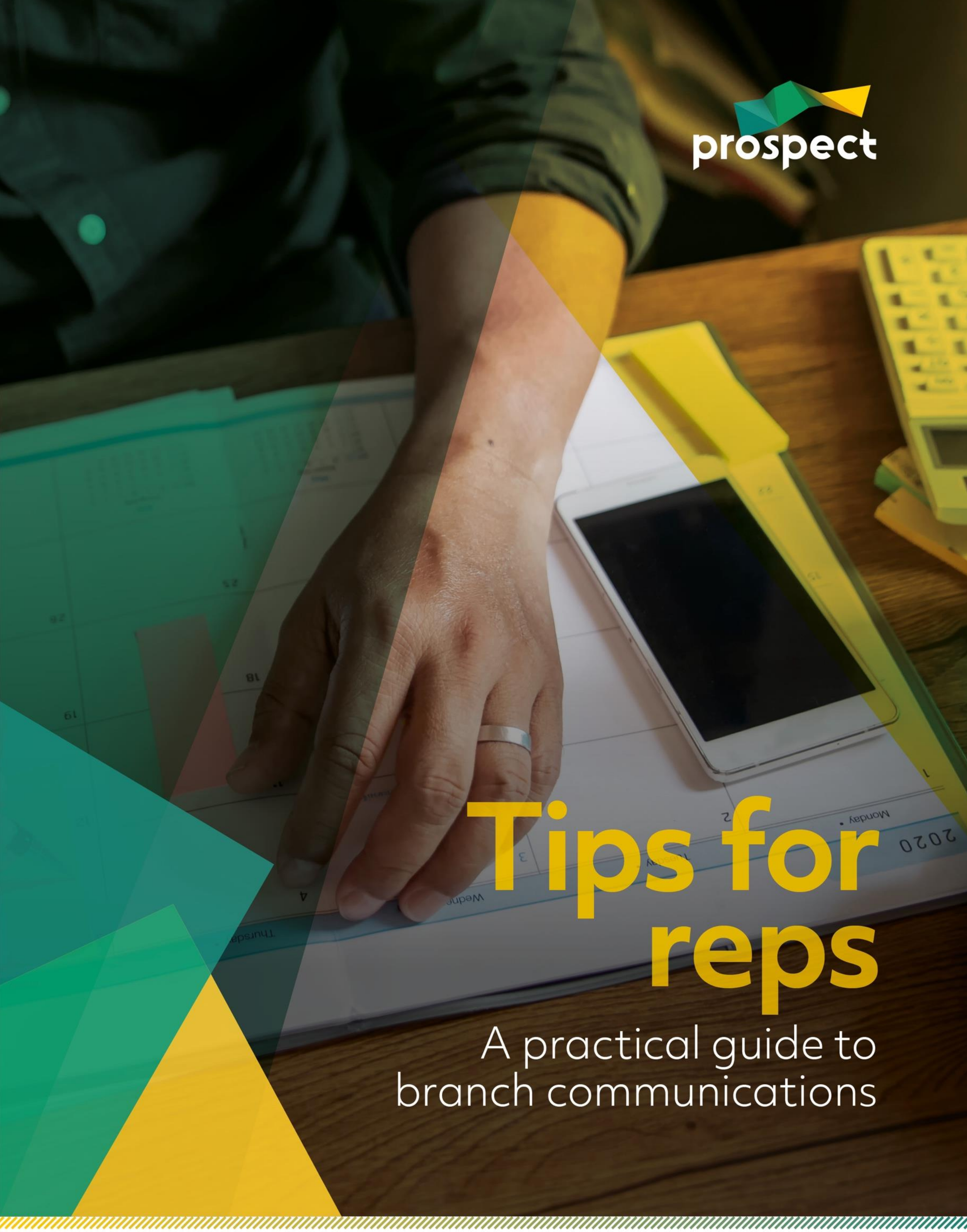

prospect

Tips for reps

A practical guide to branch communications

prospect.org.uk

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1

Organising an online branch meeting

Zoom is a great way to keep in touch with your branch, whether that's in one-to-one catch ups or bigger meetings.

You can create a Zoom account at zoom.us where you can set up meetings for free - although there is a time limit of 40 minutes should you have three or more attendees. Alternatively, you can set up an account with Zoom and pay for bigger and better options which include break-out rooms.

If you're looking to organise with your branch online here are ten top tips to help you get the most out of your digital meetings.

Ten important tips

1. **Recurring meetings** - If you're planning to hold a regularly recurring meeting, you can set this up in Zoom via Schedule a Meeting. The meeting template gives you the option to select 'recurring meeting' which means one invite with one URL goes to everyone's email and calendar so you don't need to send out a new invite or link each time.

2. **Have a clear agenda** - You might wish to send participants an agenda with any useful materials in advance so members can prepare, and you can save reading time in the meeting. When you start your meeting, welcome people and then outline how the meeting is going to run so they know what to expect and when and how they are going to be able to contribute, whether that's by asking questions or by submitting questions in the Q&A or chat boxes.

3. **Keep to time** - Online meetings can suffer from the same issues as IRL (in real life) meetings and it can actually be harder for people to maintain concentration and focus remotely. Make sure you say at the beginning how long the meeting will run for, how long you will give to agenda items, and stick to it. If it's going to run over an hour, have a break for people to get up, get a drink and refocus. Remember, free Zoom calls end after 40 minutes.

4. **The joy of the mute button** - When you create your meeting set it so that participants are muted when they enter. This means you won't get distracted by late-comers and potential external noise. When they want to speak, participants can either unmute themselves or, if you want more control, you can set it so you unmute them. They can indicate they want to speak by using the 'raise your hand' button.

5. **Share your screen** - If you want to share a report or presentation with your members, you can do this easily by sharing your screen. Just press the big green button at the bottom of the screen and pick what you want to share. Other participants can do this too and as host you can stop them from sharing if necessary. If you want a collaborative annotation session for example brainstorming for a campaign, you can share a whiteboard which acts like a flipchart for either yourself to live edit or for participants to annotate using the Annotate button.

6. **Record it for re-watching** - If you want to record the meeting as a video you can set this up in your settings. It's good practice to let participants know that they are being recorded. You can then send it around to anyone who wasn't able to make the meeting. If you don't want a copy of it but a participant does, they can also manually start to record their screen - but again please ask people to let all meeting attendees know if this is happening!

7. **Watch your background** - Remember that people will see you and your background so make sure there's nothing you don't want colleagues and members to see. On Zoom you can choose from a range of virtual backgrounds too, from beaches to sports stadiums, so this is always an option if you really don't want people seeing where you're sat, although choose with care depending on the nature of the meeting. There's also a 'touch up your appearance' selection in your settings, which gets rid of any blemishes if you're feeling you need it!

8. **What's in a name?** - People can edit their names so make sure that they are aware that what might be suitable for a family quiz may not work for a meeting. You can also include your title if you want to have let members know the roles of everyone in the room.

9. **Be secure** - Zoom encourages you to set a meeting password to ensure that only the people you want to attend can attend. This means anything confidential will be kept that way and guards against any nasty surprises! You can also lock your meeting as soon as everyone you know is attending has arrived. If you're holding a meeting with the wider public use a Unique Meeting ID to avoid any security breaches where hackers can take control of your meeting - what's known as 'Zoom bombing'.

10. **Last but not least and we're back to mute** - It's good online meeting etiquette to mute when you're not speaking so that background noise doesn't distract other participants. It seems obvious but lots of people forget it and it can really disrupt meetings. Perhaps strangely for a format that encourages face to face interaction, you always need to remember that the golden rule for online meetings if you're not speaking is Mute, Mute, Mute!

Formal branch business and voting

Whilst Zoom and other platforms do have tools for online voting or polls these may not be suitable for all occasions. For example, they do not necessarily allow us to check whether everyone voting is eligible or that members do not vote twice, so they should be used cautiously.

Snapshot polls though might be appropriate to informally gauge members' views on a call to help inform discussions by a branch committee.

If you are planning on conducting formal branch meetings online then you should speak to your Prospect full-time officer, to discuss the best way forward. We do have our usual ways of organising online ballots, for example on pay. Again, this should be discussed with your full-time officer.

We will also be looking to produce further guidance and support for branches on remote democracy later in the year.

Other platforms

Although the reps' communications survey showed the most common platform in use is Zoom, we know reps use a range of different platforms. Many of the tips above apply regardless of the platform that you choose. Here are some links to help with other common platforms:

- How to use Google Meet
- Google Meet Tips and Tricks
- Learn more about Microsoft Teams
- Organise conference calls on Skype with one click

Organising a branch webinar

You may be familiar with webinars from our series of Prospect and Bectu live online events. Since we launched this series, we've hosted a small number of webinars for branches, sectors or groups within the union.

Compared to online discussions, which work for smaller groups of members, webinars give you the chance to reach upwards of 100 members.

Important tips for a successful webinar

1. **Know the difference -** It's really important to know the difference between a meeting and a webinar. A webinar is good for when you have specific speakers doing a presentation or talk, when the attendees watch and listen rather than being seen or heard. A meeting is better for smaller groups where everyone can contribute to the conversation.

2. **Preparation -** Ahead of your webinar date, make sure you describe what participants can expect - the theme of the webinar, any internal or external speakers, the start and end time. You can send reminders to members to attend, you can start running polls and you start the chat section. This means members are engaged early, and you have a sense of the opinions and concerns ahead of time. It's also worth letting members know that connection problems are probably due to their internet, so maybe they could try unchecking the 'Enable HD' in the Zoom video settings, or try closing some other applications ahead of time to get the best connection.

3. **Introduction -** Once the webinar has gone live, introduce who is on the call and what attendees can expect from the session. It does usually take a few seconds for all attendees to have joined the call so make sure you wait for them. You can also welcome people in any chat bar you've set up, and you can remind people about improving their connectivity, answering any polls and whether they can re-watch and share the webinar afterwards.

4. **Speaker Prep -** Make sure speakers are in a quiet and distraction free environment and, if necessary, you can ask them to join the call a few minutes early (in practise mode) to test out their equipment. If you are joining the webinar late, it would be a good idea to make sure you are muted to avoid any disruption and to keep mute when you're not talking.

5. **Zoom settings -** There are lots of settings on Zoom to consider when setting up a webinar. Look out for options like enabling the host and panellists to share their video, whether you want to record the session and if you want attendees to register before joining. Once you are happy with the setting for one webinar, you can save this as a template for ones in the future.

6. **Polling -** You can set up polls before the webinar begins which help the audience engage more in the event as well as being a good opportunity to gauge some

information that you can refer to during the session. Keep poll questions short and to the point with, say, three simple options - Yes, No and Haven't decided being the most obvious. Polls aren't supposed to be in-depth surveys, they're just a snapshot of sentiment.

7. **Q&A -** The Q&A is a great function for people to ask questions anonymously and for you to answer in real time. Attendees can also upvote the questions to the top of the list so you can see and answer the most popular queries. Panellists can type the answer or choose to answer them verbally.

8. **Plan your time efficiently -** Make sure you stick to time; webinars usually shouldn't go over one hour as online focus is generally less than in real life. In general terms, the total time of presentations should be around 20 mins preferably delivered as a piece to camera with minimum slides, using simple ideas and language to avoid information overload. Allow time for a Q&A, this is an interactive part of the webinar so keeps people engaged. You can read out questions from the Q&A section or invite participants to ask their question themselves on screen.

9. **Panellists -** You can ask panellists to the webinar via a Zoom invitation. Display full names and titles so attendees know who they are watching, and make sure you give panellists a clear brief about:
    - the topic
    - the time limits
    - the numbers and interests of the people attending the webinar
    - expectations on presentation content and Q&A participation
    - details of the other panellists

    Promote interesting panellists ahead of, and after, the event to secure more sign ups and shares of the recording.

10. **Recording -** You may want to record the session so you have a recording for those who couldn't make the event. This link can be sent in the follow-up email to both attendees and absentees or uploaded to a YouTube account. You can ask people to share with colleagues who missed the session and also ask them to sign up for any future events you've got booked.

11. **Safeguarding -** If there is a chance that children may run into your shot, you can consider turning off your camera to avoid any safeguarding issues. Also, unless the session is open to anyone, the registration link should be sent round to attendees only, sharing on social media can increase the chance of Zoom bombing or unwanted guests.

12. **Virtual backgrounds -** Using virtual backgrounds is a fun way of making your video look more interesting and can also protect your privacy. You can select virtual backgrounds in the setting tab. In settings, there is also an option to 'touch up my appearance' if you would like to blur out any unwanted blemishes.

13. **Speaker/gallery view -** Depending on the nature of your webinar, you can choose to have panellists displayed all at once on the screen (gallery view) or so just the person speaking is visible to attendees (speaker view.) You can toggle between these once the webinar has started. You can also mute people and turn off their cameras.

14. **Share screen -** The screen sharing option is really useful when presenting a slideshow or conducting a demonstration. All panellists have this option though, ultimately, the host of the webinar has control over who can share.

15. **Live captioning -** Although Zoom does not have an option for live captioning at the moment, this is important to consider making your webinar as accessible and

inclusive as possible. A quick, free way of live captioning is on a PowerPoint presentation (only available on Microsoft 365) where you can turn on live subtitles in the ‘slide show’ setting and subtitles appear as you speak. Not 100% accurate, but an option.

How to organise a branch webinar

The union has a small number of Zoom accounts that can host webinars for up to 500 members. These accounts are prioritised for the Prospect and Bectu Live events but, where account and staff resources allow, we’ll try to support branch events. Please discuss your options with your full-time official.

It’s worth checking which platform your workplace uses and whether they’d allow you to use it. Microsoft Teams live events functionality offers many of the same features as webinars in Zoom.

2

Welcoming new members

Prospect is one of the country's fastest growing trade unions. We only grow because of the hard work of reps in all our branches to recruit new members. Once members have joined, one of the most important activities is to welcome new members to the branch.

Why do we welcome new members?

New members are often still forming their opinions of the union.

A warm welcome affirms members' desire to be part of something positive. This initial contact is likely to give new members a good first impression, allow them to put a face to the union and to share any concerns - all of which **increase the chances they will remain a member in the longer term**.

Of course, building relationships offers the chance to **spot members who want to do more in the union** – they may be happy to share information with colleagues and that's one of the first steps to becoming a rep in future.

New members may have valuable or new skills that a branch can use. New members are often the most enthusiastic and some bring valuable or new skills to the branch. We find that some of **our best recruiters under our Member Recruit Member scheme are new members.**

How can I find out who my new members are?

The Prospect eBranch system lets you generate a list of members who have joined in the last three months. You can set a reminder every quarter to generate this list.

How can I contact new members?

New members receive a welcome email shortly after they join from the membership department. It's vital that branches welcome their new members too because:

- Many members join to know about what is happening in their workplace. They can bring insight and influence.
- A standard email is quite impersonal. Branches and reps can tailor their communications to local circumstances and encourage a two-way conversation.

There is no one-size fits all approach to communicating with new members. Branches develop their own approach depending on their size, the areas they work in, the number of workplaces they cover and what works well for their particular area.

Here are some ideas for how you can get in touch with new members:

Personalised email – an email to introduce yourself, thank them for joining and asking their views can work really well. It's best to send separate emails to each person as this feels more personal. However, it is slightly more time consuming. If you need to send a group email **always make sure you use the BCC function.**

Face to face – introducing yourself as the union rep and thanking them face to face is very powerful. Remember though that some members might not be comfortable with others knowing they have joined and that union membership is protected under the Data Protection Act – so be discrete.

Drop in or coffee morning – in person or virtually. Some branches have organised these drop-ins for new members. Coming along to something for the first time can be a little daunting, so make sure you emphasise that no prior knowledge is needed, and it is a chance to find out more with their colleagues.

New member webinar – branch officers can share information using a platform like Zoom and members can join from various workplaces or home. Make sure you leave plenty of time for new members to speak and ask questions.

Social media – We always try and amplify when someone says on their social media account that they have joined. Reps and branches can do the same by 'liking' or replying with a welcome message - be sure not to identify someone as a member if they haven't done so themselves.

New member welcome pack – if you have a lot of information to share, you could create a branded a welcome document in Word or Publisher - various templates are at prospect.org.uk/ambition - to send alongside a welcome message.

What can I say to new members?

Here are some topics you could cover in your communications. You don't want to overwhelm the new member so choose the right topics depending on the circumstances in which they joined:

- Say thank you for joining, we're delighted to welcome you to a branch with (INSERT NUMBER) members

If they've joined from a workplace with no apparent issues, then:

- Talk about some of the areas or issues that the branch is working on at the moment
- If you're face to face, on the phone or text you can ask open questions about why the member joined - there might be a reason so there might be potential for further new joiners

If they're joined from a workplace with known issues, then:

- Ask open questions about their experiences of the workplace
- Talk about how the branch is working on these issues at the moment

You can cover the following points as a face to face conversation unfolds, but limit yourself to the most important 'ask' or share of information over any other channel:

- Let them know what communications they can expect from the branch and how often.
- Let them know how they can get in touch locally and nationally if they ever need any help.
- Mention any branch activities coming up – for example a social meeting.
- Encourage people to come along to social or branch meetings, but don't make this the only way to become involved. Some people may find a meeting difficult, but it doesn't mean they wouldn't want to do something else to help out.
- Don't be afraid to ask if a member can do something to help, but start small, putting up a poster maybe or wearing a union lanyard in the office. Even if someone is enthusiastic don't try to make them become branch secretary right away.
- Tell them about the member benefits and the Member Recruit Member scheme and that they can use them straight away.
- You might want to include details of how the branch works and the key officers. Avoid too much detail about the branch rules or constitution.

- If you need to share a lot of information, try following up with the key points in an email, and point to further content on the website or other documents.

Model email to new member

Here is some model text. Obviously if you know the new member directly you may wish to make it more personal.

> Dear XXXXX
>
> I am emailing to introduce myself as the <INSERT POSITION> of the Prospect union <branch/section> at <organisation>. I also work as a <JOB TITLE> in <DEPARTMENT/TEAM>.
>
> It is great to see that you have joined our Prospect branch, you're now part of a group of HOW MANY members working together to make <ORGANISATION> as good as possible for you and your colleagues.
>
> I wanted to make sure you had my contact details in case you ever need them. The details of the main Prospect reps (including mine are):
>
> - *<Insert details of reps here – you may not need to include every rep, but normally best to include more than one if possible, in case a member needs to get in touch, and you are on leave etc>*
>
> From time to time, we'll send you details about our Prospect meetings which offer a great opportunity to talk to other members and feedback about working here.
>
> *<If you have a prospect channel on the intranet or similar here is a good place to add the details>*
>
> There is also a lot of information and support available from the Prospect website nationally.
>
> - General workplace advice
> - Detailed member guides (you will need to sign-up to the website and login to see them all)
> - Networks including the BAME and LGBT+ networks
> - Legal services including free wills service
> - Money-saving benefits
>
> If you need to get in contact with Prospect nationally – for example to change you address or if your earnings change - then you can email, web chat or phone: prospect.org.uk/contact-us/
>
> Lots of members like to get more involved in the branch, from updating notice boards through to working on issues like health and safety and the environment. If you can spare a little time, please let me know.
>
> Yours
>
> XXXXXX

Useful links

- https://www.yourmembership.com/blog/make-new-members-feel-welcome/
- https://blog.memberclicks.com/how-to-write-an-effective-new-member-welcome-email
- http://beta.suefroggatt.com/resources/member-retention/items-to-include-in-a-welcome-pack/

3

Using intranets and other workplace networks to engage

Our reps' communications survey told us branches use a range of channels to engage with members. This often varies by what is already widely used within an organisation or company. But Yammer, Workplace, WhatsApp, Teams chat, Slack, as well as more traditional Intranets are all in use.

The tips in this section are designed to be helpful on a range of different platforms.

Top tips

Choose a platform that people are familiar with
When starting a new group or channel, its success will depend on engagement and people are far more likely to engage if they know the platform. Throwing in a new platform to 'learn' can be off-putting when people are busy.

Don't use too many different platforms
For group communications, stick to as few platforms as possible. Different threads about the same topic on different platforms is confusing for members and difficult to manage for you.

You should choose the right platform for the right activity
Steer away from a highly populated chat platform for important announcements and use email instead so the message doesn't get lost. Or, to get ideas, you might ask people to contribute using a Google Doc rather than spamming the channel with hundreds of different messages that will be hard to collate.

Identify some champions
You might have colleagues who will act as advocates for a platform by posting regularly or directing other colleagues to the platform. They might also help with technical queries or hints and tips as to how to use the platform successfully.

Gather thoughts from members
Be open to ideas from members around which platforms they prefer and how to make the most of the channel. If it will help them engage more, it'll only help you!

Welcome new members to groups/channels
It can be quite daunting being added to a new group if you don't know anybody so, as the admin, welcome new members by introducing them and ask your advocates to say hello too. New members will feel more comfortable and be more likely to voice useful contributions.

Keep the group/channel membership fresh
If people leave the organisation, make sure they don't remain in the group.

Respect people's right to switch off
If you get loads of messages and conversations happening on the platform you use, that's great but respect people who may only want to engage occasionally. They shouldn't be expected to read every single message. This is another reason to make important announcements using a different channel so no-one misses out. Say that you don't expect people to reply out of hours and make other people aware of your approach. People have a right to switch off.

Keep the discussion focused and on topic
Try not to stray into conversations about the previous night's TV or recent football results. It can exclude people from the group and, therefore from hearing the important discussions. Remind people of the community guidelines if needed.

Keep your posts engaging
People have hundreds of messages to read across multiple platforms, every day. Keep people in your group engaged by only communicating when you have something to say, share or ask, and attract their attention using photos, emojis, videos, voice messages and gifs. Keep your content appropriate and don't go overboard – a gif with every message can get quite annoying

Stay engaged
If your goal is to engage your members on the platform, you must stay engaged yourself. Keep an active presence up, answer queries quickly and don't go absent for long periods of time. You can't expect the community to engage if you're not doing so yourself.

But…you can switch off as well!
Set some boundaries for when you engage and when you have some downtime. You might want to mute a group at certain times of the day so you're not constantly getting notifications. While it's important to stay engaged, an 'always on' culture helps nobody and we all need to switch off for the good of our mental health.

Some useful links

WhatsApp
https://shaz.co.uk/whatsapp-etiquette-for-business/
https://www.forbes.com/sites/paularmstrongtech/2018/04/29/how-to-run-a-successful-whatsapp-group/

Yammer
https://www.talksocialtome.com/increase-yammer-engagement/
https://www.spigroup.com/2019/09/03/four-tips-you-can-use-right-now-to-make-your-yammer-posts-more-engaging/

Workplace
https://www.linkedin.com/pulse/6-tips-using-workplace-facebook-ren%C3%A9e-van-holsteijn/
https://www.gend.co/blog/best-practice-tips-for-workplace-users

Slack
https://www.franzvitulli.com/7-tips-use-slack-effectively/
https://www.wired.co.uk/article/how-to-use-slack-tips-tricks
https://e-m-marketing.com/2016/03/15/slack-secrets-to-success

4

Writing tips for reps

Ideas to keep in mind for reps writing branch emails/newsletters

Know your audience
Before you start writing, think about who you're writing to - all members or a group of members with a common link?

You can tailor your content based on their level of knowledge and involvement. For some groups, this means recapping previous information before you share new details. For other, more engaged groups, you can be brief on the background and cut straight to the next steps.

No matter who you're communicating with, think about why you're writing to them: what do you want them to think, feel and do as a result of your communication? Without this insight, you'll just be broadcasting information rather than engaging them in activity.

Know your message/purpose

Some communications are simply about sharing information so make the content relevant to the audience's needs. Always make an ask to do something after reading:

- Report on a particular event, such as the outcome of a meeting, needs to mention how members' views were heard and what steps will follow. An ask could be around sharing with other colleagues or giving more feedback
- Participation and feedback, like in a ballot?
- Giving notice of a forthcoming event needs to mention why the session is important to members, what are you discussing which matters? An ask is to sign up and share
- A general branch round-up needs to mention how members' views were heard, what success the branch has had in the workplace, what the wider union is undertaking. An ask could be how members can help or get involved further.

Use the subject line of the email to distil the essence of your message, or the email's purpose, and keep to a short sentence.

Be concise

Keep your stories or emails as brief as possible. Be clear and concise. Keep your sentences short and to the point and don't repeat yourself.

A good tip is to write out everything you want to say, then reorder the text to give better flow, then edit hard.

Break up your paragraphs as long and dense text can be off-putting to read on screen. Make one point, per paragraph.

Bullet points/bold

Make use of bullet points for lists, statistics or to emphasise your main points.

For example:

- Staff on Grade A will get a 3% pay increase
- Staff on Grade B will get a 3.5% pay increase

Bold up words or sentences if they are crucial to your message.

Jargon/acronyms/don't assume knowledge

Workplaces tend to be breeding grounds for acronyms and jargon, but don't assume knowledge on your readers' behalf. This can be particularly off-putting for new staff and, therefore, recruits.

In the first instance, always spell out acronyms in full, even ones that you think are commonly known, for example T&Cs for terms and conditions or H&S for health and safety.

Similarly, be as specific as possible and give instructions if you're giving crucial information, such as the location of a meeting.

Images/Graphics

A well-chosen image with a good headline is far more effective at getting your message across than writing 500 words.

Pictures should not be an afterthought but a critical part of your communications. If nothing else, breaking up large chunks of text with a few pictures will make your emails/newsletters much more attractive.

Some good sources of free and royalty-free images:

- https://unsplash.com/
- https://www.pexels.com/

Proofreading/grammar/punctuation

If possible, ask a colleague to read through your email before sending. Reading what you have written out loud is another useful technique to spot mistakes.

Always check that names, job titles, locations are spelt correctly and use Prospect's house-style for, among the things, laying out dates, names/job titles and using capital letters.

Try to get apostrophes and other grammar right. Grammarly is a free and useful online tool.

Writing a news story

Be clear on the story that you wish to tell: before you start writing, imagine how you would quickly explain the most crucial and salient points over the phone to someone.

Get all the key points in the first couple of sentences. Write those first couple of sentences as though nothing else will get read.

Make sure your those first sentences cover:

- What is happening
- Who is doing it
- Where
- When

After you've got your crucial introduction, the rest of the story could include:

- Why it is happening
- Quotes
- Examples
- Chronological information: 'how we got here'
- What happens next

News stories should be brief. No more than 300 words.