

The tech revolution in the Union sector

Part of our series on Digital Unionism - how modern engagement tools are transforming member services and value

2023–2028: from Legacy → Cloud → AI.

Contact info@smartimpact.co.uk



Your hosts today

Matt Dunphy, Chris Lightley and Steve Sydee

Welcome to our guest

Patricia Keating, Administrative Officer, Teachers' Union of Ireland (TUI)



Matt Dunphy
Independent Non-profit consultant



Chris Lightley
Dynamics 365 Consultant



Patricia Keating
Admin Officer, TUI



Steve Sydee
Head of Sales and Marketing

Webinar etiquette



This session will be recorded



Please **use the chat box** for any content-related questions for the speakers



Send in your questions at any time during the webinar



We will address as many of them as possible them **during the Q&A session** at the end of the presentation



*Please check
your microphone
is on mute*



Today's agenda

1

Introduction

Trade union membership
in a new era of
technology

2

Case study

Digital Unionism at the
Teachers Union of
Ireland (TUI)

3

Demo

Personalised
engagement, campaigns
and AI for unions

4

Audience Q&A



Award-winning apps and AI

Best use of Technology

Winner: Fire Industry Association (FIA)

Highly Commended: Heart of England Co-operative Society

Best transformation project

Winner: Fire Industry Association

Highly Commended: Heart of England Co-operative Society

Best agency of the year

Winner: smartimpact

Best collaborative partnership

Highly Commended: FIA & smartimpact

Best use of technology

Highly Commended: Heart of England Co-operative Society

Team of the year

Highly Commended: FIA smartAI Team

Best transformation project

Highly Commended: Heart of England Co-operative Society



Introduction:

Trade union membership in a new era of technology

Building technology solutions that respond to the current and future needs of unions and their members



Matt Dunphy
Independent Non-profit consultant

Key shifts in the UK trade union landscape

According to a 2024 bulletin published by the Dept. of Business and Trade...

22%

Trade union members

Proportion of UK employees who were trade union members – the lowest on record

64%

Have a qualification

Close to two-thirds of employee union members have a degree or equivalent or other higher education qualification

134,000

Female members increase

The overall increase in female union members in 2024, with male numbers falling by 172,000

Let's look at the latest trends

The current and future demands of trade union members...

More direct relationships, less burden on branch / workplace reps

A positive online user experience

Real-time support on pay and working conditions

Greater personalisation in exchange for any personal data shared



Responding to these trends

Critical technology questions unions need to ask...

Q Platform: which technology?

What Dynamics 365 offers as a replacement for legacy systems...



Q AI: How do we use it?

Copilot, GPTs, Chatbots, AI Assistants, more automation...

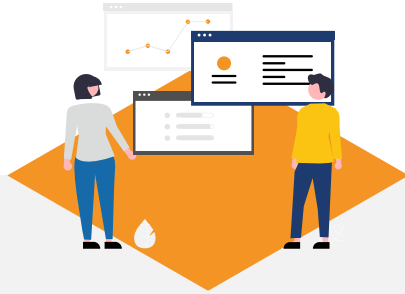


Q Partner: does any supplier **truly** have what we need as a Union?



Which technology?

Choosing the right future platform for a trade union...



Challenges with legacy or certain proprietary systems

- **Legacy systems** – rapidly running out of service and support
- **Certain proprietary systems** - heavily productised and dependent on coded development

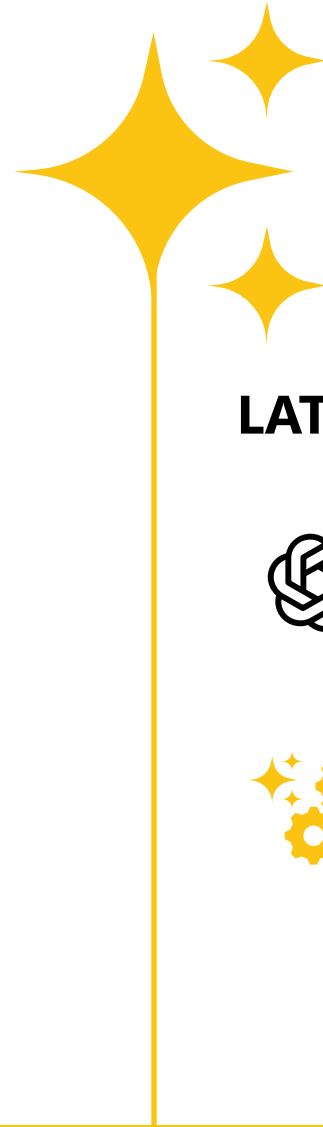


Our vote for Dynamics with smartimpact

- Union-ready features on a cloud-based platform, including smart**DAS**
- Easily configurable CRM functionality that your teams truly own on a day-to-day basis

What about AI?

Use cases for trade unions



EARLIER...



Copilot

Safely exploring AI across your Microsoft Office apps day-by-day



SmartAI for Case Management

Auto-categorise advice queries and draft responses

LATER...



Event Analytics

Predict high-risk renewal segments













AI Search Assistant

For members asking natural language questions on the portal

This is not about cutting jobs, it's about redirecting internal teams to better support your members

Can you cover what we need?

The Must Haves for any union's future technology

-  A single CRM and member portal services!
-  Systems that fit a union's structures
-  A low-barrier online join process
-  Useful features for branch/workplace reps
-  Digital tools for member engagement
-  Rapid balloting functionality
-  A reliable Deduction at Source (DAS) tool
-  A sophisticated subscriptions model
-  Adaptable case management workflows
-  Darn good data migration support!

The bottom line...

We are in **increasingly volatile times**, and a union member's digital needs and behaviours are shifting

Modern technology especially Dynamics 365 **IS a good fit** for your needs

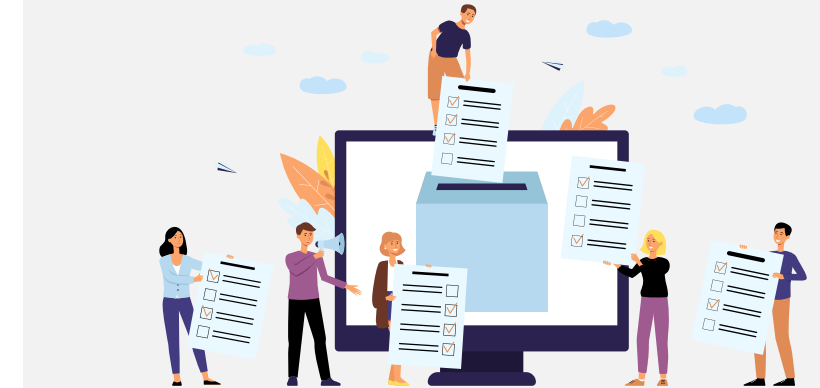
Spend time **exploring how well** a supplier meets your union's specific "use cases", including those for AI

A quick poll...

Question:
Which of the three critical questions is most on your union's mind right now?

Options

1. **Which technology?** Choosing the right platform
2. **What do we do with AI?** Identifying union "use cases"
3. **Does any supplier have what we need?** Meeting our requirements





Client case study: Digital Unionism at the Teachers Union of Ireland (TUI)

Exploring initial challenges, project experiences and future plans for TUI's CRM and portal services



Patricia Keating
Admin Officer, TUI



Matt Dunphy
Independent Non-profit
consultant

Looking back, what was driving **technology change** at TUI?

What were your **main goals** for the TUI change project?

Why did you choose **smartimpact** and Dynamics 365?

The early stages...



Thinking about the project itself, what was your **biggest technical challenge**?

How did **staff react** to the change?

What impact did members notice first?

During the project...



What have been major **operational benefits** so far?

What has been the **impact for branch reps**?

What are the future plans for TUI's **digital services**?

Post-launch impact...





Finally, what is your advice for other unions **starting out** on their technology change journey?

Your advice to other unions...



Demo:
From recruitment to balloting

Digital tools to recruit and engage members



Steve Sydee
Head of Sales and
Marketing



Chris Lightley
Dynamics 365 Consultant

More key metrics in the UK trade union IT landscape

3%

**Drop in Trade
union members**

UK union membership down
3% year-on-year (DBT 2024)

61%

of members now
expect to manage
membership
online

45%

of unions still on
systems that are
over 10 years old

Digital Unionism Journey



Discover

Reach new workers through digital advice campaigns



Join

Make membership seamless



Engage

Keep members informed and involved



Learn

Build rep skills and digital confidence



Stay

Retain loyalty through ongoing value

Digital Unionism is not about replacing people — it's about equipping every organiser, rep, and member with smarter tools at every step of their journey.

What's different for unions...

Mastering "Digital Unionism"



Secure,
sensitive
interactions



Rapid
mobilisation
and responses



Robust support
when needed



Social media
touchpoints
and activism



High
engagement
measurement

Our advice to all organisations...

Address **your technical burden** – old systems not integrated, manual processes



Prioritise development of **portal self-service and smart engagement** with members

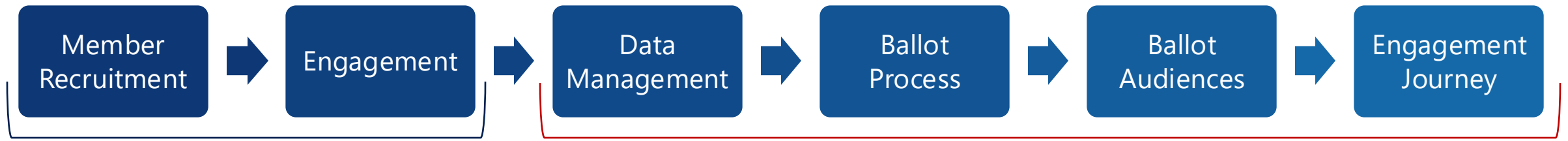


Identify the **right opening AI use cases** then expand AI adoption over time



Digital-first, safe, platform-based, high engagement working practices

From recruitment to balloting



Portal

Dynamics 365



Top 4 takeaways...

- ✓ Embrace digital unionism – it is what your members want and expect now!
- ✓ Seriously consider Dynamics 365 as a safe and growable platform for continued union technology
- ✓ Understand how AI can be ethically and easily introduced at your union
- ✓ Pick a supplier who truly meets your union's nuances and bespoke needs

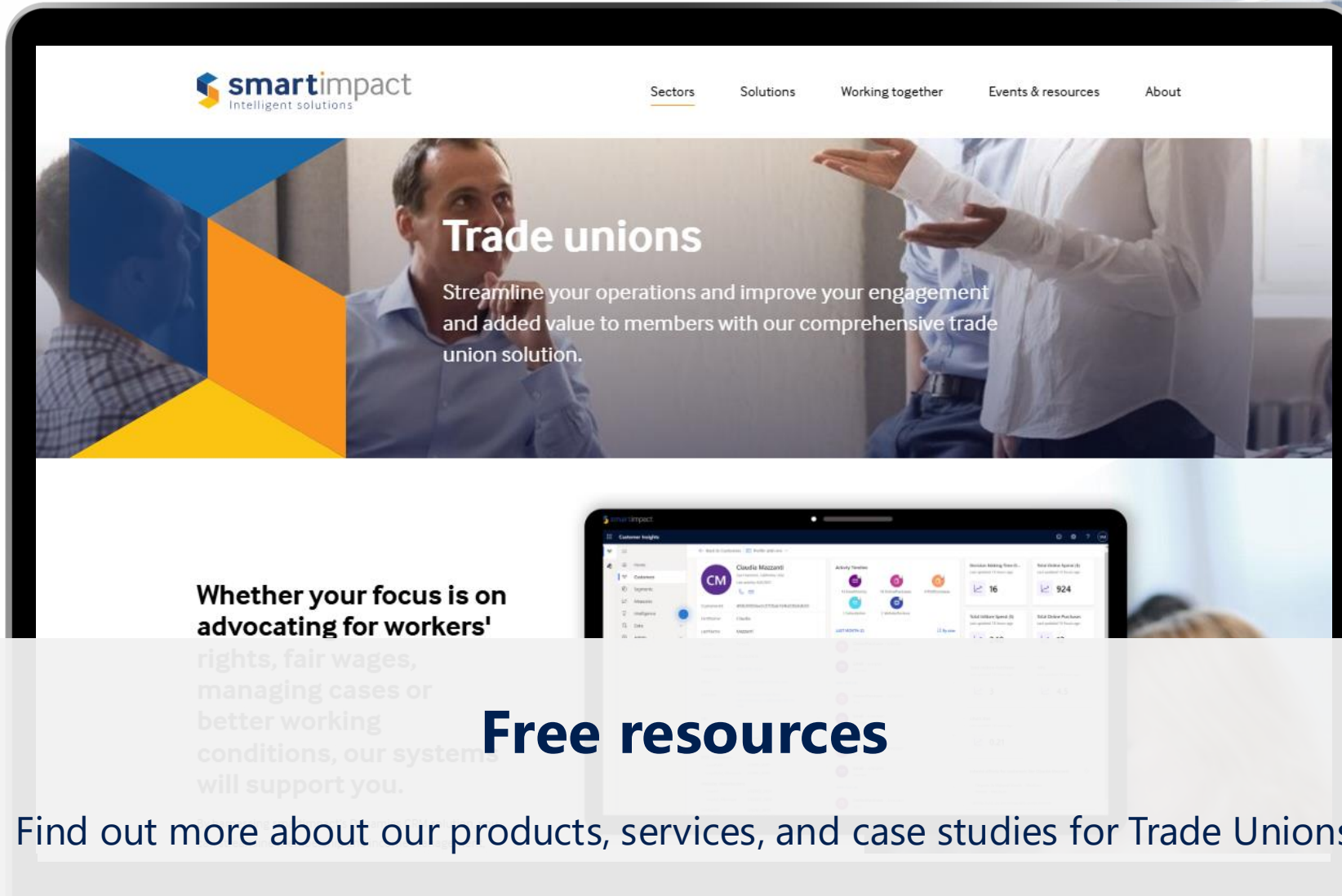
A quick poll...

Question:

**How confident about
Digital Unionism is your
union right now?**

1. **Very confident** – we do a lot digitally with our members already
2. **Somewhat confident** - there are certain more channels we could explore
3. **Not confident at all** – we're doing the basics well – lots still to do though!





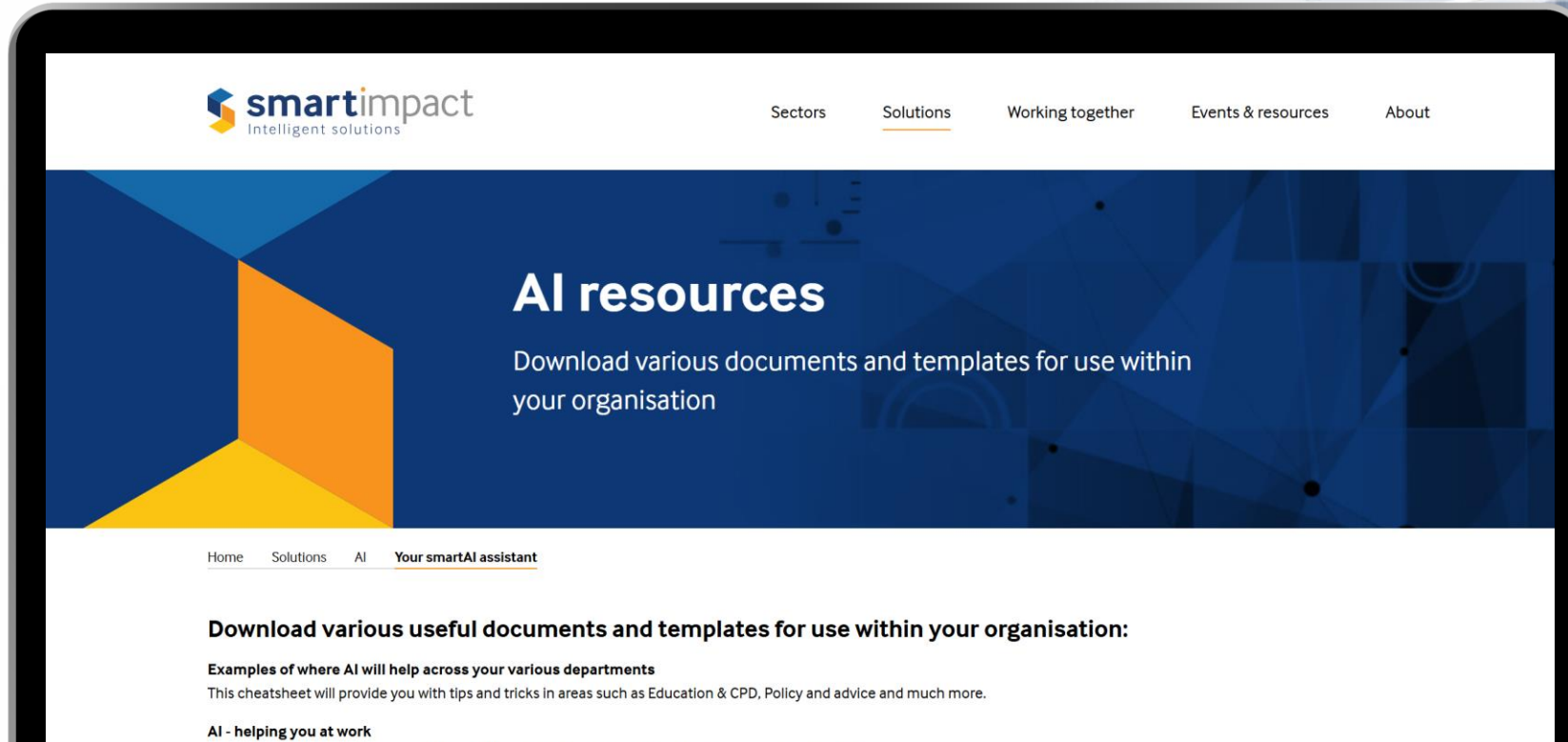
The screenshot shows the SmartImpact website for Trade Unions. The header includes the logo and navigation links: Sectors, Solutions, Working together, Events & resources, and About. The main content area features a large image of a man in a blue shirt with the text: "Trade unions Streamline your operations and improve your engagement and added value to members with our comprehensive trade union solution." Below this is a smaller image of a tablet displaying a dashboard with various charts and data points. The text "Whether your focus is on advocating for workers' rights, fair wages, managing cases or better working conditions, our system will support you." is overlaid on the bottom left of the screenshot.

Free resources

Find out more about our products, services, and case studies for Trade Unions

smartimpact.co.uk/sectors/trade-unions





Free resources

A range of guides, policies and suggestions on how to start implementing practical AI

smartimpact.co.uk/AI_downloads



Upcoming events



WEBINAR

Tuesday 4th November, 9.30-10.30am

Transforming member services with Microsoft Copilot and new digital tools

Microsoft has invested literally billions in technologies for Associations and other businesses, revolutionising the way services can be delivered – and you can get ahead of the curve.



WEBINAR

Tuesday 2nd December, 9.30-10.30am

Revitalising your Dynamics system to make the most of inbuilt automation and AI

In this webinar we'll showcase how our cutting-edge deployments of Dynamics 365, integrated with Copilot, Copilot Studio, and Microsoft Dynamics 365 Customer Insights, can revolutionise your member services

Join future webinars

Covering a wide range of CRM and digital issues, **09:30 on an early Tuesday each month**

smartimpact.co.uk/events



Thanks!

Hope to see you next time...