

# UNION MODERNISATION FUND

**BERR**

Department for Business  
Enterprise & Regulatory Reform

**CONNECT – KNOWLEDGE  
MANAGEMENT FOR BETTER  
COMMUNICATIONS**



# Connect – Knowledge Management for better communications

## Background

Connect used Union Modernisation Funding (UMF) for an innovative Knowledge Management (KM) project, the first stage of a process that will transform the way the union communicates with its members.

## Why this project?

The union wanted to improve its service to members and strengthen its relationship with employers. Specifically, they intended to redesign the accessibility of its website, making its communications with members and employers more effective and available faster, as Joanne Graham, Head of Administration, explains:

*'One of our core functions is to provide accurate information and advice to members (predominantly on pay and conditions) and to employers (mostly on good practice issues), based on our collective knowledge. A key challenge was that this knowledge exists in a variety of forms and places, at a number of levels, and is constantly changing. So we wanted to supply it to users in the most cohesive and efficient way, providing access to information and advice in a form that would meet their needs.'*

Because of the focus of the industry and Connect's highly IT proficient membership, members' preferred form of communication

### Connect profile

- Connect represents around 20,000 managers and professionals in the communications sector.

with the union is online, usually via the website. And because of the nature of their work, they tend to want access to information 24/7. Says Joanne:

*'In many instances, members' first point of call is the website; if they need further information or can't find what they're looking for, they tend to pick up the phone and speak to our union Helpdesk, where they can be directed to experts if necessary.'*

The majority of queries relate to pay, benefits, pension and other work-related issues such as performance, discipline, bullying, career development and training.

Employers tend to turn to the union for advice on best practice, so this project presented an opportunity to centralise the union's various areas of expertise so that employers could more easily tap into it.

## Aims and objectives

Connect's Knowledge Management (KM) project ran from 1 March 2006 to 31 May 2007, although Connect's involvement in the project continued beyond the official project

end date. The project was designed to provide an easily accessible, centralised repository of potentially all the information held by Connect. The major component is a search engine, which collects and aggregates disparate content sources and, from an end user’s perspective, delivers a single point of access. Alongside this, the union propose to create a classification scheme that attempts to map all Connect content.

The key objectives were:

- To convert and organise the collective knowledge that currently existed in a variety of forms and places, into a systematic electronic data store which can ‘learn’ – that is, identify and remedy knowledge gaps – and allow for different levels of access.
- To develop a search engine to enable union members, union activists and Connect employees to access the latest information and advice in response to specific or general questions online 24 hours a day, 7 days a week, 52 weeks a year.
- To train and encourage Connect employees to update the data store and treat it as Connect’s information and advice resource.
- To link the datastore to external information sources, such as DTI (now BERR) and TUC websites, in order to search relevant external information at the same time.
- To test progress at regular intervals against the needs of various user groups.

## Methodology

The project was overseen by a project management team, which set objectives throughout the project period and received reports on the costs incurred. A significant benefit of this approach was that as the

*‘The project has its roots in union modernisation. It’s about providing an effective service, making online access more efficient, presenting knowledge systematically and bringing it all together in one place in a way that members would want it to be.’*

**Joanne Graham,  
Head of Administration**

project developed, team members contributed individually by undertaking specific tasks relating to their particular areas of expertise.

The project management team comprised:

- The Deputy General Secretary – project sponsor with overall ownership of the project
- Head of Administration – responsible for overseeing the project
- Information Scientist – responsible for the day-to-day work of the project
- Systems Administration and Desktop Administrator – IT representatives responsible for ensuring that the work was compatible with the union’s IT systems
- Editor & Publications Manager and Campaigns & Media Manager – responsible for advising on the structure of the union’s website, communications and content issues
- Membership & Helpdesk Team Leader – responsible for ensuring that the kinds of questions members ask of the Helpdesk were taken into account in the design of the datastore

- Employment Relations Adviser & Researcher – responsible for advising on what agreements and policies needed to be included and the key points of any document
- Finance Administrator – responsible for ensuring that the project kept to the budget and that appropriate records were kept

## Information Scientist

Connect monitored and evaluated the progress of the project against key milestones and objectives. They began by recruiting, on a 12 month fixed contract from 3 April 2006, an Information Scientist to be responsible for the day-to-day work of the project, required to produce reports to the project management team.

The next milestone had been the user research to identify key information needs, using focus groups of members, activists and employees and analysing Helpdesk enquiries. This three month stage was to devise the content benchmarks and parameters for KM system, producing sufficient documentary evidence of the areas of information and the key questions from the user groups to enable a plan for building and organising the datastore. But it didn't quite run to plan, as Joanne explains:

*'While the project plan identified user needs analysis as the next milestone, in reality we found that this could not be achieved unless we had a clear picture of our sources of information. So the first task for the Information Scientist was to identify our information sources. We also needed to understand how information is created, where it is stored, how it is organised, how it is distributed, what the information is used for and by whom. Once complete, we could move on to determine user needs –*

*particularly important as they defined what was required from a KM system. For this reason, analysing user needs, comparing this to the information in existence and gap analysis took considerably longer than anticipated.'*

## User groups

The Information Scientist had identified the different user groups as Connect employees, union members and activists.

- **Connect employees** – Since Connect employees are both users of information and content creators, the Information Scientist developed a **specific questionnaire** for this group to examine how employees accessed information in their day-to-day duties and also the content they created whilst at work.
- **Union members** – An **online survey** was developed targeting ordinary union members rather than activists. It was sent out to approximately 8500 members, and 1726 responses were received (a 20% response rate). The focus was on gathering feedback from members on the kinds of information they typically look for, how they look for it at present, and pointers on how they may prefer to receive it in the future. The survey also gathered basic demographic information, followed by questions encompassing all methods by which members receive information from Connect. It concluded by asking questions specifically about the website.
- **Activists** – A series of focus groups (piggybacking onto other meetings to optimise efficient use of individuals' time) were held to determine how particular groups of activists within Connect's membership access the information they need and how this could be provided more efficiently. Some of the main points to come out of the focus groups were:

- The need for activists to be able to access details of members in various ways, such as branches, geographic region etc.
- There is a perception that content either does not exist or is out of date on the website.
- There are concerns about alerting members to when new information is published and available to members on the website.
- The website search engine seldom retrieves meaningful results, and confidence in its performance is low.
- There is a perception that there are too many levels to drill down on the website. This and the point above partly explain participants feeling that they cannot find information on the website, or that it does not exist.
- It would be useful to be able to access details of previous cases handled by Connect, which may hopefully provide guidance when tackling future cases.

## Results

The **online survey** identified that information about pay, pensions, performance management and grading was the type of information most frequently sought. Connect's website was the first port of call for respondents when looking for this information.

From comments entered by the survey respondents, it was clear that different members prefer to receive information in different ways: the helpdesk, website, branch, network, direct emails. In general, comments focused upon the problems encountered when members were logging on to the website, the poor performance of the search engine, and the difficulty in navigating the website.

Analysis of **Helpdesk** enquires confirmed that the majority of calls from members could be classified under the information headings identified in the online survey.

**User needs analysis** highlighted that 70% of the content created is for internal use by Connect employees and is considered to be inappropriate, not useful to members, or confidential, with the remaining 30% being external (content that needs to be provided to members and is useful to them). When user information needs were compared with sources of information, it was found that much of the external content already existed on Connect's website (although there were some gaps in information) and was available to Connect employees, union members and activists. But this information was not easy to find or retrieve – and was not necessarily written in a way that was clear to members and activists.

## Outcomes

In light of the focus groups and online survey, the **content management system** that stores and organises the content behind Connect's website was analysed. Says Joanne:

*'In particular, we looked at how fields already defined to organise content on the website can be used in any new classification scheme. We also investigated how the fields can help with retrieving better results for the search engine. It was clear from both the online survey and the focus groups that union members and activists wanted to use Connect's website for information retrieval. This would meet the project objective of providing a single point of access to information for all user groups. However, problems with the speed of the website, poor performance of the search engine, the ways in which the*

*various types of information existed, and the difficulty in navigating the website needed to be addressed.'*

### External communications review

A review was undertaken of Connect's **external communications**, looking at the key audiences and how and what the union communicates, identifying problems. The review highlighted that much of the information on the website was derived from email communications to members and activists – giving them information on a specific topic, for example. It emerged that the emails were not always written in a way that was appropriate as a permanent element of a datastore in that the content was not easily searchable or retrievable.

### Communication framework

As a result of the external communications review, a new **communication framework** has now been developed, which delivers targeted emails using language and terminology easily understood by a new member. The content is more easily searchable on the website and the process serves to collect, convert and update information into a more usable form.

### Classification scheme

As part of making the information more accessible and usable, it was identified that a new **classification scheme** was necessary, reducing the number of levels to make the website easier to navigate. In practice, this would mean a complete re-design of the website, incorporating a new classification system; this will be taken forward as a separate project by the union in 2008.

### Keyword list

To help with the any new classification scheme, a **keyword list** was developed – a flat list of terms which describe subjects, concepts or initiatives that the union is

involved in and, more importantly, creates content about. It lists the companies in which members are represented and groups/sub groups within the union's membership. The list reflects the work of the union and attempts to describe all the content that Connect produces and publishes. Joanne sees the keyword list as a pivotal tool:

*'Initially this list may be used as a guide for publishers when creating summaries for articles. Eventually every piece of content created and published will have one or more keywords that describe the themes contained in the content. The keyword list will map to all or most of the terms within the websites classification. At the moment it hasn't been practical to incorporate the list into the workflow of the website, because the classification system needs to be developed first – but this is something we are working towards.'*

### Improving information retrieval

Four areas of the website that needed to be improved or added, to make **information retrieval** easier were:

- search engine
- A-Z index
- site map
- browse directory

Specifications were drafted which outlined the features and functions of each component.

#### ● Search engine

The search engine was re-developed to enable a much improved default search as well as giving users the option of fine-tuning their search through an 'advanced search' page. Users accessing the advanced search are now able to find results 'with all the words', 'with the exact phrase', 'with at

least one of the words', 'without the words', as well as to be able to search a date range. Users have the choice of displaying the results in order of relevance or date.

The weighting for the search engine lists results that match the article title, then in the article summary, then article body. For each word in the search string, the search engine also looks for synonyms – common misspellings, alternative names, abbreviations and full names. This has helped to increase the success of search results:

*'In developing the specification, we investigated whether the new search engine could search for results from other relevant websites. We discovered, though, that combining site searches with results from external sites was not particularly straightforward and would significantly slow down the engine. Given that users had already complained about the speed of the website, the project team felt that this objective of the project would not be feasible.'*

- **A-Z index**

The A-Z index is in essence an alternative way of accessing content on the website. The terms making up the A-Z primarily come from the existing navigation. The creation of the index was undertaken in two steps:

- A significant number of terms were taken straight from the existing website navigation. This made up the bulk of the index.
- A number of terms taken from the existing website navigation needed to be renamed – when terms used as they are did not make sense out of context of the hierarchy, for instance.

- **Site map**

A site map was developed, an alternative way of accessing content under the navigation tabs.

- **Browse directory**

Various ways were investigated of providing users with some sort of browse directory, focused upon discovering information. The solution was **Connect Recommends** links, which appear in a separately highlighted box above the search results. The links relate to the search request and help users browse other relevant content on the website.

## Web page development

Development work and design of the new web pages to incorporate the new components was completed in March 2007. Next steps were to identify content to be listed in the A-Z index, develop the synonym list and build the Connect Recommends links. In addition, thought was given to the most effective way to ensure that the new functionality is linked to the most up-to-date information:

*'Since the launch of the new components, we have monitored searches and Helpdesk queries to ensure that the relevant information is easily accessible via our website. This has resulted in new words being added to the A-Z index, the Connect Recommends links and the list of synonyms, as well as new information being added to our website. We have also looked at creating an entry on the A-Z index that matches Connect's Helpdesk call categories, thereby ensuring that information on our website covers the types of calls received. These areas will continue to be developed and enhanced to meet the information needs of employees, members and activists.'*

The new components were tested against Helpdesk queries and common website searches, and launched in May 2007. Because users had highlighted an issue with the speed of the website, a new server was purchased and the website transferred to this server.

### **Training Connect employees**

Training on the new website components was needed for a core group of people who are maintaining the system. This has been managed internally without the need to access or use KM project funding.

### **Benefits**

Connect has met its project objectives, developing an accessible, centralised repository of information held by the union that is relevant to union members and activists alike. Connect employees, members, activists and employers are able to search and browse for this information 24 hours a day, 7 days a week, 52 weeks a year through a variety of ways, with greatly improved accuracy and faster response rates. Feedback has been very positive:

*'Since the launch we have received comments that there has been a great improvement on information retrieval. We have seen an increase in the number of visitors to the Connect website and an increase in the number of words or phrases searched using the search engine. There has also been a 168% increase in the number of hits by search engines on pages on our website, indicating that our content is now written in a way that is more searchable.'*

So far, the system is unable to search external information sources, nor to 'learn', identifying and remedying knowledge gaps. This is still a manual requirement, which requires human input. However, it is expected that the much greater use of the website by

*'We have gained valuable insight into how employees, union members and activists access information. We have also gained enormous insight into the use and future of our website as a prime communication tool, specifically in terms of structuring, classifying and designing information to make it useful for a wider range of members.'*

**Joanne Graham**  
**Head of Administration**

members, activists and employees will itself identify information gaps.

### **Best practice identified**

As a result of the project, Connect has identified elements of best practice relating to their own internal systems and classification systems:

'It became apparent through the project that one barrier to the easy flow of information was that different parts of the organisation used differing classification systems. For example, our Helpdesk logs calls using a set of criteria that are very different from our website and internal structures. Whilst it has not been possible to implement best practice immediately, this is something we will be able to deal with as part of a website redesign due in 2008.'

Another element of best practice from the KM project relates to Connect's writing style. Style rules have consequently been developed and implemented to ensure that emails to members can be easily adapted into website content. The rules include guidance on using language that is appropriate for both the targeted

members and a more general audience. They are also designed to ensure that, once posted online, the content should contain useful keywords to help the website's search engine. In the longer term this should improve search results.

## Lessons learned

UMF project management techniques were valuable throughout the process, helping team members develop the requisite skills:

*'We gained a greater insight into how projects are managed within Connect and where additional work is needed – in preparation, for example. As a result of the project, Connect's senior management team has been on a project management training course, which will help us maintain better oversight of projects we run in the future. We realised from the process that we need to slow down and plan carefully, see the bigger picture, foresee issues and understand how Connect's priorities fit together.'*

Evaluation of the KM project identified three key learning points, which helped the union understand what they would do differently in the future:

- Without prior knowledge of trade unions, it was a cumbersome process for the **Information Scientist** to understand how the union operates, its terminology, the information they create and the relationship between employees, members and activists. In future, there will be better systems for integrating a specialist on a 12 month contract into the organisation so that they are able to get up to speed in a minimum amount of time.
- The KM project was slow to start and slow to build momentum. In future, more **preparation** will be built into the project plan, with tasks broken down to a lower level and tighter controls in project management.
- However good the search engine, **content** needs to be written in a way that the engine can cope with. By recognising that most of their online content comes from email and then focusing on how they could make those emails more search friendly, the union anticipates a long-term impact on improving members' abilities to find information.

## Next steps

While the KM project has come to an end, Connect's work in this area will continue. The knowledge gleaned will inform the union's work in the coming year in completely redesigning Connect's website:

*'The knowledge and understanding gained from this project will be used to develop a classification system that will operate within a brand new website. It will require a culture shift by our employees, since they will need to think carefully about how they classify the content they include. But it will ultimately mean we provide an efficient and invaluable service to our members, activists, Connect employees and employers.'*

### For more information, contact:

Joanne Graham  
0208 971 6006  
joanne.graham@connectuk.org



