

# UNION MODERNISATION FUND

**BERR**

Department for Business  
Enterprise & Regulatory Reform

**LLOYDS TSB GROUP UNION (LTU)  
TECHNOLOGY MODERNISATION  
PROJECT**

CASE STUDY



# LTU technology modernisation project

## Background

The Lloyds TSB Group staff are represented by an independent trade union, Lloyds TSB Group Union (LTU), which is not affiliated to the TUC or any political party. As a matter of policy, the union accepts no support of any sort from employers within the group.

### LTU profile

- LTU has over 45,000 members, including pensioner members, out of a staff in the areas in which the union is recognised of around 65,000.
- The union encompasses Lloyds TSB, Scottish Widows, Cheltenham and Gloucester Building Society, Alex Lawrie and other companies within the Lloyds TSB Group.
- In the Lloyds TSB branch network, the union represents 77% of staff.

LTU represents almost exclusively staff in the Lloyds TSB group of companies, so has a finite pool of potential members. Because there is a competitor union and because inevitably a proportion of staff do not support union membership at all, there is limited scope for membership and income growth – at a time when the resources allocated to individual representation have needed to be increased massively.

### Benefits of the project

- Members benefit from faster service when they're communicating with the union.
- Members have more freedom to interact with the union when it suits them.
- The union's staff save time on admin for general member services – so they can spend more time on fulfilling the union's more personal services, such as individual representation in the workplace.

Providing a top quality service to members is at the top of the union's agenda. Central to this service is the union website, LTU Online, where LTU members can access a range of internet services, including travel insurance, professional CVs, shopping vouchers, electrical goods and personal accident cover. Many of the services the union offers are long established and have proved their value to members over many years. Others are innovative and unique among European trade unions – such as 24 hour access for members to a full-time union official, one of an advice team always on call.

## Why the technology modernisation project?

In the past few years, the union witnessed progressively smaller turnouts in ballots, which made it much more difficult to gauge member attitude towards some important industrial relations issues. It was a troubling trend, which the union was keen to turn around, as Assistant General Secretary Nick Holt explains:

*'We attribute the poor response to an increasing disinterest in civic affairs and participative democracy. Trade unions are not the only bodies to have been affected by this tendency – political parties have been damaged just as much. This disinterest is apparent across all age groups but is particularly evident among the under 30s. Although membership is very high, young people are almost totally uninvolved in the affairs of the union and play a very small role in union democracy and decision making. One of the dangers for trade unions is that even with a commitment to balloting on important issues as a means of decision making, it is becoming increasingly unlikely that tests of membership opinion will produce representative results.'*

Nick points out that this lower involvement is just as dangerous from an employer's perspective because there is the risk that industrial action or other damaging courses of action will be decided upon by vocal minorities given extra power by silent majorities. For the LTU, the way forward was clear:

*'We believe that the way forward lies in using other less traditional means of sampling opinion and a conduit more likely to appeal to young people. We needed to develop other fora that allow members to raise and debate issues among themselves. And we needed to consult more widely and frequently.'*

Ballots and surveys, however, represent a material cost to the union and one that, because of production, postal and administration costs, is prohibitive except for the most major issues. A cheaper and easier way of testing opinion continuously was needed – and technology and the web offered a real alternative for those members who choose to use it. Yet for a relatively small union, the cost of revamping the website to streamline into a service fit for the 21st century was going to prove prohibitive. Thankfully, the Union Modernisation Fund (UMF) came at just the right time.

## The way forward

Using UMF funding, the union proposed to improve the level and quality of two-way communication with its members through internet technology, leading to a potential for greater participation of members in the union, and to broaden the range of online services that would enhance and add value to the union's membership package. At the same time they would be improving the ability of the union to respond to the increasing diversity of the labour market, and to supply services geared to the needs of a diverse membership. The Union's modernisation strategy sets out, for instance, 24 hour access to services for all members and improved accessibility of services for visually impaired members among its objectives. Nick Holt adds:

*'The project would also improve the efficiency of the union's internal administrative processes, with consequent cost savings that could be redirected to further improve the package of services provided to members. The internet presents an excellent opportunity for the union to increase and improve the level of two-way communication, consultation and interaction with its members. There was huge scope for us to develop further and expand both our general online communication between us and members and the range of services offered to members online.'*

The proposed improvements would allow the union to:

- use continuous sampling of opinion through attitudinal research;
- use the web and email to reach members most likely to respond through that medium;
- develop online forums that will allow members to generate their own debates;
- provide more web-based opportunities for individual members to make input to decision making separate from surveys and ballots.

Such systems would be initially expensive to develop but, once in place, in most cases would be cheap to maintain and could be administered by the union without help from outside. All along, the union has emphasised that these new media will not replace paper-based systems entirely – but they will reduce costs substantially and make more frequent testing of opinion feasible:

*'Our communications with members have hitherto been primarily through newsletters sent out to branches – but there have been considerable postal costs attached to this. We can now email the newsletters to people when we can, backing up that coverage with reduced numbers of posted material. The project also presents an opportunity for a substantial saving (and redirection) of staff resources that would otherwise not be possible with a constant level of traditional communication. What's more, the changes and new systems flowing from the project will require very little on-going support. The use of Content Management Systems, the inherent scalability of the project and the nature of the technology being used means that right from the start the union has been able to run and amend the new systems using internal resources at limited cost.'*

## **What the union wanted to achieve**

At the start, the union set out key objectives for the project, to:

- enable all the union's members to use the internet to sign up to or initiate the union's membership services;
- ensure that the union's redeveloped website achieves the Web Content Accessibility Guidelines (WCAG) Priority 2 standard;
- at least double the number of members (to 18,000) emailed by the union;
- increase the number of members using the union's online service at least five fold, to 10,000;

- provide the facility to conduct all union ballots online and to successfully convert 25% of union members to this method of voting;
- launch online forums that allow members to communicate their views on all matters relating to the workplace and the union’s role – and to recruit 5,000 union members to use this service;
- save 20% of the annual administrative costs of providing member services traditionally (i.e. by telephone and post) as opposed to on the internet;
- redirect the savings and additional income generated into improved representation and other membership services.

## The project

The union engaged the services of marketing experts Sterling Work to redesign and redevelop the LTU website ([www.ltu.co.uk](http://www.ltu.co.uk)) and online services area. With their expertise, the **home page** has become stylish, functional and feature rich, providing users with one-click navigation to all sections, together with links to featured areas of the website – such as the online services area, latest news articles and newsletter pages.

### Website navigation

The **website navigation** structure is now consistent across all areas of the website, split into the following menu areas:

- Main menu
- LTU online
- Professional services
- Member benefits
- Insurance schemes
- Legal services
- Pensioner pages

Each of the navigation sections has individual content pages that can be edited by LTU using the Content Management System (CMS); new pages can also be added.

A list of **feature items** is displayed across all pages of the website, including images and links to the relevant features, which can be controlled through the CMS. The home page features a **quick login** and registration facility for the LTU online services areas, which allows union members to access additional member-only services.

A new **LTU online services area** has been designed and developed to allow members to access the existing range of services, together with new services added as part of the development project, including the **online balloting system** and **bulletin board**. Members can register for an **LTU online user account**, which gives them access to the full range of services, including:

- free benefits;
- travel offers;
- IPP insurance;
- PA insurance;
- combined insurance;
- travel insurance;
- portfolio shopping vouchers;
- electrical goods;
- CV writing;
- car scheme;
- conveyancing;
- personal injury;
- LTU website and online services area design and development.

The new website CMS means that all areas of the website can be instantly updated via a simple, web-based control panel from any computer with internet access. The CMS is broken down into sections, known as

modules, which can be used by LTU administrators to control various areas of the website. The main modules are:

- **Core content** – adding, editing and deleting content for existing pages of the website.
- **Dynamic content** – creating complete new content pages within any area of the website.
- **News articles** – adding, editing and deleting news articles that will appear on the website in date order.
- **Newsletters and newsletter categories** – uploading, updating and deleting newsletters in PDF format, creating, editing and deleting categories for posting newsletters.
- **Featured items** – adding, editing and deleting featured items and their associated images to appear on all pages of the website.
- **Link categories and links** – adding, editing and deleting hyperlinks to appear on the useful links page of the website.
- **Admin users** – adding and configuring admin users of the CMS with usernames and passwords. It is now possible to assign a CMS user with privileges at every access level.

### Additional CMS features

As well as all the modules customised for the LTU website, the new CMS offers:

- **Live page preview** – ‘as live’ editing, enabling web pages to be previewed while they are being created or edited. The CMS also features a site preview function for quick viewing of the whole website.
- **META tag editing** – the option to edit META tags easily and instantly for optimum search engine performance.
- **Information back up** – enabling the website’s administrator to create an external back up of the website’s content at regular intervals.
- **Advanced text editing and formatting** – the ability to format areas of text and to quickly add internal/external hyperlinks through the content section of the CMS. This interface works in a similar way to a text editor, like Microsoft Word.
- **Website and search engine statistics** – the CMS displays up-to-date and detailed statistics relating to the website’s performance on search engines. Graphs are used to illustrate frequency of visits to the site on both a daily and weekly basis. A graph of ‘referrers’ is displayed to illustrate the website’s popularity within certain search engines and online directories.
- **Automated online balloting and surveying system** – a new balloting and surveying system allows ballots and surveys to be created and managed completely online, using the CMS. It means that LTU can post new ballots and surveys online and promote them to members via a graphics-based email. It’s possible to determine the type of information fields required (e.g. name, date of birth, membership number etc.) and to create fields for the submission of votes or opinions (e.g. very good, good, disappointing etc.) Members can vote or take part online by logging onto the LTU online services area and the results are collected, automatically summarised and stored in an online database in an encrypted format within the CMS. Only LTU administrators with sufficient CMS access privileges can view and download this data. The results of each ballot or survey are instantly accessible by LTU administrators via the CMS, presented in a format that can be viewed instantly

or downloaded into a separate format, such as an Excel spreadsheet. LTU administrators can then generate a further email to members to present the results of the ballot or survey to them.

### Online bulletin board

The new customised online bulletin board is in keeping with the rest of the layout and style of the LTU website. It's designed so that LTU administrators can create a number of fora for different areas of its operation within the bulletin board as a whole, for example, Registrars, Salesforce, or IT. Within each forum administrators can post discussion topic questions that can be responded to and discussed by forum users, who in turn need to register before they can create discussion topics and respond to ones already posted. The registration process makes for easy monitoring of forum usage – and these details can then be collated for marketing purposes.

All the administration of the bulletin board is carried out via the CMS, with LTU administrators able to add, edit and delete topics, fora and discussion questions. For easy policing of the bulletin board, users can be instantly prohibited or deleted if necessary. It's expected that as the bulletin board develops, it will be less necessary to monitor the posted topics and responses – bulletin boards tend to be 'self-policing', with registered users ensuring that that everyone adheres to posting rules and policies.

### Online pensioner pages

A dedicated set of dynamic web pages has been created for LTU's pensioner members, including:

- latest news – a selection of relevant news articles, displayed in chronological order, together with a news archive for older articles;
- newsletters – up-to-date newsletters relating to pensioner issues. Each newsletter can be uploaded with some extracts of text and can be viewed or downloaded in PDF format;
- advance copies of LTU's quarterly pensioner newsletter – for viewing or downloading by pensioner members;
- bulletin board integration – an online forum dealing with pensioner issues, part of the wider LTU bulletin board.

All areas of the pensioner pages can be controlled centrally through the CMS, so LTU administrators can:

- manage all page content;
- add, edit and delete news articles;
- upload, update and delete newsletters in PDF format;
- upload copies of the Advance newsletter in PDF format;
- fully administer the online bulletin board.

### Training

Factored into the project were training sessions for LTU staff on how to get the most from the website, CMS online balloting system and bulletin board. Union officials responsible for dealing directly with members could then promote the benefits of the online service to members still to register and offer their support. The training sessions were received positively by union officials, who appreciated the time saving benefits of the various new online facilities.

### Results

The union has met its objectives for the project and significant long-term benefits are anticipated as a result. Whilst the union doesn't expect to convert all its members to web-based communication, it believes that, as a result of the project, a significant proportion of members will benefit from

the flexibility and speed that is now on offer, and that the two-way flow of communications will be transformed as a result. Nick Holt adds the caveat:

*'The ability to communicate and interact with members via the internet has automated many of the traditional administrative processes within the union. But the proliferation of online communication with members changes their perception of the personal service quality we offer. So we're careful to ensure that whilst it will be possible for members to access and subscribe to all of the membership services online, the traditional communication channels such as face-to-face registrations with area officials and postal and telephone applications will still remain available.'*

### Results so far

- Number of LTU members registered for LTU Online – increased initially by 137% to 5,240; most recent figures show increase of 11% to 5,803 between March and September 2007
- Number of members with whom LTU communicates by email – increased by 26% to 14,680 between March and September 2007
- Average number of site visitors per week – increased by 21% to 630 between March and September 2007
- Total number of site visitors per month – increased by 13% to 3,104 between March and September 2007
- The online survey and balloting system has not yet been used.

Initial statistics from the website's CMS have shown an increase in the usage of the LTU website and an uptake of online services. Nick sums up:

*'The reaction to the project from union officials has been extremely positive and the project itself both has and will have a significant impact upon certain roles performed by them in relation to updating text content and documents on the website, processing online orders from members of items such as shopping vouchers, insurance policies and CVs, all of which were previously placed by phone or post, and managing the members' online discussion forum. As a result of these functions, not only has speed and efficiency of dealing with requests from union members been vastly improved, but productivity levels of union officials have also been enhanced.'*

### LTU top tips

- Make sure you allow enough time in your calculations when you're embarking on a project like this – our timescales slipped slightly due to ongoing development requirements on the existing website – but the subsequent extension granted by the DTI in fact resulted in improved standards across the overall project.
- If the core elements of your project are undertaken by an external contractor, it's crucial to ensure the firm you select is up to the job and will bring the project in on time and on budget. We used a contractor we had trialled on a number of occasions on smaller pieces of work very successfully. It meant they had an advantage in knowing our systems and how we worked, which helped the speed of production and liaison.
- We would particularly point to the importance of regular contact and progress meetings between the union's project manager and the contractor as being a contributing factor to the quality of the outcome of the project.

- Where possible, the contractor can ensure your website meets industry standards. For instance, our contractor identified and adopted within the project:
  - compliance of the website with the coding standards set out by The Worldwide Web Consortium (W3C);
  - achievement of the Web Content Accessibility Guidelines (WCAG), Priority 2 standard.



