user also has a negative experience.

Here are a few ways you can improve the experience for group members.

## **Share reliable information.**

Verify the accuracy of information before sharing it within your WhatsApp group or with others.

## **Communicate effectively.**

Keep communications concise and focused to capture members' attention. You don't want a group with nothing being said, but equally you don't want to be sharing less useful or less relevant information, just for the sake of activity.

Use multimedia content such as images, videos, and audio messages where possible, to make your content more engaging.

## **Schedule and plan announcements.**

Where possible plan ahead and set a schedule for regular updates, announcements, and discussions. This can help maintain engagement and momentum.

Be mindful of the frequency of messages to avoid overwhelming group members.

### **Encourage collaboration and action.**

Facilitate collaboration by encouraging members to share ideas, resources, and action plans.

Direct communication with other members is the most important factor in establishing a sense of community, but involving moderators as well can help.

Where you have multiple moderators, it's great if everyone can contribute regularly. This helps the community feel livelier than if only one admin is posting.

### **Respectful and constructive dialogue.**

Promote a culture of respectful and constructive dialogue within your WhatsApp group.

Encourage members to express their opinions and engage in healthy debates while maintaining respect for others.

For groups that you expect to be active, you could set time rules, for example posting only between 9am and 9pm.

### **Encourage offline engagement.**

Encourage members to translate their online discussions into real-world actions.

Provide guidance and resources to support members in taking tangible steps i.e., a workplace activity.

Feed the results back to the group to help establish social proof – the feeling for users that others are engaging and that therefore they should too.

### **Use polls and surveys.**

Use WhatsApp's polls feature to gather opinions or preferences from group members. Polls are a quick and interactive way to engage members and make collective decisions.

Surveys can also be used to gather more detailed feedback or conduct research.

## Approaching risks

For all its power in organising and comms, WhatsApp is a consumer tool, not optimised for the needs of organisations in a heavily regulated space. It has also been controversial for its approach to data sharing with its parent company Meta (Facebook).

Depending on the constraints your union faces, it may not even be possible to use it safely. But there may be scope to identify the risks the union faces and mitigate them enough to make it viable for use.

### Data protection

For detailed information about WhatsApp privacy and security, you should speak to your union's Data Protection Officer, who will know any details or cases specific to your own union. But here are some basic rules of thumb.

A union WhatsApp group counts as union data for the purposes of data protection law. This doesn't matter if it's a broadcast list held centrally in the union, or a member group managed by branch activists. If a breach of personal data occurs, the union could be held liable.

And if the list is specifically a group of members, it's also classified as "sensitive personal data" as the users' trade union membership status is implied by being on the list. This type of data carries greater sanctions if data protection is compromised.

If you're using a group or community, then how you sign people up for it matters. A WhatsApp group will expose member contact details to other members of the group.

Whilst many people will understand and appreciate this, don't presume that's universal. It's much safer to invite people to join a group than it is to simply add them to it. When they receive an invite, there is an opportunity for them to consider the privacy implications of joining.

If you do need to add people directly, then make sure they confirm they understand and are happy with being visible to others in the group.

You also need to consider user consent to receive messages from the union. If you are adding people to a group or broadcast list, make sure you have a record of their consent to receive communications in this way. At the time of consent, you should explain how you're planning to use it, that they can opt out if they wish, and how to find the union's privacy policy if they have questions.

For example, RCM have used an online form for users to request being added to a list or group. The form asks for identifying information and displays disclaimers that the user will have to signal they have read. Submitting the form gives a timestamp for that

consent. Having a record of how people opted in will be helpful if a complaint arises and the union needs to explain what's happened to the Information Commissioner.

There are also questions for the union to consider centrally, such as whether they can use data processor services that store or transfer data outside of the European Economic Area (as WhatsApp does). Check with your Data Protection Officer if this is possible for you, or what you might need to do to accommodate this.

The union will also need robust systems in place to avoid data risk when allowing the use of WhatsApp at different levels across the organisation. For example, a subject access request to the union for all data held on an individual would need to be able to provide retained messages about that individual in WhatsApp groups.

As a result, devolved WhatsApp groups around the union should be logged with your Data Protection Officer in an information asset register (or Register of Processing Activities). This will help the union track down the right groups if needed, within what can be a tight timescale.

You should also consider how you will provide data protection training to people who help moderate WhatsApp groups. This may help stop some common mistakes, but keeping a record of training will also evidence to the ICO that the union is approaching this responsibly overall if there should be a problem.

### **Community safety**

Be conscious of how open or closed the group is. If the group is set so that anyone can join it, you should assume that anything you send in the group is public.

This means that an employer representative, a journalist or a political opponent could join the group and receive communications from the union or between members.

Make this clear to members, as well as considering it in planning your own messaging to the group.

You might also consider whether using the WhatsApp's optional *Disappearing Messages* feature is appropriate. You can choose for messages to disappear after 24 hours, 7 or 90 days. This leaves less of your community's historical discussion available for potential opponents to be able to search through.

Especially avoid sharing sensitive personal information in the group. Move discussion of sensitive cases onto more secure channels.

Use the *Block* and *Report to WhatsApp* features, if necessary, to remove unwanted content and keep abusive behaviour away from your groups, before it has a chance to make users unsubscribe.

And it's also worth remembering that whilst the app encrypts conversations between senders, that doesn't stop any user from downloading or screenshotting any content and sharing it onwards.

You may also need to consider the safety of any activists or staff members who are participating in WhatsApp communications. Social media messaging tools like this can blur the line between union roles and personal life, leaving activists vulnerable to unwelcome intrusion into their private lives.

If this is a concern, one option may be to provide dedicated phones or secondary SIM cards for people to use for union work. This could allow them to better compartmentalize their union messaging and avoid making their personal phone number visible to all.

But it is theoretically a risk to all members of a WhatsApp group, who may be revealing their personal phone numbers to each other. Consider how you would manage safeguarding in cases of unwanted direct contact between group members.

### **Adoption**

A huge proportion of your membership will already be familiar with WhatsApp and will already use it. This is a significant advantage in being able to convince members to receive communications on this channel. But it's worth remembering that it's still not everyone. You may need to support members in joining up.

Many will be understandably resistant to using the platform if they have data protection concerns. A 2021 update to the company's privacy policy confirmed that parent company Facebook could share and use personal data from WhatsApp users. Whilst it can't see your messages, it does collect a huge amount of other personal data from users of its app. The company has also received fines for poor data protection compliance.

Using a more privacy-focused channel such as Signal might allay these concerns, but you will then need to convince most of your members to sign up for a completely new service. And if they would only use it for union communications then they may be less likely to use it as regularly as they do WhatsApp, negating one of WhatsApp's biggest advantages.

So don't assume it can be a universal channel for your particular need. And be aware that this may have implications for being able to treat and engage with all members equally.

### **Management and resource**

WhatsApp is primarily a consumer product rather than a business-focused one. As such it doesn't have administration features that would help a union see which members are involved or making use of it, and easily edit their accounts.

Be aware that you may have to do a considerable amount of work to manage a group or community. That could mean finding and removing people who are no longer members of the union.

It will also be hard to identify genuine members as they will not be linked to membership numbers or have to give identifying information when joining.

A potential exception to this is currently around WhatsApp's paid business tools, which have integrations for major CRM systems such as Salesforce. A union can theoretically administer WhatsApp broadcast communications in the context of its membership tools. Integrations are also available for major service desk tools, allowing members to contact the union and interact with ongoing cases through WhatsApp messaging.

Some unions have looked at other systems to get around this problem. For example, NEU use a platform called Guild for some of their communities. It has better tools for membership administration and better data protection compliance, reducing the drain on administrators' time. This approach will cost more to rent and will need focus on signing users up to a new system and supporting them in using it.

# Communication style

When communicating with your WhatsApp group or broadcast list, consider the following:

## Content

- Avoid unnecessary detail that could put people off engaging with you. Think conversation prompts rather than longer stories. You can always provide outline information and links to further material online if needed. Emotional content and timely actions that people can take will work well.
- Avoid jargon and technical terms that could confuse. Anything that makes people feel like they aren't an appropriate audience for a message will reduce their engagement with it.
- Personalisation - share a bit about yourself and why you're motivated to do the work you're doing. Personal stories help to get good conversations going.
- Use timely content. Because it's based around phone notifications, WhatsApp is a more urgent medium than other digital channels. Content that reflects that timeliness and urgency will do well.
- Share actions that people can take. WhatsApp (along with Facebook Messenger) is a particularly useful tool for encouraging members to share actions with friends and colleagues. At the TUC's Megaphone campaign platform, we've noticed people decreasingly sharing union campaign actions on public social media like Twitter or Facebook, but increasingly sharing on messaging networks, where the user can specify more closely who will see the post.

## Tone

- All communication should feel like it comes from a real person - and not just be another mass text or marketing message. Write shorter and more 'off the cuff' communications - using a less formal style than you typically would in a work environment.
- Communication should be clear and to the point. Avoid vague or imprecise language - write as if there's work to be done.
- Address people directly - "We need your help for this plan to work."

## Format

- Centre the *call to action* (the link for the thing you want to drive people to do).
- Use bold text and emojis 📌👉👉👉 - especially when you need to highlight a call to action.
- Add images, video and audio content where it adds to a feeling of being closer to what's going on.

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