Enabling 'managed activism': the adoption of call centres in Australian, British and US trade unions

John Lund and Christopher Wright

This article examines how trade unions in different country settings have utilised call centre technologies. Rather than viewing union call centres as simply a means of service delivery, our research suggests they can also enable a more strategic approach to workplace organising. We explore the implications of union call centres for debates on servicing and organising models of trade unionism.

Introduction

In the face of declining membership levels and an increasingly hostile environment, trade unions have invested significant resources in new methods of operation and service delivery. One innovation that is being implemented by unions is the use of dedicated call centres for responding to member inquiries and grievances, and using 'outbound' calls to retain, recruit, mobilize and poll their members. This strategy has been advocated by peak union bodies as delivering more effective services, as well as assisting in the recruitment and organising of dispersed and fragmented memberships. Since the early 2000s, a number of unions around the world have established and developed their own call centres, serving as models of 'best practice' to other unions (see examples provided in ACTU, 1999; TUC, 2004).

However, while an extensive research literature has developed on call centres as examples of new service work and managerial control (e.g. Callaghan and Thompson,

❏   John Lund (john.lund@uwex.edu) is a professor at the School for Workers and the Department of Industrial and Systems Engineering at the University of Wisconsin. His current research interests include union financial reporting, accountability and restructuring as well as the design of new work and compensation systems in transportation, retail, distribution, service and manufacturing settings. Christopher Wright (c.wright2@econ.usyd.edu.au) is an associate professor in Work and Organisational Studies at the University of Sydney. His research interests include the diffusion of management knowledge, managerial and occupational identity and technological and workplace change.

2001; Taylor *et al.*, 2002), researchers have largely ignored the potential of trade unions to use these technologies as mechanisms for service delivery and organising. As a result, little is known about how trade unions are utilising call centre technologies. At one level, trade union call centres appear to reinforce a vision of unions as simply member-service organisations, dispensing advice to unionists as passive consumers. This might be linked to the recent adoption by unions of other managerial practices, such as strategic planning and performance management, as indicative of a more general trend towards 'managerial unionism' (Heery and Kelly, 1994; Bramble, 1995). However, much of the advocacy of union call centres has been located within a broader vision of an 'organising model' of unionism, in which new strategies and technologies are adopted to assist in the promotion of rank and file participation and activism (Shostak, 1999).

In order to gain a better understanding of how union call centres are structured, what functions they perform, how they are designed, and how they might relate to broader servicing and organising models, in this article we undertake preliminary analysis of this phenomenon through a comparative examination of union call centres in three different country settings. We begin by exploring the structure and function of each call centre before investigating the motivations and choices behind the creation and design of each centre, and how the operation of call centres has impacted upon the delivery of union services, member recruitment and organising. We argue that union call centres have begun to transform not only the way unions provide services to their members, but also how these unions are structured internally and the nature of their organising and political campaigning. The article begins with a consideration of the debates surrounding union servicing and organising models and what role new technologies might play in this regard. We then outline our research design, before presenting the case study findings. In the final section, we discuss the implications of this study for the broader debates surrounding the future of trade unions as well as identify areas for further research.

New technologies and approaches to servicing and organising union members

The adoption of new strategies and methods by trade unions has been an area of growing practitioner and academic interest. In particular, the 'organising model' of trade unionism has become a key focus for labour movements in the United States, the United Kingdom, Australia and New Zealand. In contrast to a traditional 'servicing model', in which union members are viewed as passive consumers of union-provided industrial services, the 'organising model' emphasises rank-and-file activism and the transformation of full-time officials from solving member problems to recruiting and mobilising the membership base (Brofenbrenner, *et al.*, 1998; Voss and Sherman, 2000; Heery *et al.*, 2000b; Carter and Cooper, 2002; Peetz *et al.*, 2007). In particular, the organising model is seen as 'stimulating activism and strengthening trade unionism in the workplace in order that workers can resolve their own problems without recourse to external representation' (Heery, 2002: 27). Associated with this debate has been an argument about the role of new technologies in union recruitment and organising (Shostak, 1999; Fiorito *et al.*, 2002). For example, in an era of declining union resources, the capacity for new methods and practices to free up the time of full-time officials so they can focus on organising industrial and political campaigns while still delivering a consistent, high-quality service to existing members, has been a common theme in many accounts of trade union renewal (e.g. Oxenbridge, 1997). Proponents of change have argued for the need for internal restructuring of union activities and the potential of new information and communication technologies (ICT), such as web pages, emails, text messaging and wireless communication, to better coordinate activities between the union and its membership (Shostak, 1999; Lazarovici, 2001; Newman, 2005). As Fiorito *et al.* (2002: 628–631) note, these technologies offer both efficiency and synergy gains in the conduct of industrial campaigns, fast two-way communication with members and activists, improved coordination with community groups and other supporters, as well

as promoting a more modern and positive image of union professionalism and competence. In their analysis of survey data, Fiorito *et al.* found some support for the increased use of ICT in US union organising success, albeit more mixed results for overall union effectiveness.

Trade union call centres are a key example of the convergence of new technology and new approaches to union service delivery and organising. For example, in the Australian Council of Trade Unions (ACTU)'s 1999 publication *Unions@work*, the establishment of union call centres was presented as part of a more general trend towards strategic planning, more professional service delivery and 'technology for the times', which was seen as essential to stem the tide of membership decline (ACTU, 1999: 31–6). A later report produced by the Trades Union Congress (TUC, 2004), focussed specifically on the potential of union call centres to improve union service delivery, citing a number of successful UK case studies such as TUC and UNISON. These call centres offered a centralised location for communicating with members and non-members, both responding to 'inbound' inquiries, complaints and grievances, as well as also providing a mechanism for 'outbound' calls to retain, recruit, mobilize and poll their members on industrial and political issues. As the term 'call centre' implies, these centres rely largely on telephone communication, however unions have also made increasing use of email and direct messaging technologies for both 'inbound' and 'outbound' communication. As with other forms of ICT, advantages of this strategy are argued to include: improved and more timely communication with members; increasing accessibility to members working outside of 'traditional' business hours or in dispersed locations; minimising servicing and administrative costs; achieving economies of scale in the delivery of services; standardising the processing of incoming calls and responses to member inquiries; and as a mechanism for member recruitment, retention and campaign organising (ACTU, 1999; TUC, 2004).

However, despite the growing advocacy for new technologies and practices as a source of trade union renewal, in-depth analysis of specific techniques, such as union call centres, is rare. For example, studies of the application of the 'organising model' in particular unions and country settings have tended to focus more upon issues of union leadership, cultural change, and the implications for the work of union officials, such as increasing workloads, stress and resistance (Oxenbridge, 1997; Fletcher and Hurd, 1998; Carter, 2000; Carter and Cooper, 2002; Rooks, 2003).

Union call centres are commonly portrayed as part of a broader move to modernise the organisational efficiency of unions through the adoption of modern management methods such as strategic planning, performance management and new technologies (ACTU, 1999). One way of interpreting the use of call centres by unions would be to characterise them as a form of 'managerial unionism' in which union members are viewed as 'reactive consumers whose needs must be continually tracked and responded to by unions drawing on the techniques of strategic management' (Heery and Kelly, 1994: 1). Such a view parallels the earlier characterisation of the 'services model' of unionism, as well as those of critics of the 'organising model' who have emphasised its 'top-down' change agenda (Carter, 2000), and questioned its ability to accommodate divergent interests and diverse contexts (de Turberville, 2004). For instance, in a recent article, Early (2008) critiques the concept of union call centres, as applied by the Service Employees International Union in the United States, as simply another form of service-based unionism, and argues that these measures will reduce the level of personal interaction between union officials and members and will undermine workplace activism. However, the way in which the recent adoption of managerial practice in unions has occurred within a broader context of rank-and-file organising, raises questions regarding the intent and outcomes of such reforms. For example, Heery and Kelly (1994: 13), in their original discussion of 'managerial unionism', noted the potential for 'hybrid' union servicing relationships to exist, which involved *both* increased managerial competence and a focus on rank-and-file participation, a theme developed in more recent work within the concept of 'managed activism' (Heery *et al.*, 2000a: 1004). In a similar vein, Cooper's (2002) study of three Australian unions, argued a more viable categorisation to be what she termed 'strategic

organising', which combined a commitment to membership mobilisation and recruitment of new members with the more sophisticated management of internal resources and strategic planning of future growth. In these scenarios, trade union adoption of new technologies and increased managerial competence can be seen as *enablers* of broader union goals, such as membership participation and rank-and-file activism, rather than just mechanisms of service delivery, organisational rationality and control.

Research design and method

Rather than a detailed micro-analysis of the impact of union call centres on union office-work organisation, member attitudes and other outcomes, our focus in this preliminary study is to gain a better understanding of the objectives, design process, structure and functions of union-operated call centres. In order to explore how trade unions have adopted and enacted call centre technologies, we conducted a comparative case study analysis of a limited number of trade unions that had established their own dedicated call centres in different national settings. Three unions, one in Australia, the UK, and the USA, respectively, with call centres operational for at least three years, were selected as case study sites. We deliberately targeted the oldest, continuously operating union call centres in each country in order to observe the most innovative practice as well as to facilitate both a longitudinal and cross-sectional comparison.

The Community and Public Sector Union (CPSU) is a large national Australian union that organises public-sector workers and has 60,000 members and approximately $20 million (US) in annual revenues. Recent legislative changes to industrial relations and public sector reform have had a major impact on union membership, and CPSU has introduced a variety of changes to its internal operations, including the establishment of its call centre as a central mechanism for service delivery for members. Our second case, UNISON, is one of the UK's largest unions, with $324 million (US) in annual revenues and over 1,300,000 members who work in the public sector or for private contractors delivering public services. Besides a national office staff, UNISON has a series of regional offices and nearly 1,500 branches nationwide. The union has undertaken a number of amalgamations with other public-sector unions over the years, and as these new partners have been added, integration of services has been largely focused at the regional offices. The third case, Service Employees International Union (SEIU) Local 1 is a large local union in the Midwest of the United States, with nearly 38,000 members in building and other services, and over $20 million (US) in annual revenues. It has also recently undergone a major reorganisation into industrial divisions following amalgamation with several other regional unions.

After securing the permission of each union to participate in the study, on-site interviews and observations were undertaken. We sought out the key union officials who were responsible for day-to-day management of the call centres and who had the most direct knowledge regarding the design, establishment and ongoing operation of the call centre. In each organisation, we were fortunate to interview the senior union official who had been involved from the inception of the design process of the call centre through to the present day. Because each of these individuals had been continuously involved with their union's call centre from the point of inception, they all possessed an extensive knowledge of the history of their call centres' operations, which they were able to share with us. Ideally, multiple interviews with design-team members, stakeholders, members and call centre workers would have been desirable, but given the preliminary nature of our research and the limited resources, this was not possible. In addition to interviews with these key informants, we also observed call centre operations that provided a richer understanding of variations in call centre activities. We were also granted access to an extensive range of documentary data, including copies of evaluation and impact studies, spreadsheets and charts on outcome measures (e.g. 'inbound' and 'outbound' call volume by type), as well as strategy and policy documents that outlined the design, implementation and operation of each call centre. Follow-up contacts were made with all three cases to feedback our initial findings, confirm details and elicit additional documentation. This involved the preparation of detailed summaries of each

case-study organisation, which were reviewed and discussed with participants in each of the three trade unions and which resulted in further refinements of our analysis. In each case study we focussed on four key areas, specifically:

1. *Structure and function*: How is each call centre structured and what functions does it perform? What inbound and outbound activities and services does the call centre provide?
2. *Motivation*: Why did the union consider the establishment of a call centre? What factors motivated them and what did they hope to change or improve within their union through its use?
3. *Design process*: What processes did the union use in designing the call centre and in selecting technology? Who did they involve from the organisation and outside it? Did they visit other call centres or use external consultants?
4. *Impact*: What is the union's evaluation of the effectiveness of the call centre? What aspects of the union has it changed and how is it likely to develop in the future?

Union call centres: variations in structure and function

While discussion of union call centres has been framed within the broader vision of an 'organising model' of trade unionism (ACTU, 1999), the work of our three case-study call centres has focussed predominantly on 'inbound' activities; where members ring the call centre with an inquiry, request for information, or grievance. Only recently have some of these call centres sought to extend their capabilities to 'outbound' activities, in areas such as recruitment, retention, member surveys, campaign organising and political polling.

CPSU

CPSU's call centre is located in the union's federal headquarters in a central business district office block and operates 12 hours a day, from 8:00 a.m. until 8:00 p.m., five days a week. The inbound function of the call centre is staffed by 10 industrial organisers who each average an ongoing caseload of 50 to 60 individual grievances per week. There are six outbound staff who average approximately 2,500 to 3,000 outbound calls per week. The call centre is used as an entry-level position for the organisation and serves as an important training ground for future 'field' organisers. Approximately 60 per cent of those hired as call centre operators move into 'field' organiser roles after 12 to 18 months. An additional ten staff handle the call centre's administrative work, including membership records and databases.

A typical inbound call regarding a member's change of address, status or other administrative matter, is received by a 'phone organiser', who accesses the membership database to update details via a customer relationship management (CRM) software system. The call centre is responsible for handling all individual grievances and liaises with field organising teams to identify potential collective organising issues. If the call is determined to be of an industrial nature, the phone organiser makes an assessment as to whether the inquiry represents an organising opportunity (if the issue affects other members in the workplace or has been brought to the attention of workplace delegates). If it is seen as having organising potential, the phone organiser refers the issue to a field organiser via email. In the case of individual grievances, the phone organiser is seen as 'owning' the case until it is resolved. This might involve working with the member, local workplace delegates and employer representatives to negotiate a grievance resolution through phone and teleconferencing. In some cases, the phone organiser may simply empower the member to run their own case, providing resources and back-up support to them. Importantly, this division of labour means that field organisers should be freed from handling individual grievances, which are now handled by the call centre, allowing them more time to focus on broader organising campaigns.

As can be seen in Figure 1, since the call centre's inception in 2000–2001, there has been a steady increase in call volumes. Union staff attributed much of this growth to
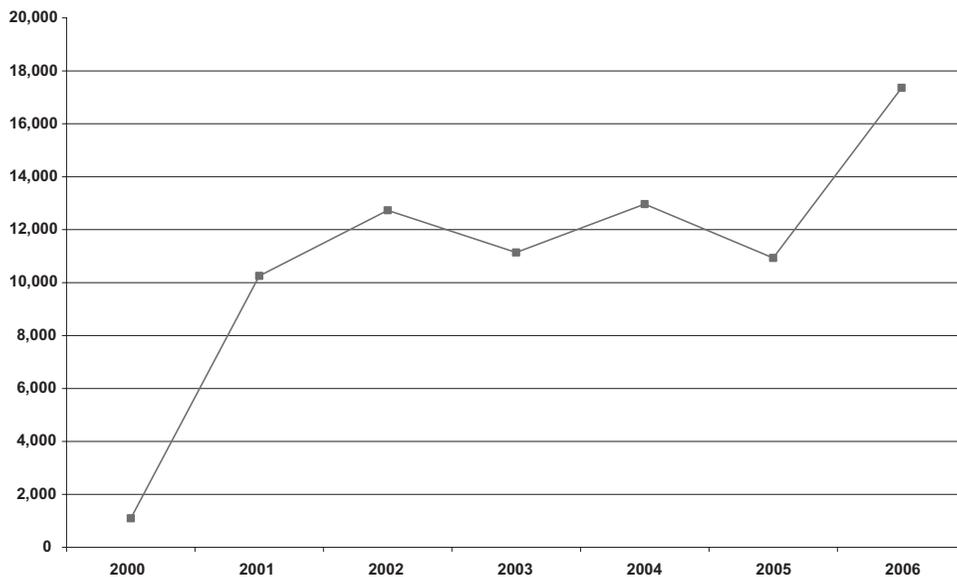
Figure 1: CPSU call centre inbound call volumes, 2000–2006

increasing member acceptance of the new system and the quality of its service delivery. Although in its early stages, the vast majority of inbound calls were of an administrative nature (change of address, status, etc.), in recent years the proportion of such inquiries has dropped to around 55 per cent, with 35–40 per cent of calls focused on industrial grievances or technical advice questions, and the remainder, simple 'receptionist'-type issues. The reduction in administrative inquiries was attributed to improvements in the accuracy of membership records, and the increasing member use of email and online facilities to make changes in details.

The 'outbound' calling facility of the CPSU call centre is a more recent innovation and was rolled out at the beginning of 2007. In its initial testing phase, the early outbound activity has been directed at political polling (related to a forthcoming federal election) and telephone surveys on issues such as occupational safety and health structures and worker involvement.

UNISON

Our second case study, UNISON, delegates the operation of its call centre to an insurance firm with which it has close links. Although the facility is co-located with the insurance company's other call centre functions, the UNISON call centre operates as a self-contained unit with its own dedicated staff. The call centre is located at a site remote from the national union office, and is a significantly larger unit than CPSU's call centre, employing approximately 50 workers, nearly half of them part time. Sixty per cent of the work occurs during peak hours, but the call centre is open from 6:00 a.m. until midnight, Monday through Friday, and from 9:00 a.m. to 4:00 p.m. on Saturdays. Like CPSU, the call centre was also designed primarily to handle inbound calls from members, with the capability to conduct some outbound calling for limited purposes. However, unlike CPSU, a conscious decision was made not to handle and process grievances or complaints directly, but rather to refer this information to regional union offices for follow-up. When a call comes into the centre, the automatic call director sends it to the agent who has been available the longest. The software program provides a gateway to the union's membership database, and allows for a significant array of 'scripts' to be called up to guide call centre staff through various queries. After dis-

pensing with some preliminary issues, the agent then identifies the caller's issue and provides the relevant information via a script (e.g. a maternity rights fact sheet). If the caller wants to speak with a branch or regional representative, the call centre agent collects the pertinent information and contacts the branch; once a call centre agent speaks to someone at the branch, the case is closed. During the call, the agent updates the member's information in the system.

The call centre receives around 4,000 calls a week, although this can increase dramatically during periods of industrial disputation or following the distribution of union publications. Typical inbound calls include members requesting information/advice/leaflets, union representatives wanting information/advice/leaflets, questions about ongoing campaigns, members wanting access to legal services, members advising of a change in address or other information, and calls for staff in the union's national office. Besides handling requests for information, the call centre also deals with requests from workers to join the union, which contribute between 20–25 per cent of incoming calls. In these cases, the call centre operator elicits information about where the individual works, and then the computer database is able to determine whether or not the individual is eligible for membership and whether or not a membership campaign is underway at the workplace. If there is no question of coverage, the caller is classified as an 'applicant' and is sent an information package in the mail, including a membership application, which is already populated with the necessary information. All the individual then has to do is to verify the information, sign the application and return it to the union.

Although outside the original design parameters, the call centre has begun to undertake some limited outbound calling, for example, notifying new stewards of training courses in their area and asking them if they have the necessary materials or if they have any questions or problems. The union call centre also contacts branch officers regarding attendance at upcoming events, such as lobbying days, verifying that they have the necessary information on location, travel directions, and number of people attending. With the addition of new software, call centre managers also plan to begin a program of outbound calls to 'lapsed' members.

As can be seen in Figure 2, since its inception in 1999, UNISON's call centre has received almost a 10-fold increase in call volumes. This dramatic growth is partly
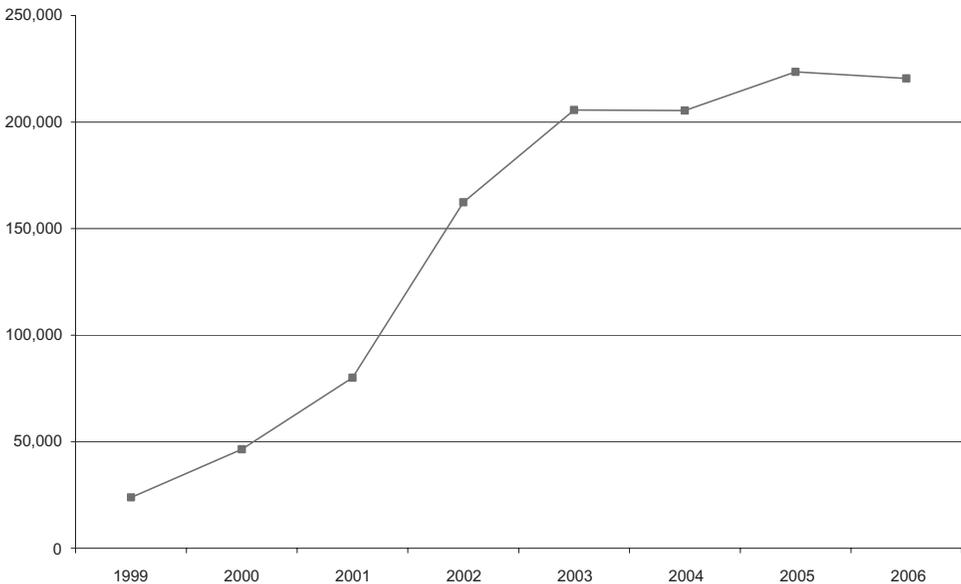

Figure 2: UNISON call centre inbound call volumes, 1999–2006

attributable to the growing reputation of the call centre within the union. From the early days when the call centre only targeted members in London, publicity about the call centre through internal union sources such as leaflets, newspapers, national and branch representatives and stewards, had resulted in a growing number of calls from across the UK. Union officials also argued that with each year of operation there had been a steady reduction in member resistance to the concept, and that union branches had acknowledged the benefits that flowed to them from a reduction in routine member inquiries that were now handled by the call centre. In addition to inbound calls, UNISON's call centre has also experienced a steady increase in email inquiries from members, rising from nearly 16,000 in 2005 to close to 20,000 in 2006.

SEIU Local 1

Our third case study, SEIU Local 1's call centre, was designed and operates solely as an inbound call centre. Established in 2003, the Member Resource Center (MRC) is located in the union's headquarters in downtown Chicago, and operates from 8:30 a.m. to 5:30 p.m., Mondays to Fridays. About 70 per cent of inbound calls relate to information requests or other administrative queries and 30 per cent to individual or group grievances. While inbound informational requests are handled by a staff of five call centre operators, the union made a deliberate decision to create a separate specialist group (the grievance centre) to handle grievances, which is physically located inside the union's call centre. The grievance centre has a director and nine representatives of which two are Polish-English bilingual, four are Spanish-English bilingual and one is former Yugoslavian-English bilingual. On average, the grievance centre receives about 130 calls a day based on a membership that works in nearly 4,000 different workplaces. Once a call is received in the grievance centre, the organiser assigned to that workplace is emailed and a case log is created. All contact between the union and the employer is handled by the call centre operator assigned to the case. If the grievance is not resolved at the first step, the case goes before a 'Grievance Merit Board', which consists of three grievance centre representatives, as well as the grievant, his/her employer and the union delegate.

The call volumes to SEIU Local 1's call centre are outlined in Figure 3 and have averaged around 25,000 calls per annum. The only changes that the union has made to
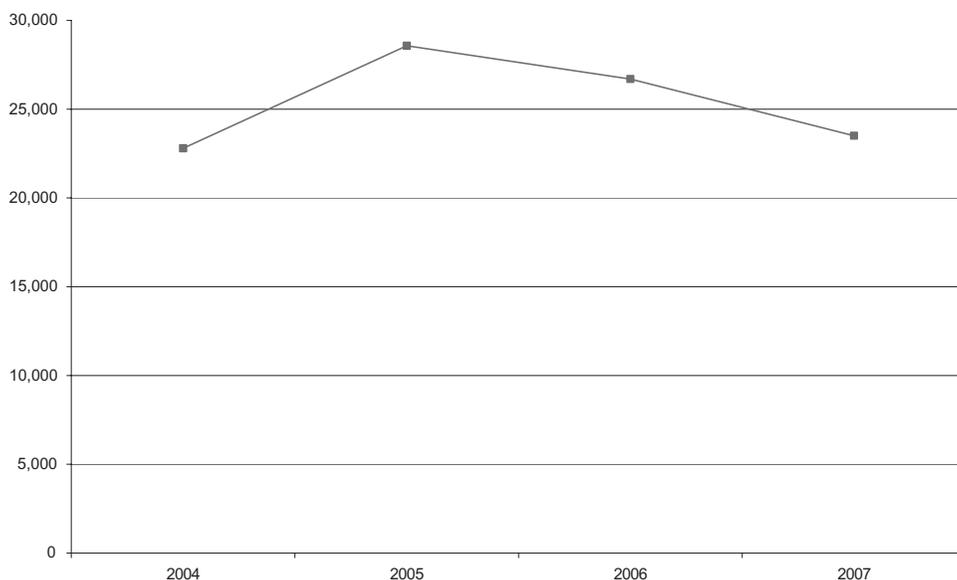

Figure 3: SEIU Local 1 call centre inbound call volumes, 2004–2007

Table 1: Summary of structural/functional call centre components

	CPSU	UNISON	SEIU
Year established	2000	1998	2003
Inbound call centre	×	×	×
Handles member inquiries and requests	×	×	×
Processes and resolves grievances and complaints	×		×
Receives member complaints but refers for resolution (does not process and resolve grievances itself)		×	
Number of inbound calls has peaked		×	×
Outbound calls	×	Limited	
Conducts member polling	×		
Engages in recruiting new/lapsed members	×	Proposed	

the system since its inception has been to add a query generator to the database and to add additional phone lines to cover new cities not previously part of its regional jurisdiction. Recently, the MRC has begun a switch over to a Web-based system and now has a dedicated computer server.

In comparing the three case-study sites, a number of similarities and differences are evident (see Table 1). First, in all three call centres, the predominant work activities are 'inbound' in nature, focussed on responding to call (and more recently, email and text messaging) inquiries from members for information and advice, as well as a source of grievance resolution. While UNISON's call centre is far larger than either the CPSU or SEIU call centres, there are a range of innovations in the smaller call centres aimed at improving not only the responsiveness of the union to member inquiries and grievance-handling, but also freeing up organising staff from these duties so they can devote more time to recruitment, campaigning and rank-and-file mobilisation. 'Outbound' activities are a more recent innovation at CPSU and UNISON, although in the case of the former, the call centre is seen as playing an important role in future organising, given recent success as a medium for political polling. However, there are also differences between the three call centres in terms of the scale of operations, union control over their day-to-day operations, the technology employed, and the potential to extend call centre capabilities as a mechanism of rank-and-file communication and activism. Much of this variation is, we believe, explicable in terms of the varying contexts and internal structures of each union, which resulted in different motivations and design decisions in the creation of each of the call centres. In the following sections we analyse these issues in greater depth, before exploring the perceived impact of these technologies on member recruitment, retention and mobilisation.

Motivations in establishing union call centres

As we have seen, peak union bodies have argued that a range of advantages can flow from unions establishing their own call centres (ACTU, 1999; TUC, 2004). While the three case-study unions outlined many of these factors as reasons for establishing their own call centres, there were discernable differences in emphasis between the three organisations. In particular, issues of efficiency of service delivery, consistency of information, access to members, and the changing demographics of union membership featured to varying degrees in officials' explanations for their call centre innovations.

CPSU emphasised the broadest range of factors behind the creation of their call centre. Most importantly, changes in the industry context of the union had forced a radical rethink of how the union delivered services to members. For example, changes in industrial relations legislation under a conservative national government had significantly restricted the workplace access of union officials and had reduced the ability

to conduct 'face-to-face' organising. Added to this, a restructuring of government agencies and of broader public sector reform had resulted in a dramatic decline in union membership, with the union effectively loosing half of its financial members in a three-and-a-half-year period. In response, the union undertook a major review of its organisational structure and the efficiency of member service delivery. Analysis of organisers' work during workplace visits revealed that approximately two-thirds of their time was spent assisting members on individual issues instead of devoting more time to recruitment of new members, education and campaigning. Echoing the claims made in the broader literature regarding the potential advantages of new technologies for union organising, CPSU's call centre manager argued that establishing a dedicated call centre offered the potential to relieve organisers from dealing with individual grievances so they could devote more time to rebuilding the union's lost membership and political clout.

A further motivating factor behind the establishment of CPSU's call centre was the issue of access to union members. With a high percentage of members on shift work, and many having their telephones and email monitored by their employers, CPSU officials argued many members were more comfortable calling their union outside of work hours. With restricted right of entry and nationwide employers, the union also perceived a need to have a standardised, consistent set of responses to inbound member calls. Hence, members calling with inquiries about legislative changes to superannuation provisions or an update on negotiations with a particular employer, would, through the call centre, receive consistent and potentially more accurate responses.

UNISON had begun considering the development of its call centre in 1998 at the suggestion of a union official who worked in the communications section of the union and who had a strong interest in new technologies. Unlike CPSU, which stressed the hostile industrial relations environment and declining membership as key reasons for the establishment of a call centre, UNISON's primary motivation was a desire to reach out to members who worked outside of traditional working hours and away from fixed workstations. UNISON already had a large membership database, and officials realised they could leverage this database into developing a 'single source' for a variety of functions such as information inquiries, campaigning, and membership retention and recruitment.

Establishing a call centre at UNISON was also motivated by a desire to reach a younger membership who were more accustomed to mobile and electronic communication. For instance, union officials related how they had had successes in several industrial campaigns through the use of text messaging and believed there was a need to expand their communication with a more tech-savvy membership. Like CPSU, the two UNISON staff who championed the call centre also argued that the call centre would bring advantages in standardising messages to members and developing more consistent campaign information. However, unlike CPSU, officials did not foresee any cost or major resource advantages flowing from the call centre. Indeed, reflecting the importance of regional branches at UNISON, the call centre was not seen as replacing the grievance function. Rather, this function would continue to reside at the branch or regional level and the call centre operators would only collect basic information from members sufficient for referral purposes and the ability to forward fact sheets or other explanatory information.

At our third case study, SEIU Local 1, the primary motivation for establishing a call centre was explicitly centred on issues of efficiency of service and cost minimisation. Reorganisation of the union following amalgamation with other branch unions led to the establishment of a working party of senior officials to investigate ways to reduce operating costs and improve efficiencies. Officials noted how 70 per cent of their field staff's time was spent with information requests from members and handling individual member grievances, and that nearly three-quarters of all grievances were individual in nature, representing a small percentage of total members. The working party also identified a lack of accountability among field staff and a propensity for creating 'fiefdoms', where organisers would gravitate to those parts of the job and employers

Table 2: Summary of motivating factors in the formation of the call centre

Motivation	CPSU	UNISON	SEIU
Structural change within the union	×		×
Elimination of duplicative structures or functions	×		
Reorganisation of staff functions	×		×
Cost minimization	×		×
Improve quality of communication with members		×	
Standardised response to incoming calls	×	×	
Increased accessibility to members outside of traditional business hours	×	×	

they preferred to deal with. As a result, a lot of worksites were not visited and union member grievances in those workplaces were not adequately dealt with. In addition, officials argued it was hard for members to contact their servicing representatives, who were faced with the trade-off of 'time on the street' versus 'time in the office'. The working party believed too much emphasis was being placed on 'fire fighting' and not enough on 'fire prevention', let alone organising new members. Establishing a dedicated call centre was therefore seen as the most effective means of reducing the information request and grievance load on field staff so they could devote more time to campaigning, recruiting and other tasks.

In contrast to both UNISON and CPSU, the establishment of a call centre at SEIU Local 1 was not seen as offering any benefits regarding improved member communication and accessibility, nor improved consistency of information to members. According to the union's chief of staff, members of this organisation had no difficulty contacting the call centre during normal working hours, and there was no acknowledgement that new forms of communication were required as a result of a younger membership demographic.

These variations in motivation between the three unions help to explain some of the differences in the structure and practice of the call centres noted earlier. As outlined in Table 2, CPSU had the most comprehensive range of motivating factors, including both efficiency and quality of communication issues, reflected in the broader range of activities this call centre undertakes. By contrast, UNISON was motivated more by the quality of communication and accessibility issues, highlighting its emphasis on its call centre as a single source of member contact and information. SEIU Local 1 demonstrated a narrower focus on improved efficiency of service delivery following the broader restructuring of the union, which was evident in the more minimalist approach adopted in its call centre's operation.

Designing and implementing the call centre concept

Variations in the operation and practice of each of the call centres also reflected differences in the degree to which the three unions utilised external advice, the extent to which internal stakeholders had input into the design of the call centres, and the choices regarding the use of new and existing technologies. Once again we found significant variation between the three unions in this area, particularly in terms of the extent of involvement of internal participants in critical design decisions and how member reactions to the introduction of the call centre were managed.

After realising a call centre would be a key element in rebuilding the union, CPSU created a formal working party to oversee the design of the system. This included a mixture of individuals with strong administrative and/or computer technical skills, as well as organisers, campaigners and industrial officers. In their research, the working party found only a small amount of published material on union call centres, and

decided to engage a number of computer and technology consultancies to assist in the redesign of their computer and telephone systems. The working party also decided they would need to upgrade the union's membership database system and began a search for a commercial CRM system. While an extremely costly and time-consuming investment to implement (taking nearly two and a half years to fully 'bed-down'), union managers realised these commercial technologies offered far greater potential to analyse membership demographics and correlate data for 'inbound' and 'outbound' call activities. Despite internal controversy at the time of purchase, the call centre manager argued that the amount of data generated, together with regular reports, testimonials and more strategic allocation of organising resources, had convinced 'nearly everybody' of the wisdom of the CRM purchase. Based on these motivations, CPSU ran a 'pilot' of the call centre concept for a newly formed telecommunications division of the union. This division proved to be a sophisticated user group, and in 2000, after a successful six-month test, CPSU's call centre was extended to cover the union's other divisions.

However, acceptance of the new call centre system was far from uniform, with significant resistance among members. According to the call centre manager, the biggest membership 'pushback' related to the 'movement away from individual servicing (face-to-face servicing) to what would initially appear to be fairly mechanical servicing'. Specifically, this official observed that many individual members felt their individual problems were unique. He argued traditional forms of union servicing, with organisers visiting workplaces and individual members and representing their claims, had reinforced this notion. In seeking to deal with these concerns, the working party used a series of workshops and regional 'road shows' to communicate their vision and seek to increase member acceptance. A key message in this regard was that the call centre concept demonstrated individual issues needed to be seen as workplace issues, which had more commonality than individual members might perceive.

At UNISON, the call centre initiative was led by two individual officials, although their cause was also championed by one of the union's assistant general secretaries. These officials emphasised the need to respect the union's culture and therefore undertook extensive discussions, meetings and focus groups with all departments of the union and its regional staff, gathered information about what types of calls the call centre would likely receive, how these calls should be handled, and what 'inbound' and 'outbound' services the call centre should provide. In terms of external information gathering, the two officials visited an external call centre administered by an employer whose employees they represented, and reviewed some of the literature on call centres as well as attended several call centre exhibitions. However, they argued much commercial call centre practice was not readily applicable to a trade union setting. From its early design phase, the UNISON call centre was intended to act as an 'inbound' contact centre through which members could easily access information. Given the size of the membership base and the lack of internal expertise in running a large call centre facility, UNISON decided to delegate the operation of its call centre to an outside provider. While the idea of 'outsourcing' union activities was highly controversial, after much internal debate, the union decided to use an insurance firm it was closely related to and that had call centre capabilities. Importantly, UNISON staff were critically involved in the oversight and management of call centre activities.

In contrast to the other two cases, the SEIU Local 1 call centre lacked any formal design process and evolved organically from the union's pre-existing technologies. Officials did not undertake any extensive research of call centre practice, nor did they visit any call centres or use external consultants to assist in the implementation of technology. As a result, the SEIU Local 1 call centre utilises the most basic technology of the three call centres, with a single toll-free number for members to access and a menu that allows callers to select from the four different languages spoken by the majority of SEIU Local 1's members: English, Spanish, Polish and former Yugoslavian. This multilingual capability was clearly essential given the demographics of the union's membership. In terms of software, Local 1 adapted its existing membership dues (subscription) database system, which had sufficient functionality for call centre uti-

Design process	CPSU	UNISON	SEIU
Formed a formal design working party	×		
Utilised outside consultants to select hardware or software	×	×	
Visited at least one other call centre		×	
Read papers or gathered information from outside sources	×	Limited	
Consulted with union staff and officers in the design of the call centre	×	×	
Utilised existing membership database in call centre design		×	×
Adapted existing telephone systems		×	×
Purchased new software	×	×	

lisation, allowing individual member information to be called up and inbound call information to be recorded for processing. Unlike CPSU and UNISON, this pragmatic adaptation of existing technology was implemented without the formation of a formal working party or extensive consultation with the broader union organisation (see Table 3 for a summary of the design processes).

The impact of call centres on union operations

Union officials at each of the case studies emphasised a range of outcomes from the implementation of their call centres. At CPSU, officials highlighted how the call centre provided a single gateway to the union's membership system, which facilitated a more precise documentation and tracking of membership changes. Hence, in the five years of the call centre's operation, while 1,500 members had been directly recruited, more importantly the call centre had 'recovered' over 15,000 members (i.e. members who had let their membership lapse and through an outbound contact were persuaded to rejoin). In addition, the call centre was credited with reducing the level of non-financial members from 11 per cent of total membership to just 4 per cent, and convincing over 2,100 members who had intended to cancel their membership to continue as union members.

While it is more difficult to demonstrate the financial impact of the grievance handling and routine information queries that occurred through inbound call activities, officials emphasised the ability of the call centre to provide consistent information and advice. As the call centre manager noted, 'you've got one place where any legislative changes that may affect the entitlements or application of the agreement is centralised . . . you've got people with real familiarity with what the issue is because that's their day to day work'. More broadly, officials stressed the strategic analysis and planning capabilities that were possible through the linking of a sophisticated CRM system to the call centre. In this respect, the call centre manager argued that they had only begun to tap into the possibilities such as the ability to produce daily, weekly and monthly reports detailing new memberships, the most effective recruitment methods, as well as numbers of resignations for particular reasons. Data could also be readily generated on a variety of issues that could be fed into industrial negotiations or organising campaigns. This enhanced analytical capability had also resulted in a growing confidence among union officials and organisers that they now had increased insight into broad membership trends and future challenges. As the call centre manager argued:

> [I]t has given you the capacity for a lot of strategic insight that you didn't have before. It has taken a lot of time and effort to get that data and now just with the click of a button the report can come up.

At UNISON, while the initial introduction of the call centre had been a highly controversial development, officials argued that over time, opposition had diminished

significantly. Most branches, they argued, saw the call centre's ability to deal with routine inquiries as extremely useful, giving them more time to deal with grievances and organising. This was particularly the case for smaller branches with limited financial resources. In addition, the call centre's ability to act as a 'one stop shop', providing standardised advice through its use of nearly 400 individual scripts, was also seen as a major advantage in ensuring the diffusion of consistent and more accurate information to members.

However, the decision to exclude grievance handling meant the call centre has operated explicitly as a source of basic information for members. While managers argued that the call centre had greatly improved the level of communication with members (a position supported by member surveys and external consultant reviews), they were less happy with the extent to which branches actually followed up on grievances referred to them from the call centre. Indeed, the continued delegation of grievance handling to the branches was seen as lessening the transformational impact of the call centre on union operations. In designing the level of call centre service, the two advocates of the project had been cautious about unduly raising member expectations with regards to grievance handling. On the one hand, they did not want call centre operators to be too impersonal in responding to member grievances, but on the other hand they also did not want operators providing too much advice or raising false hopes. In addition, there was a concern that if the call centre provided a high level of grievance handling, the call centre's ready availability and extended hours of operation could result in members expecting a similar level of availability from the branches.

At SEIU Local 1, officials argued the call centre initiative has been particularly effective in achieving their original goals of improving the handling of member grievances and thereby freeing up field staff resources to devote to organising campaigns. For example, over the previous three years the call centre had handled over 77,500 calls, with four out of five of these effectively dealt with by call centre representatives at the time of the call. While only a third of the union's members were found to file grievances, and most of these related to personal issues such as disciplinary action, resolving these inquiries took up a significant amount of time and resources. In this regard the new arrangement was viewed as highly successful, with 97 per cent of the 16,000 calls referred to the grievance centre over the previous three years having been satisfactorily resolved.

As a result, a key outcome of SEIU Local 1's call centre initiative was the redesign of the work of field staff who no longer had to deal with information requests or individual grievances. This resulted in the redesign of the job classification of full-time union representative into three new categories: Field Representative, whose primary function is to organise in the workplace; MRC Representative, whose primary function is to handle inbound calls, provide information and pass grievance issues to the Grievance Centre; and finally, Grievance Centre Representatives, who specialise in grievance handling. To ensure communication between call centre operators, grievance centre representatives and field staff, monthly meetings of all three groups have been introduced to discuss emerging issues, problem worksites, and to develop common solutions. This involved the adoption of an action plan using the grievance procedure, worksite visits and a greater role for union stewards (delegates) who were now expected to deal with supervisors, enforce the collective agreement, welcome new members into the union and turn out members for campaigns, rallies and demonstrations. Information from the grievance database also provided a further resource, which could be analysed prior to negotiations with employers to generate key issues and documentation of problems.

Most recently, field representatives of the union in all the cities covered by Local 1's call centre, have largely been removed from the grievance-handling process (although they can access the grievance database). Grievance centre representatives have access to all the collective agreements for all the cities the MRC covers, and because they are dedicated to grievance handling and because of the extensive training they receive, they are seen as grievance specialists. A centralised database allows them to log every contact with a member, which proves invaluable should there be any question about

the quality of representation each member receives. In addition, because grievance resolution is centralised, there is uniformity and consistency in grievance settlements, something that was extremely difficult to achieve before the Grievance Centre.

Another dividend of the Grievance Centre is that it frees field representatives up from grievance handling and routine membership inquiries, so they can now better focus on organising tasks. According to call centre managers we interviewed, during SEIU Local 1's successful 2006 campaign to organise janitors in Houston, Texas (Greenhouse, 2006), a very large contingent of field representatives were sent to Houston for sustained periods of time because the MRC and Grievance Centre representatives were 'taking care of business' and 'keeping the home fires burning'. Such a significant shift of human resources would not have been possible for any lengthy period without a call centre.

The success of SEIU Local 1's call centre has led to the diffusion of this model to other local unions of the same parent organisation, including California, but perhaps more significantly, the union has taken on call centre work from other locations in the Midwest and South, including Houston, Cincinnati, Columbus and Detroit, with plans to add other major cities such as Cleveland, St. Louis and Kansas City by the summer of 2008. They now handle inbound calls and grievances from 11 different cities, which has necessitated the development of a Web-based MRC and grievance centre database.

Discussion and conclusions

While the distinction between 'servicing' and 'organising' models of unionism is often emphasised (e.g. Banks and Metzger, 1989; Conrow, 1991; Early, 2008), our study of trade union use of call centre technologies highlights the potential synergies between servicing and organising activities (see also Fletcher and Hurd, 1998). In particular, our three case studies point to the advantages for unions in using call centre technologies to reduce the servicing load of full-time staff and field organisers in terms of member inquiries and grievances, thereby freeing up resources for organising, recruitment and campaigning activities. Beyond the more effective delivery of services, union call centres also have the potential to contribute directly to recruitment and organising activities through targeted 'outbound' activities, as well as enabling improved data analysis and strategic planning through associated improvements in membership and grievance records.

While all three unions demonstrated the advantages of call centres as mechanisms for responding to member inquiries and providing more timely and accurate information, the extent to which this extended to grievance resolution, let alone more proactive 'outbound' recruitment and organising, varied. This reflected the differing motivations and design choices of officials in each union. In terms of scale and volume of calls, UNISON's call centre highlighted the advantages of a centralised single gateway and of scripted responses as a more efficient source of information diffusion to members. However, the decision to leave grievance handling within the union branches meant that the impact on union structures and the work of organisers was probably less pronounced than the other two cases. By contrast, SEIU Local 1's call centre, with its dedicated grievance centre, fundamentally restructured the work of organisers, through the removal of member inquiry and grievance resolution activities, and allowed for a freeing up of organisers' time to devote to dedicated organising activities. Finally, the CPSU example suggests some future paths for extending call centre capabilities, with both 'outbound' calling and more sophisticated information technologies, such as CRM, providing a powerful contribution to the union's recruitment, organising and industrial strategies.

More broadly, our study provides empirical support for the advantages of a 'hybrid' form of union activity, which combines a more sophisticated use of managerial practice *and* a commitment to rank-and-file organising and mobilisation. It could easily be argued that union call centres, standing alone, merely promote the servicing model just as insurance companies have largely given over to call centres themselves. However, rather than simply returning to a vision of union members as 'consumers' of union

services, call centre technologies can also act as an enabling device in reinforcing union organising. Whether we characterise this as a form of 'managed activism' (Heery *et al.*, 2000a) or 'strategic organising' (Cooper, 2002), the key issue is the potential of these technologies to enable a more efficient allocation of union expertise and resources, *and* further leverage the commitment to improving the participation of existing members in workplace activism, as well as recruiting and mobilising new members through improved communication and interaction. As Heery *et al.* (2000a: 1004) have noted, such hybrid forms of 'managed activism' do involve tensions, and indeed, participants in all three cases acknowledged the controversial and contested nature of implementing the call centre approach. However, our research suggests the tensions between servicing and organising are not insurmountable, and each of the unions studied have, at least in the short term, developed ways of balancing these competing tensions.

As a preliminary analysis of the adoption and use of call centres by trade unions, this study has relied on the interpretations of senior officials in the most innovative unions in Australia, the UK and USA, supplemented by extensive documentation and observation of call centre work. While this study highlights the potential for new technologies and management methods to improve the servicing and organising of union members, further research is needed into the reactions of organisers, delegates and members to the adoption of the call centre approach. Moreover, there is a need for further investigation across a broader cross-section of unions utilising these technologies in different industrial and national contexts. While one of the case study unions had begun to develop call centre capabilities for 'outbound' recruitment and industrial campaigning, further research needs to explore how these technologies might develop into a more explicit organising mechanism. Overall, the three trade unions in this study demonstrate that union renewal requires not only rank-and-file mobilisation, but also the adoption of new methods and technologies that improve communication between members and officials. Rather than a simple means of delivering member services, union call centres also hold the promise of developing a more strategic and sophisticated approach to workplace bargaining and activism.

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