



International  
Labour  
Organization

## ► Towards using data as a strategic asset:

A study of current data management practices,  
challenges, and opportunities for Employer and  
Business Membership Organizations



## ▶ **Towards using data as a strategic asset:**

A study of current data management practices, challenges, and opportunities for Employer and Business Membership Organizations

Copyright © International Labour Organization 2021  
First published (2021)

Publications of the International Labour Office enjoy copyright under Protocol 2 of the Universal Copyright Convention. Nevertheless, short excerpts from them may be reproduced without authorization, on condition that the source is indicated. For rights of reproduction or translation, application should be made to ILO Publications (Rights and Licensing), International Labour Office, CH-1211 Geneva 22, Switzerland, or by email: [rights@ilo.org](mailto:rights@ilo.org). The International Labour Office welcomes such applications.

Libraries, institutions and other users registered with a reproduction rights organization may make copies in accordance with the licences issued to them for this purpose. Visit [www.ifrro.org](http://www.ifrro.org) to find the reproduction rights organization in your country.

---

Towards using data as a strategic asset: A study of current data management practices, challenges, and opportunities for employer and business membership organizations (International Labour Organization, 2021)

ISBN 9789220346235 (Web PDF)

---

The designations employed in ILO publications, which are in conformity with United Nations practice, and the presentation of material therein do not imply the expression of any opinion whatsoever on the part of the International Labour Office concerning the legal status of any country, area or territory or of its authorities, or concerning the delimitation of its frontiers.

The responsibility for opinions expressed in signed articles, studies and other contributions rests solely with their authors, and publication does not constitute an endorsement by the International Labour Office of the opinions expressed in them.

Reference to names of firms and commercial products and processes does not imply their endorsement by the International Labour Office, and any failure to mention a particular firm, commercial product or process is not a sign of disapproval.

Information on ILO publications and digital products can be found at: [www.ilo.org/publns](http://www.ilo.org/publns).

## ► Preface

---

To remain strong, independent and effective representatives of their members, Employer and Business Membership Organizations (EBMOs) should strive to be role models for members and to reflect their members' best business practices.

With practical tools for business intelligence and data analytics now more accessible and affordable than ever, the strategic management and use of data has become a realistic solution available to support EBMOs in their decision-making, to generate new value-added and sources of income, and to improve overall organizational efficiencies in ways that not only keep pace with changes, but predict them.

This report, prepared by the ILO Bureau for Employers' Activities (ACT/EMP), shows that data is perhaps the most powerful, yet underutilized and poorly managed organizational asset EBMOs have today. In most EBMOs, data are fragmented across business functions, and few EBMOs apply policies that explicitly recognize data as an asset, with systems and procedures in place to ensure its appropriate stewardship.

This paper aims to provide actionable insights to helping EBMOs to identify the strategic opportunities emerging from changes in the world of business and work, and to harness data in adjusting and innovating as organizations at the following levels:

- **strategically**, in providing added value to members and gaining competitive advantage by exploiting core competencies in specific product or service markets;
- **organizationally**, in the area of structural adjustments and changes to ways of working in support of long-term goals and outcomes; and
- **operationally**, in adopting business practices that maximize efficiencies within an EBMO's various business units.

Primarily, this report aims to serve EBMOs as a thought piece for internal reflection and to inform future action. However, it will also prove relevant for all those interested in representing businesses and understanding the role that digital transformation may now play in helping EBMOs develop new capacity to respond effectively to the pace of technological developments and changing market conditions. One key finding of this study is that EBMOs rarely analyse data concerning their own internal operations, a practice that can yield new information for working more efficiently or effectively.



**Deborah France Massin**

Director, Bureau for Employers' Activities, ACT/EMP

April 2021

## ► Acknowledgements

---

Dr Deborah Soule, an international expert on digital transformation of organizations, business analytics and innovation, and Linda Vega Orozco, an economist and data analyst, undertook the design of research instruments, data collection and analysis, and led the drafting of this report. The International Labour Organization (ILO) is grateful for their expertise, professionalism and commitment throughout the assignment.

The contributions from all EBMOs that completed surveys, questionnaires and participated in interviews also proved critical in ensuring that practical lessons learned and experience grounded the report. We thank these organizations for their willingness to share.

We extend our thanks also to ILO and ITC-ILO colleagues who provided peer review and made technical contributions to the report: from the Bureau for Employers' Activities, Wade Bromley, Sanchir Tugschimeg, Jae-Hee Chang, Dong Eung Lee and Paolo Salvai; from the ITC-ILO, Jorge Illingworth, Jeanne Schmitt, Sandro Pettinio, Jorge Ramirez Mata and Barbara Maino.

## ► Table of Contents

---

Executive summary	9
Acronyms	12
Highlights	13
About this report	16
<b>Data for strategic, organizational and operational decision-making</b>	<b>17</b>
<hr/>	
Defining “data”	18
Quality of data available to EBMOs	20
Data for strategic decisions	23
Data for organizational and managerial decisions	25
Data for operational decisions	26
<b>EBMO sources and types of data</b>	<b>29</b>
<hr/>	
Membership data	29
Data on member needs and interests	31
Advocacy data	32
Communications data	32
Training data	34
Research data	35
Operations and organizational performance data	36
<b>EBMO data management practices</b>	<b>37</b>
<hr/>	
Data collection	37
Data analysis	41
Data storage and security	44
Data access, sharing and dissemination	47
Data retention, retirement or destruction	49
<b>Data, technology and COVID-19: Further observations</b>	<b>50</b>
<hr/>	
<b>Data-oriented opportunities for EBMOs</b>	<b>52</b>
<hr/>	
Opportunities at the strategic level	52
Opportunities at the organizational/management level	54
Opportunities at the operational level	55

- Towards using data as a strategic asset: A study of current data management practices, challenges, and opportunities for Employer and Business Membership Organizations

<b>Recommendations for EBMOs starting their data journey</b>	<b>57</b>
<hr/>	
Tell the EBMO data story	57
Inventory current data in use	57
Review active data collection and maintenance efforts	58
Identify opportunities to share EBMO knowledge	58
Establish or update data management policies	59
Identify passive data collection opportunities	59
<b>References</b>	<b>60</b>
<hr/>	
<b>Annex I. Research methodology</b>	<b>61</b>
<hr/>	
Semi-structured interviews	61
Survey	61
<b>Annex II. Survey demographics</b>	<b>62</b>
<hr/>	
<b>Annex III. EBMO survey</b>	<b>65</b>
<hr/>	

## ► List of Tables

---

Table 1. Volume, variety, velocity and veracity of data	19
Table 2. Data collection frequencies, global results	38

## ► List of Figures

---

Figure 1. Availability of information to make decisions, global results	21
Figure 2. Availability of quantitative data to support decision-making at different organization levels, global results	22
Figure 3. EMBOs indicating available data was sufficiently complete to support decision-making	22
Figure 4. Characteristics of data to support strategic decision-making, global results	23
Figure 5. Characteristics of data to support organizational decision-making, global results	25
Figure 6. Characteristics of data to support operational decision-making, global results	27
Figure 7. Most common research topics, global results	35
Figure 8. Data collection limitations, global results (%)	39
Figure 9. Data analysis limitations, global results (%)	42
Figure 10. Storage of members' details, global results	44
Figure 11. Data storage locations, global results	45
Figure 12. Customer relationship management for employers' and business member organizations	48
Figure 13. Topics covered in data guidelines or procedures, global results	49
Figure 14. Survey sample by region	62
Figure 15. Type of EBMO	62
Figure 16. Level of operations	63
Figure 17. Membership type	63
Figure 18. EBMO size	64
Figure 19. Survey respondents by role	64



# Executive summary

---

**Defining and delivering a new value proposition.** In response to today's fast-changing, digitally enabled environments, Employer and Business Membership Organizations (EBMOs) seek to more effectively innovate and adapt their business models, processes, and governance practices. Like the businesses they represent and serve, EBMOs face continual competition from new actors, new pressures, and ongoing changes in the world of business.<sup>1</sup> Amid such change, EBMOs must define and deliver a new value proposition to their members to ensure that they remain relevant, representative and influential.

**Identifying and using often overlooked sources of valuable data.** EBMOs are uniquely positioned to filter and frame feedback from the business community and generate data-driven insights quickly. However, many EBMOs overlook sources of data that could inform their operations and strategic initiatives and, as a result, fail to use all their available data for systematic decision-making. Despite real challenges to accessing certain types of data, EBMOs also face many opportunities to use their existing data more strategically.

**First in the Data as a Strategic Asset (DaaSA) series.** This report, the first publication of the Data as a Strategic Asset (DaaSA) series, examines data generation and use in EBMOs. It examines the types of data EBMOs collect, analyse, store and disseminate in the course of their business activities, and investigates how EBMOs use data for operational, organizational and strategic decision-making. This publication also identifies opportunities emerging from improved data management practices, and proposes recommendations that would help EBMOs align available data with strategy, organization and operations in support of their core value propositions.

## ► Methodology

---

**Interviews.** The researchers conducted 20 semi-structured interviews with board members, chief executive officers (CEOs) and department directors of EBMOs in Asia and the Pacific and five interviews with international experts, including business leaders, multilateral representatives, and academics, conducted between September and November 2020.

**Global survey.** Between November 2020 and February 2021, a global survey was conducted that engaged 112 respondents from 66 EBMOs in 49 countries across Africa, Asia and the Pacific, Arab States, Europe and Central Asia, and Latin America and the Caribbean.

Interviews explored the categories of data that EBMOs recognize as essential, as well as how EBMO staff and departments manage data in their work activities. The survey quantified the extent to which data are collected, analysed, and used for decision-making at the strategic, organizational and operational levels.

---

<sup>1</sup> ILO (International Labour Organization) and IOE (International Organisation of Employers), *Changing Business and Opportunities for Employer and Business Organizations* (2019).

- ▶ Towards using data as a strategic asset: A study of current data management practices, challenges, and opportunities for Employer and Business Membership Organizations

## ▶ Findings

---

- ▶ **Data collection.** EBMOs intentionally collect original data on members and their interests, needs, and policy concerns, as well as through research into specific issues or topics.
  - ▶ There is substantial variation in the frequency, method, and degree of systematization of EBMO data collection approaches.
  - ▶ EBMO data collection is often hindered by limited member interest and participation rates, staff capacity, financial resources and time.
- ▶ **Data generation.** EBMOs generate original data on internal activities, operations and performance from their ongoing work in support of member advocacy, training and communications. EBMOs are less aware of their operational data and the potential value of these data, and so they do not use these data in making decisions.
- ▶ **Data analysis.** EBMOs primarily analyse data to support advocacy- or need-driven research.
  - ▶ Many EBMOs overlook opportunities to analyse the impact of policy advocacy, the demand for and use of their various services, and their own internal operations.
- ▶ **Data storage.** EBMOs store their data with care and attention to security and their responsibilities for data confidentiality. EBMOs vary, however, in their use of data storage tools (for example customer relationship management [CRM] databases and spreadsheets) and storage locations.
- ▶ **Data dissemination.** EBMOs disseminate data to both members and non-members through formal and informal communication channels, but most EBMOs lack formal procedures or guidelines to help them manage data over the long term.

## ▶ Opportunities and recommendations

---

More consistent, focused, and intentional data management practices can provide EBMOs with opportunities to provide high-quality services to members. EBMOs that can effectively use data to reinforce and market their value propositions ultimately increase their membership, resources and influence in a virtuous cycle of expanding effectiveness. This research recommends that EBMOs implement changes in data management practices at the strategic, organizational and operational levels.

### Strategic recommendations:

- ▶ EBMO leaders need to clearly communicate to their secretariats how more data-driven practices support and strengthen their EBMO mission and goals.
- ▶ The CEO and board members should also model data-driven behaviour by using data more systematically to decide on strategic initiatives, identify suitable strategic goals, and monitor organizational progress towards those goals.
- ▶ EBMO leaders should guide their organizations in developing effective data management policies to ensure the optimal and ethical use of distinctive and unique member data.

- ▶ Towards using data as a strategic asset: A study of current data management practices, challenges, and opportunities for Employer and Business Membership Organizations

## Organizational recommendations:

- ▶ Managers should define, direct and monitor the management and use of data to support overall strategy, as defined by the CEO and board.
- ▶ Managers should also use data more systematically to identify and develop skills, roles, resources and work routines needed to implement the chosen strategy. Data on current staff capacity and gaps can inform more efficient investments in recruitment and training.
- ▶ Managers should promote and monitor information sharing across departments to support the identification of additional member needs and service opportunities. Greater internal sharing of information improves EBMO operational efficiency and enhances overall EBMO performance.

## Operational recommendations:

- ▶ Staff should follow more systematic and intentional data collection practices and apply evidence-based approaches in every member-facing interaction.
- ▶ Managers and staff should explore technology solutions that facilitate more automated data collection and storage, as well as enable more integrative analysis and insights.
- ▶ Managers and staff should identify performance baselines, benchmarks and goals, and use appropriate data to monitor progress towards their goals.

## ► Acronyms

---

<b>ACT/EMP</b>	ILO Bureau for Employers' Activities
<b>BI</b>	business intelligence
<b>CEO</b>	chief executive officer
<b>CRM</b>	customer relationship management system
<b>DaaSA</b>	Data as a Strategic Asset
<b>EBMO</b>	Employer and Business Membership Organization
<b>HR</b>	human resources
<b>ITC</b>	International Training Centre
<b>KPI</b>	key performance indicator
<b>ILO</b>	International Labour Organization
<b>IOE</b>	International Organisation of Employers
<b>OSH</b>	occupational safety and health
<b>SOP</b>	standard operating procedure

## ► Highlights

112 survey respondents from 66 EBMOs in 49 countries



- 71% Employers' organization
- 16% Chamber of commerce
- 7% Amalgamated
- 6% Business coalition / alliance

- 81% National organization
- 7% Local/provincial organization
- 5% Sectoral organization
- 4% Foreign chamber or business council
- 3% Global organization

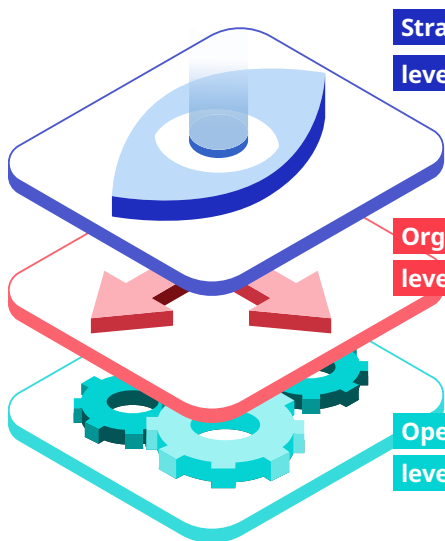
- 42% Large
- 37% Small
- 21% Medium



The survey targeted respondents in different EBMO roles, including board members, CEOs, department managers, and other staff.

► Data is perhaps the most powerful, yet underutilized and poorly managed organizational asset EBMOs have today

The research explored use and potential for data-driven insights at the:



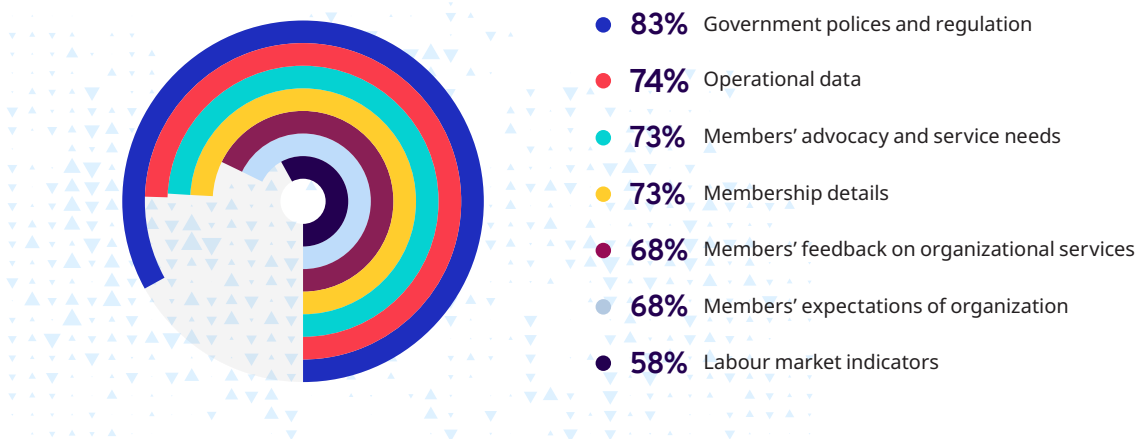
- ① "Are we doing the right thing?"
  - Explore innovation opportunities
  - Define EBMO plans
  - Set strategic objectives
  - Identify strategic constraints

- ② "Are we doing things right?"
  - Provide input to strategies identified by leadership
  - Implement organization to meet strategic objectives
  - Monitor and control operations

- ③ "Are we delivering value, transaction by transaction?"
  - Perform individual tasks efficiently and effectively

## Quality of data available to EBMOs

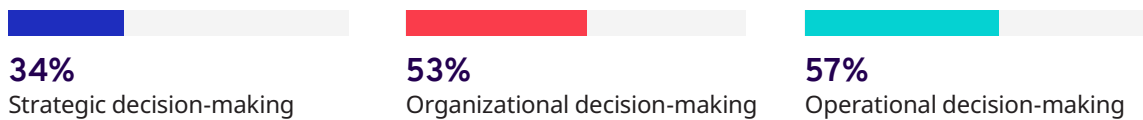
### EBMOs have access to a range of data on different topics



However, many note their access to quantitative data is insufficient.

**47%** of CEOs and board members lack confidence in the accuracy of their data for strategic decision-making.

### EMBOs indicating available data was sufficiently complete to support decision-making:



### EBMOs do not yet systematically collect and analyse data about the internal operations and performance of secretariat departments



**63%** of the survey respondents reported that data collection at their EBMOs is limited by participant response rates to a great or moderate extent.



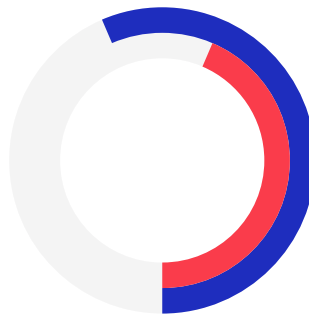
**almost 70%** of board members, CEOs and department managers indicated that data analysis by their EBMOs was limited by financial resources and time to a great or moderate extent.



**EBMOs rarely analyse** data about their own internal operations, which could yield new information for working more efficiently or effectively.

**Many EBMOs lack explicit procedures on how to address data over the long term.**

About half of respondents from medium and large EBMOs reported having data management guidelines, compared to a third of respondents in small EBMOs.



Availability of data guidelines or procedures, global results

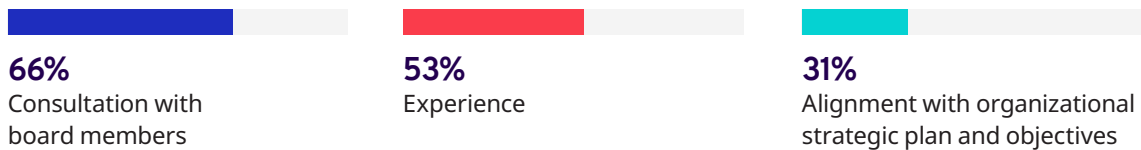
- 45% Data guidelines
- 55% No data guidelines

**28%** of CEOs and board members reported using economic trends or indicators, and consulting with government, regular and affiliate or staff.

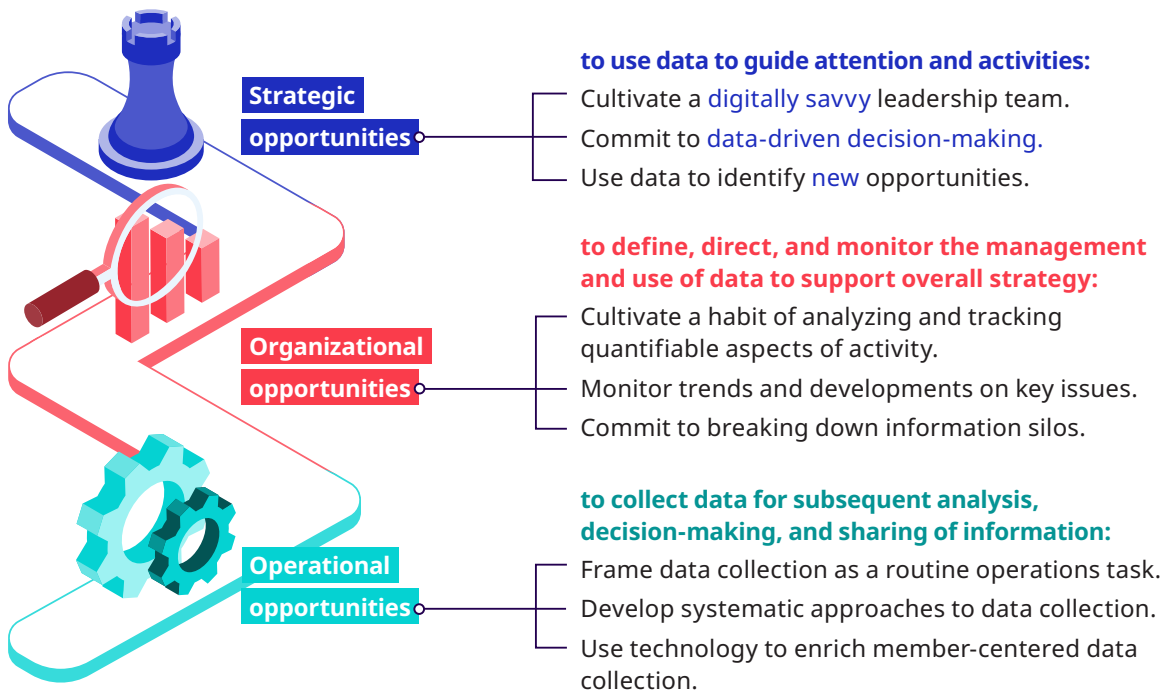


**EBMO leaders (CEOs and boards) still rely heavily on their own and others' experience.**

**Top three factors that EBMO leaders consider to make decisions in their roles, global results**



**Data-oriented opportunities for EBMOs**



## ► About this report

---

The Data as a Strategic Asset (DaaSA) initiative was launched to help EBMOs identify and respond to strategic opportunities emerging from twenty-first-century changes in the world of business and work.<sup>2</sup> Specifically, the initiative aims to deepen insights and build capacity among EBMOs in the following ways:

- identify strategic opportunities to provide data-driven value for their members in the changing world of business through policy work and services;
- achieve operational efficiencies through implementing more data-driven business practices in key business units; and
- produce practical guidance notes, reference material and tools to help EBMOs to innovate as organizations through data-based structural design and human resource development initiatives.

As part of this initiative, the ILO Bureau for Employers' Activities (ILO-ACT/EMP) commissioned a study to examine the impact of rapidly proliferating data, especially digital data, on EBMOs. Like the businesses they represent, EBMOs need to innovate, adapting their business models and processes to take advantage of the opportunities to harness data that come with new technologies and advances in the field of business intelligence and analytics.

The study comprised 20 semi-structured interviews with staff and board members of EBMOs in Asia and the Pacific, as well as five interviews with internationally recognized member association experts conducted between September and November 2020. Between November 2020 and February 2021, a global survey also engaged 112 respondents from 66 EBMOs in 49 countries across five regions.<sup>3</sup> Three annexes to this report describe, respectively, the research methodology, the survey demographics and the survey questions.

This report offers EBMOs guidance in managing their data as critical assets: (1) highlighting the opportunities for more consistent and rigorous data management; (2) recommending EBMO actions to adjust and transform their secretariats into data-driven organizations; and (3) developing insights and tools to guide their transformation at multiple levels:

**Strategic level:** appreciate data for identifying new EBMO opportunities; collect and use data to improve the impact of policy advocacy, expand services and grow their membership base.

**Organizational level:** collect and use data to monitor and manage EBMO human resources, work practices, and internal operations to meet EBMO long-term goals.

**Operational level:** collect and use data to deliver value efficiently and effectively through each business department transaction.

The report is organized into five sections:

- The first defines “data” and examines the quality of data availability for EBMO use in strategic, organizational, and operational decision-making.
- The second provides an overview, by department, of the types of data that EBMOs collect and generate.
- The third analyses EBMO data management practices from a data lifecycle perspective, exploring how EBMOs collect, analyse, store, disseminate and retire various types of data.
- The fourth proposes opportunities for improved data management at the operational, organizational and strategic levels.
- The final section presents conclusions and recommendations emerging from this research.

<sup>2</sup> The DaaSA project also coincides with and aims to inform the *ILO-wide Strategy for Institutional Capacity Development* (International Labour Office, 2019).

<sup>3</sup> Africa, Asia and the Pacific, Arab States, Europe and Central Asia, and Latin America and the Caribbean.



# Data for strategic, organizational and operational decision-making

---

Effective EBMO decision-making at the operational, management and strategic levels relies on data as sources of information, knowledge, and insights. Improved decision-making over time creates more value for stakeholders. For EBMOs themselves, improved decision-making can mean more and better services, including distinctive services for particular members, increased influence vis-à-vis other stakeholders, and thus competitive advantage with respect to other membership associations.

**Data for improving decisions about strategic directions.** EBMO boards are responsible for identifying strategic goals and setting the agenda for their organizations. Having access to accurate and up-to-date data on business trends, member interests, and secretariat capabilities, for example, can support these senior leaders in their evaluation of opportunities and their prioritization of strategic goals. One EBMO board member convincingly articulated the importance of data to improve decision-making:

For us to innovate, for us to push government, for us to grow our membership, we need data. We need a lot more data, and we need to analyse the data to develop a better understanding of the issues we're dealing with.

**Data for improving decisions about organizational capability.** Department managers, responsible for the delivery of specific EBMO services, must monitor how their departments handle and complete tasks, and guide adjustments when performance targets are not being met. Accurate and accessible data about ongoing operations, activities and performance can support managers in making decisions about such matters as resource allocation, changes to business processes, and staff recruiting, training and development. Data can be used not only to improve core operations and ensure that all EBMO advocacy is evidence based, but to identify new opportunities for adding value through knowledge products as well as to inform and launch new or improved services.

**Data for improving decisions in operations.** In EBMO operations, secretariat staff deliver value through such transactions as responding to member queries, registering participants for training, coordinating events, disseminating business-relevant news, initiating surveys, and analyzing survey responses. Timely, accurate and complete data can support secretariat staff members in making appropriate and effective choices quickly, thus delivering value transaction by transaction or member by member. Eventually, internal data can support staff members in more effective self-management. In other words, detailed data about EBMO activities and operations can be used to give individual staff the insight and responsibility to directly monitor, evaluate and improve their own work processes.



## ► Defining “data”

---

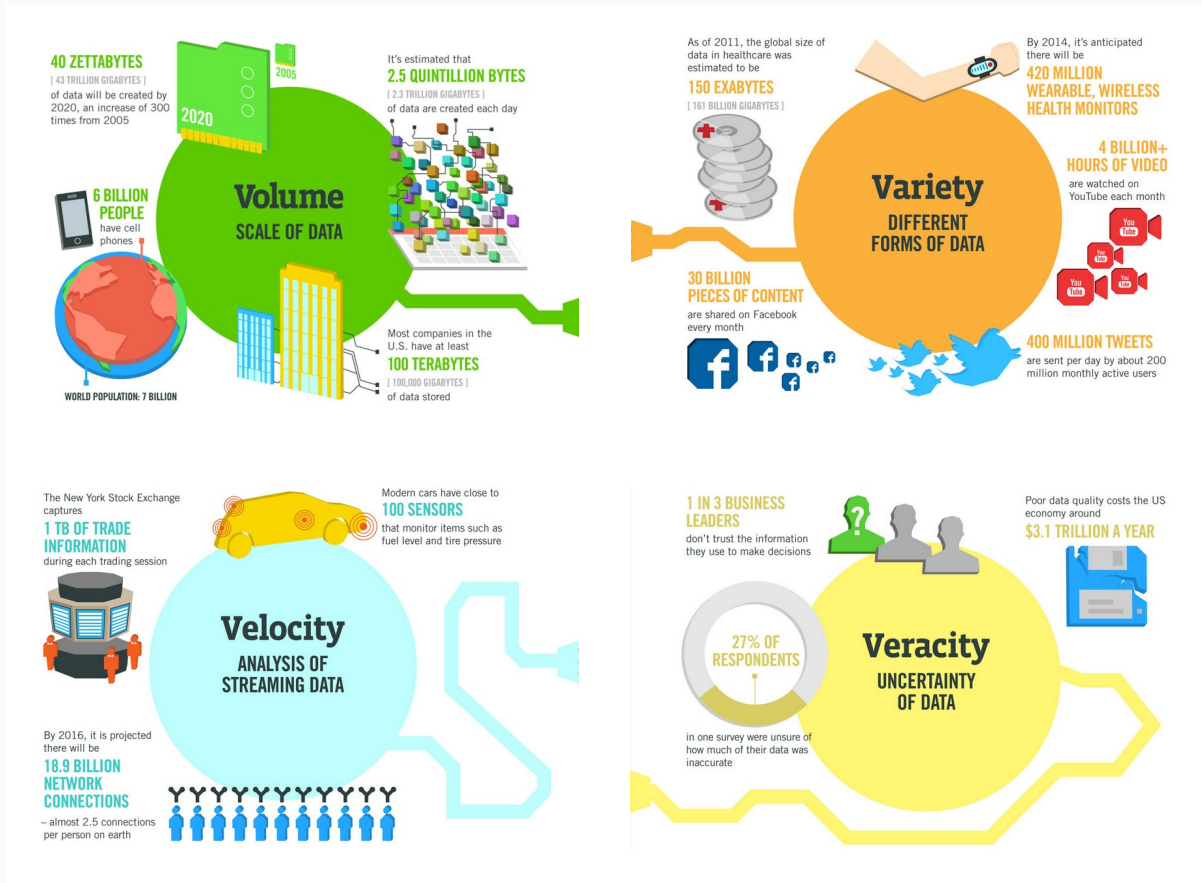
**Data defined broadly for the purposes of this report.** Data can comprise raw facts and values recorded in a structured fashion, such as in databases or spreadsheets, but it can also include all unstructured informational resources used or created by EBMOs, such as written or spoken correspondence, documents, reports, or other sources of content, whether in physical or digital forms, and whether created intentionally or as the byproduct of another activity. Analyses and syntheses of original data are also considered data available for further use. For example, analysis of raw facts can yield insight into the current state of some issue. However, those data, when combined with similar datasets from other timeframes or localities, can reveal further insights about the extent, trend and dynamics of that issue.

**Digital data are the digitized forms of any material information.** Digital data might include numbers, text, photos, videos, reports, location data, financial information, activity logs, databases, spreadsheets and much more. Sources of digital data can include email, websites, social media, phones, online surveys, digital sensors, multimedia, and functional or enterprise-wide information systems. Accelerating technological changes mean that data, notably digital data, are increasing exponentially – not just in amount but also in type and the pace of renewal.<sup>4</sup> Furthermore, because digitization facilitates easy and rapid generation of data, all organizations are increasingly challenged to verify and find value in the available sources.

---

<sup>4</sup> These contemporary characteristics of data are often referred to as the volume, variety and velocity of data.

► Table 1. Volume, variety, velocity and veracity of data



Source: McKinsey Global Institute: Twitter, Cisco, Gartner, EMC, SAS, IBM, MEPTec, QAS.

EBMOs still use and generate some analog (non-digital) data in the form of paper-based membership subscription records or responses to training and research surveys. However, almost all EBMOs generate and use significant and increasing quantities of digital data in their domains of operation. For example, by using email addresses, internet-connected

computers, voicemail systems, CRM systems, digital accounting systems or networked printers, they are collecting, generating and depending on digital data. EBMOs need to recognize the proliferation of digital data in their spheres of business activity and develop capabilities to manage these data effectively.

## ► Quality of data available to EBMOs

---

**Quality of decisions enhanced by quality of data on which they are based.** There are many ways to think about data quality, and a variety of recognized dimensions of data quality. The following key dimensions of data quality were distilled in this report:<sup>5</sup>

- **Accessibility.** Are data easily and readily available to authorized users when needed?
- **Accuracy.** To what extent are data correct and free from error? This an intrinsic dimension of information quality, important in any context and regardless of how the data are represented.
- **Completeness.** To what extent are data both sufficiently detailed and broad enough for the task or decision at hand? This may be described as a context-dependent quality.
- **Currency.** How up to date are data with respect to the task or decision at hand? This is another context-specific dimension of quality.
- **Relevance.** To what degree are data applicable, useful for the task at hand? This is yet another context-specific dimension of quality.
- **Understandability.** To what degree are data represented and formatted for ease of use?

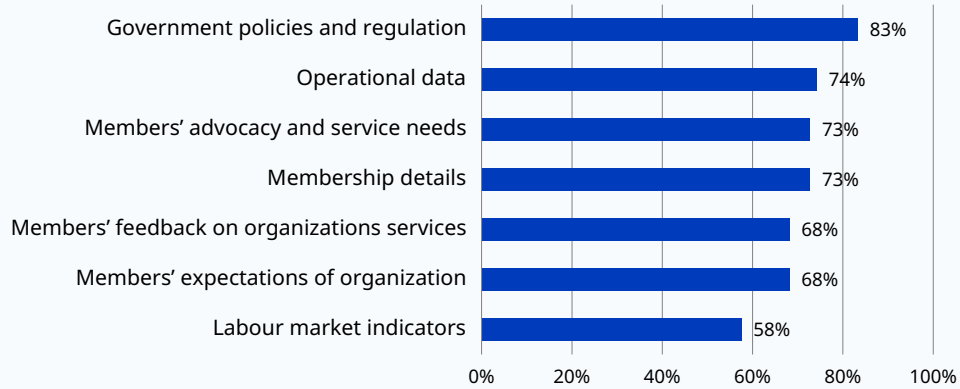
In sum, for data to be useful and effectively available for decision-making, they must first of all be accessible as well as accurate and appropriate to the task at hand. This study's interviews and the survey examined the availability of data for decision-making at different EBMO levels. The survey also asked different EBMO representatives about the accuracy, completeness, currency, relevance, and understandability associated with the data they used in their roles.

**EBMOs have access to a range of data on different topics.** Surveyed EBMO CEOs, board members and managers reported the availability of different types of information to make decisions in their roles. Most widely available to EBMOs, as reported by 83 per cent of CEOs, board members and managers, are data on government policies and regulations. Other types of available data include operational data (74 per cent), data about members' views and perspectives on the regulatory environment and policies, as well as members service needs (73 per cent), membership details (73 per cent), members' feedback on services (68 per cent), members' expectations of EBMOs (68 per cent) and labour market indicators (58 per cent). See Figure 1.<sup>6</sup>

<sup>5</sup> This report builds on a review of research regarding data quality by Richard Y. Wang and Diane M. Strong, "[Beyond Accuracy: What Data Quality Means to Consumers](#)," *Journal of Management Information Systems* 12(4):5–34 (1996).

<sup>6</sup> All CEOs, board members and managers in chambers of commerce reported having access to membership details, compared to 65 per cent of CEOs, board members and managers in employers' organizations. About 83 per cent of board members and managers from large EBMOs reported having access to members' views and perspectives on the regulatory environment, compared to lower shares of board members and managers from large EBMOs (58 per cent) and small (68 per cent) EBMOs. Moreover, all board members and managers from medium-sized EBMOs reported having access to members' expectations, compared to lesser shares of board members and managers from small (54 per cent) and large EBMOs (69 per cent). Analysis by region was not conducted due to relatively few responses to this question in Africa, Europe and Central Asia.

► **Figure 1. Availability of information to make decisions, global results**



Note: Board members, CEOs and department managers were asked this question.

**Although most EBMOs have access to different types of data, many note their access to quantitative data is insufficient.** Despite the relatively positive levels of data availability shown in Figure 1, survey responses revealed a more nuanced story regarding the availability of quantitative data to support their decision-making at operational, organizational and strategic levels.<sup>7</sup> See Figure 2.

- When considering strategic decision-making, only 12 per cent of surveyed CEOs and board members noted that they had access to a lot of quantitative data. Half (50 per cent) perceived some moderate data limitations, while 38 per cent indicated that quantitative data were unavailable or available only in limited quantities.
- The situation for organizational/managerial decision-making was better. Eighty per cent of responding CEOs, board members and department managers reported they had a lot or moderate amounts of quantitative data for organizational decision-making.

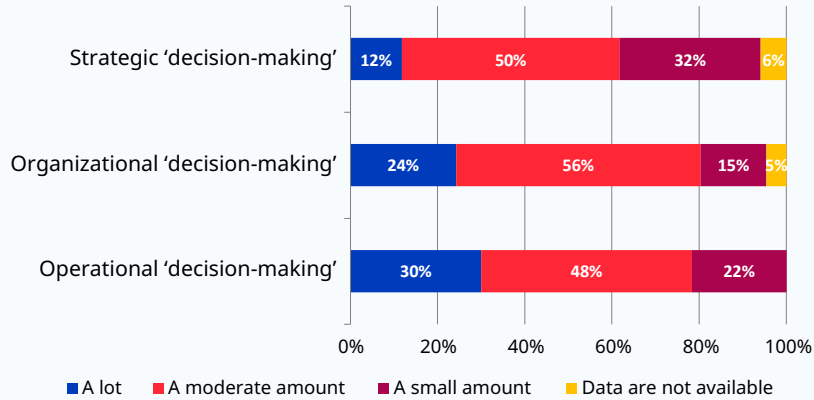
- The situation for operational decision-making was similar to that at the organizational level. Seventy-eight per cent of CEOs and department managers reported access to a lot or moderate amounts of quantitative data for operational decision-making.<sup>8</sup>

► **Having the right information on a timely basis can be the difference between the board's success or failure. While the board cannot meet each and every member, or read each and every publication, this does not negate data as business-critical to strategic decision-making on the board.**

<sup>7</sup> In the survey, CEOs and board members were asked about data for strategic decisions; CEOs, board members and department managers were asked about data for organizational decisions; and CEOs and department managers were asked about data for operational decisions.

<sup>8</sup> Eighty-four per cent of CEOs and department managers from employers' organizations reported access to a lot or moderate amounts of quantitative data for operational decision-making compared to 63 per cent of CEOs and department managers from chambers of commerce. Additionally, only 52 per cent of board members and CEOs from employers' organizations reported access to a lot or moderate amounts of information for strategic decision-making, compared to 71 per cent of board members and CEOs from chambers of commerce. Survey results by EBMO region and size did not vary significantly.

► **Figure 2. Availability of quantitative data to support decision-making at different organization levels, global results**

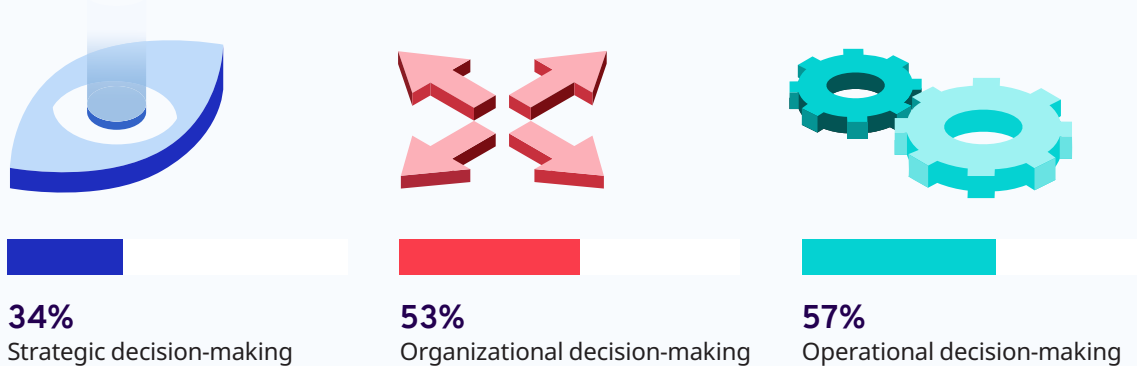


**Note:** Board members and CEOs were asked about data for strategic decision-making; board members, CEOs and department managers were asked about data for organizational decision-making; CEOs and department managers were asked about data for operational decision-making.

The discrepancy between perceptions of general data availability and the availability of quantitative data is not unexpected. The distinction can, however, provide insight into EBMO data needs. For example, the assessments shown in Figure 1 are inconsistent with anecdotal reports where many EBMOs express the

need for more information on topics such as government policies, labour market indicators, economic indicators and forecasts.<sup>9</sup> The likely reality is that they specifically seek these data in quantitative forms amenable to easy aggregation, summarization and comparison.

► **Figure 3. EMBOs indicating available data was sufficiently complete to support decision-making**



<sup>9</sup> Written communication from ILO Employers Specialists.

## ► Data for strategic decisions

At the strategic level, summarized information about organizational performance and activities combined with externally sourced information can be used to guide EBMO strategy. These data can highlight new opportunities to create value for members, inform leaders’ deliberations on which initiatives to pursue, and guide the development of relevant performance targets by each department.

**EBMO data-driven strategic decision-making hindered by data quality.** Despite having access to data on different topics, as shown in Figure 1, EBMO leaders perceive data quality limitations in terms of accessibility, accuracy and fitness for strategic decision-making tasks (see Figure 3).

**Nearly half (47 per cent) lack confidence in the accuracy of the data that they do have.**

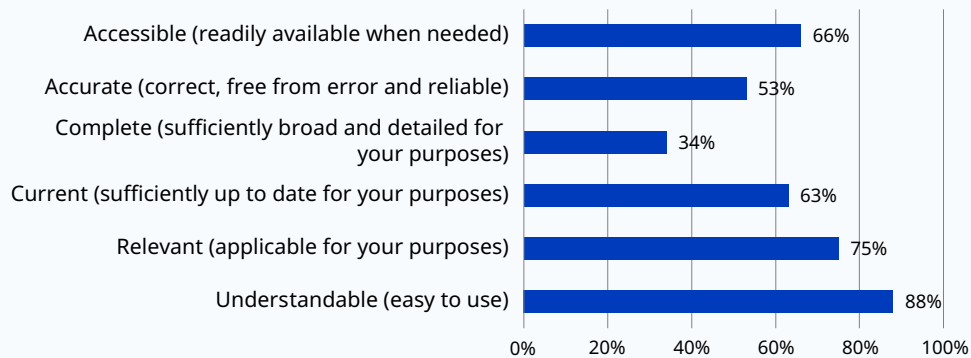
►► If we have data, let’s look at data. If all we have are opinions, let’s go with mine.

► Jim Barksdale, former Netscape CEO

Most board members and CEOs surveyed indicated that data to support strategic decision-making is understandable (88 per cent) and relevant to their task (75 per cent). However, only 66 per cent of EBMO leaders generally agreed that data is readily available when needed, a number consistent with their assessment of the availability of quantitative data, shown in Figure 2. Moreover, nearly half (47 per cent) lacked confidence in the accuracy of the data that they did have. They also noted quality limitations in the context of strategic decision-making: over a third (37 per cent) believed their data were not current and two-thirds (66 per cent) reported their data were incomplete.<sup>10</sup>

Given such perceptions of data shortcomings, EBMOs do not consistently use robust data at the strategic level. Instead, many CEOs and board members rely on their past experiences to inform their decisions.

►Figure 4. Characteristics of data to support strategic decision-making, global results



Note: Board members and CEOs were asked this question.

10 Due to the relatively few responses, this question was not analysed by EBMO region, size and type.

Only a quarter of CEOs and board members reported using economic trends or indicators, and consulting with government, regular and affiliate members or staff to support their decision-making.

**EBMO strategic decision-making depends heavily on personal experiences of board members.** Interviews with CEOs and board members revealed that these individuals viewed their historical work experience as strengths in their respective roles, and were likely to lean on these past experiences to address new situations. Survey responses from CEOs and board members confirmed this insight. Most CEOs and board members reported consulting board members (66 per cent) or relying on their own experience (53 per cent) to make decisions. In most cases, board members were active or retired senior managers of companies who drew on their industry knowledge and expertise to provide strategic advice to the CEO in periodic meetings.<sup>11</sup>

Thirty-one per cent of CEOs and board members reported considering other factors to support their decision-making, including alignment with an organizational strategic plan and objectives for decision-making. About a quarter of CEOs and board members reported using economic trends or indicators, and consulting with government, regular and affiliate members or staff.

**EBMO strategic reliance on experience and intuition insufficient in a fast-changing environment.** Although only 3 per cent of CEOs and board members reported using their intuition for decision-making, it is hard to isolate experience from intuition and vice versa. What we call intuition is the sense of recognition in a new situation, something that is derived from extensive exposure to similar situations in the past. In relying on intuition or experience in new situations, we are alert to and seek out familiar features so that we can match the current situation with our past experience and justify our response. The challenge presented by this approach is that we can overlook those features that are novel to us and overestimate the “similarity” with our past experiences. In a rapidly evolving environment, emerging situations may come to have less and less in common with the past, so reliance on historical pattern-matching to guide decisions may become less and less effective over time.

►► Data, experience and intuition should work together and support each other in decision-making.

► **Deborah France Massin**, Director, Bureau for Employers’ Activities, International Labour Organization (ILO).

<sup>11</sup> Due to the relatively few responses, this question was not analysed by EBMO region, size and type.



## ► Data for organizational and managerial decisions

At the management level, summary information about operations-level tasks and activities can be used to make resource allocation decisions, or to monitor, assess and, if necessary, adjust the performance of each EBMO function or service department. For example, membership managers might calculate summary metrics to track membership trends by organization type and intervene to minimize or stop attrition in particular member subgroups. Training managers might review the effectiveness of different course delivery methods (in-person, virtual) for different audience groups to plan their future course offerings. Managers responsible for advisory services might analyse the amount of time they spend in providing advice on different issues, and use the results to identify broad-based education needs that might be met more effectively with a regular training programme.

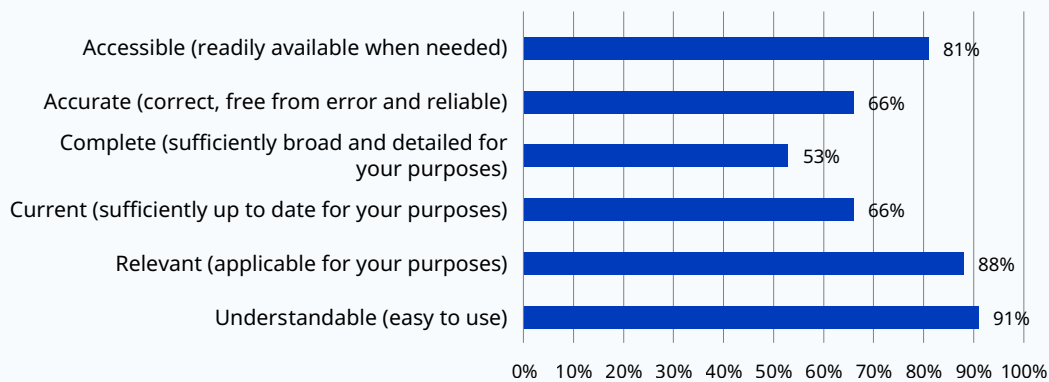
At this level, managers can also use data about how their departments operate to identify and respond to organizational needs such as additional skills training, recruitment for positions, or re-organization of roles and responsibilities.

**EBMO data-driven organizational decision-making hindered by data accuracy, currency and completeness.** Despite these potential opportunities for data-driven managerial

and organizational improvements, EBMO survey responses from CEOs and department managers pointed to limitations in the quality of data available for organizational decision-making (see Figure 4). The vast majority agreed that data to support organizational decision-making was understandable (91 per cent) and relevant to their work (88 per cent), suggesting they were well positioned to integrate more data into how they managed their departments and organizations.<sup>12</sup> However, only 81 per cent confirmed the data they needed was accessible, which was consistent with their views about the availability of quantitative data. Further, only two thirds of CEOs and managers believed their data were accurate and current, while about half of this group indicated concern about the completeness of data for organizational decision-making.

**Half of CEOs and managers indicated concern about the completeness of data for organizational decision-making.**

► Figure 5. Characteristics of data to support organizational decision-making, global results



Note: Board members, CEOs and department managers were asked this question.

<sup>12</sup> Due to the relatively few responses, this question was not analysed by EBMO region, size and type.



## ► Data for operational decisions

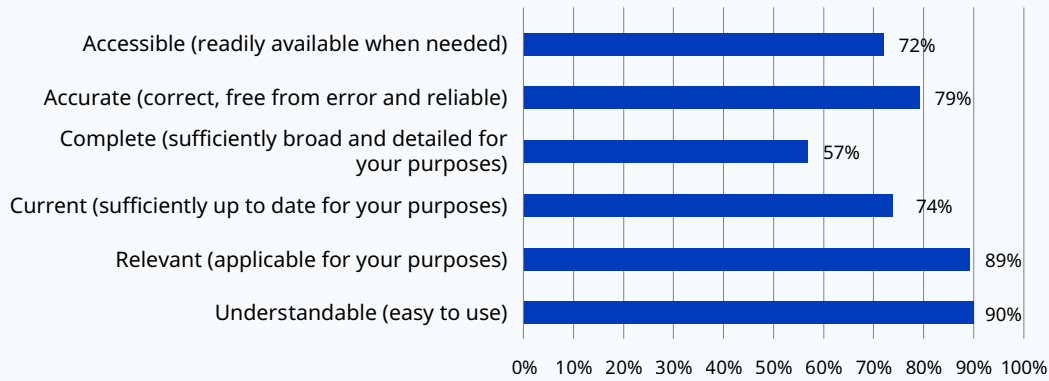
Operationally, data can be used as input to perform routine tasks and activities more efficiently and accurately. For example, staff in the membership department use data to correctly update member records, respond quickly and accurately to member queries, and disseminate relevant information to member subgroups in timely fashion. Staff in training departments use data, among other tasks, to accurately update course materials, maintain current schedules of course availability, and calculate the profitability of different courses. Membership and research staff use data to better understand member attitudes, needs, and experiences, discern aggregate positions on issues, and communicate findings to the CEO, board and other interested audiences in a timely way.

**EBMO data-driven operational decision-making within reach.** Survey responses suggested that EBMOs were relatively well

positioned with quality data to operate in a data-driven or evidence-based way. Ninety per cent of CEOs, department managers and staff confirmed that they had data that was easy to understand and use to support operational decision-making. A large share of CEOs, department managers and other staff also reported that they had data that were relevant (89 per cent), accurate (79 per cent), and current (74 per cent). A smaller percentage (72 per cent) agreed that data were readily available when needed, which concurred with the percentage of responses indicating acceptable amounts of quantitative data (see Figure 2). Similarly with the results regarding data for strategic and organizational decision-making, the completeness of data was a concern; only 57 per cent of CEOs, managers and staff indicated they had sufficiently broad and detailed data for operational decision-making.<sup>13</sup>

<sup>13</sup> Only half of CEOs, department managers and staff from chambers of commerce reported that data for operational decision-making was accessible, compared to three quarters of CEOs, department managers and staff from employers' organizations. Survey responses by EBMO region and size did not show major differences.

►Figure 6. Characteristics of data to support operational decision-making, global results



Note: CEOs, department managers and staff were asked this question.

**Breadth and detail of available data a concern at all EBMO levels.** The survey results show that EBMO staff at all levels generally felt that the data that they did have was easy to use and applicable to what they needed to do. At the same time, survey feedback shows that EBMO representatives at all levels felt they lacked enough of the right data for what they needed to accomplish. Data completeness – having data sufficiently broad and detailed for effective application was perceived as the weakest quality dimension of EBMO data. Of the various respondents asked about data for strategic, organizational or operational decision-making, only 34 per cent, 53 per cent and 57 per cent, respectively, indicated the available data was sufficiently complete to support that purpose.

Almost half of CEOs, department managers and board members recognized that there is important data to advance members’ interests that they would like to use but did not have as yet. Their survey responses highlighted the

need for information about members, including their needs and expectations, engagement and company information (including number of employees, turnover rates, status of operation). They also stressed the need for accurate, reliable, updated and systematized data to support EBMO operations. An EBMO board member explained how having procedures to collect certain types of data would allow their EBMO to conduct evidence-based advocacy regarding the cost of doing business:

This is one key advocacy area where it is complicated to really calculate what is our cost of doing business. And then obviously we [would] need to build a database over a number of years ... so that we are able to see that trend and have that data to really support it and push for it. ... Ideally, we’d like to get to a stage where we are able to lobby for a position on the cost of doing business. But that needs to be informed by adequate data.

Data completeness – having data sufficiently broad and detailed for effective application – is perceived as the weakest quality dimension of EBMO data.

While EBMO staff felt they lacked enough of the right data, findings about the types of data used in the business of EBMOs offered a more nuanced insight. In fact, EBMOs both overlooked certain sources of data and undervalued certain types of data; as a result, these data were not used in decision-making. In addition, EBMOs shared data across departments inconsistently. Consequently, insights from combinations of data were limited. In short, EBMOs had opportunities to access and use existing data more effectively.



# EBMO sources and types of data

---

This section documents interview and survey findings regarding the sources and types of data collected, generated and used in EBMOs. As membership associations, EBMOs exist to serve their members. Unsurprisingly, EBMO representatives categorize their work – and categorize the data used in that work – primarily in relationship to their members. Because of this member-centric focus, EBMOs place most value and attention on data about members, member needs and member services. Details about EBMOs' own operations are often overlooked as sources of valuable data, and EBMOs tend to miss opportunities to learn from the data related to their own practices and performance.

## ► Membership data

---

EBMOs work with member data at the individual and institutional levels. At the institutional level, member data refers to data identifying each member company or institution, and includes such contact information as addresses and telephone numbers, demographic information such as sector, industry, and size, and membership information such as status, tenure, and current organization representatives. Separately, EBMOs track contact information for current and past representatives of each member institution.

Member contact data consist largely of structured content (including numbers, categories and text strings) and do not change frequently. The structured, stable nature of membership contact information means that these data can be relatively easily maintained with high quality (accuracy, currency and completeness).

Survey results revealed that EBMOs recognized the following reasons (purposes) for maintaining membership data:

- to communicate important information or updates to members (79 per cent);
- to maintain members' contact information records (54 per cent); and
- to monitor membership indicators (33 per cent).

Summary metrics of membership data can provide an important view of EBMO size and influence. It is particularly important to accurately assess representativeness by measuring the size (employment numbers) and percentages of both direct and indirect members in the national formal sector. Peak associations depend on the transparent exchange of accurate member data from affiliated EBMOs, which in turn depends on good relationships and trust between these organizations.



Survey responses<sup>14</sup> revealed that the three most commonly tracked membership indicators were the following:

- total number of direct members (97 per cent);
- percentage of members paying membership fees (86 per cent); and
- membership retention rate (81 per cent).

Over half of respondents reported tracking additional membership indicators, as follows:

- membership recruitment rate (65 per cent);
- number of sectorial and territorial organizations affiliated to their EBMOs (65 per cent);
- percentage of new members that renew their membership (59 per cent);
- total number of indirect members (59 per cent);

- percentage of members' employment in the national formal economy (54 per cent); and
- percentage of members in relation to total number of enterprises in the country (54 per cent).

Through their members, EBMOs have a unique opportunity to collect specific type of employment and business data not readily available even to the national statistical bodies. By collecting and analyzing relevant data, EBMOs could become market leaders in sourcing certain business data and carve out an indispensable role for themselves.

<sup>14</sup> This question was asked of the 33 per cent of respondents who reported monitoring membership indicators.

## ► Data on member needs and interests

---

Member's needs and interests should guide EBMO services and activities, so these data are considered separately from member identification data. They are also considered separately from EBMO responses to these needs in the form of advocacy, training and research activities.

EBMO members may need broad information or more specific training about a potentially wide range of topics relevant to businesses and employers. Such topics include, among others, labour laws, tax laws, new business registration, business certification, changes in regulations, benchmarking on issues such as wages and benefits, access to markets, access to finance, business environment and outlook, and national competitiveness.<sup>15</sup>

Most surveyed EBMOs reported collecting data to gather members' feedback on EBMO services (76 per cent) and to assess member needs (76 per cent). These data on member needs were analysed with a view to conducting further research, leading advocacy efforts, providing topical webinars and/or offering more targeted training events. For example, one training officer itemized a lengthy list of potential training areas based on members' articulation of needs:

We were able to track the type of training they wanted, such as leadership, more on employment relations issues as well as human resource or HR issues, on occupational safety and health (OSH), occupational safety training. [They also needed guidance on] customer service and project management. As we go through the assessment, we also look at issues that arise in [country] that need attention, such as workplace sexual harassment or domestic violence or mental health issues. We also [share information on] the impact

of COVID-19 in the workplace, something we started to incorporate this year. We also include leadership coaching as part of some of the trainings that we provide.

During the COVID-19 pandemic, EBMOs have been able to assess and respond to their members' needs for information about rapidly changing employment and business regulations, because of their existing position as an information broker between employers, trade unions and government.<sup>16</sup> They were able to use this position to respond quickly with topical offerings during the pandemic; for example, organizing webinars on the need for digital transformation, how to move a business online, or on employee health and safety obligations.

Some data about member needs are structured, such as quantitative or categorical responses to specific queries or survey items, but these data may also take the form of unstructured text or conversation. For example, conversations between an EBMO CEO or president and member representatives often yield valuable reference points on member organizations' needs and concerns. Interviews indicated, however, that EBMOs did not necessarily think of these conversations as "data" to be recorded, processed and systematically managed.

In membership associations, it is not uncommon that some staff members develop strong rapport with different types of clients or member segments. When these relationships are viewed as sources of valuable data, all staff should feel empowered to play to this strength and work together across departments rather than consider member relationships as the sole responsibility of senior leaders or the membership department. In these relationships, EBMOs have an opportunity to adopt perspectives on member needs that the secretariat would otherwise struggle to acquire.

<sup>15</sup> ILO, *Services by Employers' Organization: A Strategic Approach to Service Development* (Geneva, International Labour Office, 2012).

<sup>16</sup> ILO, *A Global Survey of Employer and Business Membership Organizations: Inside Impacts and Responses to COVID-19* (Geneva, International Labour Office, 2020).

## ► Advocacy data

---

An EBMO's most distinctive function is representation and advocacy on behalf of their members vis-à-vis policymakers. Strong performance in the field of advocacy leads directly to increased membership.<sup>17</sup> EBMOs advocate on behalf of all employers in their jurisdiction, regionally and internationally, but their positions are informed by their members. Most survey respondents (79 per cent) reported that their EBMOs collected data to advance policy positions as part of advocacy efforts.

Advocacy data includes information about issues of employer interest or concern, as well as specific positions on policy matters. Some member feedback data are collected informally through conversation, but EBMOs often gather data on specific issues more systematically through consultation workshops and focused polls or surveys. In addition, advocacy involves use of third-party data such as information about government regulations, industry statistics or economic trends.

Records of the actions of EBMOs in their advocacy efforts, in the form of correspondence, presentations, reports and meetings, and outcomes achieved provide important data about an EBMO's advocacy operations. However, interviews suggested that most EBMOs did not appear to systematically record actions or efforts

taken over the course of advocacy work or in providing support for individual members. As one EBMO leader noted regarding this issue:

That [is] one of the areas that I've tried to get us to capture and it's a little bit challenging. I guess with the nature of advocacy, a lot of the work is intangible so you don't see any outcomes... I've been trying to get a secretary to capture the work we put in. ... [In my industry], one of the things that is really important for us is documentation. We have lots of spreadsheets that we use to capture communications, meetings, things like that... And I've been trying to, I guess, transfer some of that thinking to the [EBMO].

Data associated with advocacy operations could include records of times and durations of calls or meetings, who was involved, what topics or concerns were discussed, and whether any actions were agreed upon. Analysis of advocacy operations data could highlight, for example, the costs of providing member-specific advice or support, or the characteristics of advocacy approaches associated with successful policy interventions. Such insights could inform EBMO organization resourcing decisions and choices among strategic initiatives.

## ► Communications data

---

A central EBMO responsibility is to provide members with accurate and timely information about issues that are important to them. While disseminating such information is a regular EBMO practice, effective responses to COVID-19 required EBMOs to invest more time

and resources in this activity to ensure their members are informed about their governments' various COVID-19 pandemic responses, including industry or sector closures, changes to employment arrangements, and opportunities for financial aid.<sup>18</sup>

<sup>17</sup> ILO, *Advocacy: Maximizing the Impact of the Voice of Business*. Guide 3 in The Effective Employers' Organization training package, a series of "hands-on" guides to building and managing effective employers' organizations (Geneva, International Labour Office, 2005).

<sup>18</sup> ILO, *A Global Survey* (2020).



Communications data include both informal content exchanged with members through written or oral means, and more formal content disseminated broadly in the form of newsletters, website updates, social media posts, annual reports, topic guides or other reports. Typically, formal communications content is developed from data collected and processed by the EBMO in its other operations of advocacy, research and training.

Increasingly, EBMOs handle communication with their members through digital channels such as institutional websites and social media sites. One EBMO board member commented on the social media data associated with EBMO digital communications:

The current data collection that we do is more on social media. A lot of it concerns our posts... how many shares, how many likes, what is our reach. ... [We collect] very high-level [data] on which stories get the most shares and likes and reactions from people. That gives us some indication of what the public is interested in.

Comments like these suggest that EBMO staff recognize audience engagement data being generated in the course of communications activity. In particular, digital communication

channels – already in use by most EBMOs – offer powerful and largely automated means to monitor a variety of summary measures of audience engagement. Measures such as number of visits over time, average views per visitor, distribution of different visitor types, and average views per content item (post) can provide EBMOs with valuable insights into the reach and impact of their communications efforts. Member/customer relationship management systems (CRMs) as well as email-based relationship management tools such as Constant Contact, ConvertKit, and Mailchimp can also offer automated analysis of the uptake of and responses to various mailings. Interviews suggest, however, that many EBMOs still lack the capacity to effectively take advantage of these automated analytics resources.

While data about audience engagement are recognized but underused, EBMO communication operations tend to be completely overlooked as sources of “data”. Nevertheless, records of what content was disseminated, in what form, through what medium, to whom and when, and its outcome are important for assessing the effectiveness and efficiency of an EBMO’s communications department. Data about both communications efforts and engagement can be usefully analysed to help EBMOs use their limited human and financial resources more effectively.

Measures such as number of visits over time, average views per visitor, distribution of different visitor types, and average views per content item (post) can provide EBMOs with valuable insight into the reach and impact of their communications efforts.

## ► Training data

A key service of most EBMOs is the facilitation or direct provision of trainings for members and non-members. EBMO training can span both technical and management training, and address such issues as employment relations, taxation and business legislation, enterprise management (including HR, financial and communication), and export and import practices.

EBMOs organize regular training sessions on standard topics as well as occasional training sessions on special topics. An interview with an EBMO training staff member highlighted how that EBMO's practice translated member needs into training initiatives:

By the end of every year I prepare the training needs analysis and then from that I prepare training plans to the extent of getting trainers. [We] identify the needs that are requested by our members. [Then] I work together with a trainer to develop in their blurb as well as the advertisement [for the course and] I send it out to members.

Data about these training activities include such information about courses as topic, description, past ratings and group size, as well as such information about leaders (trainers, presenters)

as name, contacts, expertise and availability. Data also include such financial information about the training as course costs, fees, estimated income and minimum number of participants required to cover costs. In addition, training data include information about sessions (an example of a course) including dates and times, the current trainer, attendance numbers and participants (including members and non-members) in a specific session, including their contact details, as well as subsequent reviews of the training experience.

EBMOs track training operations data to some extent, but do not always consider this to be "data". Nevertheless, records of course offerings, lengths, schedules, bookings, participants served, income generated, evaluation of results and impact and more are potentially useful in assessing the effectiveness and efficiency of an EBMO's training department. For instance, EBMOs could analyse training data to understand whether courses of certain length or topic prompt training participants to become members of their EBMOs. If data indicates declining participation, it could either mean that quality is inadequate, there is lack of interest, or there is a more competitive provider.



## ► Research data

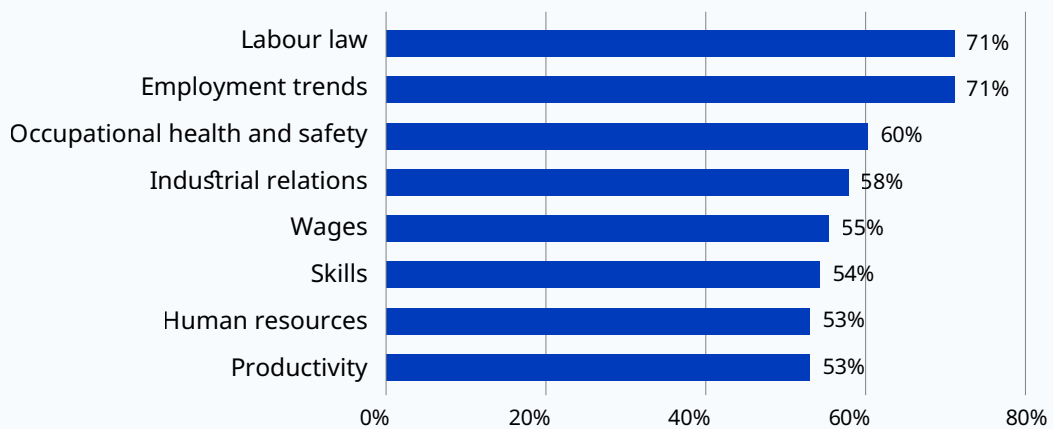
In their capacity as information brokers, EBMOs collect and analyse original data on a variety of issues and topics relevant to their members. Research initiatives are most often undertaken independently, but from time to time they are also conducted in cooperation with the ILO, development partners or other stakeholders. About 74 per cent of survey respondents said their EBMOs collected data to conduct research on business topics. Survey respondents indicated the topics on which their EBMOs conduct research, the most common of which, as reported by over half of respondents, included labour law, labour market indicators, OSH, skills, HR trends, and productivity. In addition, 54 per cent of respondents said their EBMO gathered data to analyse labour market indicators.

Research data comprise information about both the plan for research and its outcome. For example, EBMO research often takes the form of a survey, so the research data corresponding to a survey effort should include a record of the survey itself and the sets of responses to specific

questions, as well as any subsequent analysis or summarization of those responses. EBMOs often collect or generate research data on a particular topic, for example wage increases, at regular or periodic intervals. To be able to use these related datasets for comparative purposes, EBMOs also need to record the “metadata” (including information regarding when, with whom and on what subject) about a research-focused data collection effort. Interviews suggested that this kind of metadata is often recorded largely in the heads of employees, and thus risks being lost from an EBMO’s organizational memory.

The frequency of data collection for research purposes varied across survey respondents. Among all respondents, 26 per cent reported that their EBMOs collected data to conduct research on business topics according to member needs, and 24 per cent reported they did so on a quarterly basis. While 30 per cent of respondents reported collecting data to analyse labour market indicators every year, 22 per cent of respondents reported doing so every quarter.

► Figure 7. Most common research topics, global results



Note: This question was asked of the 74 per cent of respondents who indicated their EBMOs conduct research.

## ► Operations and organizational performance data

As people are living longer and working longer, EBMOs, like other organizations, face the ongoing challenges and opportunities of a multigenerational workforce comprising Baby Boomers, Generation X, Millennials and, soon, Generation Z. At the same time, careers have become more dynamic and complex as the rapid pace of technology change has forced many workers to reinvent themselves multiple times during their careers.<sup>19</sup> As a result, and despite the belief that there are clear generational differences in workers' professional needs and expectations, workers of all ages share fundamental concerns about access to meaningful work, good leaders, and opportunities for professional growth.<sup>20</sup> Accordingly, EBMOs must develop new management models and strategies that play to the strengths of a diverse workforce that is experienced, open-minded and increasingly more technologically adept. However, these new approaches will also enable EBMOs to benefit from broader and more effective use of data-generating technology and communication methods.

As noted in previous sections, interviews revealed that many EBMOs did not yet systematically collect and analyse data about the internal operations of secretariat departments. But the interviews were with EBMOs with relatively small secretariats, and these might have been able to successfully monitor operations and organizational performance on a less formal basis than would have been possible with EBMOs with medium to large secretariats. Nevertheless, the survey responses from EBMOs of different sizes and type also pointed to relatively limited attention to data about EBMO operations and organizational performance.

Just over half the survey respondents reported collecting data for two operational purposes:

- to produce organizations' annual reports, financial and/or technical (58 per cent); and
- to measure the impact or success of a particular initiative/project (56 per cent).

The slight majority of respondents from large EBMOs reported collecting data to produce annual reports (64 per cent), whereas smaller proportions of respondents from small (55 per cent) and medium (52 per cent) EBMOs reported collecting data to produce annual reports. Large EBMOs were also more likely to measure the impact of a particular initiative/project (70 per cent). Only 60 per cent of respondents from medium EBMOs, and 40 per cent of respondents from small EBMOs, reported collecting data to measure the impact of an initiative/project.

On average, different shares of survey respondents indicated collecting data for two organizational purposes:

- to monitor organization's activities and performance (63 per cent); and
- to manage organizational structure and human resources (32 per cent).

The share of respondents that reported collecting data for organizational purposes varied among respondents from small, medium and large EBMOs. Respondents from medium and large EBMOs (70 per cent and 68 per cent, respectively) were more likely to report collecting data to monitor organizational activities and performance, compared to respondents from small EBMOs. Similarly, almost half of respondents from medium EBMOs reported collecting data to manage organizational structure and human resources compared to a third of respondents from large EBMOs and under a quarter of respondents from small EBMOs.

<sup>19</sup> Erica Volini et al., *The Postgenerational Workforce: From Millennials to Perennials* (New York, Deloitte Insights, 2020).

<sup>20</sup> Lindsey Pollak, *The Remix: How to Lead and Succeed in the Multigenerational Workplace* (New York: Harper Business, 2019).

# EBMO data management practices

---

Data are a resource that can prove either an asset or a liability. Just like financial and human resources, data must be managed efficiently, ethically and effectively toward EBMO missions.<sup>21</sup> The unique characteristics of digital data mean that they can be stored, shared, analysed, and reused faster and on a larger scale than ever before. EBMOs are responsible to develop effective practices to securely manage but also benefit from the greater variety and faster evolution of these digital data sources.

EBMO data management practices are examined from a data lifecycle perspective, which focuses attention on how different EBMO roles and departments interact with data over their lifecycle.<sup>22</sup> Although data management needs differ across types of data, common activities of data collection, analysis, storage, dissemination, and retention or disposal are evident across different EBMO operations.

## ► Data collection

---

Data collection refers to EBMO activities of gathering and maintaining information either used in or generated by EBMO work.

**EBMOs collect data actively and passively.** EBMOs routinely collect or generate primary data about entities such as members, individuals, services, and issues.<sup>23</sup> Most survey respondents (74 per cent) reported their EBMOs collected data to conduct research on business topics, collected member feedback on services, and collected details of new members and/or updated details of current members. EBMOs also gathered secondary data generated by external sources, including economic, labour or regulatory information and government statistics. EBMOs

also generated valuable primary data passively (for example communications data in the form of website or social media feedback); to this point, however, the use of such data for further analysis and decision-making appeared limited.

**EBMO data collection varies in frequency across different types of data.** Member contact data are relatively stable and are typically reviewed and updated annually. Data about member training needs, advocacy requests or other interests, on the other hand, might be collected at different times and frequencies, when external events suggest those needs or interests might have changed (see Table 2).

<sup>21</sup> See Data Orchard (Staunton-on-Wye, UK) for further guidance, especially for non-profits, on managing and using data effectively. Available at: <https://www.dataorchard.org.uk/>.

<sup>22</sup> See Digital Impact for additional information in digital data lifecycle considerations. Available at: <https://digitalimpact.io/toolkit/digital-data/>.

<sup>23</sup> Data collection efforts by EBMOs can target both member and non-members.

► Table 2. Data collection frequencies, global results

	Weekly or more frequently (%)	Monthly (%)	Quarterly (%)	Yearly (%)	Longer than a year (%)	Based on members needs (%)	Based on reporting deadlines (%)
<b>MEMBERSHIP</b>							
Collect and/or update member details	27	19	8	31	4	12	0
Monitor membership indicators	14	29	10	29	5	5	10
Communicate information or updates	61	17	7	0	2	7	5
<b>MEMBER NEEDS AND INTERESTS</b>							
Collect member feedback on services	13	15	8	33	8	8	18
Assess member needs	11	16	16	16	8	26	8
<b>ADVOCACY</b>							
Develop and advance policy positions	23	15	18	8	3	28	8
<b>RESEARCH</b>							
Conduct research on business topics	11	13	24	13	5	26	8
Analyse labour market indicators	11	19	22	30	7	4	7
<b>ORGANIZATIONAL</b>							
Manage EBMO structure and human resources	18	12	6	35	12	6	12
Monitor EBMO activities and performance	16	16	16	34	0	6	13
<b>OPERATIONAL</b>							
Measure the impact or success of a particular initiative or project	12	15	6	9	6	12	39
Produce EBMO annual reports (financial and technical)	3	7	3	77	0	0	10

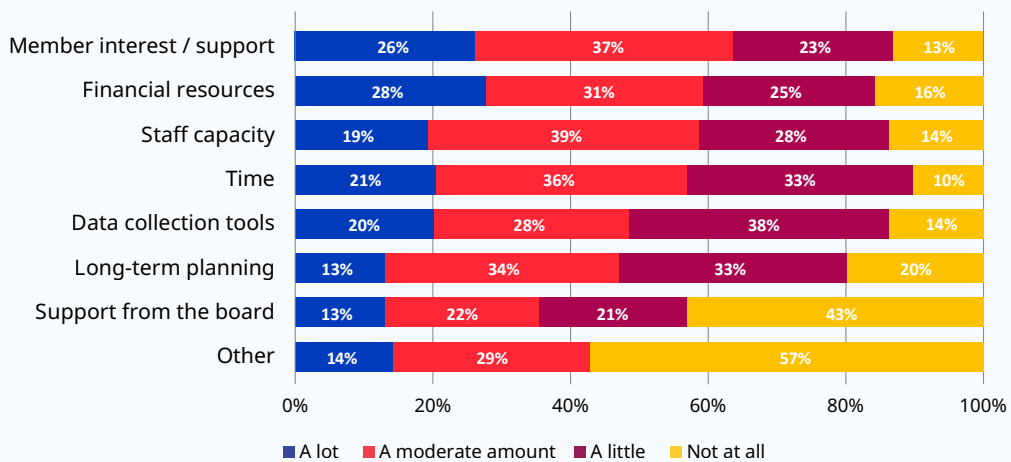
**EBMOs increasingly collect data in digital form.** Interviews revealed that EBMOs retain paper-based approaches for reaching member subgroups such as microenterprises and informal enterprises. However, the COVID-19 pandemic has forced many members to further digitalize operations, making it easier for EBMOs to collect more digital data. Digital data can be readily combined with other data to yield

further information and/or shared with other parties. Because digital data can be so readily reused, or easily combined with other data for additional purposes, it is important to effectively track and manage its metadata (for example information about when and from whom data is collected, and for what original purpose). Many EBMOs, however, do not explicitly recognize the importance of tracking the origins of a set of data.

**EBMOs use several channels to collect survey data.**<sup>24</sup> Google forms and Survey Monkey were reportedly the most common channels to distribute surveys (60 per cent and 44 per cent of respondents, respectively). Their popularity was explained by the fact they were free or low cost and relatively easy to use. Almost 30 per cent of respondents said their EBMOs distribute surveys in hard copy. Less commonly used ways to distribute surveys included paid services, allowing for a greater number of respondents and providing more advanced analytical features such as Qualtrics (16 per cent) and Typeform (10 per cent).<sup>25</sup>

**EBMOs most common data collection concerns include limited participant response rates, staff capacity, financial resources, and time.** Over half the survey respondents reported that data collection at their EBMOs is limited to a great or moderate extent by participant response rates (63 per cent), financial resources (59 per cent), staff capacity (58 per cent) and time constraints (57 per cent). About half of respondents said that data collection is limited by lack of data collection tools or long-term planning. By comparison, only a third of respondents said that lack of support from the board limits data collection to a great or moderate extent (see Figure 7).

► **Figure 8. Data collection limitations, global results (%)**



Note: All survey respondents were asked this question.

24 This question was asked of the 94 per cent of respondents who reported their EBMOs collect data to conduct research on business topics, collect member feedback on services, and collect details of new members and/or update details of current members.

25 Eighty-three per cent of survey respondents in Africa reported that their EBMOs used Google forms to collect data, compared to lesser shares of respondents in Europe and Central Asia (47 per cent), Asia and the Pacific (57 per cent) and Americas (62 per cent). Additionally, over half of respondents in Europe and Central Asia reported using Qualtrics to collect data, compared to no respondents in Africa and a lesser share of respondents in the Americas (3 per cent) and Asia and the Pacific (18 per cent). Survey results by EBMO size and type did not differ greatly.

Difficulties in collecting survey responses was a common interview theme. Even when member organizations expressed interest in or support for EBMO initiatives on a topic, their active involvement – for example, in responding to a survey – was given low priority. The member perspective on EBMO data collection was reflected in this comment by a board member:

Our challenge in terms of data collection is getting the members to fill in [the survey] and [do it] accurately. One of the things I do find is that during the recent [pandemic period], there's been a surge of people wanting so much information to be filled in. And to be honest... we've got to keep up with our own work, you know, as opposed to filling in too many surveys for other stakeholders.

Another data collection challenge concerns the nature of the data that EBMOs might seek. For example, benchmark surveys depend on obtaining internal, often confidential, company data, and require the involvement of senior member representatives who are typically least

available to fill in surveys. An EBMO staff member explained the data collection challenges:

Over the years, we have a dwindling number of respondents to our survey, because the data that we are trying to obtain are confidential. These are salaries. These are benefits. These are agreements made between management and labour. We understand that, especially now with the data privacy law. It's really very difficult to obtain this these types of data from our members.

**Data collection limitations vary depending on EBMO size.** Lack of financial resources is a common limitation among small EBMOs (58 per cent), limited staff capacity is prevalent among medium EBMOs (69 per cent), and limited participant response rates is widespread among large EBMOs (69 per cent).

Survey respondents from chambers of commerce and employers' organizations cited limited participant response rates most frequently as a data collection limitation (75 per cent and 65 per cent, respectively).





## ► Data analysis

---

Data analysis refers to any statistical calculations, summarization, segmentation, or further processing conducted on original or secondary data collected by an EBMO to yield new insights and information.

**EBMOs focus most explicitly on analysis conducted as part of their research operations.** For example, analysis of a survey of members about wage increases could yield information about the distributions of proposed wage increases for different categories of employee.

**EBMOs rarely analyse data about their own internal operations, which could yield new information for working more efficiently or effectively.**

---

Analysis of data collected in support of advocacy efforts is often limited to descriptive statistics and information on response distributions.

EBMOs do analyse some membership data, for example tracking trends in different member types or industries, or such training data as summarizing course attendance over a time period to yield information about interest levels. These analyses can be used to guide changes in EBMO services. Most survey respondents who reported collecting member feedback on EBMO services, for instance, also offered targeted services to members (for example according to sector or size). Interestingly, interviews suggested that EBMOs typically did not consider these efforts as “analysis”, and missed opportunities to learn from more systematic examination of demand for and usage of their various services. EBMOs also rarely analysed data about their own internal operations, which could yield new information for working more efficiently or effectively. About 8 out of 10 respondents who collected member feedback on EBMO services reported offering targeted services to members.



**Most EBMOs rely on spreadsheets for their analytic capabilities.** When asked about applications used to analyse survey results, the vast majority of survey respondents (88 per cent) reported using Excel. Forty-two per cent of respondents said that data collection software such as Survey Monkey or Qualtrics produced the bulk of the analysis. By comparison, lesser shares of respondents reported using statistical software such as SPSS (13 per cent) or Stata (4 per cent). Spreadsheets are sufficient for conducting basic descriptive analyses of such individual datasets as the responses from a single survey. However, spreadsheets do not easily facilitate integration of multiple datasets for comparative or trend analyses, nor do they easily accommodate more predictive analyses. Spreadsheets are also inadequate for EBMO goals of storing data securely and transparently for the longer term, and thus supporting the development of an institutional knowledge base.

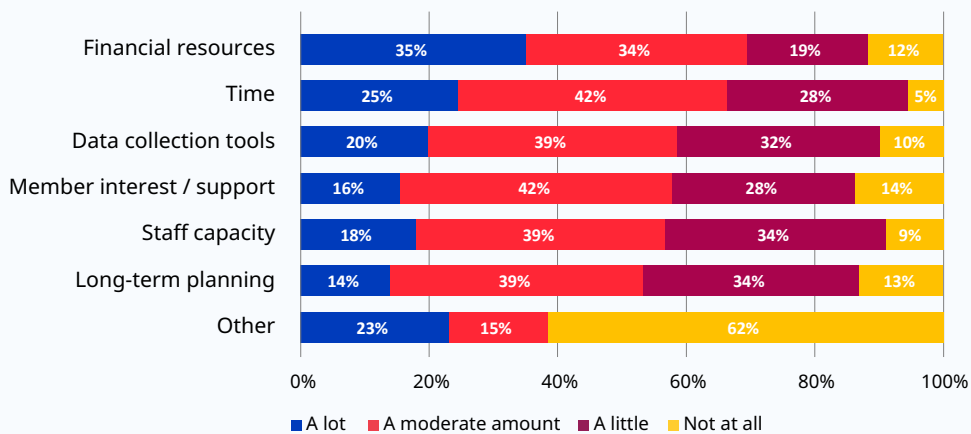
**Excel the most common application used to analyse survey results regardless of EBMO size.** Large EBMOs (50 per cent) were more likely to have data collection software produce the bulk of analysis, compared to small EBMOs (35 per cent) and medium EBMOs (40 per cent). While respondents from small EBMOs did not report any use of statistical software to analyse survey data, 10 per cent of respondents from medium EBMOs and 18 per cent of respondents from

large EBMOs reported using SPSS. Nine per cent of respondents from large EBMOs reported using Stata for data analysis.

**Excel also the most commonly analysis tool regardless of EBMO type and region.** About two thirds of respondents from EBMOs in Europe and Central Asia reported that data collection software produced the bulk of analysis, compared to lower shares of respondents from EBMOs in Africa (45 per cent), Asia and the Pacific (41 per cent) and Latin America and the Caribbean (34 per cent). Over a quarter of respondents from EBMOs in Africa reported using SPSS to analyse data, compared to 14 per cent of respondents from EBMOs in Asia and the Pacific and 3 per cent of respondents from EBMOs in Latin America and the Caribbean. By comparison, no respondents from EBMOs in Europe and Central Asia reported using SPSS to conduct data analysis.

**Financial resources and time most common EBMO limitations in analyzing data.** Almost 70 per cent of board members, CEOs and department managers indicated that data analysis by their EBMOs was limited to a great or moderate extent by financial resources and time (see Figure 8). Other factors limiting data analysis to a great or moderate extent included data collection tools (59 per cent), limited member interest or support through participation (58 per cent), low staff capacity (57 per cent) and a lack of long-term planning (53 per cent).

► Figure 9. Data analysis limitations, global results (%)



Note: Board members, CEOs and department managers were asked this question.

One EBMO staff member highlighted staff capacity as among key challenges that their EBMO faced in managing and using data:

[We face challenges] in terms of the capacity of our secretariat to conduct quantitative research. We are more [familiar with] the qualitative kind of research, and there's a different set of skills that the researcher needs. We are researchers by necessity, but we lack the necessary advanced skills to conduct in-depth research.

**EBMO data analysis limitations vary by organization size and type.** Both small and large EBMOs most frequently (73 per cent and 65 per cent, respectively) cited financial resources as a constraint on data analysis. By contrast, medium EBMOs cited limited participant response rates/member support most often (78 per cent) as a data analysis limitation.

Respondents from employers' organizations reported that lack of time (74 per cent) and limited financial resources (72 per cent) were common constraints to data analysis. By comparison, the most common data analysis limitation among

respondents from chambers of commerce was limited staff capacity (66 per cent). At the regional level, lack of financial resources was the most common limitation in analyzing surveys among respondents from EBMOs in Asia and the Pacific (72 per cent), Latin America and the Caribbean (69 per cent) and Africa (75 per cent). Conversely, lack of time was the most common limitation among EBMOs in Europe and Central Asia (92 per cent).

**EBMOs should take more advantage of powerful and user-friendly analytic tools on the market.** The continued prevalence among EBMOs of using Excel for data analysis points to an opportunity. Many powerful but simple tools supporting data collection, analysis and/or visualization are now available on the market. Qualtrics offers data collection, basic descriptive analyses and more advanced analytics, but many other analytics tools – such as Qlik or Tableau – offer impressive summarization and visualization capabilities that can be produced by non-technical staff. These cloud-based software tools also typically handle important data storage requirements such as data warehousing, which could help EBMOs that lack the skills to configure and analyse more complex datasets effectively.

### ► The move towards data warehousing

A data warehouse is a central repository designed to enable and support business intelligence (BI) activities, especially analytics. Data warehouses are solely intended to perform queries and analysis, and often contain large amounts of historical data. The data are usually derived from a wide range of sources such as application log files and transaction applications.

A data warehouse centralizes and consolidates large amounts of data from multiple sources. Its analytical capabilities allow organizations to derive valuable business insights from their data to improve decision-making. Over time, it builds a historical record that can prove invaluable to data scientists and business analysts. Because of these capabilities, a data warehouse can be considered an organization's "single source of truth".

Data warehouses allow organizations to analyse large amounts of variant data, extracting significant value from it while keeping a historical record of the information. Computer scientist William Inmon, generally considered the father of the data warehouse, defined data warehouses in terms of these four features:

- **Subject-oriented.** They can analyse data about a particular subject or functional area (such as sales).
- **Integrated.** Data warehouses create consistency among different data types from disparate sources.
- **Nonvolatile.** Once data are stored in a data warehouse, they remain stable; they don't change.
- **Time-variant.** Data warehouse analysis looks at change over time.

Source: Oracle, "[What Is a Data Warehouse?](#)" (n.d.).

## ► Data storage and security

In general, EBMOs are careful and systematic in their storage of data, whether in digital or physical form. In interviews, EBMO representatives expressed cognizance of their responsibilities for data security, especially the security and confidentiality of member data. For example, one organization had reached out to an EBMO wanting to contact members to disseminate information on online safety. According to an EBMO board member, however:

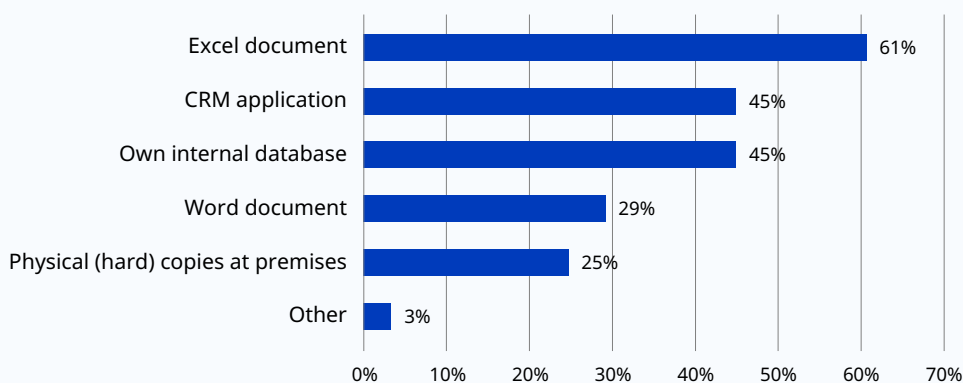
The first [concern of] our secretariat was confidentiality. So, the next thing [our secretariat] said to them was ... send us the information and we will disseminate that information to our members ourselves. [Our secretariat] wouldn't just ... say, "Here's a list of our membership and please send them the information that you want to send them."

Some data used in research, advocacy or training activities may start in paper form, but the final results and reports tend to be digital. Interviews indicated that EBMOs appropriately limit staff access to role-relevant applications, digital databases and physical files.

**Excel most common tool used to store members' details.** Some EBMOs make use of customer relationship management (CRM) software applications for recording and tracking membership data, but most rely on general-purpose software such as Excel spreadsheets. Some even retain original paper records (see Figure 9).

Sixty per cent of survey respondents used Excel to store members details. Less than half of survey respondents reported storing members' details in CRM software or in their own internal database; and about a quarter of respondents reported storing members' details in a Word document or retaining physical paper copies.

►Figure 10. Storage of members' details, global results



Note: This survey question was asked of the 80 per cent of respondents whose EBMOs collect members' details and members' feedback on EBMO services.

**Large EBMOs more likely to apply purpose-specific data storage solutions.** Respondents from large EBMOs (59 per cent) were more likely to report storing membership details in a CRM system, compared to respondents from small or medium EBMOs (19 per cent and 52 per cent, respectively). A greater share of respondents from large EBMOs (51 per cent) also reported using their own database for this purpose, compared to respondents from small EBMOs (37 per cent) and medium EBMOs (43 per cent). An EBMO board member highlighted the value of having a CRM, not just for recording member contact information, but for recording all member interactions in a way that provides a holistic view of the EBMO-member relationship:

I'd like to see certainly a CRM implemented ... that we can use to manage information, because a lot of it is anecdotal. ... We're relying on people. We have good staff that have been there for a number of years and have built up knowledge that is very valuable to the CEO ..., but if one of those people resigned [we would] lose [their knowledge].

**EBMOs rely on multiple data storage locations.** EBMOs typically use local on-site servers as well as cloud-based servers (from Internet Service Providers) to store such digital data as

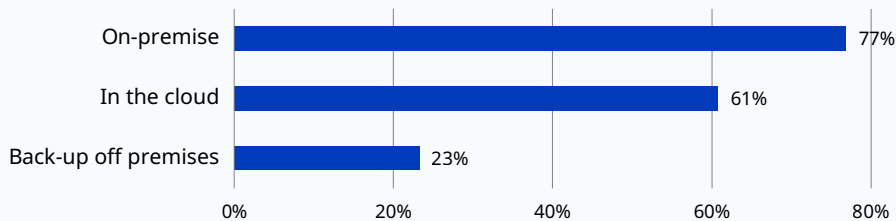
membership records, information about training activity and history, and research activities. Types of original data in physical form (for example, member subscription forms) are secured in locked cabinets on EBMO premises.

Most survey respondents (77 per cent) reported that their EBMOs stored data on their premises and in the cloud (61 per cent). Additionally, only 23 per cent of respondents reported that their EBMOs had data back-up facilities at a separate location.

Key data storage insights by EBMO size reveals the following:

- Respondents from small EBMOs were more likely to report storing information on their premises (83 per cent), compared to respondents from medium or large EBMOs (70 per cent and 74 per cent, respectively).
- A greater share of respondents from medium EBMOs (70 per cent) reported storing information in the cloud, compared to respondents from large or small EBMOs (66 per cent and 50 per cent, respectively).
- A slightly higher share of respondents from large EBMOs (28 per cent) reported having data back-ups off their premises, compared to respondents from small or medium EBMOs (19 per cent and 22 per cent, respectively).

► **Figure 11. Data storage locations, global results**



**Note:** All survey respondents were asked this question.



**On-site data storage remains the most common practice.** Survey responses showed little variation in the share of respondents who reported storing information in the cloud, and keeping information back-ups across respondents from employers' organizations and chambers of commerce, and EBMOs in Asia and the Pacific, Latin America and the Caribbean, Europe and Central Asia and Africa.

Nevertheless, EBMOs should recognize that cloud-based storage has become increasingly accessible, affordable and secure in recent years, and presents an option for simplifying EBMO data management responsibilities. More generally, cloud-based systems also facilitate virtual or remote work, which may become a more routine part of EBMO operations even after COVID-19 pandemic constraints are lifted.

#### ► Data confidentiality and protection

Any information that an EBMO stores, whether it be digital data or hard copy, needs to be properly protected. In an increasing number of jurisdictions, data usage, everything from financial information and payment details to contact information of staff and members, is protected by law. This is to prevent misuse of that data by third parties. But, aside from matters of legal liability and compliance, there are compelling reasons that an EBMO should ensure high standards of data confidentiality and protection.

Individual negligence, intentional misconduct or security breaches resulting from poor data security

could damage trust or confidence in the EBMO or result in negative repercussions for individual staff or members. Because data is a strategic asset, integral to the core value proposition of any EBMO, its protection is also vital to innovation and competitive advantage.

What data needs to be protected?

Data that EBMOs might commonly store include names of staff and members; address and contact information for staff and members; bank account details of staff and members; health information of staff; minutes of meetings; records of member participation in activities and services; and survey or research findings collected to support policy advocacy.

## ► Data access, sharing and dissemination

EBMOs disseminate relevant information among members and other stakeholders primarily through their communications and membership departments. Data shared or disseminated at this stage is informational content, based on original raw data collected by the EBMO and processed through analysis and application of internal EBMO knowledge. Interviews indicate that EBMO staff are strongly aware of their responsibilities in disseminating information at appropriate levels of detail and breadth – acknowledging competition among their members, and therefore the need to keep certain member-specific data confidential.

**EBMOs need to use both tools and culture to change behaviour.** An EBMO CRM will not yield the expected benefits of efficiency and insight if individuals or departments resist sharing their data. EBMOs adopting new tools should therefore also be ready to adjust their business processes and work practices. These changes will also benefit from leaders' attention to encouraging a culture of openness so that departments are receptive to sharing details and progress about their activities.

One EBMO board member's interview comments suggest that EBMO leaders recognize the opportunity to collaborate around data to deliver more member value, and acknowledge the organizational effort required:

Obviously, there's a huge potential for data. ... [W]e should be able to capitalize on that data and use it and be able to generate some other benefits for our membership. But I think at the moment, given the competing priorities at the secretariat, we haven't really capitalized on that.

**Internal data sharing can yield valuable opportunities for EBMOs.** For example, a training department can share early information about training/educational offerings with the membership department to enable promotion of specific educational offerings to specific member segments. Or it might share information on non-member clients of services that could be used by the membership department to design and target future membership recruitment campaigns.

**EBMO departments remain proprietary about their data.** Many interviews suggested a lack of systematic dissemination of information among departments. The relatively small size of some EBMOs may allow for more informal data sharing and dissemination. However, more systematic and digitized data could also provide insight into the operations and performance of EBMO departments.

### ► Working in silos

Information silos exist when information is not readily shared between departments or divisions. Limited communication and information sharing across departments or groups can mean higher costs and slower growth because siloed operations result in duplication of effort, lack of synergy and missed opportunities. When groups or departments don't work together and share information, no consensus will emerge regarding company priorities. As a result, when individual departments depend on support or input from other departments, their lack of consensus on goals and priorities can lead to failure in meeting department-level goals.

Identifying and correcting the problems of information silos can help EBMOs open lines of communication across their organizations. To encourage information sharing, EBMO leaders can identify, promote and monitor progress towards superordinate goals that can only be achieved by different departments working together.

**A CRM system can facilitate more systematic collection and sharing of EBMO data.** By design, CRM systems offer a shared data repository intended to be accessible and updateable by staff or departments serving a variety of functions or roles. They can be used in ways that enhance cross-secretariat visibility about members and events. At the same time, however, they may be used in ways that reinforce “gate-keeper” behaviour or limit direct access to EBMO data.

Our membership department is in charge of migrating or populating the CRM. So ... we send [them] the list of trainings or the list of participants for them to populate the CRM. In the CRM we have two classifications: members and non-members. So, if we want to send a targeted [training] invitation to our members we use the CRM.

Ideally, EBMOs configure technology resources so that staff have role-relevant direct access to update and view data, rather than relying on old ways of doing things. EBMOs introducing new technology should expect to undertake business

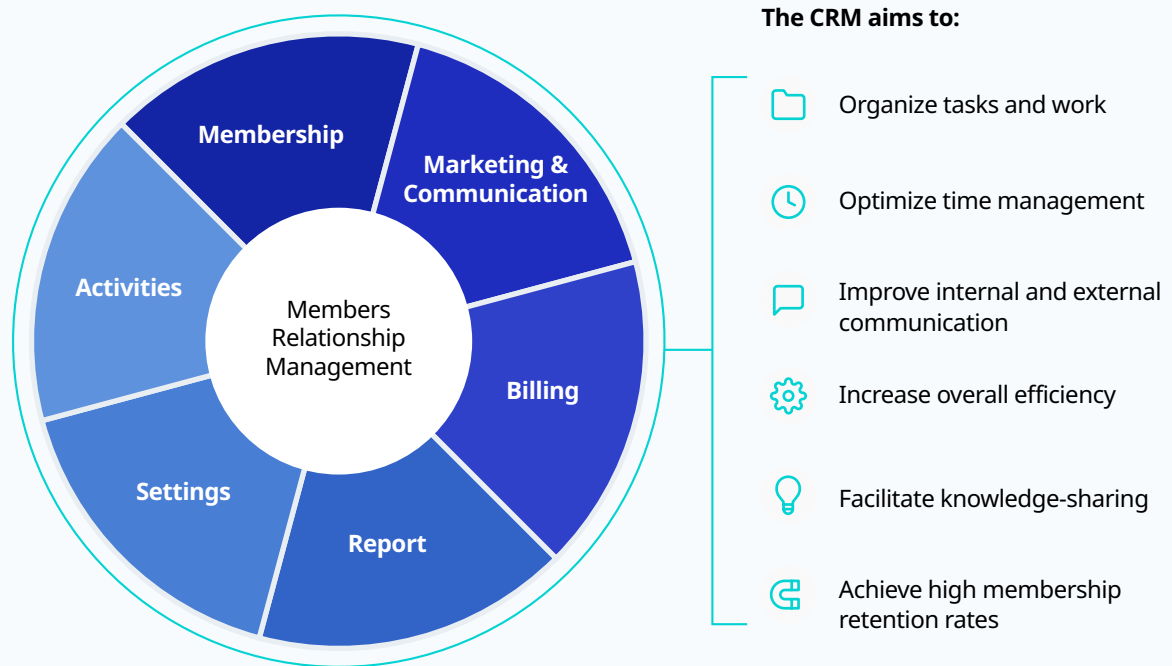
process improvements as well as staff training and skill development to benefit optimally from their technology investments. According to Barbara Maino, Programme Assistant and CRM Focal Point, ITC-ILO ACT/EMP:

What we have learned about introducing CRMs in our work with EBMOs around the world is that installation of the software is really only the last step in the process. For the CRM – or any other technology-based tool to leverage data – an EBMO first needs to assess how the technology will impact their staff and members, and ensure that the necessary steps are taken to prepare these stakeholders and get them on board.

Related to this and just as critical is the need for an EBMO to undertake business process reviews to better understand how front and back office functions will be impacted or need to change.

Only when these three integrated components are addressed can the EBMO succeed in leveraging the data they have.

► Figure 12. Customer relationship management for employers’ and business member organizations





## ► Data retention, retirement or destruction

As part of their data management practice, EBMOs should define how data are to be handled over time, and define explicit rules about data retention, retirement or destruction. Research data can be reused in comparative studies, and thus is worth retaining in an accessible format. Membership and HR data may also be subject to regulations specifying a minimum retention period. However, some types of data may date quickly or require extra security, supporting an argument for intentional destruction after some given period of time.

**Many EBMOs lack explicit procedures on how to address data over the long term.** Interviews suggested that EBMOs should recognize opportunities to more formally consider the long-term life of different kinds of data. Just under half the survey respondents claimed their EBMOs do have formal (documented) guidelines or procedures to collect, process, store and use data. However, their feedback indicated that these guidelines were the result of decisions prompted by legal requirements or donors, rather than strategic EBMO decisions based on recognition of the value of data.

Key survey findings by enterprise size, EBMO type and region are examined below:

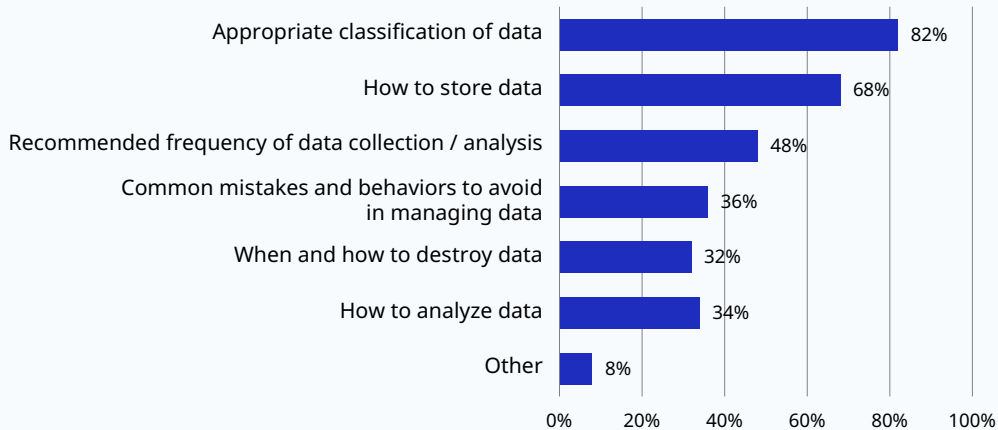
- About half of respondents from medium and large EBMOs reported having data guidelines, compared to a third of respondents in small EBMOs.
- Seventy-two per cent of respondents from chambers of commerce reported having data guidelines, compared to 38 per cent of respondents from employers’ organizations.
- Almost two thirds of respondents from EBMOs in Asia and the Pacific reported having data guidelines, compared to lesser shares of respondents from EBMOs in Africa (62 per cent), Europe and Central Asia (33 per cent) and Latin America and the Caribbean (18 per cent).

The three most common topics covered regarding such data guidelines across all EBMOs in the survey were the following:

- Appropriate classification of data as, for example, confidential, sensitive or public (82 per cent);
- How to store data (68 per cent); and
- Recommended frequency of data collection or analysis (48 per cent).

Among respondents who noted the existence of formal data guidelines, 80 per cent also indicated that staff members received training or had a copy of such data guidelines.

► **Figure 13. Topics covered in data guidelines or procedures, global results**



**Note:** This survey question was asked of the 72 per cent of respondents whose EBMOs have formal (documented) guidelines or procedures to collect, process, store and use data.

# Data, technology and COVID-19: Further observations

---

Crises such as COVID-19 often bring lasting change and drive innovation. For EBMOs this will involve being prepared to challenge existing models and seek out external support and new approaches.

In May 2020, the ILO ACT/EMP and the IOE undertook a global survey among EBMOs to assess their responses to the ongoing COVID-19 crisis, and to explore potential strategies and actions to support EBMOs in building the foundations for a strong post-pandemic recovery. The final report<sup>26</sup> identified a number of findings and recommendations relevant to the data focus of the present report:

- Most surveyed EBMOs renovated and adjusted their service delivery to respond to COVID-19. Four out of five EBMOs across the world are now offering virtual advisory, legal and consulting services. Similarly, over half of surveyed EBMOs moved their training services to online platforms.
- EBMOs have been able to collect data from members during the crisis through surveys at short notice, which has helped them better understand member situations and prioritize key requests to government and support provisions.
- EBMOs have been using practical research and data collection tools to generate significant research insights in a way that maximizes impact while saving them significant time and budget.

- EBMOs have stepped up their roles during the crisis through timely data generation. This will continue to play a pivotal role in influencing public policy, public opinion and business practices linked to the future of work and emerging workforce challenges.
- Looking ahead, EBMOs need to rely on technology-driven innovation to enhance their service delivery. To help industry leaders make strategic decisions for the future of their businesses, EBMOs should consider incorporating a move to digital delivery of services and member engagement and access to unique data.

Collectively, these findings and recommendations reinforce the need for EBMOs to collect and analyse data in systematic and intentional ways that support their research and advocacy efforts, while enhancing their overall service delivery.

The COVID-19 crisis provided the impetus and opportunity for EBMOs to rethink their traditional business models. EBMOs have already demonstrated that they can pivot their organizations to remain relevant. This report highlights further opportunities for EBMOs on that data-centred and technology-enabled transformational journey.

---

<sup>26</sup> ILO, *Leading Business in Times of COVID Crisis: Analysis of the Activities of Employer and Business Membership Organizations in the COVID-19 Pandemic and What Comes Next* (2021).



---

►► A radical rethink of traditional EBMO business models will be vital for future sustainability. This is where external support will be more important than ever, with organizations such as ACT/EMP taking on a role of ‘transformation partners’ to EBMOs.

► Leading business in times of Covid crisis: Analysis of the activities of employer and business membership organizations in the COVID-19 pandemic and what comes next (ILO, 2021. Pg 67).

# Data-oriented opportunities for EBMOs

---

Data help EBMOs provide value to their members in the form of accurate and timely information, appropriate learning opportunities, and well-informed advocacy and advice. Providing distinctive, high-quality representation, advocacy and support to members is the main reason EBMOs should strive to use data as effectively as possible. When EBMOs can market and deliver on a clear value proposition, they can grow their membership, expand policy influence and impact, and increase resources in a virtuous cycle of increasing effectiveness. EBMOs with few or

declining numbers of members, on the other hand, will eventually lack both resources and influence to offer value to their members, creating a vicious downward spiral of ineffectiveness.

Analysis of the interview and survey responses reveals the following opportunities for EBMOs to improve their strategic, organizational and operational uses of data. By allowing EBMOs to measure needs and be guided by evidence, more effective use of data can enable EBMOs to provide relevant and unique services to their members.

## ► Opportunities at the strategic level

---

In EBMOs, the CEO and board are responsible for setting strategic direction and selecting the approach and activities that will contribute value to members and, ultimately, strengthen the membership base. Using data to make decisions systematically can gain traction at this level. Here, data can be used to guide the selection of strategic objectives and strategies employed to pursue them. Data can also be used to identify appropriate key performance indicators (KPIs) and to monitor organizational progress towards those goals.

► **Cultivate a digitally savvy leadership team.** Existing boards should reflect on their dispositions towards data and digital approaches, and honestly evaluate their capacity for leading a data-driven organizational transformation. Boards should consider recruiting digitally savvy individuals to the board to strengthen their

understanding of digital technology and data-based capabilities. It is important that senior EBMO leaders are able to make the case for using data as a strategic asset with authenticity and conviction.

► **Commit to data-driven decision-making.** The full buy-in and commitment of EBMO leadership (board and CEO) to data-driven decision-making is needed to transform the secretariat level. EBMO leaders should use data systematically to choose among possible strategic initiatives. Data will help EBMOs explain (both good and bad) decisions to their stakeholders. Whether or not strategies and decisions have the outcomes expected, EBMOs can be confident that they undertook an action plan based not upon guesses or anecdotal evidence and intuition, but on good solid data.

► **Use data to identify new opportunities.**

Summary data from operational departments can be used as input to create new and relevant services. Some examples are as follows:

- **Member needs.** Review member needs assessments for insight into potentially new service offerings to address the unique needs of enterprises of different sizes, sectors and locations, among others.
- **Membership trends.** Review membership numbers and trends within different membership groups to detect needs and opportunities to better serve under-represented sectors and enterprises.
- **Training.** Review and analyse new course requests or over-subscribed topics searching for potential new training offers and alternative modalities for delivery.
- **Communications.** Review responses to such content as press releases, reports, and articles, seeking further insight into the concerns of stakeholders, potential new membership segments, and delivery channel preferences.
- **Economic and workplace trends.** Monitor emerging patterns and trends in workplace issues such as working from home, salaries, absenteeism and OSH to detect opportunities for conducting EBMO-driven research to inform solutions and strategies for members.

- **Define metrics to monitor strategic progress.** EBMO leaders should define metrics to measure the effectiveness of any given strategy. Strategic initiatives should be

supported and managed with data. When strategies are implemented, collecting and analyzing data will allow EBMOs to determine the effectiveness of that implementation, and decide whether a given approach needs adjustment.

- **Use data to manage limited resources.** Data increases efficiency. Effective data collection and analysis will allow EBMOs to direct scarce resources to where they are most needed. If an increase in requests is noted in a particular service area, this data can be dissected further to determine whether the need is widespread or confined to a particular sector or industry. Training, staffing or other resources can be deployed in a targeted effort. Data can also support EBMOs to determine which areas should take priority over others.
- **Lead development (or refinement) of data management policies.** EBMO leadership can cultivate organization-wide support for collecting, analyzing and reporting data by leading an effort to define/clarify and document policies for handling EBMO datasets and data sources.
- **Expand influence and develop a reputation as a data-driven organization.** EBMO leadership should recognize the opportunity to expand their influence by demonstrating their access to and ability to use data effectively to support member businesses. Because more data can yield better insights, EBMOs should seek partnerships with government and like-minded associations to use – securely and appropriately – their combined data to better serve their shared stakeholders.



## ► Opportunities at the organizational/management level

---

EBMO managers are responsible for translating EBMO strategy for their departments, defining, directing and monitoring activities that are aligned with and support EBMO strategy. This includes defining, directing and monitoring the management and use of data to support overall strategy. Strengthening data analysis and sharing can have substantial traction at this level. Analysis can aggregate a mass of operations data into useful information and feedback on progress towards strategic goals. Sharing information about selected progress indicators can help departments work together towards overall EBMO goals.

- **Cultivate a habit of analyzing and tracking quantifiable aspects of activity.** Many aspects of EBMO operations can be measured and monitored more closely than they currently are. Developing a detailed and quantitative understanding of their operations will help department managers recognize trends more quickly and advise their CEOs on emerging opportunities. Some examples:
  - **Membership.** Close monitoring of membership statistics and trends should be considered an EBMO priority because members are the source of EBMO sustainability and success. Some easy-to-calculate indicators include total members; share of paid-up members; retention rates; recruitment rates; and growth rates by member subgroup (categorized for example by size, owner profile, or sectoral affiliation).
  - **Membership needs.** Track needs assessments, for instance from year to year or following each member interaction, and regularly review how current services address these needs.
  - **Training.** Measure and analyse such indicators of training use as registration levels, actual participation numbers, and post-session reviews. Assess how well current training offerings address these needs.

- **Use data to monitor trends and developments on key issues.** EBMO CEOs and managers should cultivate norms of data use to monitor ongoing ideas and activities in such relevant areas as workplace, business, and policy impacts. Early awareness of hot topics and trending issues will help EBMOs develop timely services to address emerging member needs.
- **Commit to breaking down information silos.** EBMO leaders and managers should recognize that data produced as a byproduct of one business unit's work can be critical to enhancing the work of another unit. For example, training services know information about the business locations of training clients, which could be valuable in helping the memberships team focus their promotional outreach efforts.
- **Implement systematic sharing of data.** Effective coordination across EBMO service departments is important to integrate their services in alignment with member needs and to achieve overarching organizational strategic objectives. After department managers develop experience with suitable department activity indicators, they should start to share these indicators routinely with other departments. Target collaboration and full data sharing across EBMO departments as an ultimate goal.
- **Expand data analysis to monitor, evaluate, and adjust operations and staff performance.** As EBMOs increasingly digitize their operations, managers can use data from those activities to drive accountability through their organization. Specifically, managers can analyse data generated from those activities to monitor the health of important systems (including people, process and technology) in their secretariats. When EBMO managers monitor the consistency and quality of their work systems and staff performance, they can intervene in a timely way when activities drift off-target. Effective quality monitoring encourages EBMOs to be proactive rather than reactive, and supports them in maintaining best practices over time.

- **Use data to detect and understand problems.** Operations data allow EBMOs to more effectively determine the cause of problems. Managers can use analysis and visualization of activity records to highlight relationships among factors of interest, which can reveal the cause of some outcomes. In this way, operations and performance data become a foundational part of a continuous improvement strategy.
- **Use data to find and share strengths.** Data allow EBMOs to replicate areas of strength across their organizations. Data analysis can help to identify high-performing

programmes, services and people. High-performers can then be studied to develop interventions to improve less strong programmes, services and staff.

- **Identify and measure KPIs.** EBMO department leaders can use analysis of their operations to identify KPIs that reflect strategic targets. Not all metrics are “key” in that they provide clear, timely feedback on progress towards strategic targets. However, by starting to analyse more data, EBMO managers will learn which indicators are most informative and deserve consideration as KPIs.

## ► Opportunities at the operational level

---

In EBMOs, individual departments are primarily responsible for data collection efforts in their respective domains, so data collection improvements can have most traction at this level. Moreover, improvement or expansion in data collection efforts yield direct benefits for subsequent analysis, decision-making and sharing of information.

- **Frame data collection as a routine operations task.** EBMO operations groups should strive to establish data collection as a routine task, one performed regularly and frequently. Building regular data collection into operations staff work patterns and schedules – rather than handling it on an ad hoc basis – demonstrates evidence of the importance of data collection to the EBMO’s mission. Further, increasing the frequency of specific data collection efforts offers more opportunities to learn, and therefore to become better at this task. One way this can be achieved is through the revision of job descriptions and orientation programmes for new team members.
- **Develop systematic approaches to data collection.** Systematic data collection provides indisputable evidence. Merely anecdotal evidence, assumptions, or abstract observations, on the other hand, can lead to

incorrect conclusions, inappropriate actions and wasted resources. EBMOs should strive for clear and consistent documentation and standardization of data collection, in this way supporting continuity of such efforts even when staff change roles.

- **Use technology to enrich member-centred data collection.** In their unique and trusted role, EBMOs are well positioned to collect distinctive and hard-to-replicate data about their members. By harnessing new technologies, EBMOs might develop “360 degree” profiles of member organizations, which combine members’ general contacts and company information with all their research contributions (including survey responses) over time, records of informal interactions, and even links to such member-generated sources as annual reports. Such a multidimensional member dataset can yield data-based insights for new services as well as opportunities for data-based collaboration with member companies and other member-based associations.
- **Automate data collection where possible.** As EBMOs digitize their records, content, correspondence and activities, automated data collection becomes increasingly accessible and real-time data is increasingly within reach.

EBMOs can learn more about their stakeholders in a cost-effective way by automatically logging and analyzing interactions with member representatives, training participants and individuals in the broader community. For instance, analysis of behaviour patterns can highlight unspoken needs and guide EBMO development of new services. Some examples follow:

- **Communications.** Automatically logging and summarizing patterns of interaction with website elements or social media posts can reveal what kinds of content draw attention.
- **Membership.** Automatically tracking and analyzing which members open email correspondence and what kinds (including newsletters, survey requests, training announcements) can help to segment members by their interests, in addition to their size and industry.
- **Relationships.** Automatically logging interactions between individual staff and

policyholders, members and clients to analyse outcomes can produce insights into which team members have better rapport with different stakeholders/ segments.

- **Training.** Automatically logging and summarizing webinar participation numbers can identify high-interest topics and monitor interest trends for regular offerings. Automating the collection of course feedback through a polling tool and immediately aggregating responses for review with course leaders and managers contributes to effective monitoring and training improvement.
- **Establish baselines, benchmarks and goals to keep moving forward.** Because data allow EBMOs to measure, managers can establish baselines, find benchmarks and set performance goals for different roles and/or activities.<sup>27</sup> Collecting and analyzing data allows EBMOs to set performance goals and recognize when people or departments achieve these goals.

<sup>27</sup> A baseline is what a certain area looks like before a particular solution is implemented. Benchmarks establish where others in a similar demographic stand.





# Recommendations for EBMOs starting their data journey

---

EBMOs should use their available data to align strategy, organization and operations around a value proposition of distinctive, timely and relevant services. EBMOs that can develop and market this value proposition clearly will grow their membership, increase resources and improve their policy influence in a virtuous cycle of increasing effectiveness.

The following specific actions are offered to kickstart the EBMO journey of using data as a strategic asset.

## ► Tell the EBMO data story

---

Develop and communicate a clear and persuasive narrative explaining how high-quality data can drive EBMO influence and growth. Stories can change minds. The sharing of this narrative means to cultivate positive attitudes towards this effort and engage the whole secretariat in becoming more data-driven.

Led by board and CEO, with the involvement of the secretariat staff.

- Explain how data analysis and data-driven decision-making enable clearer identification of needs and opportunities.
- Explain how data help to develop and deliver services that offer value to members.
- Explain how data help to communicate and share evidence of EBMO impact and value.
- Invite all levels of the organization to play a part in building EBMO data capabilities.
- Commit to investing in data and data capabilities for EBMO growth.

## ► Inventory current data in use

---

Develop an inventory of different sources or types of data, with a view to developing or strengthening data management practices. A data inventory will provide a foundation from which to start managing data more systematically and securely.

Led by EBMO CEO and operations department managers, with the involvement of the staff.

- Examine the entities described or affected by any dataset – for example members, training events, issues, communications.

- Consider the availability and quality of data needed by each EBMO department. Are data missing or incomplete?
- Identify special confidentiality needs associated with that data.
- Consider unusual security risks associated with that data.
- Identify who currently has access to the data and who needs to have access.
- Address questions of how to store and secure the data, and for how long.

## ► Review active data collection and maintenance efforts

---

Within each EBMO department, review data being actively/intentionally generated or collected, with a view to standardizing and routinizing data collection.

Led by operations department managers, with the involvement of the staff.

- Evaluate whether data is current and how often it can change.
- Find out how often this data is being updated, as well as when, by whom and under what conditions.
- Look for opportunities to standardize, routinize and simplify these activities.
- Identify metrics for data collection efforts and outcomes.
- Clearly document the new process or processes.

## ► Identify opportunities to share EBMO knowledge

---

Within each EBMO department, review available information (synthesized data) for sharing opportunities, with a view to strengthening learning across the EBMO and marketing its capabilities to members and non-members.

Led by operations department managers, with the involvement of the staff and CEO (sponsor).

- Assess what information generated in your department could be relevant to other departments, or to external parties.
- Consider what metrics or indicators might be used share your progress or state of operation.
- Develop a process to routinize sharing of communication activities.
- Clearly document the new process or processes.

## ► Establish or update data management policies

---

Use data inventory, plus any existing processes, to develop a formal written policy for handling and managing data.

Led by EBMO CEO, with the involvement of the operations managers.

- Consider the data life-cycle: collection, analysis, storage, security, dissemination and, finally, retention or destruction.
- Identify the use of specific technologies at each/any stage; note any limitations.
- Identify and document governance (rules, requirements or expectations governing the use of any data) applicable at each stage.
- Establish standard operating procedures (SOPs) or a system for collecting, storing and managing data, and then test the viability of these instructions with the staff responsible for following them.
- Identify/assign responsibilities for managing different data at different stages.
- Share data management policy documentation/SOPs with responsible staff.
- Train staff regarding the intent (principles) and practice of the new data management policies.

## ► Identify passive data collection opportunities

---

Within each EBMO department, examine how work gets done, what tools are used, and look for occasions of passive data generation such as logs, histories and work records.

Involved: Operations department managers.

- Look for where data is being generated in the course of work.
- Consider how this data could be used to monitor operations.
- Consider how this data could be used to work more efficiently or effectively.
- Document passive data sources and opportunities.

The preceding recommendations offer concrete outcomes that can be achieved within a relatively short timeframe. Such visible efforts and outcomes are important to arouse and sustain organizational interest and engagement in EBMO data-focused change. As EBMOs document their access to and use of data more explicitly, staff, managers and leaders will themselves start to identify further opportunities for improving their use of data. EBMO responses to the COVID-19 crisis have already shown that they are ready, willing and able to take on the challenges and opportunities of using data as a strategic asset.

# References

---

- Data Orchard. n.d. (Staunton-on-Wye, UK). Accessed 24 April 2021 at <https://www.dataorchard.org.uk/>.
- Digital Impact. Accessed 24 April 2021 at <https://digitalimpact.io/toolkit/digital-data/>.
- ILO (International Labour Organization). 2005. Advocacy: Maximizing the Impact of the Voice of Business. Guide 3 in The Effective Employers' Organization training package, a series of "hands-on" guides to building and managing effective employers' organizations (Geneva, International Labour Office).
- \_\_\_\_\_. 2012. Services by Employers' Organizations: A Strategic Approach to Service Development. Part of the Effective Employers' Organization training package (Geneva, International Labour Office).
- \_\_\_\_\_. 2019. ILO-wide Strategy for Institutional Capacity Development (Geneva, International Labour Office, Governing Body).
- \_\_\_\_\_. 2020. A Global Survey of Employer and Business Membership Organizations: Inside Impacts and Responses to COVID-19 (Geneva, International Labour Office).
- \_\_\_\_\_. 2021. Leading Business in Times of COVID Crisis: Analysis of the Activities of Employer and Business Membership Organizations in the COVID-19 Pandemic and What Comes Next (Geneva, Bureau for Employers' Activities).
- ILO and IOE (International Organisation of Employers). 2019. Changing Business and Opportunities for Employer and Business Organizations.
- McKinsey Global Institute: Twitter, Cisco, Gartner, EMC, SAS, IBM, MEPTEC, QAS. (n.d.). Accessed 21 May 2021 at: [https://virtualization.network/Resources/Whitepapers/e38de7d5-6974-4ec2-807c-6b4dd5e4e7b6\\_4-Vs-of-big-data.pdf](https://virtualization.network/Resources/Whitepapers/e38de7d5-6974-4ec2-807c-6b4dd5e4e7b6_4-Vs-of-big-data.pdf).
- Oracle. n.d. "What Is a Data Warehouse?"
- Pollak, Lindsey. 2019. The Remix: How to Lead and Succeed in the Multigenerational Workplace (New York, Harper Business).
- Volini, Erica, Jeff Schwartz, Brad Denny, David Mallon, Yves Van Durme, Maren Hauptmann, Ramona Yan, and Shannon Poynton. 2020. The Postgenerational Workforce: From Millennials to Perennials (New York, Deloitte Insights).
- Wang, Richard Y., and Diane M. Strong. 1996. "Beyond Accuracy: What Data Quality Means to Consumers." *Journal of Management Information Systems* 12(4): 5–34.

# Annex I.

## Research methodology

---

This study sought to identify the types of data EBMOs generate, collect, access, analyse and use in the course of their business activities. Data collection comprised semi-structured interviews and a global survey. The study comprised 20 semi-structured interviews with staff and board members of four EBMOs in Asia and the Pacific, five interviews with internationally recognized member association experts, and a global survey reaching 112 respondents from 66 EBMOs in 49 countries.

### ► Semi-structured interviews

---

Interviews aimed to explore the categories of data EBMOs recognize in their work, their needs for different types of data, how different data are collected, analysed, stored and used, and how different EBMO roles or departments participate in these activities. Analysis of these narrative sources highlighted common categories of data and revealed details of how and why EBMOs interact with different datasets. Interviews also pointed towards constraints and challenges that EBMOs might face in their data management efforts.

Twenty interviews, lasting between 45 minutes and an hour, were conducted between September and November 2020 with secretariat staff, the CEO and board members of four EBMOs in Asia and the Pacific.

Five additional interviews were conducted with internationally recognized experts on business associations affiliated with the ILO, the International Training Centre of the ILO, and the International Organization of Employers.

### ► Survey

---

Interview insights were used to develop a survey to assess EBMO data practices. The survey aimed to quantify EBMO activity in areas such as how data are collected and analysed, and the extent to which data are used for decision-making at the strategic, organizational and operational levels.

The survey was conducted between December 2020 and February 2021, reaching 112 respondents from 66 EBMOs in 49 countries across Africa, Latin America and the Caribbean, Asia and the Pacific, and Europe and Central Asia. The survey was available in English, French and Spanish. It targeted respondents in different EBMO roles, including board members, CEOs, department managers and other staff.

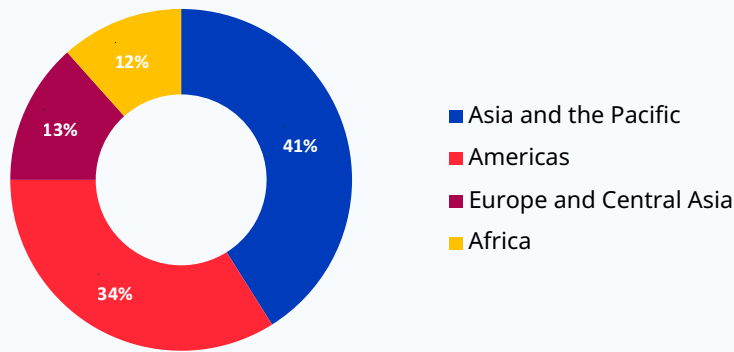
# Annex II.

## Survey demographics

---

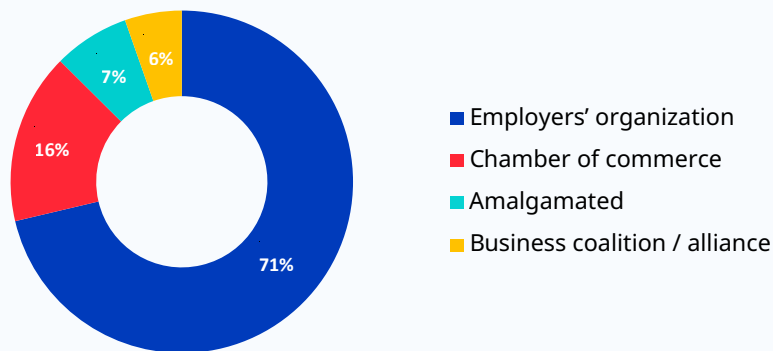
The survey was conducted with 112 respondents from 66 EBMOs in 49 countries across four regions. The majority of responses came from Asia and the Pacific (41 per cent), followed by Latin America and the Caribbean (34 per cent), Europe and Central Asia (13 per cent) and Africa (13 per cent).

► Figure 14. Survey sample by region



About 71 per cent of responses came from employers' organizations. Of total responses, 17 per cent were from chambers of commerce, 7 per cent were from amalgamated organizations and 5 per cent were business coalitions or alliances.

► Figure 15. Type of EBMO



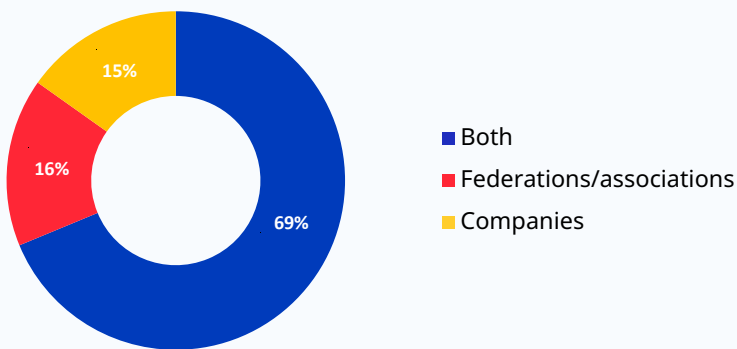
The vast majority (8 out of 10) of respondents represented organizations operating at the national level. Other organizations participating in the survey operated at the local or provincial (7 per cent) and sectoral levels (5 per cent). Only 4 per cent of responses came from foreign chambers of commerce and 3 per cent of responses were provided by global organizations.

► Figure 16. Level of operations



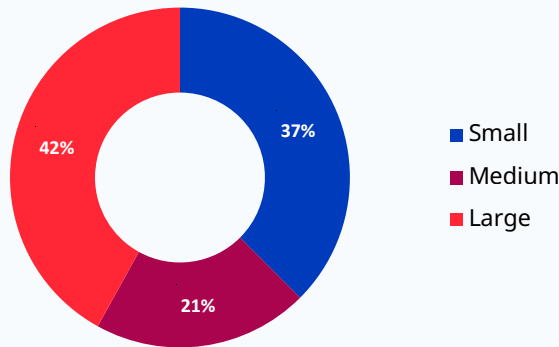
Over two thirds of respondents reported that their membership included both companies and business associations or federations. Of total respondents, 16 per cent said that their members were only federations or associations and 15 per cent said their members were only companies.

► Figure 17. Membership type



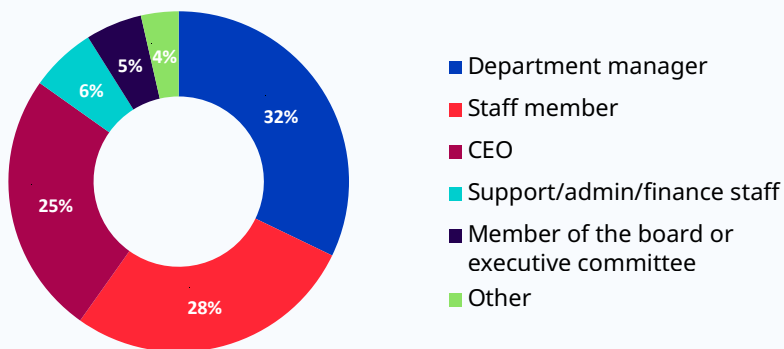
The survey included EBMOs of different sizes. Of total responses, small EBMOs with 10 staff or less accounted for 37 per cent, medium EBMOs employing between 11 and 20 staff represented 21 per cent and large EBMOs employing over 21 staff accounted for 42 per cent.

► Figure 18. EBMO size



EBMOs were encouraged to have different secretariat staff as well as board members participate in the survey. The goal was to include different perspectives to learn more about EBMO data practices and use for operational, organizational and strategic decision-making. Department managers accounted for 32 per cent of survey responses, followed by staff members (28 per cent), CEOs (26 per cent), support or admin staff (6 per cent), board members (6 per cent) and other staff (4 per cent).

► Figure 19. Survey respondents by role





# Annex III.

## EBMO survey

---

### I. General information

1. Name of organization:

---

2. Type of organization:

- National organization
- Regional organization
- Sectoral organization
- Local/provincial organization
- Foreign chamber or business council
- Global organization

3. What type of organization is it?

- Employers' organization
- Chamber of commerce
- Amalgamated/mixed between employers' organization and chamber
- Business coalition/alliance

4. In which region are you located?

- Africa
  - Central Africa
  - Eastern Africa
  - Western Africa
  - Southern Africa
  - Northern Africa
- Americas
  - North America
  - Central America
  - South America
  - Caribbean
- Arab States
- Asia and the Pacific
  - Eastern Asia
  - South-East Asia
  - Southern Asia
  - Pacific Islands
- Europe and Central Asia
  - Central Asia
  - Eastern Europe
  - Western Europe
  - Northern Europe
  - Southern Europe

5. How many permanent staff members currently work at your organization?

- 1–5
- 6–10
- 11–15
- 16–20
- 21–25
- Over 25

6. What is your role/position?

- Member of the board or executive committee
- CEO/director general/secretary general/executive director
- Department manager (training, membership, communications, research)
- Staff member (training, membership, communications, research)
- Support/admin/finance
- Other, please specify \_\_\_\_\_

*For the purpose of this survey: “direct members” or “direct membership” refer to companies, sectoral associations and territorial/regional organizations that pay membership subscriptions.*

7. What type of direct membership does your organization have?

- Companies
- Federations/associations (e.g. sectoral, regional, provincial associations)
- Both

## II. Data collection

*For the purpose of this survey: “data” refers to facts, figures or information grouped together for reference or analysis.*

8. For what purposes does your organization collect data (e.g. through interviews, surveys, collection of existing information for reference or analysis)? Select all that apply.

- To manage your organizational structure and human resources
- To monitor your organization’s activities and performance
- To develop and advance policy positions (i.e. represent members)
- To conduct research on business topics (e.g. business confidence surveys, ease of doing business, business climate surveys)
- To analyse labour market indicators
- To collect members’ feedback on your services
- To assess members’ needs (e.g. regarding training and other services)
- To collect details of new members and/or update details of current members
- To monitor membership indicators
- To communicate important information or updates to members
- To measure the impact or success of a particular initiative/project
- To produce your organization’s annual reports, both financial and/or technical
- Other, please specify \_\_\_\_\_

9. How frequently does your organization collect data to support the following goals?

	Weekly	Monthly	Quarterly	Yearly	More than a year	Based on member needs	Based on reporting deadlines
Managing your organizational structure and human resources							
Monitoring your organization's activities and performance							
Developing and advancing policy positions							
Conducting research on business topics							
Analyzing labour market indicators							
Collecting members' feedback on your services							
Assessing members' needs							
Collecting details of new members and/or updating details of current members							
Monitoring membership indicators							
Communicating important information or updates to members							
Measuring the impact or success of a particular initiative/project							
Producing your organization's annual reports, both financial and/or technical							
Other, please specify							

*Q10 shows to respondents who selected "To conduct research on business topics (e.g. business confidence surveys, ease of doing business, business climate surveys)" or "To assess members' needs (e.g. regarding training and other services)" or "To collect members' feedback on your services" in Q8.*

**10.** How does your organization distribute surveys to members? Select all that apply.

- Survey Monkey
- Qualtrics
- Google forms
- Typeform
- Hard copy (in person)
- We do not conduct surveys to collect data; other research methods are used (e.g. interviews, focus groups)
- Other, please specify \_\_\_\_\_

*Q11 shows to respondents who did not select "We do not conduct surveys to collect data; other research methods are used (e.g. interviews, focus groups)" in Q10.*

**11.** What applications does your organization use to analyse survey results? Select all that apply.

- Excel
- Stata
- SPSS
- Data collection software (e.g. Survey Monkey, Qualtrics) produce the bulk of the analysis
- Other, please specify \_\_\_\_\_

*Q12 shows to respondents who selected "To conduct research on business topics (e.g. business confidence surveys, ease of doing business, business climate surveys)" in Q8.*

**12.** What topics does your organization conduct research on? Select all that apply.

- Access to finance
- Business continuity planning
- Cost of doing business
- Diversity and inclusion (e.g. gender equality, non-discrimination)
- Employment trends
- Exporting and/or importing
- Flexible workplace practices
- Human resources
- Industrial relations
- Migration
- Labour law
- Occupational health and safety
- Productivity
- Skills
- Social protection
- Taxation
- Wages (e.g. wage setting)
- Other, please specify \_\_\_\_\_

*Q13 shows to respondents who selected "To monitor membership indicators" in Q8.*

- 13.** Does your organization keep track of the following membership indicators? Select all that apply.
- Total number of direct members (associations and companies) of your organization
  - Total number of indirect members (companies affiliated to sectoral or territorial organizations which are affiliated to your organization)
  - Number of sectoral and territorial EBMOs affiliated to your organization
  - Total number (direct and indirect) of members / total number of companies in country (in formal private sector)
  - Total employment of (direct and indirect) members / Total employment in formal private sector
  - Total turnover of (direct and indirect) members / Total GDP achieved in formal private sector
  - Membership retention rate
  - Percentage of members paying subscription fees
  - Membership recruitment rate
  - Members using EBMO services / Total number of members
  - Percentage of your new members which go on to renew for a second year

*Q14 shows to respondents who selected "To collect members' feedback on your services" or "To collect details of new members and/or update details of current members" in Q8.*

- 14.** How does your organization store members' details? Select all that apply.
- We use a customer relationship management (CRM) application
  - We store their details in a Word document
  - We store their details in an Excel document
  - We store their details in our own internal database
  - We store their information as physical (hard) copies at our premises
  - Other, please specify \_\_\_\_\_

*Q15 shows to respondents who selected "To collect members' feedback on your services" or "To collect details of new members and/or update details of current members" in Q8.*

- 15.** Does your organization use members' details to offer targeted services (e.g. according to their sector or size)?
- Yes
  - No

- 16.** Where does your organization typically store information? Select all that apply.
- On-premise (own server, filing cabinets, PCs, etc.)
  - In the cloud (on a service provider's server, accessed over the internet)
  - We have a back-up off our premises

- 17.** Does your organization have formal (documented) guidelines or procedures to collect, process, store, and use data?
- Yes
  - No

Q18 shows to respondents who selected "Yes" in Q17.

18. On what does the guideline or procedure provide guidance? Select all that apply.

- Appropriate classification of data – confidential, sensitive, or open/public
- Recommended frequency of data collection/analysis
- How to store data
- How to analyse data
- When and how to destroy data
- Common mistakes and behaviours to avoid in managing data
- Other, please specify \_\_\_\_\_

Q19 shows to respondents who selected "Yes" in Q17.

19. Did staff receive training or have a copy of such data guideline or procedure?

- Yes
- No

20. To what extent is data collection by your organization limited by the following?

	A lot	A moderate amount	A little	Not at all
Support from the executive committee/board				
Staff capacity (skills and expertise)				
Time				
Member interest/support				
Long-term planning				
Data collection tools (physical or digital)				
Financial resources				
Other, please specify				

### III. Data analysis and decision-making

Different options in Q21 are shown according to respondents' positions: **strategic** – board members or CEOs; **organizational** – board members, CEOs or department managers; **operational** – CEOs or department managers.

21. How many quantitative data are available to support decision-making at different levels of your organization?

	Strategic decision-making	Organizational/managerial decision-making	Operational decision-making
A lot			
A moderate amount			
A small amount			
Data are not available			

Q22 is shown only to board members or CEOs.

22. In your organization, are data to support **strategic decision-making**...?

	Yes	No
Accurate (correct, free from error and reliable)		
Current (sufficiently up to date for your purposes)		
Complete (sufficiently broad and detailed for our purposes)		
Accessible (readily available when needed)		
Relevant (applicable for your purposes)		
Understandable (easy to use)		

Q23 is shown only to CEOs or department managers.

23. In your organization, which of the following describe data to support organizational/managerial decision-making?

	Yes	No
Accurate (correct, free from error and reliable)		
Current (sufficiently up to date for your purposes)		
Complete (sufficiently broad and detailed for our purposes)		
Accessible (readily available when needed)		
Relevant (applicable for your purposes)		
Understandable (easy to use)		

Q24 is shown only to CEOs, department managers or staff.

24. In your organization, which of the following describe data to support operational decision-making?

	Yes	No
Accurate (correct, free from error and reliable)		
Current (sufficiently up to date for your purposes)		
Complete (sufficiently broad and detailed for our purposes)		
Accessible (readily available when needed)		
Relevant (applicable for your purposes)		
Understandable (easy to use)		



Different options in Q25 are shown according to respondents' positions: **strategic** – board members or CEOs; **organizational** – board members, CEOs or department managers; **operational** – CEOs or department managers.

25. What best describes the use of quantitative data to support decision-making at different levels of your organization?

	Strategic decision-making	Organizational/managerial decision-making	Operational decision-making
Decision-making tends not to rely on data			
Decision-making relies slightly on data			
Decision-making relies heavily on data			
Decision-making relies entirely on data			

Q26 is shown only to board members or CEOs.

26. Select the top three factors you consider to make decisions in your role.

- Experience
- Intuition
- Consultation with board members
- Consultation with staff
- Consultation with regular and affiliate members
- Consultation with (non-member) experts
- Consultation with government
- Economic indicators and/or trends
- Strategic long-term vision
- Reports, publications or data produced by others
- Alignment with organizational strategic plan and objectives
- Other, please specify \_\_\_\_\_

Q27 is shown only to board members or CEOs.

27. Which of the three factors produces the best outcome?

- Experience
- Intuition
- Consultation with board members
- Consultation with staff
- Consultation with regular and affiliate members
- Consultation with (non-member) experts
- Consultation with government
- Economic indicators and/or trends
- Strategic long-term vision
- Reports, publications or data produced by others
- Alignment with organizational strategic plan and objectives
- Other, please specify \_\_\_\_\_

Q28 is shown only to board members, CEOs or department managers.

28. Is the following information accessible/available when needed to make decisions in your role?

	Yes	No
Operational data		
Government policies and regulation		
Labour market indicators		
Member's advocacy and service needs		
Members' feedback on EO services		
Member's expectations of EO		
Membership details		

Q29 is shown only to board members, CEOs or department managers.

29. Is there important information that you would use to advance your members' interests but that you don't yet have? If yes, please explain.

- Yes \_\_\_\_\_
- No

Q30 is shown only to board members, CEOs or department managers.

30. To what extent is **data analysis** by your organization limited by ...

	A lot	A moderate amount	A little	Not at all
Staff capacity (skills and expertise)				
Time				
Member interest/support				
Long-term planning				
Data collection tools (physical or digital)				
Financial resources				
Other, please specify				

## IV. Final comments

31. Please share any additional comments related to your organization's data needs or concerns:

---



---



---



---



---



---



---



---

**ILO DWT for East and South-East  
Asia and the Pacific**

United Nations Building  
Rajdamnern Nok Avenue  
Bangkok Thailand 10200

**Tel.:** +662 288 1234

**Fax:** +662 280 1735

**Email:** BANGKOK@ilo.org

**Website:** [www.ilo.org/asia](http://www.ilo.org/asia)

