



Digitising the union

A continuing journey

Some background



- ✓ Oct 2019 a digital audit conducted. Key recommendation was the adoption of cloud technologies & digitising the union. 3-year roadmap...
- ✓ H1 2020 – Cloud apps adopted, MS 365 became go to platform. Cloud backups became the norm in H2.
- ✓ H2 2020 – I started to take the reins unofficially on digitisation having come from an IT background and was better placed to understand the needs of Accord than the consultants (and challenge them).
- ✓ H2 2020 – Started to develop and launch eBites – online training for our reps using Microsoft Sway. This included using MS Forms for quizzes at the end and using Power Automate to build a list on SharePoint.
- ✓ Jan 2021 – Delayed new website launch bringing automation of the join online & member update process using APIs. “Retainer” contract for continued development.
- ✓ Jan 2021 – Launch of automated forms submitted from the website to create a Workflow task manager in SharePoint (partial automation, including getting zipped attachments from the website to reduce data in transit and increase data security).
- ✓ H1 2021 – Created a process for managing the legal process of Settlement Agreements (demo in July 2021 for TUC Digital “Case Management” report).
- ✓ H1 2021 – PowerBI started to be used, but limited functionality due to data (CRM provided 2 tables of data, the rest had to be constructed via spreadsheets). Consultant replaced with internal resourcing, but capability not sufficient and a new consultant was brought in who had no experience of PowerBI, but high technical capability.
- ✓ 2021 – Online SAT platform and online HR & Payroll systems introduced
- ✓ H2 2021/H1 2022 – Servers migrated to Azure (SharePoint becomes file structure, and CRM on cloud)
- ✓ Nov 2022 – Officially appointed as Accord’s Digital & Data Protection Officer.
- ✓ H1 2023 – Granted SQL permissions to CRM data enabling rebuilding and extending PowerBI & data capabilities.
- ✓ H2 2023 – Integrated CRM with Mailchimp for automation of mailing lists
- ✓ H1 2024 – Microsoft Intune becomes default MDM for new devices (Windows, Android & iOS)

Digital maturity



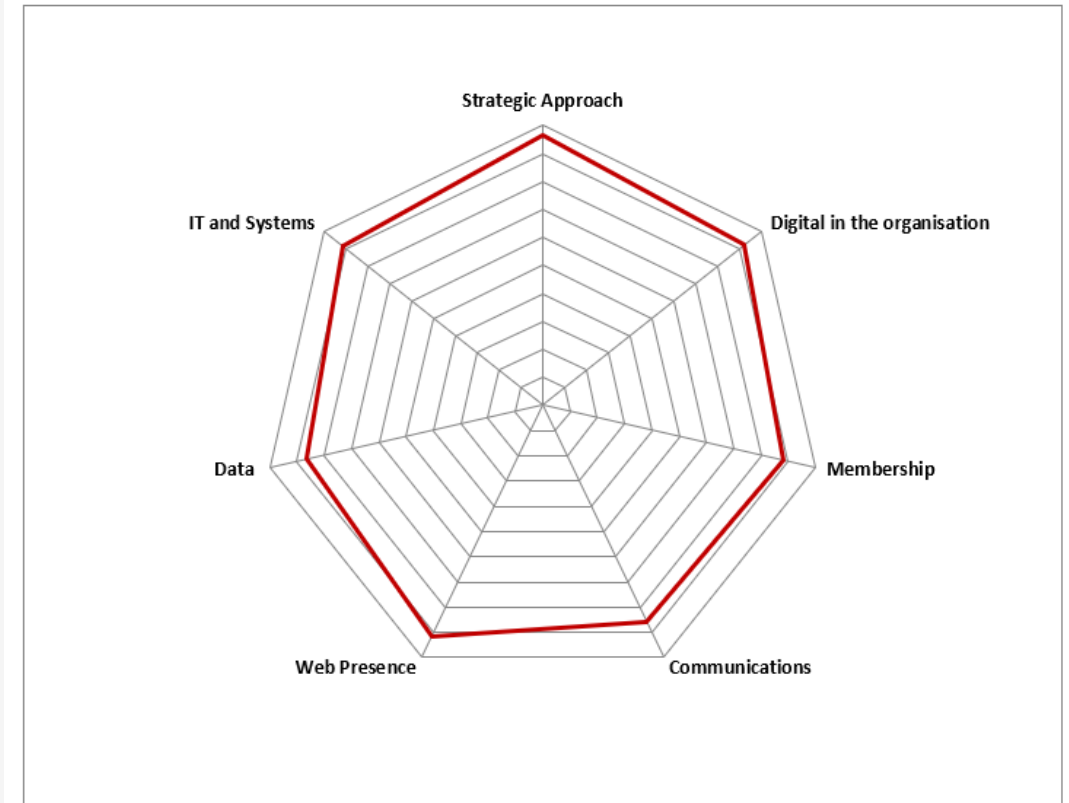
For you

Digital maturity 2019 vs 2024 (TUC Digital Healthcheck)

Overall digital maturity



Overall digital maturity





Using Power Automate

Case for automation



Problems & limitations

- ✓ No single place to manage manual tasks
- ✓ Manual interventions; emails, spreadsheets, word documents, etc
- ✓ Reliance on individuals to manage & diarise critical actions
- ✓ Duplication of effort to enable reporting capability

Accord's approach



Underlying considerations

- ✓ Power Automate requires licenses (in some cases Premium connectors used).
- ✓ It's low code – not no code. Complexity requires knowledge and some coding elements.

Example 1: Settlement agreements



- ✓ Prior to semi-automation, each officer would be responsible for their legal agreements. Often little or no detail collected centrally.
- ✓ Creation of a SharePoint list/form to collect data – robust data that can be used for reporting too.
- ✓ Power Automate used as triggers at key touchpoints:
 - ✓ Creation – email to appoint and instruct solicitors
 - ✓ 14 days prior to exit – officer notified via Teams and requests an interactive response
 - ✓ 1 day prior to exit – no response? Additional reminder sent
 - ✓ On response – task created to membership team
 - ✓ 1 day after exit – automated case evaluation. Is all data complete and did we get a response?
 - ✓ Yes – close case
 - ✓ No – escalation sent & manager notified

The image shows a SharePoint form titled 'Settlement Agreement Referral - Test case' and a Teams chat window. The form has sections for 'Member details' and 'Address'. The 'Member details' section includes fields for 'Member Name', 'Member ID', and 'Retain membership'. The 'Address' section includes fields for 'Address', 'Employer Point of Contact', and 'Employer Contact Number'. The Teams chat window shows a message from 'Chris Burrell' with a subject line 'Settlement Agreement Referral - Test Case'. The message includes a table for 'Member Details' and a table for 'Settlement Details'. The bot message in the chat window says 'Settlement agreement: Exit date due' and provides a link to 'Update details now'.

Member details

Member Name *
Enter value here

Member ID *
Enter a number

Retain membership *
TBC

Address *

Address
Enter value here

Employer Point of Contact *
Enter value here

Employer Contact Number *
Enter value here

Member Details:

Name	ID	Address
Jacob Testlog	0656555	87 Peter Street, Southampton, EX1 4RE
Email: jacob.testlog@bathbathman.com.uk	Phone: 07506540325	

Employer Contact:

Contact Name	Phone	Email
David Simmons	07506540325	David.Simmons@bathbathman.com.uk
Employer Name: Bathbathman Ltd		

Settlement Details:

Settlement Value	Contract End Date
£15,000	2021-07-05

Details:

3 months PILON

Thanks
Chris Burrell
07506540325

Test Bot 2:36 PM

Settlement agreement: Exit date due

A member you are representing is due to leave tomorrow. This is a reminder to have a conversation with them about retaining their membership as an associate or cancelling.

Member: @[items('Apply_to_each')?['(Name)']]

Settlement details: View SharePoint item

Update details now

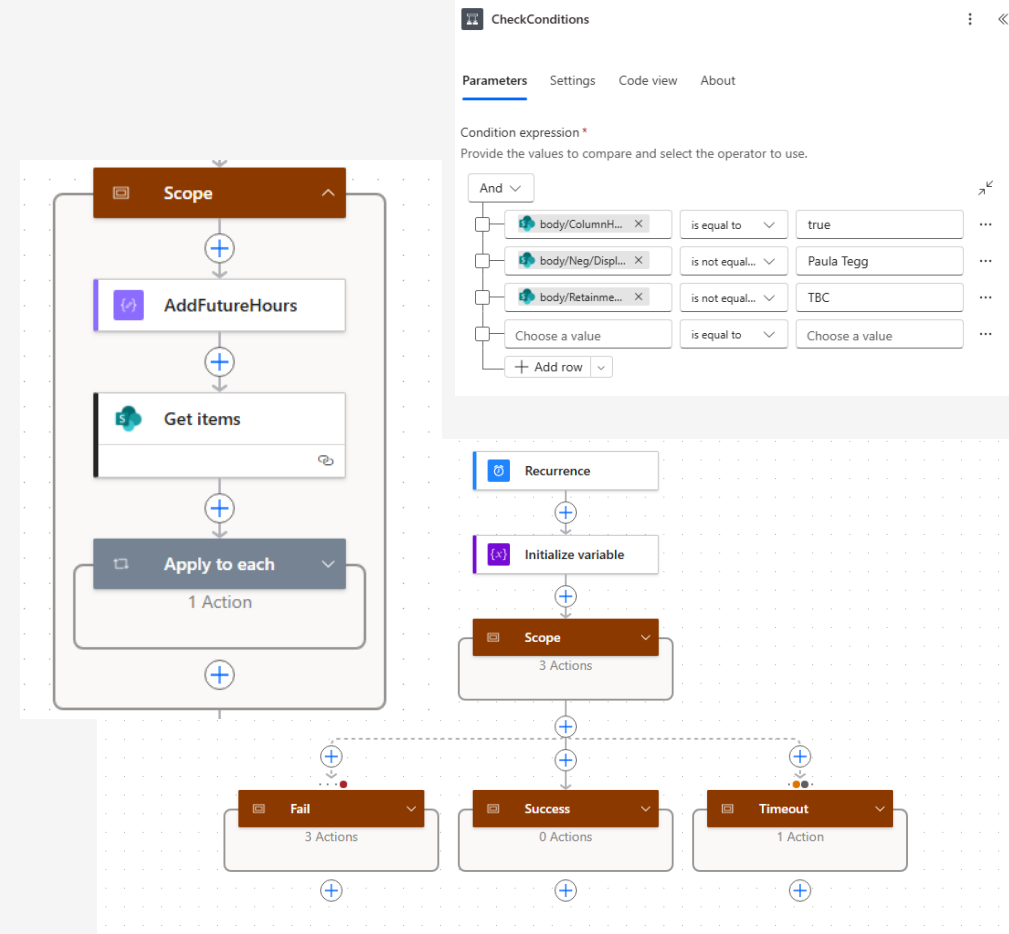
Select an option

Update Record

Example 1: Flow behind the scenes



- ✓ Triggers include daily recurrence, on creation of SharePoint item and on edit of item
- ✓ Evaluation of version changes (have certain fields changed and depending on response different actions taking, including ending the flow with no action)
- ✓ Error handling to collect data about failures and trigger emails.
- ✓ Evaluation phrases such as whether a date is 14 days from now `addDays(utcNow(),+14,'MM/dd/yyyy')`
- ✓ Posting of interactive adaptive cards to Teams (use the MS tool <https://adaptivecards.microsoft.com/designer>)
- ✓ Creation of new SharePoint items
- ✓ Emails, written in HTML (tools such as [w3cschools](https://www.w3cschools.com) can help visualise the code)
- ✓ Using integration with Excel to use RegEx (Regular Expression) to check format of email addresses



Example 2: Spreadsheet manipulation



- ✓ Prior to automation, each month an evaluation needed to be made to extract data from a spreadsheet based on activity (Approved & Approval date)
- ✓ Extract used to upload to a CRM table.
- ✓ Power Automate used to fully automate this process:
 - ✓ Daily run to evaluate changes – has a new item been approved yesterday?
 - ✓ Run manipulation – format number to be at least 5 digits, replace blanks, convert currency to number, validate dates (is the date in the future or invalid?), convert name fields to proper case, trim blank spaces from beginning & end of fields
 - ✓ Add data into a table on a different spreadsheet for import (this is emptied once imported).
- ✓ This is a work in progress. The next steps are to remove the row from the existing sheet. But as the membership team require historical records, it needs to be added to a secondary table on a different sheet tab so they still have access.
- ✓ Exploring whether there's a method to automate the import into the SQL table.

Example 2: Behind the scenes



- ✓ Triggers include daily reoccurrence, on creation of SharePoint item and on edit of item
- ✓ Evaluation phrase to narrow changes to yesterday's date `formatDateTime(addDays(utcNow(), -1), 'yyyy-MM-dd')`
- ✓ Filter query on Excel *Approval_Status eq 'Approved'* and for error checking, I want to know how many records are output which requires filtering an array and then reporting the length of the response using `length(body('Filter_array'))`
- ✓ Converting number to correct format `formatNumber(int(trim(item()?['Membership Number'])), '00000')`
- ✓ Checking date formats `if( or(empty(item()?['Date Received']), not(equals(string(int(item()?['Date Received'])), item()?['Date Received']))), 'Invalid', formatDateTime(addDays('1899-12-30', int(item()?['Date Received'])), 'yyyy/MM/dd') )`
- ✓ Proper case is not supported by Power Automate as a command – so workaround needed. Convert to lowercase and then use code to split words, convert the first letter to upper case and then concatenate `concat(toUpper(slice(item()?['Lower Name'], 0, 1)), slice(item()?['Lower Name'], 1, add(indexOf(item()?['Lower Name'], ' '), 1)), toUpper(substring(item()?['Lower Name'], add(indexOf(item()?['Lower Name'], ' '), 1), 1)), slice(item()?['Lower Name'], add(indexOf(item()?['Lower Name'], ' '), 2)))`

Reflections



Learning from experience of using Power Automate

- ✓ Understanding your process by mapping first. Consider the touch points and decisions tree based on responses.
- ✓ Sometimes things break due to connectors being updated, discontinued or on occasion requiring re-authentication.
- ✓ Consider the user account that will run the automation – for example if using MS Forms, you can only trigger off forms created by that user account and not ones held by a group or shared with the account
- ✓ It may be low-code, but it still requires some technical understanding for more advanced workflow. As you can see in Example 2, it can be quite complex and you'll soon need to code something.
- ✓ If you're new to Power Automate, start simple to build confidence, add the glitter later.
- ✓ ...but also add error handling to send failed flows to you. Power Automate sends some failures to you, but these are limited and not in real-time (for example today your flow has failed x number of times). Not useful.
- ✓ Test before you release – but be prepared for users to do unpredictable things. You can't plan for everything.
- ✓ Using online tools and forums can help find solutions to problems – you will run into problems or simply don't know how to start on something. There's lot of solutions out there.
- ✓ AI (Copilot for example) can be useful too and will write code for you– but you also need knowledge to be able to challenge it when it gives you incorrect information that doesn't work.



Using CRM data

Case for change



Problems & limitations of CRM

- ✓ Email facilities are limited compared to tools like Mailchimp
- ✓ Data capabilities are limited, no real analytics
- ✓ Oracle underlying database isn't directly cloud connected for data query

Accord's approach

- ✓ Using Mailchimp for advanced email facilities & segmentation, but not linked to Live CRM data
- ✓ Use of PowerBI to visualise data and help inform and drive decisions, but data needs to be linked to CRM

Underlying considerations

- ✓ Development of APIs required for CRM to connect to Mailchimp webhooks
- ✓ Access required to the backend tables in the Oracle DB for direct query
- ✓ PowerBI Gateway required to connect to Oracle DB

Mailchimp



- ✓ We use a number of mailing lists that members can opt into, outside of our general legitimate interest & mandatory mailings.
- ✓ Only mandatory messages are sent from the CRM. Everything else goes via Mailchimp offering data insights & stats.
- ✓ Automating mailing lists with Mailchimp enabled us to cut down on exports and create segments to target messages.
- ✓ Required APIs building and links to webhooks. These are triggered on a number of conditions and particular fields being updated.
- ✓ Members can update their preferences via our website which feed into CRM and pushed out to Mailchimp.
- ✓ We're able to trigger 'alert' messages from the website based on preferences and opt-ins using RSS emails in Mailchimp.

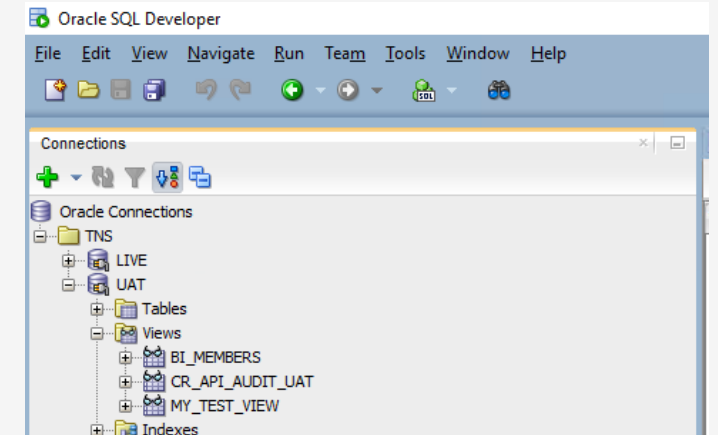
Code	Name
CAWA	Website alerts (News)
CAWB	Website alerts (Others)
GM	Mandatory mailings & exports
TGMM	General member mailings & updates
TMB	Membership benefits
TMS	Member surveys

PowerBI - Pre-requisites



To use live data from CRM there are several pre-requisites:

- ✓ A service account on the Oracle DB which has been given access to query the data tables & views
- ✓ PowerBI Gateway running on a device/server with the Oracle connector installed
- ✓ PowerBI Pro licences (or greater)
- ✓ Time to understand the backend tables in CRM
- ✓ SQL knowledge (creation of SQL views for extracting data)
- ✓ A copy of Oracle SQL developer installed (free) connected to the CRM DB

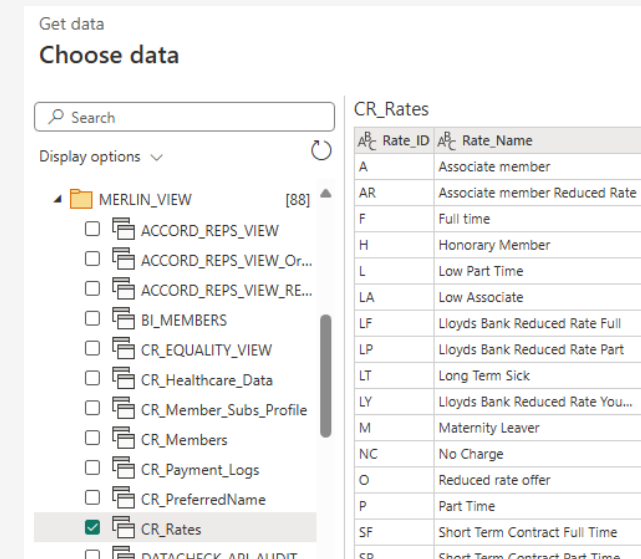
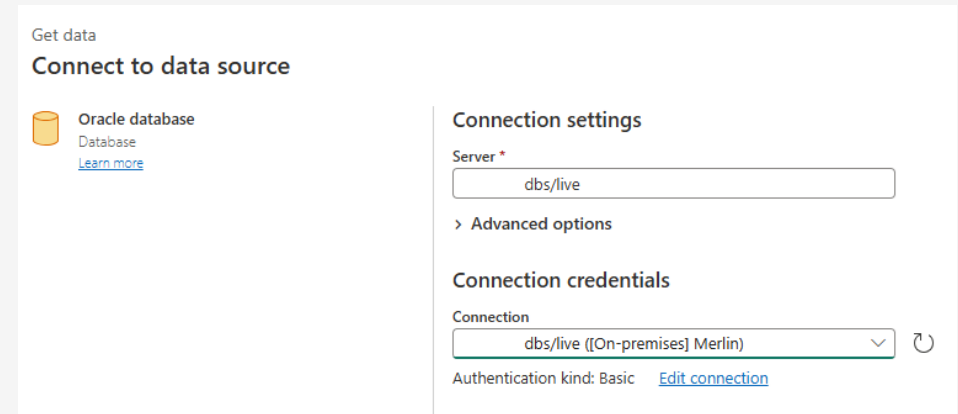


```
CREATE OR REPLACE FORCE EDITIONABLE VIEW "MERLIN_VIEW"."CR_Member_Sub_Profile" ("Sub_ID", "Start_Date", "End_Date", "Class") DEFAULT COLLATION "USING_NLS_COMP" AS
SELECT
  mem_rates.mra_person_id,
  mem_rates.mra_start_date,
  mem_rates.mra_end_date,
  mem_rates.mra_rate
FROM
  mem_rates;
```

PowerBI – Extract data using dataflows



- ✓ Once you have your views, you need PowerBI to connect to the data to consume and visualise.
- ✓ You do this through the PowerBI Gateway and creating a new dataflow.
- ✓ You can then add the tables you want to the dataflow and use the PowerQuery editor to refine the data (for example to filter out blank values or other data functions).
- ✓ Once your dataflow is created, you can schedule refreshes to happen on a suitable frequency.
- ✓ You can now use the data in PowerBI to create visualisations, join with other data, or otherwise manipulate as needed



PowerBI – Reflections



Learning from experience of using PowerBI

- ✓ The views and tables in CRM are complex - create new views in SQL rather than relying on existing.
- ✓ Queries often need to join multiple tables – for example employment is stored in a separate table to personal details linked by a unique identifier (membership ID in our case).
- ✓ Give your views meaningful names, essential when you create multiple.
- ✓ Sometimes you need more than one view that you'll link in PowerBI rather than in SQL.
- ✓ Data isn't always in the places you might expect so create a log/map of your data.
- ✓ When creating your views, give your data columns meaningful names – makes it easier when you're building your visuals.
- ✓ Understand the data you're pulling out. Sometimes you'll have a single line per member, and other are logs of history (for example employment history).
- ✓ When you query dataflows, you're querying the last refresh of data, and not the live CRM DB.



Online Training modules

Case for change



Problem

- ✓ Reliant on face-to-face training which can't be delivered due to Covid-19.
- ✓ No online alternative exists.
- ✓ Lengthy & time consuming to move to online platforms.

Accord's approach

- ✓ After evaluation, it was decided to build presentation like interactive training inhouse using Microsoft Sway.

Underlying considerations

- ✓ Quick to build – text and modular based.
- ✓ Cost (i.e. free with our MS365 licences).
- ✓ Platform accepted by our members' employers.



accord Rep induction programme

This online programme consists of 7 eBites which are designed in bite-sized chunks – each should take around 45-60 minutes.

You'll find a quiz at the end of each eBite which will help you to check your understanding – please make sure you complete this. As well as testing your knowledge, you can use it to tell us your thoughts on the eBite itself.

The accompanying workbook which is packed with useful activities and prompts. Your local Accord Officer will review your workbook with you to complete the induction programme.

[Download the workbook](#)

- ✓ **Accord & trade union history** – Learn about the history of Accord, our values, and about the wider trade union movement.
- ✓ **What the union does** – Get to know what Accord does, our recent achievements, and get to know how we're structured.
- ✓ **Being a union rep** – Explore what a union rep does, the skills needed for the job and start to build your knowledge for the role.
- ✓ **Reps & data protection** – Understand your role as a rep in helping us to protect members data, and the steps you'll need to take.
- ✓ **Growing the union** – Exploring the importance of growing the union and how your role as a rep is vital to our success.
- ✓ **Engaging communication** – You'll get to know more about our communications, and how you can help us reach members effectively.
- ✓ **Health & safety in the workplace** – Reps play an important role in keeping workplaces safe. We'll take a look at the activities you'll be asked to get involved in.

Once you've completed all 7 eBites, contact your local Accord Officer to complete your induction.



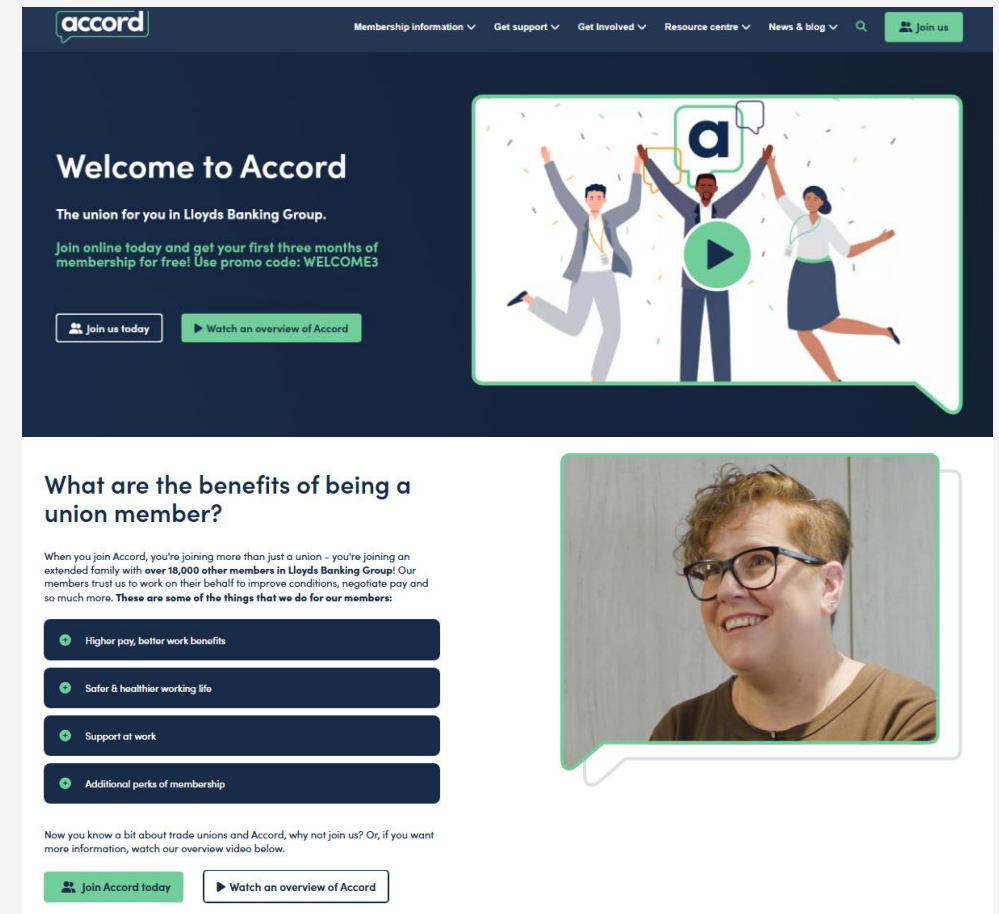
Landing pages – LBG project

Touchpoints for new staff



Following recognition agreement changes, Accord was offered improved information sharing about union membership to new staff.

- ✓ A tailored web page was created for this journey including new videos and content.
- ✓ There are 3 touchpoints from the employer, so different content is delivered in different forms during that process (pre-employment, day one induction, and one month into the job).
- ✓ Data tracking through Google Analytics to understand interaction and on which of the 3 touchpoints.
- ✓ Unique URL so we could isolate traffic and deliver content that was created for this purpose without interrupting our existing web pages.
- ✓ Frequent calls to action (CTAs) to join the union, and prioritised content to create a natural flow.





Always
there
For you

Thank you! Any questions?

