

# UNION MODERNISATION FUND

**BERR**

Department for Business  
Enterprise & Regulatory Reform

**RMT REMOTE ACCESS PROJECT –  
IMPROVING TWO-WAY ACCESS  
WITH MEMBERS**



# RMT Remote Access project – improving two-way communications with members

## Background

The National Union of Rail, Maritime and Transport Workers (RMT) used UMF funding to improve two-way communication with their members. At the same time, the project made it easier for the union to respond to the increasing diversity of the labour market and the supply services geared to the needs of their wide-ranging membership.

Alongside the new system, a fully equipped IT training room was opened at the RMT Education Centre in Doncaster. The training room can be used not just to train RMT officials in the new system but also all RMT branch secretaries. As a result of the project, they can now use modern management methods to run the union as an efficient, outward-looking and flexible organisation, with professional and competent union officials.

## Why this project?

The union wanted to improve the flow of information between the RMT and its members, completely replacing the existing membership system and making a substantial investment in an entirely new web-based one. Peter Waters, RMT Project Manager, explains:

### Project aims achieved

- Improve the two-way flow of information between RMT and its members.
- Detailed access to membership information for officials.
- More reliable and detailed information available to all users.
- Capture more detailed information on members to facilitate targeted services.
- Deliver greater efficiency in dealing with members' enquiries.
- Equipping a training room at the union's education centre for branch secretary training.
- Remote access.

'The project was designed to significantly improve interaction between RMT head office and members at all levels, making remote access easier – which is so important for a union membership that's not primarily office based. Training union officials to use the system means that the investment opens up access to detailed membership information for union officials and branch secretaries. We needed not only to facilitate greater interaction between the

union and its members, but also to capture more detailed information on RMT members so that we could deliver targeted services and greater efficiency in dealing with members' enquiries. The new web-based membership system will deliver in real time up-to-date, more reliable and detailed information on the union's membership for RMT representatives at all levels.'

## Methodology

The Remote Access project began in April 2006 with the appointment of Peter Waters as Project Manager. Project plans and timetables were put in place, together with a management structure to govern the project. A long period of consultation with users and representatives of potential new users went side by side with further research into the membership database marketplace. This included visits to remote offices, the head offices of potential suppliers and their existing customers. Once a supplier was chosen to implement the project, work began in earnest in November 2006.

### Establishing regional training facilities

Early discussions took place with the union's Education Officer and IT managers, including site visits to the new Education facility at Doncaster, to ensure that the facilities were in place to provide training for regional office staff and the Branch/Regional Council Secretaries. Says Peter:

'The training was crucial to us if we were to ensure the union's full use of the web-based facilities, for the benefit of our members. It resulted in the training room at the centre being fully equipped with networked PCs with remote access to Head Office and the chosen supplier, together with printing equipment.'

### Specification, data transfer and training programme

A long and detailed specification and data transfer planning process ensued to ensure the union could achieve everything they wanted from the new system. This involved a series of meetings and internal discussions and enabled them to make sure they covered every possible angle, including how the functionality of the system could be used for the benefit of users and, in turn, the membership. A comprehensive staff training programme was set up involving the supplier's training facilities in London and the union's new Education Centre in Doncaster. A full and comprehensive testing programme was formulated, based on all working functions of the system and a test build was installed in Head Office. Peter kept a watchful eye to make sure the process ran smoothly:

'By specifying each separate part of the system in isolation and not starting work on one spec until the previous one had more or less been agreed, we were able to focus on getting the system to function exactly how we wanted it to. Because, over time, requirements change or users come up with new ones, there needed to be a lot of flexibility in the development process. In this respect the supplier was always ready to meet our needs or find ways of doing so, even after a spec had been signed off. Protracted tri-party discussions took place with our website providers and other associated software suppliers to ensure all integration work would begin at an appropriate time. From July onwards, the supplier was anxious to go live with the main system but we were determined that as many issues as possible would be resolved beforehand, having learned a harsh lesson with the previous installation a few years earlier.'

## Implementation

The final specification details were complete by August 2007. The vast majority of users had also been trained by this time. Data from the previous system was successfully transferred and issues resolved over the ensuing weeks. The new membership system went live in Head Office and remote offices in September 2007.

Peter comments:

*'The new system is accessible in a virtual web environment, running on a web server, via a web browser using Java functionality. It means we didn't need complicated client software installations and configuration on individual PCs, which would have run the risk of associated conflict issues. Remote offices connect in the same way by accessing the web browser on a terminal server at Head Office. All users' profiles and usernames, including remote users, can be set up by system administrators in the Membership Department, thus removing the reliance on network administrators accessing the servers.'*

## Communication and marketing

Regular newsletters were produced throughout the project – two issues, one to staff and officers and one to branches and regional councils – together with circulars and bulletins to keep everyone advised and aware of progress. Regular RMT news articles were published to keep the wider membership informed and displays were presented in prominent places in Head Office. This ensured that everyone felt involved and informed and were aware of the aims of the project as well as progress. An official launch is being considered once the secretary and officials training programme is under way, and a wide range of stakeholders and interested parties will be invited.

## Project outcomes

### Improved membership processes

Major successes of the project include improvements to membership processes, faster and simpler methods of changing details and the ability of RMT representatives to assess the benefit position of members by understanding their subscription records. But there are other benefits too, as Peter explains:

*'In terms of improving two-way communication with members, many users have now started to record telephone calls and produce standard documents, including despatch by email. Others have begun to produce bulk mailings by letter and email, using the system's communications facilities. These other functions are being rolled out to remaining users with the help of supplier trainers. They will be on site to hand-hold and provide refresher training, with help sheets that users can keep and refer to later. Key Membership Department staff will take over hand-holding and refresher training to ensure independent sustainability.'*

The vast majority of users, including those employed in the regional and satellite offices, have now been fully trained in accessing and understanding members' records, in issuing communications, and in gathering statistical information.

### Improved access

The project's success can also be measured in terms of what has been put in place for rolling out to other users and officials, including remote access at any time. Access by officials to the web resource, allowing branch secretaries to provide information, communicate with members and maintain their own records directly on the membership

database in real time, is now in place, along with a full training programme. Applicants can join online directly and members will be able to access local news and information and view and amend their own details.

### Access for members

Access to the membership system has now been opened to members throughout the union, available at any time convenient to the member. Access is via a web browser on any PC, with security levels dependent on a member's profile within the database.

The database and website are integrated to control and authorise access to the members' only areas. This includes access by retired members and restricted access for lapsed members to provide an opportunity for them to rejoin. Adds Peter:

*'By recording incoming and outgoing communications by all methods, we have begun to build an individual member profile, enabling us to better target services and also to keep a comprehensive record of communications with branches, regional councils, representatives and officials. While some official and important documents have to be retained in paper form, the communications aspects of the new system have the added benefit of substantially reducing the amount of physical paperwork the union has to store.'*

### Additional factors

A voice messaging/SMS process is also now being used successfully and integrated into the communications functions of the database. And the union is looking at developing an RMT social networking site, which will be accessed via the members' only area of the website. If and when it's established, this will integrate with the database to automatically put members into groups associated with such things

as their job details. Peter sees distinct advantages in this development:

*'It will mean we have yet another avenue for members to see whether the information we hold on the database is accurate and will provide a link to the area where they can change anything that's wrong. It will also be an additional method of building a profile of each member by seeing what those involved are talking about and what they are interested in. We are also looking at the possibility of using the system to email newsletters and bulletins on system developments and progress. This will further reduce the amount of paperwork produced and consequently result in more cost reduction.'*

### Looking ahead

Meetings have been held with each department to discuss how the staff are using the functions of the new system to help deliver an improved service to the membership and what steps need to be taken to ensure they are able to utilise more of the potential of the system to improve the way they carry out the Union's work. Also, what further training and help they need. Similar meetings will be held with other groups including Branch and Regional Council Secretaries and officials, at appropriate stages.

### Lessons learned

Peter sees the main lessons learned during the project as relating to timescales:

*'I believe that the Remote Access experience has shown that unless substantial resources are specifically allocated to the project in isolation, 24 months is a minimum amount of time*

*needed to complete the process. I think that experience has shown the aims of the initial project were a little over-ambitious in terms of what could be achieved in the time allocated and that at the very least, the branch secretary training programme should have formed part of a second phase, which is effectively what has happened. That should not however, detract from the success of the project, which has delivered all of the functionality we required from a new membership system. I think it is also the case that, however well risk registers and issue logs are managed and monitored by the management structure, slippage in the timetable is almost inevitable – it's important that the union's hierarchy are fully aware of that throughout. In our own case, the General Secretary and Executive were very supportive throughout the project.'*

## Looking forward

The project is just the first stage of a developmental process, as Peter explains:

*'We will be taking steps to widen the full use of the system by all users and to ensure that appropriate officials and staff are trained in the web access functions. We have a number of system developments in the pipeline that will further increase the potential for improving business processes, the provision of information and two-way communication with members. We will also be preparing user manuals and help sheets, as well as considering how we can provide refresher training and tuition in changes to processes as the system is further developed.'*

## Conclusions

The project has had a significant impact on the union. Peter sums up:

*'The project has been a major success and that's how it has been perceived by system users. It has met all our key objectives and vastly improved our business processes, laying down the foundations for future improvements. The improvements to business processes and the service we provide to the membership have been substantial and the further potential is also huge. We could not possibly have achieved this without funding from the UMF. The project achieved its objectives but has also given us the ability and confidence to consider developments in other areas. The UMF scheme has paved the way for exciting times ahead in terms of how we can develop our services to the membership. It's also given us the experience and expertise to use project management techniques in other areas.'*

### **For further details, contact:**

Peter Waters  
07793 052138  
rmtproject@rmt.org.uk









