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of work for good

Online joining for unions: current and best practice

TUC Digital Lab – February 2021

Acknowledgements

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Changing member expectations in a digital-first world

In 2021, people expect good quality digital services from all the companies and organisations they interact with. Unions are no exceptions - prospective members will expect to be able to easily and immediately join online.

Expectations have also increased around the user experience online, driven by the increasing number of digital subscription services the average person now interacts with – from Netflix and Spotify to Uber. This has been taken up by commercial services like online banking and even by government with major programmes focused on streamlining interactions with government services.

Website forms have become easier to use, with better guidance, cleaner layouts and a step-by-step approach that walks the user through the process, with less important information gathered only after the user has subscribed, and at a time that feels appropriate to them. It's now rare to come across a large, cluttered form with lots of fields to fill in at the start of a process.

In the early days of online joining, many unions had a partially digital approach that required the applicant to send their information via an online form before printing off, signing, and posting the Direct Debit mandate. This is an example of an approach that will now fall below expectations. People expect a much more joined up experience.

With the rise of smartphones and tablets, many potential union members will also be applying online using small, touch screen devices. Again, the expectations are that this is something online joining should easily facilitate.

Similarly, anyone applying for something online will now expect good communications. They will want regular and timely updates on the progress of their membership and a fast, if not instant, approval.

Speed of application can also help to increase a new member's level of engagement with the union, offering them further interactions like activism, campaigning or professional development, at a time when their attention is at its highest immediately after joining.

The state of online joining in 2021

To gauge the state of play around online joining facilities offered by unions in 2021, we analysed the websites of the TUC's 47 affiliates that have websites. Here's what we found from a quick survey of current systems.

Union	Online joining?	Layout	Mobile friendly?	Notes
Accord	Yes	Multi-step	Yes	Recently launched an improved online joining form.
Advance	Yes	Multi-step	Yes	
Aegis	Partial	One page form	Yes	Process ends without capturing payment details.
AEP	No			
AUE	Yes	One page form	Yes	Single page form, but fields have been kept to a minimum.
ASLEF	No			
BALPA	Yes	One page form	No	
BDA	Yes	Multi-step	Yes	
BFAWU	No			
BOSTU	Yes	Multi-step	Yes	
COP	Yes	Multi-step	Yes	
CSP	Yes	Unknown	Unknown	Potential members must create an online account before applying, but there were issues in accessing this during the test.
Community	Yes	Multi-step	Yes	
CWU	Yes	Multi-step	Yes. Some display issues.	National Insurance is mandatory.
EIS	Yes	One page form	Yes	

Equity	Yes	Multi-step	Yes	
FBU	No			Online joining in development.
FDA	Yes	Multi-step	Yes	
GMB	Yes	Multi-step	Yes	
HCSA	Yes	Multi-step	Yes	
Musicians' Union	Yes	Multi-step	Yes	User account required to complete registration.
NAHT	Yes	Multi-step	Yes	
NAPO	Yes	Unknown	Unknown	Form broken during testing.
NARS	No			
NASUWT	Yes	Multi-step	Yes	
Nautilus	Yes	Multi-step	Yes	
NEU	Yes	Multi-step	Yes	
NGSU	Yes	One page form	Yes	
NSEAD	Yes	One page from	Yes	New members register first to get email, and then set up payment in a user account.
NUJ	Yes	Multi-step	No	
NUM	No			
PCS	Yes	Multi-step	No	
PFA	No			
POA	No			
Prospect	Yes	Multi-step	Yes	
RCM	Yes	Multi-step	Yes	
RMT	Yes	Multi-step	Yes	
SOR	Yes	Multi-step	Yes	
WGGB	Yes	One page form	Yes	
TSSA	Yes	Multi-step	Yes	
UCAC	Yes	Multi-step	No	Online joining only in Welsh.

UCU	Yes	Multi-step	Yes
UNISON	Yes	Multi-step	Yes
Unite	Yes	Multi-step	Yes
URTU	No		
USDAW	Yes	Multi-step	Yes

Of the 47 union websites examined, 37 have a full online joining facility (78.7%). One website has a partial online joining system and 9 unions (19%) are yet to provide online joining.

In late 2018, the TUC ran a [workshop on improving online joining](#), where we worked together to examine and define what good practice could look like in this area.

One of the key recommendations to improve completion rates and ease of use was to break complex joining processes into smaller steps, making forms feel less daunting to users, and demonstrating their progress through the application.

Out of the 38 online joining systems in TUC affiliates, 29 of these take this approach. A one-page online form, where all fields are displayed at once, is utilised by 7 of the unions. The processes used by 2 unions could not be clarified.

Mobile access is another major factor to consider. Websites are now more likely to be viewed more through smartphones than any other devices, and some potential members will not have any access to a desktop or laptop computers. In the last 12 months alone, mobile usage of the TUC website has gone from 48% of total traffic to 72%.

For many unions this will be even higher, and it is likely to be the case particularly for online joining, where people may be inspired to join by a sudden change in situation or contact with a co-worker or organiser, and look to complete the process on the spot, rather than waiting until they are next sitting at a computer.

Out of the 38 online joining forms, 32 were mobile friendly (representing 68% of all unions). 4 forms were not optimised for smartphones. This approach could not be fully clarified on 2 websites.

How have things changed since 2012?

In 2012, Infobo.com's Simon Parry carried out an [analysis of union online joining facilities](#).

Using this data as a benchmark allows for the monitoring of progress over the last 9 years.

Union	Online joining in 2021	Online joining in 2012	Notes
Accord	Yes	Partial	2012: Print off direct debit form.
Advance	Yes	No	
Aegis	Partial	Partial	2012: Form generates an email.
AEP	No	No	
AUE	Yes	N/A (new)	
ASLEF	No	No	
BALPA	Yes	Partial	2012: Form with separate payment.
BDA	Yes	No	
BECTU	Yes	N/A (merged)	2012: Only freelance staff can join online. Others download a form.
BFAWU	No	No	
BOSTU	Yes	No	
COP	Yes	No	
CSP	Yes	Unclear	2012: Registration required first.
Community	Yes	Yes	
CWU	Yes	No	
EIS	Yes	Partial	2012: Paper direct debit form required.
Equity	Yes	Yes	
FBU	No	No	
FDA	Yes	Yes	

GMB	Yes	Yes	
HCSA	Yes	No	
Musicians' Union	Yes	Yes	
NAHT	Yes	Yes	
NAPO	Yes	Partial	2012: Form that generates an email.
NARS	No	Partial	2012: Form that generates an email.
NASUWT	Yes	Yes	
Nautilus	Yes	Yes	
NEU	Yes	N/A	
NGSU	Yes	Yes	
NSEAD	Yes	N/A	
NUJ	Yes	No	
NUM	No	No	
PCS	Yes	No	
PFA	No	No	
POA	No	No	
Prospect	Yes	Yes	
RCM	Yes	Yes	
RMT	Yes	Yes	
SOR	Yes	Yes	
TSSA	Yes	Yes	
UCAC	Yes	Partial	2012: A paper direct debit form is required.
UCU	Yes	Yes	
UNISON	Yes	Yes	
Unite	Yes	Yes	
URTU	No	No	

USDAW	Yes	Partial
WGGB	Yes	Yes

Back in 2012, 18 unions had a full online joining system. This has now slightly more than doubled to 37.

Back in 2012, partial online joining systems were more commonplace. These often involved the requirement to return a paper Direct Debit mandate. There were 10 unions using this approach 2012, compared to just 1 now.

16 unions had no online joining facility at all in 2012, compared to 9 in 2021.

So, it's clear that considerable progress has been made by unions to modernise their online joining offerings, but more work needs to be done and there is room for improvement that would help ensure more potential members complete the online process.

In a sense we have moved on from merely offering basic online joining itself as being the benchmark of good practice, to looking at best practice - offering user-focused and mobile-friendly joining systems.

What does good practice look like?

The TUC's 2018 workshop on best practice in online joining was based on the experiences of a few unions who had taken a new approach to reviewing and modifying their online forms, resulting in dramatically improved conversion rates.

Some of the key recommendations were:

Make it easy for people
Simple, short, accessible, mobile.

Provide reassurance
"You're making progress", "You're not alone - other people are doing this too".

Design with data
Look at where people struggle with the form. How can we remove blockers?

Break things down
It's not all one website, solve the task the user wants to do at that moment.

Making it easy for people now includes mobile friendly design. Mobiles are now the most common way of accessing the web, and many people will only use mobiles for browsing. While unions have made great strides in making their websites more mobile-friendly for general content, the online joining forms should not be forgotten.

The online joining process should also be as short and simple as possible. This means reducing the number of fields to the bare minimum and breaking the process down into smaller steps. This will result in less potential members giving up during the process.

For example, does your union really need the National Insurance number of new members? That's something that may well need them to go home and dig out their NI card from files. And that's even if they still have it. During 2020 alone, 122,000 people accessed the TUC's advice page on what to do if you've lost your NI number.

Do more complicated pieces of information have to be mandatory? Can some questions be asked later in a follow up email? This may particularly be the case for many aspects of equality data. Unions have a duty to ensure greater equality across their membership and operations, but some workers may be reluctant to supply this information to a new organisation that they do not yet fully trust.

It may also be possible to gather more of the information a union needs at further points in the member journey, where relevant content is being offered and the member sees an immediate need to provide the information. This is something that has become easier in

recent years as unions have moved to CRM systems more closely integrated to website forms, allowing easier direct updating of member data.

In looking at the current online joining offerings, it was clear that there's scope for many unions to streamline the process more, reducing the number of fields and making the online forms more user friendly.

Another recommendation is to break the process down into smaller steps. Several unions who have made significant improvements to their conversion rates had used this approach to make their applications easier to use and intimidating.

Seven unions examined for this report are currently displaying all the application fields on one page. Some of these forms are larger than others, displaying a lot of boxes and options, something some users can find off-putting. Even when the application is broken down into smaller steps, there are still plenty of examples where a lot of fields and options are displayed at the same time.

Another lesson from unions who have improved their conversion rates is to provide reassurance to applicants throughout the form, keeping them going through the process. For example, showing a progress bar to let the applicant know that they are progressing and that there are not many more steps left, can help to make people feel already invested in the process and more likely to see it through.

The review of online applications shown that there is some great work on online application forms, but also that more can be done to embed best practice. Ensuring the joining process is as smooth as possible will result in less people giving up halfway through. This means more members for the union.

The best place to start is in gathering statistics on how many people click to start the join form, against how many complete it. Knowing this ratio (the form's "conversion rate") is crucial as it will enable you to evaluate every change you make.

Think about the difference you could make to recruitment overall by improving this conversion rate just 10%. That would improve the effectiveness of organising efforts, meaning organisers had to follow up again with potential members less often, and freeing their time for other work.

For unions who are advertising for membership, whether in broadcast or targeted social media advertising, there is a cost per person recruited. Improving the conversion rate of the form in effect reduces the cost you are paying to recruit a new member in this way.

It would be a mistake to assume that any prospective members who give up on the online form will eventually find another way to join. This trend may be even more likely with mobile applications, where users decide not to act after all once the initial trigger for joining has passed.

How to get there

Sam Jeffers of [The Shop](#) led the TUC Digital Lab's original workshop on improving online joining. He's worked with unions such as UNISON, Prospect ad Ireland's Forsa on optimising their online joining processes.

We interviewed him to understand some of the steps involved in running a project to improve your own joining system.

For unions looking to improve their online joining system, Sam recommends getting a group of members, reps and people from different teams across the unions together and examining the process in detail. This helps uncover other perspectives you may not consider at first, but which are arguably the most important in understanding how to improve your offering.

Use a workshop approach. For example, agree a map of all the current steps for the new member on a wall and use sketches or wireframes to look at how different variations could work. Examine the process in detail and mock-up new ones.

Look at the questions that applicants may struggle to answer and work out how to either remove or improve each of them. Sam points out that almost everyone who applies to join a union gets accepted, so unions maybe shouldn't get too hung up about some of the questions that qualify membership. Delaying the membership of the majority may dampen their feelings of engagement with the union.

Ideally, the whole application process should be possible to complete in 2 minutes. Keep the number of questions to a minimum and don't ask questions that can't be answered on a mobile phone in a worker's lunchbreak. For example, some people will struggle to recall their previous membership dates or not understand how to describe their particular bargaining unit.

He cautions against combining user registration with the online joining form, and suggests keeping it simple, logical, and instant. "Not everyone who may join will. Losing people during applications means losing members".

Sam also highlights the importance of the processes surrounding the act of joining. Consider the onboarding of the new members – getting them to feel engaged and involved. Connect up the whole experience to help build up a relationship with the new member, making them feel welcomed into the union.

He also flags up the need to think beyond the form and to consider what different new members may be worth to the union, and how that could justify more work to bring them in. "Think about how to increase volume. Online advertising, online tools, content, social media ads and search engine optimisation."

Starting from scratch

Around 1 in 5 of the unions in this research still have no online joining offering. Custom development can be expensive and require expertise that is not readily available. However, there are cost effective ways of deploying an online joining system.

Off-the-shelf software can be used to manage the eCommerce elements of the form. Content Management Systems such as Drupal are free and can be used to configure online forms in a secure platform. For those unions using modern CRM tools, online joining modules and extensions may also provide a cost-effective route to achieve good results.

Join Together

The TUC Digital Lab has also been working with Sam Jeffers and his colleagues to create *Join Together*, an online joining system that can be branded and deployed for individual unions as a seamless third-party provided service, without requiring technical development on their part.

A mobile-friendly join system, customised in the union's own livery, with the union's particular custom data requirements incorporated, is connected to paperless direct debit compliant checking, with an admin console for union staff users to log in and approve applications, integrate data with their membership systems, and generate direct debit records to upload for BACS payments.

After a pilot project in 2020, the *Join Together* system has now been developed on a sustainable footing as an online service and several unions are currently investigating implementation. By working together and funding the core technical development through the TUC, we're able to provide this to affiliates in the most cost-effective way.

If you would be interested in finding out more about Join Together, or having a presentation for your own union about how it might help, contact John Wood, TUC Digital Manager, at jwood@tuc.org.uk

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