The Movement guide for Bectu Reps

Version 02 – December 2024

Movement is the new bulk email sending tool for staff and reps in Bectu.

The simple online platform makes it easy to manage outbound email with your members. At present, we use Movement for email, but not its phone or text campaign functionality.

When using Movement, please do not update any member records. Membership data and mailing preferences are synced with our central database – updates should be made via the membership team.

To login to Movement visit: https://prospect.v2.ringround.io/users/sign_in.

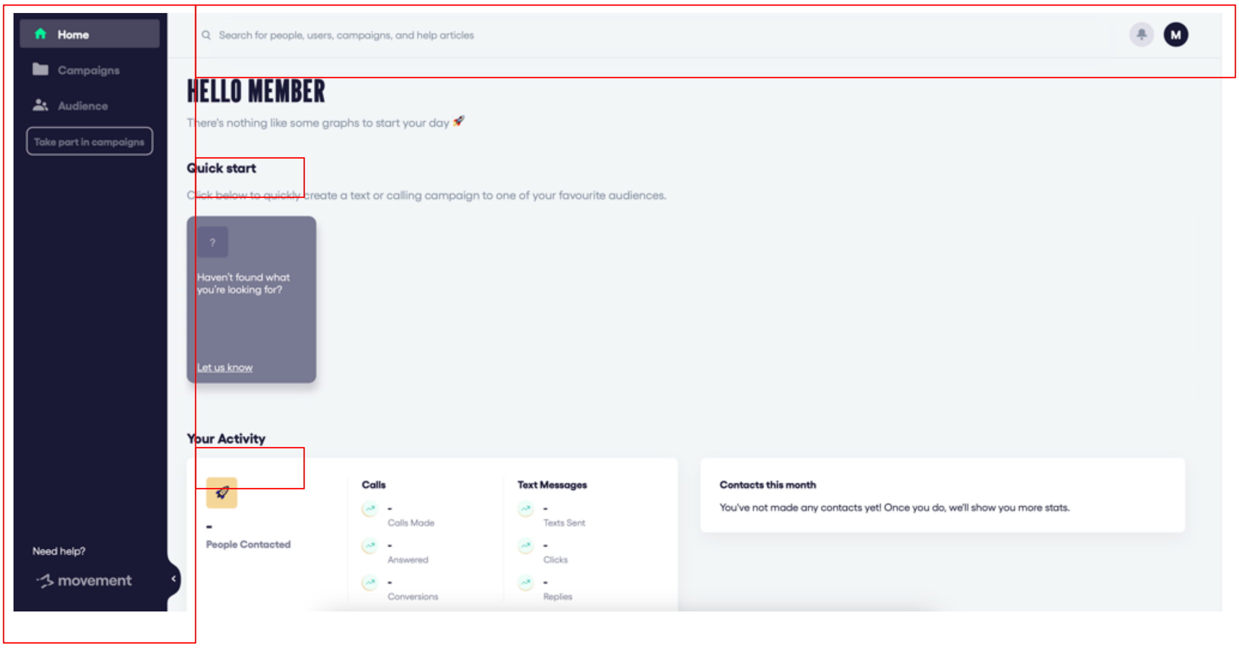
Your login email will **always** match the primary email on your membership record. It can take up to two weeks for a rep with the required permissions to be assigned access to Movement. Please email movement.support@prospect.org.uk if a rep requires immediate access.

Contents

Find your way around Movement

Each page in Movement's control panel features a collapsible left-sidebar with links to Home, Campaigns, Audience. At the foot of the sidebar there is a link to Movement's support centre.

A universal search bar spans across the top of each page where you can look up campaigns, people and other Movement users in your branch. On the top-right is a notifications icon and a link to your profile.



Home

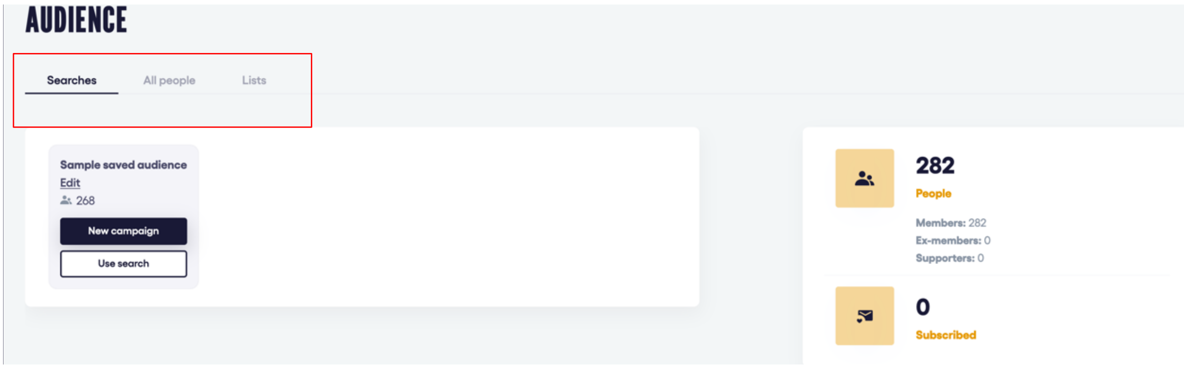
The first page, displays 'Quick start' (template) audiences. Use these to launch a new email campaign or as a starting point to create new audiences. Beneath this 'Your activity' shows headline statistics about recent campaigns.

Audience

Movement's Audience page is where you see existing audiences and a link to create new ones. By 'audience' we mean a mailing list.

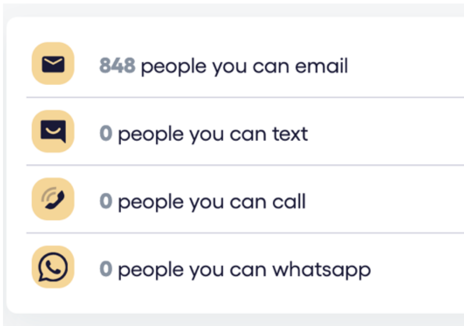
The main content window shows three tabs, quick start audiences are displayed in the 'Searches' tab. Under 'All people' you can see a list of people you can email. We are not using 'lists'.

On the right hand side, there's a count of the number of members you have access to.



The lower part of the Audience page shows ‘Your audiences’ where you see a list of the audiences you have permission to use. Next to the audience’s ‘Name’ you see the ‘Number of people’ and the date it was ‘Created’. The listing can be filtered by creation date or alphabetically.

Click an audience name in the list to see further details, including the audience criteria, the names of people in it and confirmation of how many people it contains.

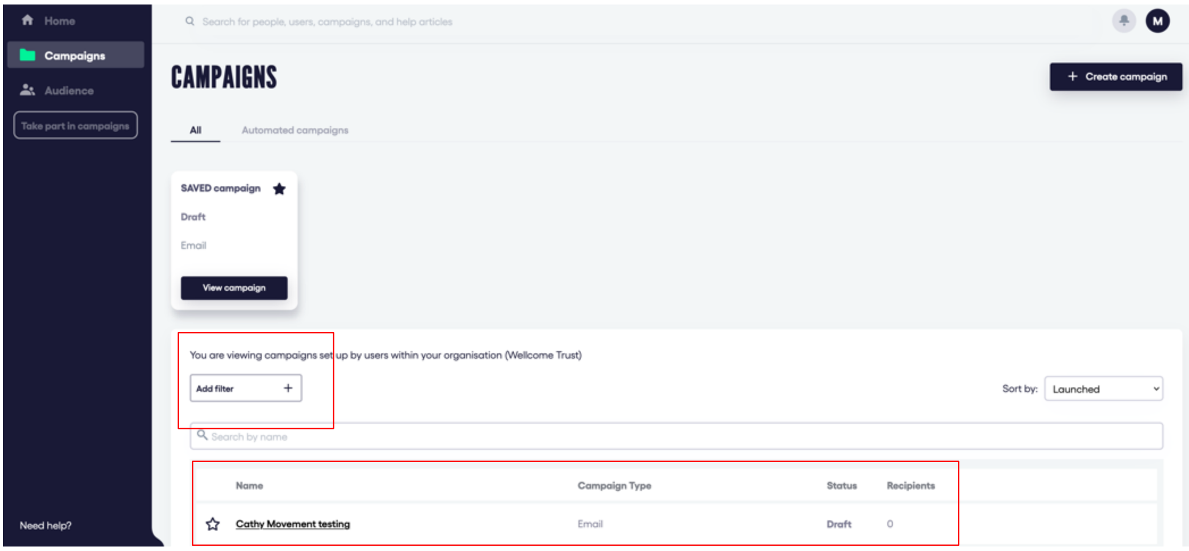


It’s possible to save an audience as a template audience so that you can quickly use it to launch new campaigns, or as the basis for copying and refining by adding further filters.

Regardless of the criteria you choose, the audience will always be restricted to the people your rep role gives you permission to email.

Campaigns

The Campaigns list page shows all campaigns, their status (e.g. ‘draft’ or ‘sent’) and the number of recipients. It’s possible to filter and sort the campaign list or search for mailing campaigns by name. If you click the star to the left of the campaign name, it will be saved above the main list for quick access.

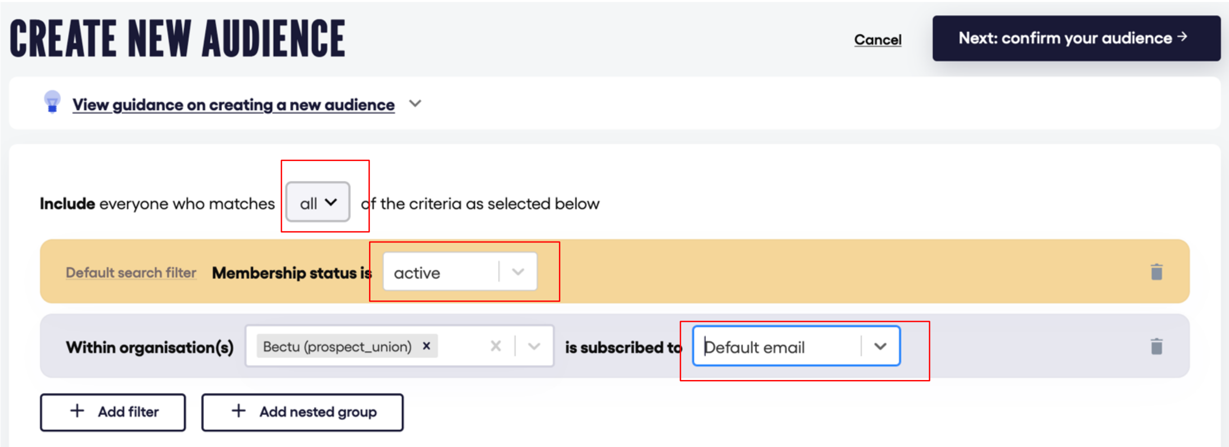


Create an audience for your mailing

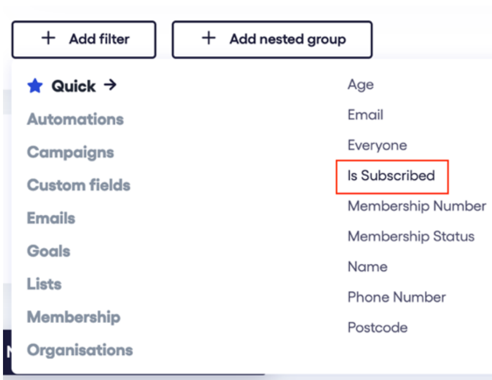
To simplify audience creation, your access to member records is restricted to the people you can email. This is determined by your branch and union role. You may have the option of sending emails to a whole branch, a division, subdivision or members in different locations or workplaces.

Click the ‘**Create an audience’** button at the top-right of the ‘Your audiences’ section on the Audience page to open the audience builder.

At the top of the ‘Create new audience’ page you will find a link to ‘View guidance on creating a new audience’. This explains the steps to create an audience.



1. Include everyone who matches **all** of the criteria as listed below.
2. The default search filter should always match ‘**All active**’.
3. Click the **‘+ Add filter**’ button and choose ‘**Is Subscribed**’ and then start typing the name of the branch you want to email into the lookup.
4. From the ‘is subscribed to’ dropdown ensure ‘**Default email**’ is selected.
5. Click ‘**Next: confirm your audience’**



The criteria above will be sufficient to email all opted-in members in a branch. You can create more advanced audiences by adding multiple filters and choosing whether to create an audience that matches ‘all’ or ‘any’ of them.

A ‘nested group’ allows you to combine ‘all’ and ‘any’ criteria.

The audience scope can be limited by setting filters that will exclude members.

After you click to confirm your audience, the number of people who match the chosen criteria will show. If this number doesn’t match your expectation, you can return to the previous page to edit the criteria. You can click to ‘**View people in the audience**’.

To proceed click ‘**Next: name your audience**’.

After naming your audience, you have the option to save it as a template so that it shows as a quick start audience, and to share it with people in your branch or in a sub-branch. This is not a required step.

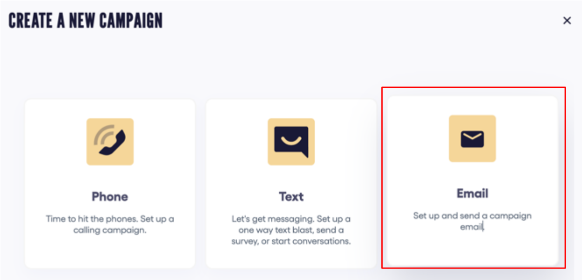
Ex-members
Members who leave Bectu will have their status updated to show as 'inactive (ex-member)' when data is synced (twice weekly). These records are regularly removed from Movement. Please do not attempt to email ex-members.

Create and send an email campaign

To start a new mailing click the dark **+ Create campaign** button near the top-right of the main window of the 'Campaigns' page.

You can also find the + Create campaign button on the top-right of an audience details page or start a new mailing by clicking 'New campaign' in a quick start audience.

When you begin a new campaign, select 'Email' in the pop-up window to confirm the type of campaign.



(We don't currently use Movement for phone and text campaigns.)

You will then need to name your campaign name and click '**Begin**'.

The campaign name is different to the email subject line. It's used to list your mailing in Movement so using a consistent naming convention is helpful.

To help system admins who see a list of all campaigns, it would be helpful if you prefix your campaign name with your branch name or a recognisable acronym/abbreviation.

e.g. Instead of naming your campaign 'Branch update' name it 'Camera branch update'.

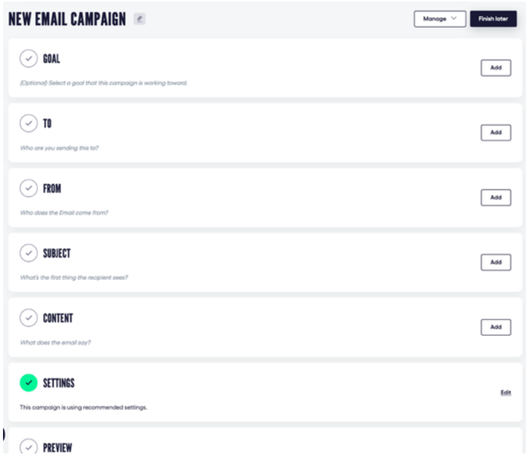
After providing a name, there are seven steps to build your campaign

The at the start of each stage will turn green when edits to a section have been saved.

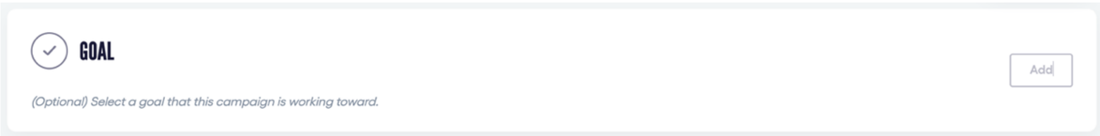
Click the ‘**Add**’ button on the right to start completing a step. If a section is open, you must ‘**Save**’ or ‘**Discard changes’** before proceeding to the next or returning to a previous step.

It’s possible to copy an existing campaign to edit and create a new one by selecting ‘**Duplicate campaign’** under the ‘**Manage’** button at the top-right.

You can pause set up and ‘**Finish later’**. Your progress will be saved.

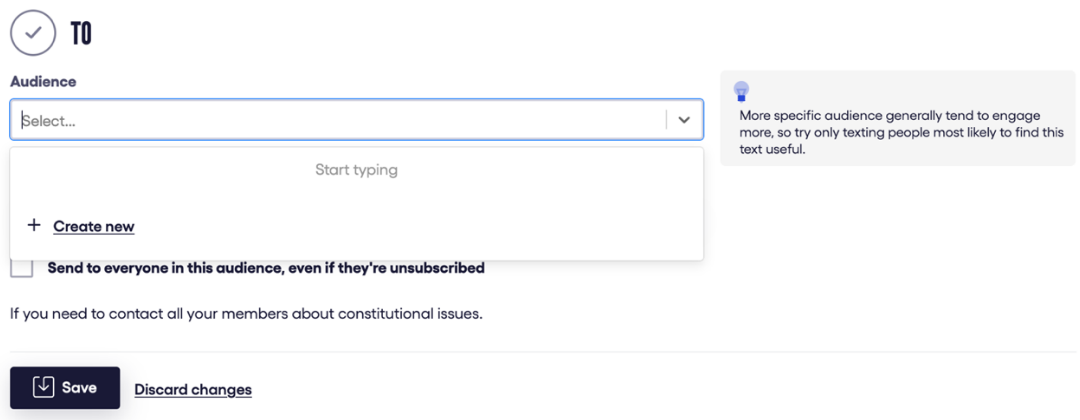


1. Goal



Goal is an optional step and we suggest you ignore it, at least initially. Goals group multiple campaigns to make it easier to track results across long-term initiatives.

2. To



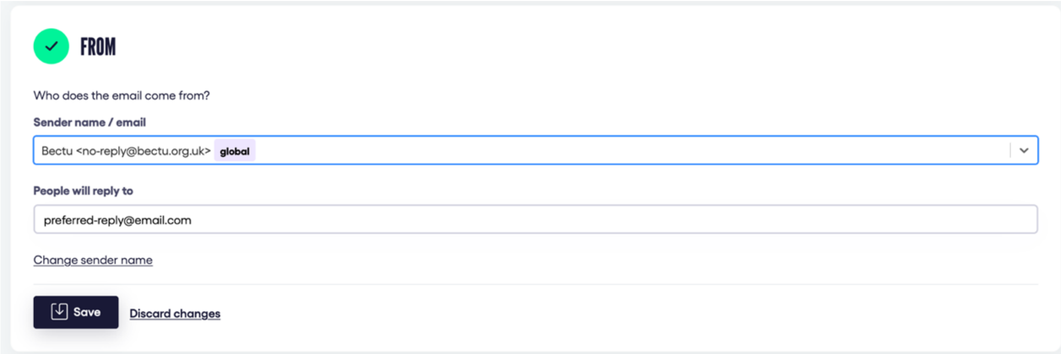
To use an existing audience, select it from the dropdown or click ‘**+ Create new**’ to define a new one. See Create a new audience for your mailing

Under ‘**Prospect subscription category**’ ensure the selection remains on the pre-selected ‘Default email’. This is the category to use for all mailings by Bectu branches. (The other categories are for use by Prospect branches).

Do not tick the ‘Send to everyone in this audience, even if they’re unsubscribed’ checkbox.

Click ‘**Save**’ to proceed.

3. From



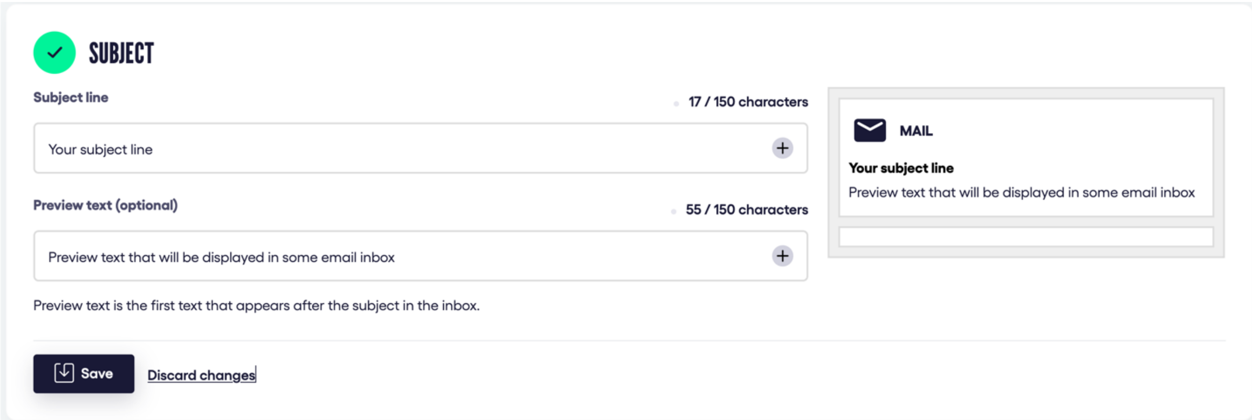
The sender email address should always be 'Bectu no-repy@bectu.org.uk'.

Replies to this sender email address are not monitored and so you can optionally, enter a forward email address to receive replies under '**People will reply to**'.

Click '**Change sender name**' to use your own branch name instead of the default, 'Bectu'.

Click '**Save**' to proceed.

4. Subject



Enter a subject line and optionally, include preview text. Some email clients display the preview text in the inbox and it can encourage engagement. See how it may look on the right of the screen.

It's possible to use merge tags (more on merge tags below) in the subject line or preview text, to include custom data like a first name. You can do this via the ⊕ at the end of the row.

Click '**Save**' to proceed.

5. Content

After clicking the dark ‘Launch email designer’ button you will be asked to pick a template to help you get started.

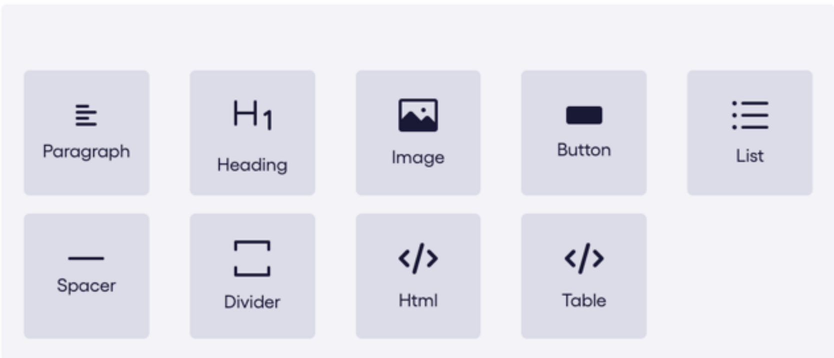
To send a mailing to members in a Bectu branch use the ‘Bectu branch mailing’. Using this template ensures you will have the correct unsubscribe location for your mailing.

The template includes a header, and footer with social links, that can’t be edited. Selecting a template, opens the content editor.

Editing your email

An email is made up of blocks. To insert a block into the email click it in the list. The options are:

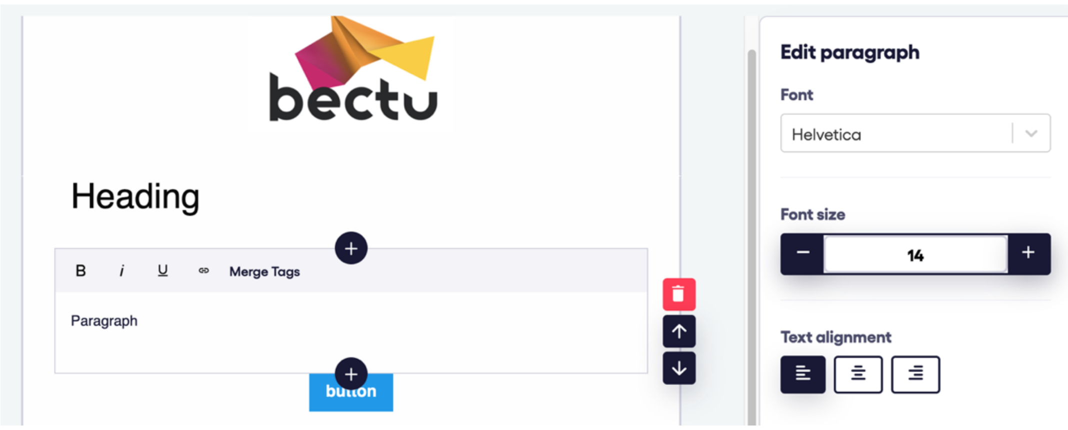
Paragraph | Header | Image | Button | List | Spacer | Divider | HTML | Table



To add another block you can click the ⊕ that appears above or below an existing selected block.

When a block is selected, related setting options will show in the side-panel to the right.

Besides each block, up and down arrows will reorder content, and there’s a delete button.



If pasting in content, please do so as **plain text** - otherwise you may see formatting errors.

Using merge tags

Merge tags can be inserted into text blocks like paragraphs to show data stored in custom fields.

For example, you could use the first_name merge tag in a greeting. Dear **{{first_name}}**

When using a merge tag, it may be useful to provide fallback text for instances where we don't hold that data for a particular member.

A merge tag isn't editable but you can create a new one by typing the tag name inside {{ }} followed with a pipe ('|') followed by 'default:' and the fallback text within quotation marks.

e.g. 'Dear {{first_name | default:'member'}} will match 'Dear Sally' etc or 'Dear member'.

A quick way to find the correct tag name is to click the 'Preview' button on the top-right of the screen. In the preview the merge tag placeholder is replaced with the code showing the tag name inside {{ }}.

Data about a member in Movement that can be included via a merge field includes:

First name | Last name | Email | Member no. | Status | Employer | Workplace | Branch | Subdivision

There are also merge fields that contain data pertaining to branch/workplace codes etc. Merge fields for address and phone numbers are empty - this information is not available in Movement.

Uploaded images will display as 4:3 landscape in their own block. There are settings to align and resize them and they can be linked to a url, email, phone number or file. Its good practise to add descriptive alt text to all images.

Using buttons

Buttons provide a great way to highlight an action you want your recipient to take. You can define button text and link it to a web address, email, phone number or file that's uploaded to the Movement server.

Inserting file attachments is not good practice in bulk mailings. They increase the size of the mailing and the chances of it being blocked by a recipient's mail server. Instead, we suggest you upload files to a cloud service like One Drive or Google Drive and share the link in the email. It's also possible to upload files to Movement when creating button links.

For links to files hosted by Prospect / Bectu, use the sharing link provided in the document library.

Links to web, email and phone

When inserting a url link, it will be recognised as a web link, so you must add the correct protocol in the url field if inserting a linked email address or phone number:

- For email use 'mailto:' - e.g. mailto:hello@email.com
- For phone use 'tel:' - e.g. tel:03006001878

Link best practice and avoiding spam filters

If you include a full url in the email copy, it will be converted to a shortlink e.g. https://mmt.is/4Ts3Ef2 and this will be displayed in the recipient email. This facilitates click tracking.

To prevent this happening we advise you to type descriptive text and link it.

e.g. instead of inserting https://bectu.org.uk/get-involved-in-the-union/ratecards/, add the link to Bectu ratecards.

In the case of a ‘call to action’ a button link is a good alternative option.

We do our best to comply with email sending best practice centrally. But the language you use in the email subject line and copy is a key factor in determining spam. Avoid obviously spammy language like “!!!SALE!!!” and keep your content concise and meaningful.

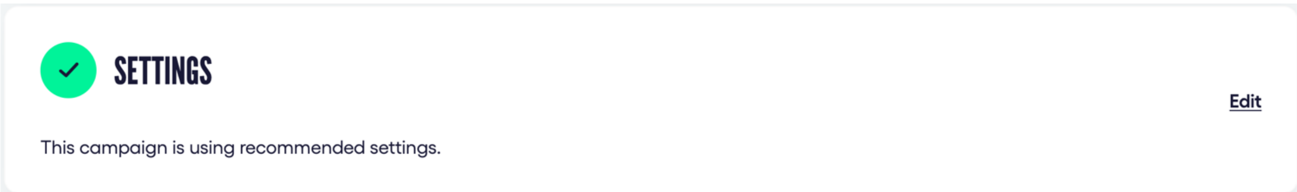
Add your own contact details

The email footer contains important information which cannot be edited including the address and phone for Bectu HQ. You may find it useful to add your own branch contact details, which you do in a separate block above the footer.

While you edit email content you can see an approximation via the ‘**Preview**’ button above the editor – you can switch between a desktop and mobile view. Once you’re happy with the content you should click the green ‘**Save**’ button or the dark ‘**Continue**’ button to proceed.

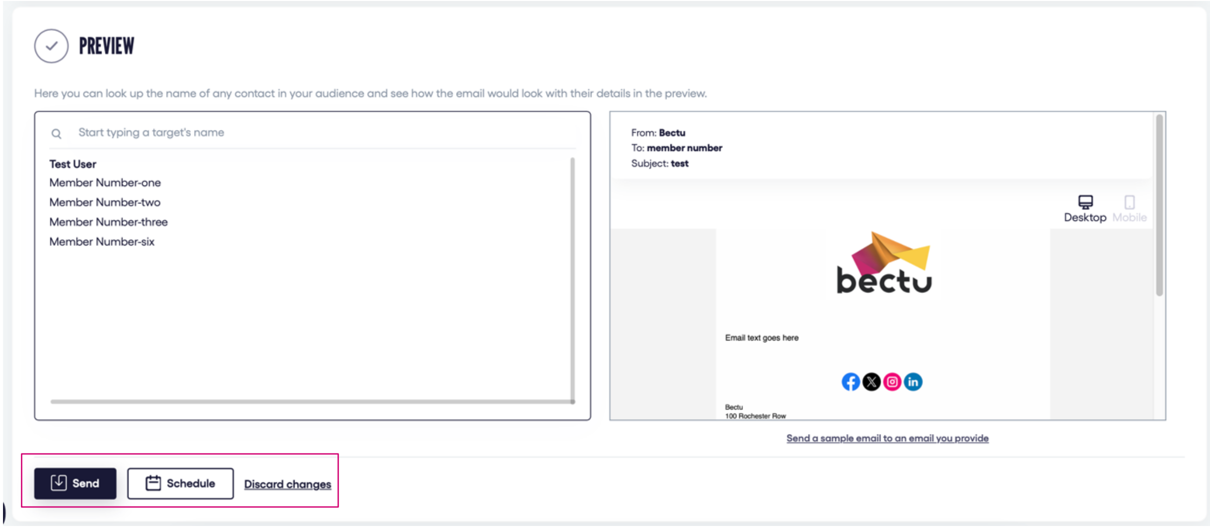
If you don’t save your work before closing the page or navigate back to the steps via the back button you will lose any unsaved updates.

6. Settings



You don’t need to change these settings to send your emails in a single batch but it is possible to change the sending mode to ‘Send an amount per hour’ to throttle delivery. This is only likely to be of value of you anticipate a large volume of replies and you wish to stagger these.

7. Preview



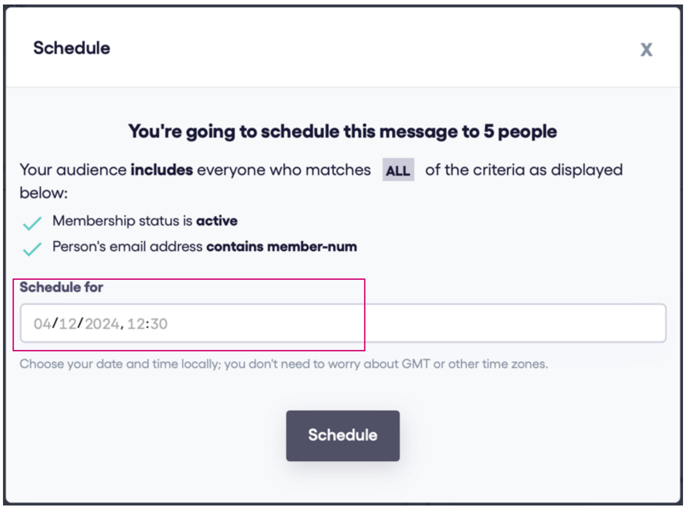
A preview email which can be toggled between desktop and mobile view will appear with a list of its intended recipients to its left. If you use merge tags you can view how the email appears to different recipients by selecting their name in the left-hand list – there's a recipient search above the list to find specific people if required.

Before sending your email we strongly recommend you send yourself a sample copy, or a copy to a colleague to proofread and check the links are working. This is also a way to send the email to someone as an 'FYI' such as your official, before the final email send.

When you click '**Send**' a 'Final Confirmation' will pop-up in which you must confirm the action again. There is also an option to '**Go back**'.

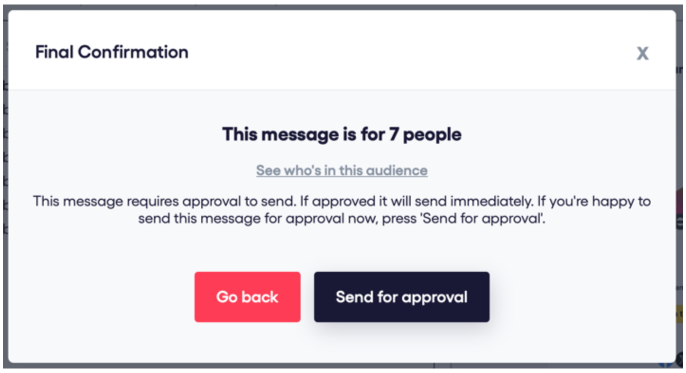
Scheduling a send for a later time

It's possible to queue your email campaign for delivery at a future date or time.



Approval for mailings to more than 1000 recipients

Mailings to over 1000 intended recipients require approval. After you click '**Send**' from the Preview page the Final Confirmation message will display a 'Send for approval' button.



The people who can authorise your mailing will receive an email alert to let them know an email campaign requires their approval in Movement.

If your email is timebound, it may be worth letting your approver know ahead of time when it needs to be approved by and letting them know when it's ready for approval.

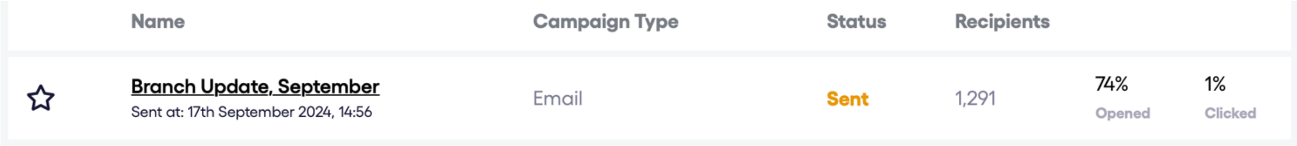
They will check and send it on your behalf or reject it, if its not suitable.

The status in your campaign list will show the email is '**Awaiting approval'**. Once it is sent the status will update to '**Sent**' or show as '**Approval Rejected**'.

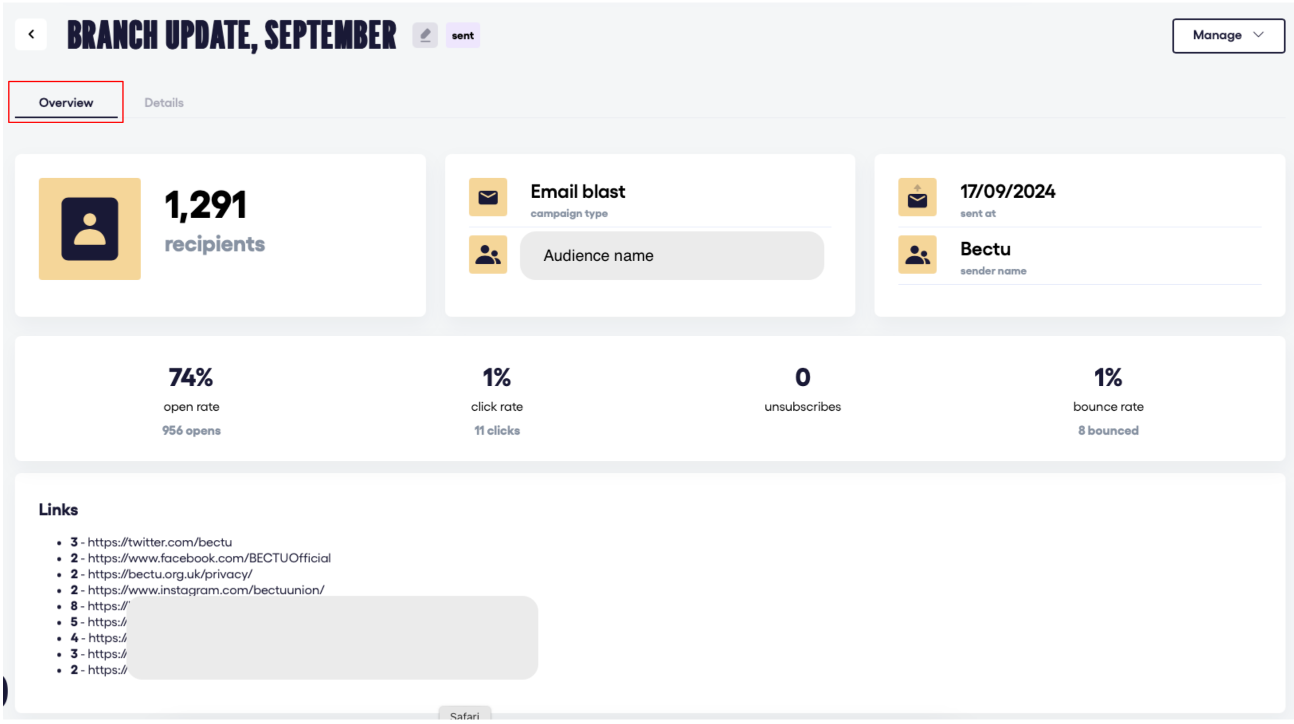
You will also receive an email notification with the subject line, 'Movement: Campaign approved…' or 'Movement: Campaign rejected…'.

Check campaign statistics

A while after sending an email campaign you can return to the Campaigns page to check how it was received. Sent campaigns show additional data in a ‘Recipients’ column:



If you click on the campaign name you can see a more information in the ‘Overview’:



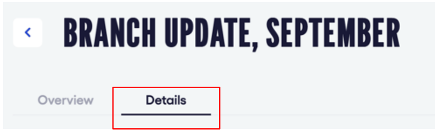
- **Recipients** – the number of people in your audience.
- **Open rate** – a percentage showing how many people opened the email ÷ no. of recipients.
- **Click rate** – a percentage show how many clicked a link in the email ÷ how many receive it.
- **Unsubscribe** – the number of people who clicked the unsubscribe link.
- **Bounce rate** – the percentage of failed email deliveries.
- **Links** – a count of how many clicked each link in the email and the link destination.

A high bounce rate is problematic and can be the result of several factors. Email delivery can fail because of mistyped or out of date email addresses, or it can be the result of your email being trapped by a spam filter. Even when email is delivered, be aware it may end up in a junk folder.

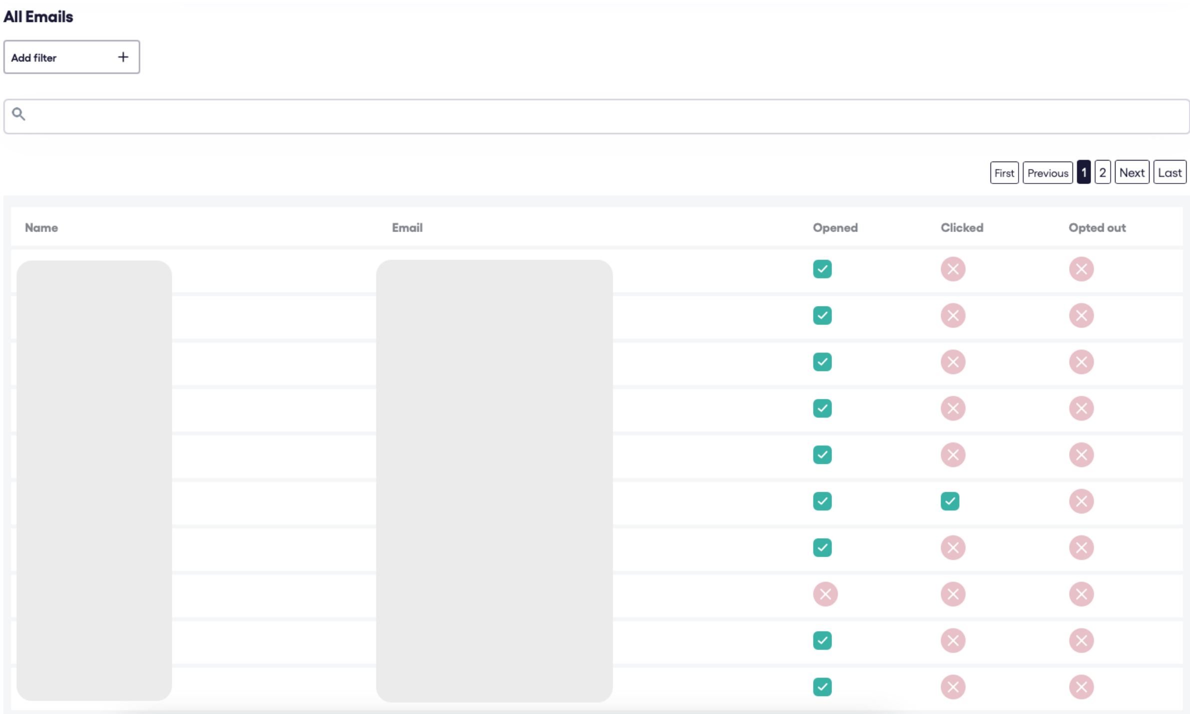
You should regularly check your bounce rates. Anything up to 2% is acceptable but rates above this, or an upward trend should be investigated. If possible, check-in with members who’s emails are bouncing and ask them to contact the membership team.

The lower half of a Campaign stats page you can find a preview of your sent email. There's a '**Send sample**' button on the top-right so that you can forward copies to other email addresses.

On a second tab next to the overview, you can find a 'Details' tab. This provides a full recap of the configuration settings and headline statistics for the email campaign.

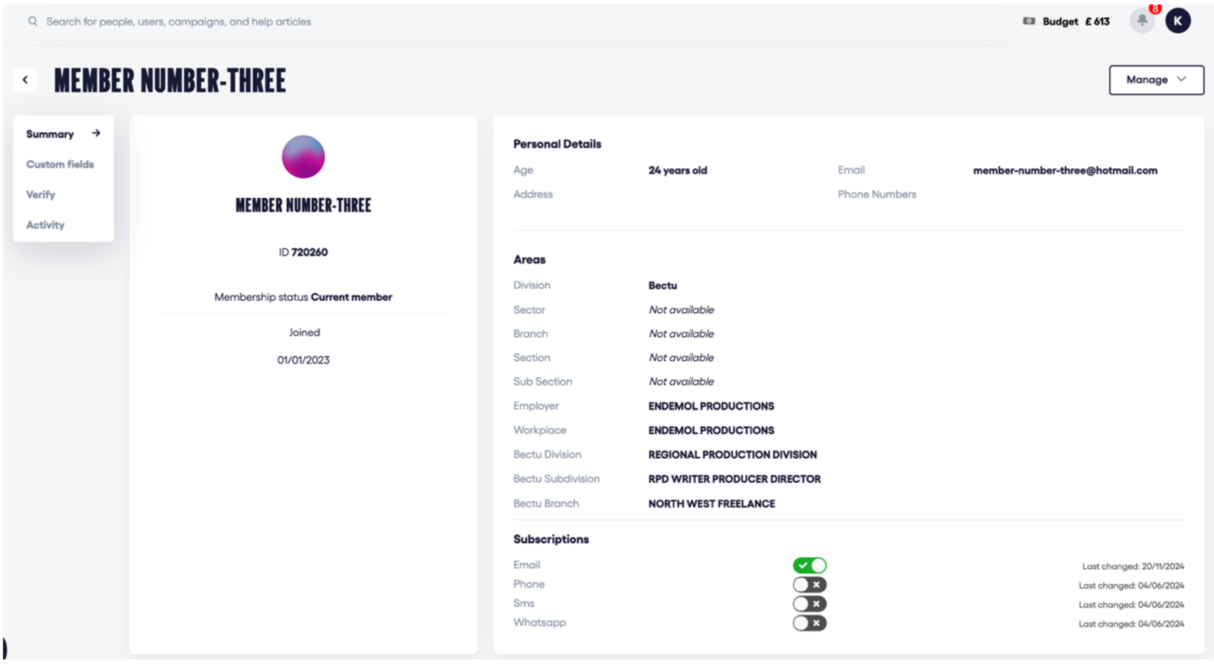


Below this the table shows a breakdown of recipients and a tick or cross to indicate whether they opened, clicked or opted-out of your email.



Look up a contact record

Although, member records in Movement will eventually sync to the member database, they are currently updated twice a week. No longer than four days will pass before the information on new joiners, leavers and unsubscribes is refreshed. The records of ex-members are regularly removed from Movement. If you require your mailing list to be updated urgently before a campaign send please email movement.support@prospect.org.uk to request this.



To access a member record click the member name in an audience list or find it via the top search bar. Under the member's name you will see the membership no., their status, join date and positions held.

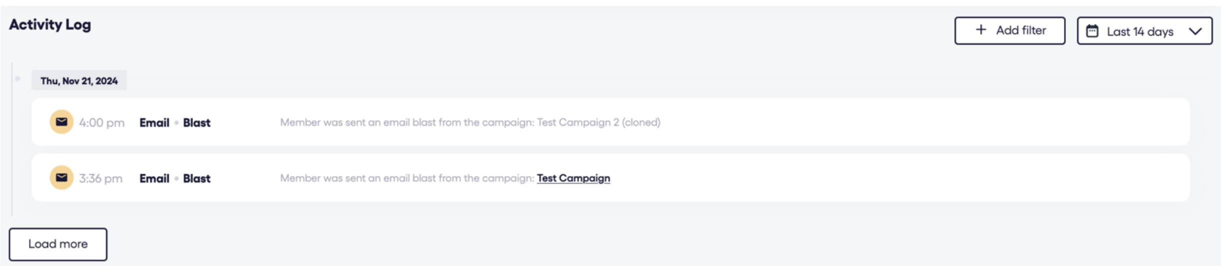
On the right you see the member's age and email. The address and phone number are not imported into Movement. Below this under 'Areas' there are details about the membership including employer, workplace, branch etc. Some of these fields won't contain data because they relate to Prospect membership.

Under 'Subscription' you can confirm whether a member has opted-in to receive email. Please do not change this or any of the supplementary information below it in custom fields. Although these are editable and it's possible to add new custom fields, we ask you not to.

'Movement Verify' is another feature we ask you not to use.

Any changes to a membership record should be made via the membership team on the main member database. These will then be synced with Movement.

At the bottom of the member record page, the 'Activity Log' allows you to check which emails were sent to the member.



Get support while using Movement

If you encounter any issues while using Movement, the quickest and most efficient way to get help is to email movement.support@prospect.org.uk.

This mailbox is shared by all Movement superusers and one of them will respond as quickly as possible.

The more information you can provide in your email the better, for example:

- When did you experience the issue
- What device and browser were you using
- Include any relevant attachments, screenshots, screen recordings etc

If your issue can't be resolved by the superusers, they will escalate your request to Movement for resolution.

Please do not report a bug to Movement directly.

A link to Movement's support centre can be found at the foot of the left-sidebar. This contains some helpful guides on using Movement, but please bear in mind that the platform has been customised to meet our needs and some features referenced in Movement support are not enabled.

Movement users are bound by the terms and conditions covered by the Prospect privacy policy / Bectu privacy policy and the website guide: using online membership lists*.

As per the existing guidance on using online membership lists:

> *Never distribute a membership list to anybody by email unless it is encrypted and password protected. Your IT support team should be able to advise you on how to do this. If you have any concerns or questions about data security or data protection please contact your Prospect/Bectu negotiating team or datacompliance@prospect.org.uk.*