

A man wearing a white hard hat and safety glasses is looking down at a tablet computer. He is wearing a dark jacket. The background is blurred, showing what appears to be an industrial or construction site with some lights.

QUICK TIP GUIDE

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Membership Software for Your Organisation

SIX QUICK TIPS FOR YOUR UNION

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When exploring different technology offerings for your trade union, it is vital to have a cohesive plan for connecting with workers, streamlining operations, and retaining and onboarding new members. To succeed you need a solution that is able to collect data from every area of your organisation and unify this information within one platform.

Navigating the various options and their features can be tricky, especially when evaluating what constitutes a necessary function versus those which are just nice to have. Although most of these features were designed to meet a specific requirement, this guide presents some good qualities to look for that deliver valuable benefits for your organisation.

#1 IMPORTANCE OF THE MEMBER EXPERIENCE

Delivering on their commitment to members, unions are continuously evolving their communication channels. Fifteen years ago this meant sending letters in the mail, ten years ago communications were via email, and today membership organisations need to offer a mix of channels to reach their audience. While still including direct mail and email, the use of social media, self-service access, and online resources have opened new paths that let members consume the information they need at their convenience. Marketing and communications systems have evolved to cater for the diversity amongst members. While older members may still be more comfortable with direct mail and in person events, consuming information digitally can have a great impact and engagement level for younger members. Successful systems also automate member on-boarding, seamlessly moving an enquiry from application and approval stages, through to welcoming new members. These processes guarantee that members receive a response in an acceptable time-frame while concurrently freeing up time for admin staff to attend to more complex queries.





#2 ENABLE YOUR UNION TO ADD VALUE TO MEMBERS

Successful unions have a good track record of listening to and assisting their members. They have systems in place that help track cases or complaints submitted by members with disputes within their workplace that need resolving. Cases are managed from the moment they are logged through to case resolution, with supervisors able to analyse and report on outstanding cases, monitor how long they have been outstanding, measure member satisfaction, and take action as necessary.

Built-in capability for surveys and feedback forms enables the collection of data from members on a continual basis. Utilising a single system ensures all member information resides in one place, allowing associations to gauge member sentiment through integrated reporting, improving decision making and action.

These proactive steps keep members happy and facilitate higher member retention/engagement.

#3 FOSTER GREAT SPONSOR RELATIONSHIPS

Understanding the importance of sponsor relationships is critical for event success. It is one thing to secure a sponsor for an event, but keeping them investing for consecutive years requires accountability and proof of the return on their investments.

Post event reporting for sponsors and providing the relevant KPIs ensures transparency and assures them that funds are going to the right cause.

Having this data readily available enables your sponsors to measure the effectiveness of their contributions and assists in solidifying their future investment.

#4 LEVERAGE TECHNOLOGY BACKED BY CONTINUOUS FINANCIAL INVESTMENT

When making IT choices, it is fair to assume that the technology you invest in will last a few years. Choosing a system that is part of a strong ecosystem (such as Microsoft) promises longevity for your platform by tapping into the ongoing technology development investment that these large corporations make.

This opens up access to a cohesive suite of applications that easily talk to each other such as Word, Excel, Outlook, SharePoint, Power BI, Fianance, and The Cloud, without the need for costly modifications.

#5 CONSOLIDATE WITH ONE SYSTEM THAT MANAGES OPERATIONS BEGINNING TO END

Maintaining multiple disparate systems for membership management, case management, events management, email marketing, finance, etc. is costly. Multiple systems each require their own licensing, training, implementation and ongoing maintenance costs, while data maintenance, analysis, and reporting become more time consuming due to data consolidation necessities from all the different systems. Combine this with the complexity of managing the relationship with different software vendors and your organisation could end up being the mediator between vendors when trying to find a resolution to IT issues.

Having one vendor who understands your objectives can assist in driving towards that goal. One system that caters for your specific requirements ensures a single source of data and a single point of contact for system support.





#6 IT IS ALL ABOUT DATA INSIGHTS

With the right software in place, unions can better ask the question “why?” when it comes to interpreting their data. Your people and your organisational processes can be better supported when the right systems are in place, allowing managers and staff a clearer focus for identifying patterns such as:

- discovering the correlation between events and memberships.
- trends in popular online resources for members.
- which members are active or not and the effect on renewals.

So how do you find something you are not looking for? Using the right combination of people and software means questions can be asked and data presented in a manner that provides insight to help identify opportunities and threats. This benefit is further compounded when running data integrity checks which highlight areas of improvement in your processes and help keep data clean and accurate.

At Professional Advantage, we understand that a union’s primary purpose is to serve their members in the best way they can. Our membership software has been purpose built to help achieve this mission.

We have the right system that will help you deliver on your promises and we welcome the opportunity to talk with you about ways Professional Advantage can help you achieve more with technology for your union.



For more information

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About Professional Advantage

Professional Advantage is one of Australia's most awarded solution providers, with over 25 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.