Union Software Selection Workbook

How to choose the right software for your union

Table of Content

.

The **Union Software Selection Workbook** is designed to ensure key union management software needs are considered and to enable your union to make "apples to apples" comparison when selecting a solution that best fit your organization.

Based on our experience working with union clients, we have captured the topline requirements for your consideration and to ensure your selected solution is future-proof. The selection checklist is by no means an exhaustive list of requirements but a good starting point to ensure pertinent areas are considered.

General

No.	Features	Need	Nice to Have	Do Not Need
1	Cloud-based platform	○	○	○
2	Ease of remote collaboration	○	○	○
3	Intuitive user experience	○	○	○
4	Mobile-friendly interface	○	○	○
5	Real-time information update	○	○	○
6	Industry standard technology with a robust talent pool	○	○	○
7	Easy to integrate with other systems within the organization for data exchange (e.g. API, web service)	○	○	○
8	Easy to extend and customize the solution (e.g. low code extendibility)	○	○	○
9	Customizable access level based on user role	○	○	○
10	Single sign-on	○	○	○
11	Best of class security standards	○	○	○
12	High availability with defined backup/restore capabilities	○	○	○
13	Data hosting in my chosen region	○	○	○
14	Multilingual capabilities	○	○	○
15	Web Accessibility Compliance	○	○	○
16		○	○	○

Membership Management

No.	Features	Need	Nice to Have	Do Not Need
1	Ability to capture and update member information with high levels of flexibility (e.g. multiple addresses, multiple job roles)	◯	◯	◯
2	Auto data validation & auto complete	◯	◯	◯
3	Member dashboard with ability to drill down	◯	◯	◯
4	Mass update to member records (e.g. from BUL submissions)	◯	◯	◯
5	Easy to add/update/delete member records manually	◯	◯	◯
6	Easy to create forms (e.g. to capture additional member data)	◯	◯	◯
7	Easy to identify records with missing data	◯	◯	◯
8	Ability to capture member relationships with the union	◯	◯	◯
9	Member employment history	◯	◯	◯
10	Audit trail	◯	◯	◯
11	Member self-service/portal	◯	◯	◯
12		◯	◯	◯
13		◯	◯	◯
14		◯	◯	◯
15		◯	◯	◯

Locals & Employers

No.	Features	Need	Nice to Have	Do Not Need
1	Ability to capture and update local & employer information with high levels of flexibility	◯	◯	◯
2	Manage key employer and local contacts	◯	◯	◯
3	Data validation & auto complete	◯	◯	◯
4	Local & employer dashboard with ability to drill down	◯	◯	◯
5	Easy to add/update/delete records manually (e.g. adjust worker bills)	◯	◯	◯
6	Easy to identify records with missing data	◯	◯	◯
7	Automated notification for key CBA management milestone dates	◯	◯	◯
8	Track employer obligations (e.g. data provision compliance)	◯	◯	◯
9	Track employer financial compliance	◯	◯	◯
10	Manage employer rosters	◯	◯	◯
11	Audit trail (e.g. deduction submission through to worker payment, record change tracking)	◯	◯	◯
12		◯	◯	◯
13		◯	◯	◯
14		◯	◯	◯
15		◯	◯	◯

Checkoff & Finance

No.	Features	Need	Nice to Have	Do Not Need
1	Easy to manually import employer deduction submissions	◯	◯	◯
2	Automated import of employer deduction submissions	◯	◯	◯
3	Easy to manually modify records	◯	◯	◯
4	Checkoff dashboard with ability to drill down and identify issues	◯	◯	◯
5	Ability to create bills for members by employer or for the entire local	◯	◯	◯
6	Ability to track employer credit and deduction	◯	◯	◯
7	Exception-based checkoff reconciliation	◯	◯	◯
8	Manage member dues obligations	◯	◯	◯
9		◯	◯	◯
10		◯	◯	◯
11		◯	◯	◯
12		◯	◯	◯

Communication & Organizing

No.	Features	Need	Nice to Have	Do Not Need
1	Filter and segment membership list	◯	◯	◯
2	Inline editing of membership list	◯	◯	◯
3	Visualization and drill down of coverage information	◯	◯	◯
4	Communication dashboard with ability to drill down	◯	◯	◯
5	Easy to create customized reports (e.g. low code)	◯	◯	◯
6	Campaign management	◯	◯	◯
7	Email/text message outreach to selected list(s)	◯	◯	◯
8	Ease of creating and modify email templates (e.g. clone and modify)	◯	◯	◯
9	Bounced email/SMS addresses	◯	◯	◯
10	Built-in unsubscription management	◯	◯	◯
11	Turf cutting	◯	◯	◯
12	Generation of house visit sheets and forms	◯	◯	◯
13	Member Engagement Portal	◯	◯	◯
14	Automated FAQs/Chatbot	◯	◯	◯
15		◯	◯	◯
16		◯	◯	◯

Vendor & Product

No.	Features	Need	Nice to Have	Do Not Need
1	Vendor track record	◯	◯	◯
2	Defined product roadmap & solid long-term vision	◯	◯	◯
3	Service model aligned to your needs (e.g. SaaS, fully supported hosted model)	◯	◯	◯
4	Pricing model	◯	◯	◯
5	Defined onboarding process	◯	◯	◯
6	Training program	◯	◯	◯
7	Training resources (e.g. documentation, tutorials)	◯	◯	◯
8	Technical support services	◯	◯	◯
9	Customer referrals/testimonials	◯	◯	◯
10		◯	◯	◯
11		◯	◯	◯
12		◯	◯	◯

Other

No.	Features	Need	Nice to Have	Do Not Need
1		◯	◯	◯
2		◯	◯	◯
3		◯	◯	◯
4		◯	◯	◯
5		◯	◯	◯
6		◯	◯	◯
7		◯	◯	◯
8		◯	◯	◯
9		◯	◯	◯
10		◯	◯	◯
11		◯	◯	◯
12		◯	◯	◯

Internal Considerations

inquiries
1. What is the budget to set up the union software?
2. What is the annual operating budget for the union software?
3. What timeframe does the new union software need to be operational? Can the implementation be done in phases? If so, what are the objective(s) and timeframe for each phase?

Internal Considerations (continued)

Inquiries
4. What existing systems does the new union software need to interface with (e.g. data exchange)?
5. Which stakeholders need to be consulted during the union software selection process?
6. Which functional areas or departments will be impacted with the implementation of the union software?

Bursting Silver is a technology products and services company that specializes in helping unions with their technology and business needs. We offer a wide variety of services specially targeted to help unions – including IT strategy, business process improvement, software implementation, and systems integration.

WeRise

WeRise is a software platform that enables unions to efficiently administer all aspects of their memberships and provides a platform for organizers to rally union members.

WeRise is 100% cloud-based with security, accessibility, and scalability built-in to future proof your operations. The solution has been architected to provide a cohesive software solution across all locals, while keeping local data segregated and secure.

With a powerful platform as a foundation, WeRise is multifaceted with the member information at its core. Clients can use the out-of-the-box capabilities as they are released and participate in product development plans through feedback or take a more direct role in specific engagements to expand the system to meet organizational goals.

Some key features include:
◊ Membership Data Management
◊ Dues Management
◊ Dashboard & Data Visualization
◊ Member List Segmentation
◊ Email/SMS Blast to Members