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- ▶ **Digitalization**
to support the transformation
of EBMOs as data-driven
organizations in the Caribbean



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of EBMOs as data-driven
organizations in the Caribbean

By Linda Vega Orozco
ILO Consultant

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Port of Spain, Trinidad and Tobago

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DIGITAL MARKETING



► Acronyms

ACT/EMP	Bureau for Employers' Activities
ACTEMP/ITC-ILO	Programme for Employer Activities of the International Training Centre of the International Labour Organization
AGM	Annual general meeting
BCCEC	Bahamas Chamber of Commerce and Employers' Confederation
BCCI	Belize Chamber of Commerce and Industry
BEC	Barbados Employers' Confederation
CEO	Chief executive officer
CRM	Customer relationship management
EBMO	Employer and business membership organization
ECATT	Employers' Consultative Association of Trinidad and Tobago
GEF	Grenada Employers' Federation
ICT	Information and communications technology
ILO	International Labour Organization
IT	Information technology
ITCILO	International Training Centre of the International Labour Organization
WHO	World Health Organization
WTTC	World Travel and Tourism Council



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► Executive summary

Employers and business membership organizations (EBMOs) can use digital tools to find better, quicker ways to solve problems and increase efficiency gains and competitive edge through new or higher added value. Digital tools provide opportunities to improve operations and staff engagement and generate value for members through new products, services, and ways of working. Becoming a digital organization, however, goes beyond adopting new technologies. Digitalization is a process that demands significant changes and requires supportive organizational culture, processes, and practices. The digitalization journey also involves an understanding and appreciation for the role of data as a strategic asset to improve operations and create greater value for members.

This report examines how EBMOs in the Caribbean currently use digital tools and explores challenges and good practices related to the use of these tools. It also explores whether organizational processes and practices support digitalization, including whether EBMOs use data strategically to make calculated, organizational and operational decisions. This report also assesses staff's capabilities, skills, expertise and mindsets in using digital tools across different roles and departments. It explores organizational culture, including whether EBMOs enable technology adoption and whether leaders are committed to digitalization.

This report uses the following definitions:

- **Digitization:** converting information into a digital format
- **Digitalization:** the adoption of data technologies to find better, quicker ways to solve problems and, as such, to rely more systematically on the collection, management, and use of data

This report includes 23 semi-structured interviews with staff and board members of seven EBMOs in the Caribbean and a regional survey reaching 70 respondents from 18 EBMOs in 17 countries. Interviews explored the digital tools that EBMOs recognize in their work, challenges, good practices in using these tools, and current and future technology needs. They also examined whether organizational processes, practices, and culture enabled the adoption of digital solutions. The survey targeted staff members, chief executive officers (CEOs), and board members and quantified digitalization practices, processes, capability needs, and challenges in different EBMO areas.

The study found that the COVID-19 pandemic accelerated shifts related to the digitalization of EBMOs, particularly regarding digital tools and a new appreciation of data to support members and operations. EBMOs have expanded their services to reach a wider audience using digital tools. CEOs and board members expect digitalization to bring more benefits to their EBMOs, including higher revenue streams, improved communication ability with members and stakeholders, and better member recruitment and retention. Most leaders consider digitalization a priority and believe staff members support this organizational change. Despite the increasing use of digital tools, EBMOs face several digitalization challenges, including a lack of organizational strategy to guide digitalization, limited integration of digital tools with existing tools or practices, and limited time to identify suitable tools for EBMOs' needs.

More systematic data collection and analysis could help EBMOs derive benefits from digital tools, including higher membership, revenue, and influence. EBMOs should:

- ▶ measure their performance across different roles and departments;
- ▶ keep track of membership indicators to gain valuable insights about their size, influence, strength, and viability;
- ▶ use customer relationship management (CRM) data strategically to offer tailored services and better manage their human and financial resources;
- ▶ make incremental improvements to their engagement with members by strategically analyzing data insights from their website, social media platforms, and email marketing systems; and
- ▶ periodically assess members' needs and change their support and service delivery.

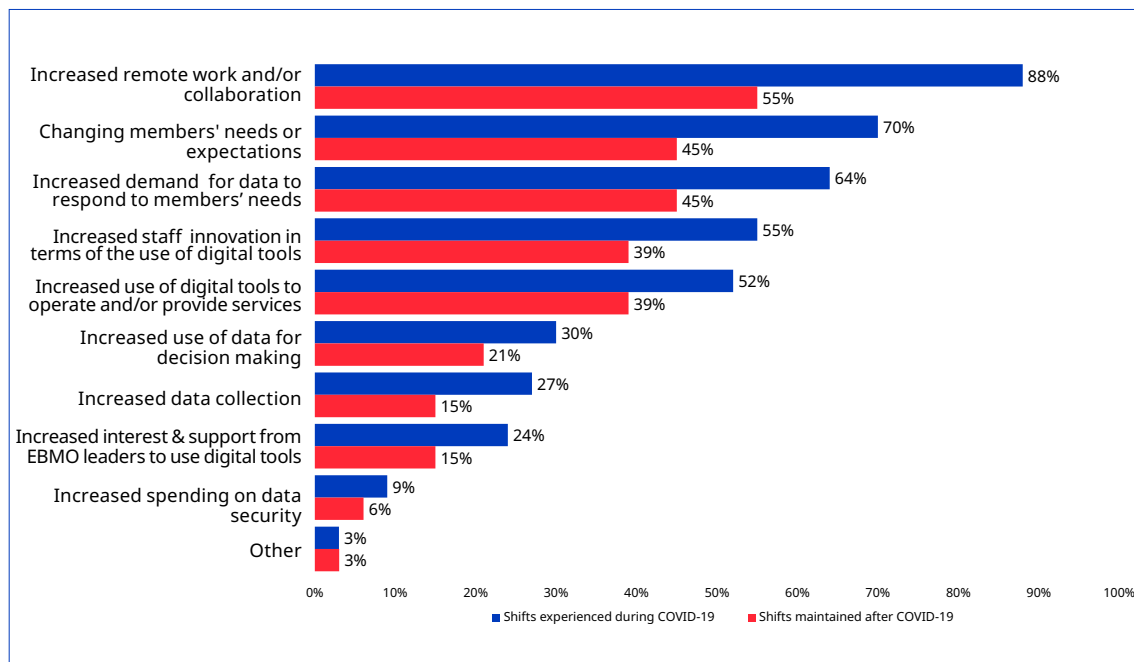
Establishing an organizational strategy that guides key digitalization goals, ideas, or priorities across EBMOs or for specific functions is critical. As part of these organizational efforts, EBMOs should designate a staff member in charge of digitalization. This person should be a staff member who understands the needs of members and the EBMO and can effectively communicate with staff and board members, rather than an external advisor. The board of directors could support digitalization efforts by forming a committee tasked with advancing technology uptake and increasing data collection and analysis at the EBMO. Job descriptions should specify the digital tools that staff use in different processes, and performance appraisals need to include an evaluation of the uptake of such tools. EBMOs should continue aligning their organizational practices with their digitalization efforts by digitizing their operations, increasing systematic information sharing in various roles and departments, using data strategically and investing in staff's capability building by allocating a fixed budget for this activity. Regarding organizational culture, EBMOs should continue to foster environments that value staff members for who they are and the experiences they bring to their organizations. They should promote innovation and digital solutions first rather than manual ones to improve productivity and organizational performance. CEOs and board members should lead by example by using and encouraging digital tools in their EBMOs to add value to members.

1. Why digitalization and why now?

Many EBMOs in the Caribbean experienced unprecedented challenges due to the COVID-19 pandemic. Government-imposed restrictions, including curfews, lockdowns, and recommendations to stay at home, changed how EBMOs provided services, operated internally and engaged with members. Such changes included offering virtual training, as well as virtual advisory, legal, and consultancy services. A joint ILO-IOE survey conducted in May 2020 revealed that over 90 per cent of EBMOs in the Caribbean modified service delivery to react to COVID-19-related restrictions of movement.¹

EBMOs experienced several shifts related to digitalization during COVID-19. Many of these shifts have been maintained after the pandemic and are expected to continue in the long term. An increase in remote work and collaboration was the most common shift experienced during the COVID-19 pandemic, as reported by 88 per cent of CEOs and board members. Other commonly experienced modifications related to digitalization included changing member needs or expectations (70 per cent), increased demand for data to respond to members' needs (64 per cent), increased staff innovation in terms of the use of digital tools (55 per cent) and increased use of digital tools to operate and provide services (52 per cent) (see Figure 1).

► **Figure 1. Shifts related to digitalization experienced during and maintained after the COVID-19 pandemic**



1 ILO and IOE, 2020.

Before the pandemic, staff rarely worked remotely or held online meetings, workshops, or events. Similarly, they used digital tools to collaborate and deliver services online in a limited manner. COVID-19 was an unexpected shock that forced EBMOs to change how they operated to be able to continue serving their members. Interviews revealed that EBMOs were prepared to work remotely to varying extents. For instance, one EBMO had bought laptops and upgraded the computer software shortly before the pandemic, facilitating remote work and collaboration. Other EBMOs were not as prepared to collaborate remotely but made incremental improvements to their systems over time. In most EBMOs, staff had to learn how to use Zoom or Microsoft Teams to run internal meetings or webinars when the restrictions began. Additionally, staff and managers experienced a change in their mindset as they realized that they could continue delivering services from their home offices, as highlighted by a staff member:

“(...) Prior to COVID-19 there were limited or no virtual meetings. The concept of working from home was something that didn't exist. COVID-19 definitely changed [our] perspective on those and showed that you don't have to be in office for work, or to be effective in doing your job.”

During COVID-19, EBMOs performed the critical function of sharing timely information to help members navigate the restrictions and uncertainty posed by the pandemic. EBMOs shared two types of information with members: updates and guidance from the government and international agencies, including the World Health Organization (WHO), and advice to support continuity, including preparedness checklists, business continuity plans, and workplace health and safety recommendations.² Additionally, some EBMOs provided a platform for businesses to exchange information and good practices during the pandemic through webinars and other online events.

In general, EBMOs took on a leadership role by collecting data and generating valuable insights on business needs for negotiations and national discussions with the government. Some EBMOs also took forward data collection initiatives with members. They used online surveys to gain initial insights into the economic impact of the virus on enterprises, challenges experienced, and business measures taken to endure restrictions. This rapid assistance accelerated shifts that were not prominent before the pandemic, particularly regarding the use of digital tools and a new appreciation for data to support members and operation. One staff member emphasized recent shifts in terms of data analysis and management for training purposes as a result of COVID-19:

“This year has been a good opportunity for acceleration. We've been making a lot more progress on so many things (...) one of the core things is data analysis and management. That's something that we never really did. I can see that being implemented.”

The pandemic had a massive economic impact on EBMOs and their members. Both had to re-think how to operate in a new business environment. EBMOs responded to the challenge by continuing to be the business community's voice and delivering online services and guidance to businesses. Likewise, members, particularly non-essential businesses, also operated online. As a result, members experienced a change in expectations about the types of services that EBMOs could provide online during and following the pandemic.

The survey also asked CEOs and board members about shifts related to digitalization that EBMOs maintained following the pandemic. **These shifts are higher remote work and collaboration (55 per cent), changing member needs or expectations (45 per cent), and increased demand for data to respond to members'**

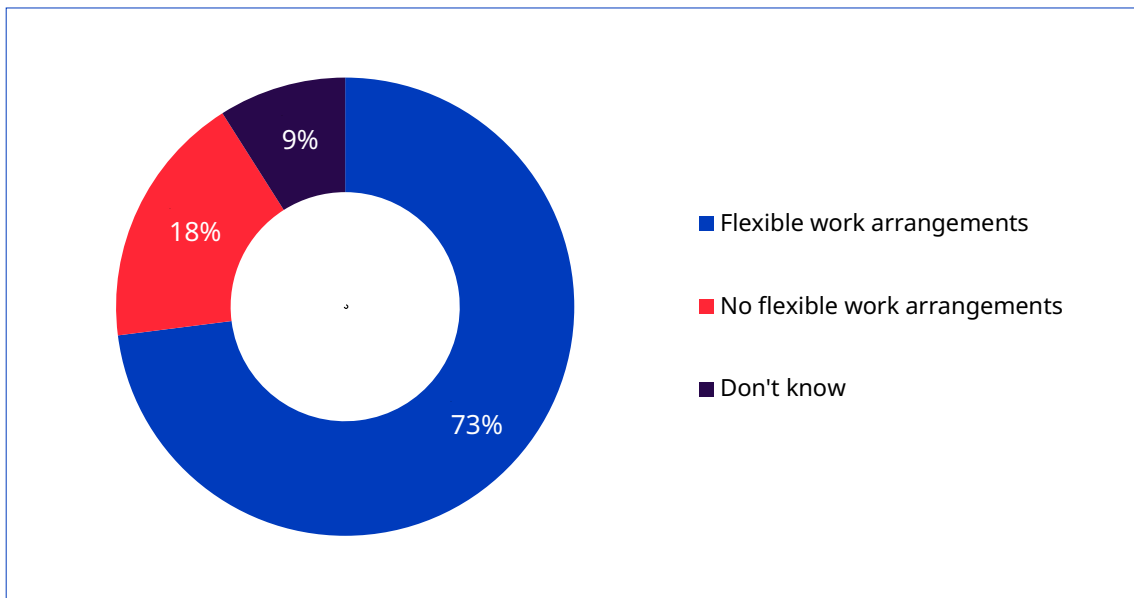
2 ILO, 2021a.

needs (45 per cent). Examples of post-COVID-19 remote work and collaboration include working from home; and allowing board and EBMO members to participate and vote remotely in regular and annual general meetings (AGMs), respectively. Interviews revealed that members not only expect more services in an increasingly digital environment but also expect EBMOs to lead changes in digitalization, as explained by a staff member:

“The world is turning into a more digital world. Some businesses are adopting their own models, or they're investing in digitalization. [Our EBMO] is looked at as the mother of all businesses, so they would expect at some point that we take the lead and carry on.”

The staff of some EBMOs have continued to work from home following the COVID-19 crisis. About 73 per cent of CEOs and board members reported that staff members have access to flexible work arrangements, including working from home and having flexible schedules (see Figure 2). Only two out of the seven EBMOs interviewed permanently allow staff members to work from home 2 or 3 days per week. Staff from the other five EBMOs have been requested to return to the office and might be able to work from home occasionally. Most interviewees who returned to the office reported preferring a hybrid model whereby they would be allowed to work half the time from home. They stressed that flexible work arrangements helped them better manage their time by eliminating commute time while maintaining their productivity and ability to do their jobs remotely.

► **Figure 2. Staff with access to flexible work arrangements**



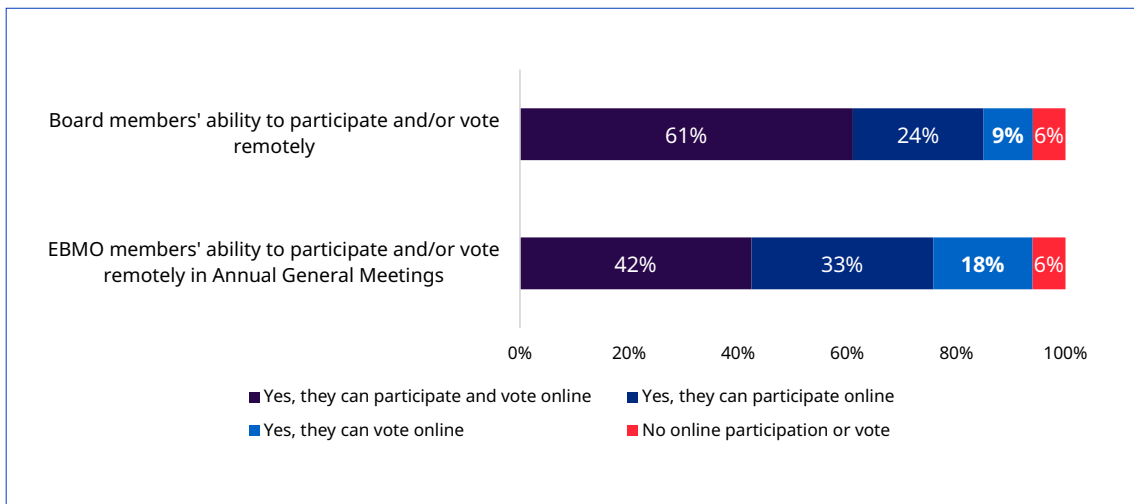
Box 1. Working from home in an accountable manner

Following the COVID-19 pandemic, the Employers’ Consultative Association of Trinidad and Tobago (ECATT) continued allowing staff members to work from home half of the time if they wanted. ECATT established a simple system whereby staff members record their daily activities on a log sheet when working remotely.

ECATT also implemented virtual phone extensions, which route incoming calls from staff’s extension numbers to their mobile phones. In this way, ECATT has maintained internal and external communications when working from home.

Most EBMOs allow board and EBMO members to vote and participate remotely in regular meetings and AGMs, respectively. Of the respondents, 61 per cent reported that board members could participate and vote online in regular meetings, and 33 per cent said that board members could either participate or vote online in regular meetings. Similarly, 42 per cent of respondents indicated that EBMO members could participate and vote online in AGMs. About half of respondents reported that EBMO members could participate or vote in AGMs online (see Figure 3).

► **Figure 3. Participation of board members and EBMO members**



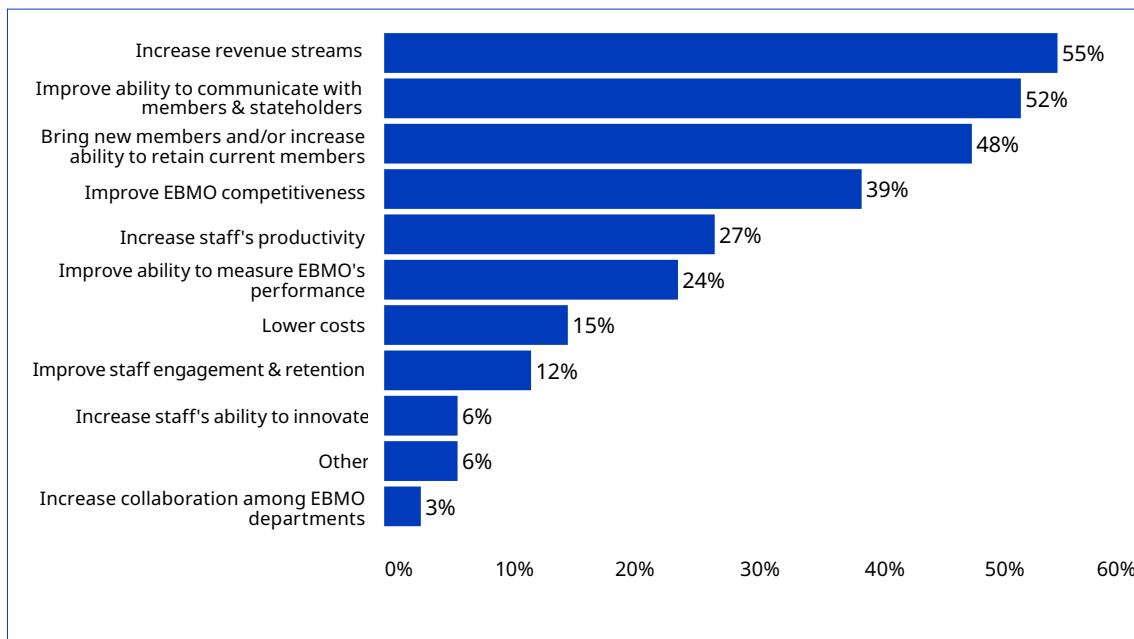
The survey also asked CEOs and board members about the benefits that they expected digitalization would bring their EBMOs. **Over half of CEOs and board members expected that digitalization would increase revenue streams and improve the ability to communicate with members and stakeholders.** Other benefits included gaining new members or increasing the ability to retain current members (48 per cent) and improving EBMO competitiveness (39 per cent) (see Figure 4).

Box 2. Facilitating online voting in AGMs

Belize Chamber of Commerce and Industry (BCCI) developed an application for iPhone and Samsung mobile phone users. This application allows members to access information on events, meetings, expositions, and a directory of BCCI members, including company names, email addresses, and phone numbers, among other details.

In the last general election, BCCI used its mobile application to allow members to vote from their devices during the AGM. The application recognized whether members were up-to-date with their dues and gave them an electronic ballot for voting. Election results were out in real time. Therefore, electronic voting was significantly more time efficient than manual voting, reducing the length of BCCI’s AGM by at least an hour.

► **Figure 4. Expected benefits from digitalization**



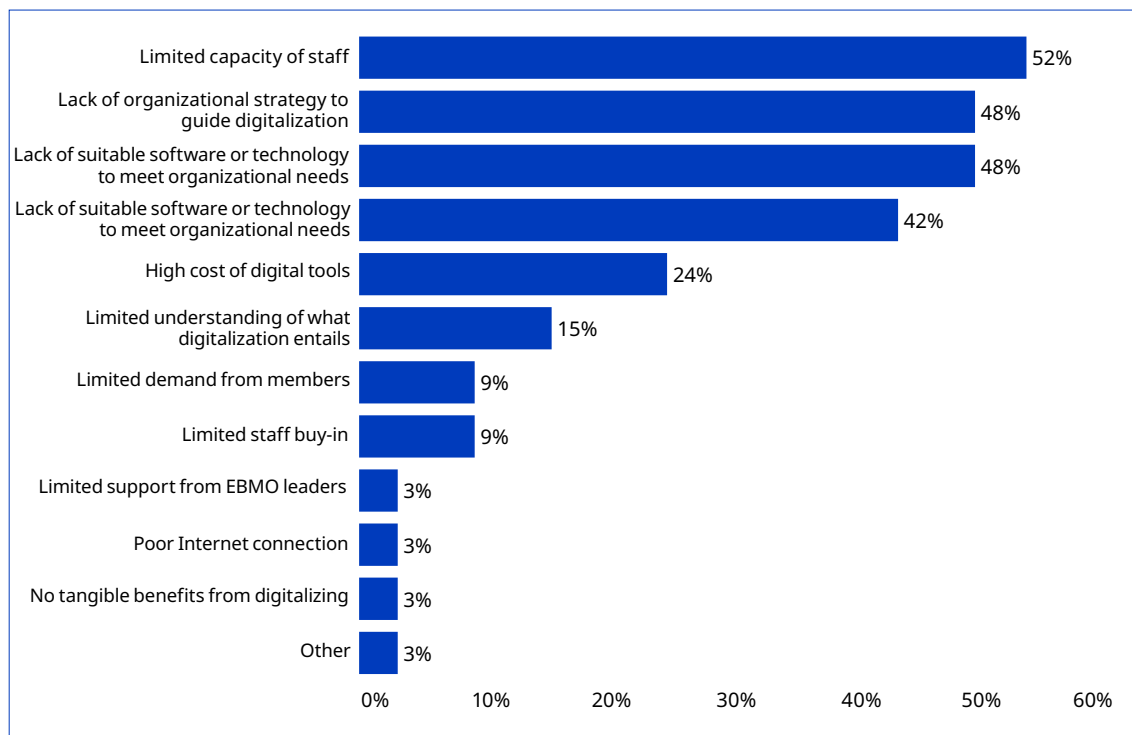
Despite the increasing use of digital tools, CEOs and board members reported facing several digitalization challenges. The top obstacles to digitalize, as reported by over 40 per cent of CEOs and board members are:

- **The limited staff capacity.** Although this is the most common challenge among CEOs and board members, interviews indicated that CEOs are relatively confident of the staff’s ability to use digital tools. Such confidence is partly due to the accelerated technology uptake experienced during COVID-19, which forced staff members to learn how to use digital tools to keep operations running. Additionally, many staff members interviewed are millennials or younger and reported learning to use new digital tools on the internet (e.g., YouTube, and Google).

- **Lack of organizational strategy to guide digitalization.** All EBMOs interviewed, regardless of size, do not have a formal strategy documenting key priorities, goals, or ideas to guide digitalization throughout the organization or for specific functions.
- **Lack of suitable software or technology to meet organizational needs.** There are myriad of applications and programmes to respond to business and organizational needs. Interviews suggested that new digital tools do not integrate well with existing tools or practices in some cases. In other cases, there is limited time to identify which tools best suit EBMO’s needs. As a result, staff members prefer to continue doing their tasks in more manual and time-consuming ways.
- **High cost of digital tools.** Limited resources were a common interview theme. The pandemic completely halted tourism in countries with economies that heavily rely on this industry and as a result, many EBMOs lost members during that time.³ All EBMOs interviewed reported using free online digital tools for different purposes, such as data collection and analysis, design, and email marketing. In some EBMOs, getting approval for new digital tools for the whole organization is challenging if these are relatively expensive, given resource constraints. As a result, staff members need to make a strong case for the organizational needs and benefits of digital tools to get approval to buy them.

Less than a quarter of CEOs and board members reported other challenges, including a limited understanding of digitalization, limited demand from members, and staff’s buy-in. These results confirm that most CEOs and board members understand the need to digitalize and believe that staff members would support this change. Likewise, the COVID-19 pandemic showed both EBMO members and staff the extent to which digital tools can facilitate interaction and increase efficiencies in service provision (see Figure 5).

►Figure 5. Challenges encountered to digitalize



³ The World Travel and Tourism Council (WTTC) estimates that tourism contributes to almost 15 per cent of the gross domestic product in most Caribbean countries (WTTC, 2022).

EBMOs are at different stages of their digitalization journey. The size of membership, the size of staff, the capability of the team, and the extent to which EBMO leaders have a vision about where digital tools can take their organizations influence how advanced they are in this journey. During interviews, staff of medium EBMOs (that employed at least five people) appeared more experienced in the use of digital tools for membership, communications, training, research, and organizational (finance, operations) purposes than small EBMOs (employing less than five people).

In medium-sized EBMOs, the staff use digital tools in practical ways to engage with members, deliver services, automate manual processes, and increase productivity. These EBMOs collect and analyze data to determine when and how members would be more likely to engage with them. They understand that one-size-fits-all communication and engagement do not work with all members. They use data to inform planning and resource management. In these EBMOs, CEOs have advanced ideas and ambitions regarding the use of digital tools to provide new services and improve existing services to bring more financial resources to their organizations.

Small EBMOs, on the other hand, are less sophisticated users of digital tools due to limited exposure or experience. For example, since mid-2022, they started using CRM software, which implies limitations in the extent to which they strategically analyzed members' data to support service provision. Most of these EBMOs currently do not have a research officer position, which limits the extent to which they can use data for evidence-based lobbying and advocacy. Limited data collection, use, and analysis also constrain their influence as they cannot quantify how much members contribute to the national economy, which can be helpful information in negotiations with the government. In some small EBMOs, CEOs had ideas about where to take their organizations. However, financial constraints and limited coordination with board members for decision-making were major obstacles limiting technology uptake and EBMO performance.

Box 3. Receiving payments online

The following EBMOs have digitized payments for their customers:

- The Bahamas Chamber of Commerce and Employers' Confederation (BCCEC) can receive online wires, and payment with credit and debit cards, and Kanoo (a digital wallet).
- The Barbados Employers' Confederation (BEC), BCCI, and ECATT can receive online wires and are looking into allowing customers to pay online using their credit or debit cards.



2. How do EBMOs use digital tools?

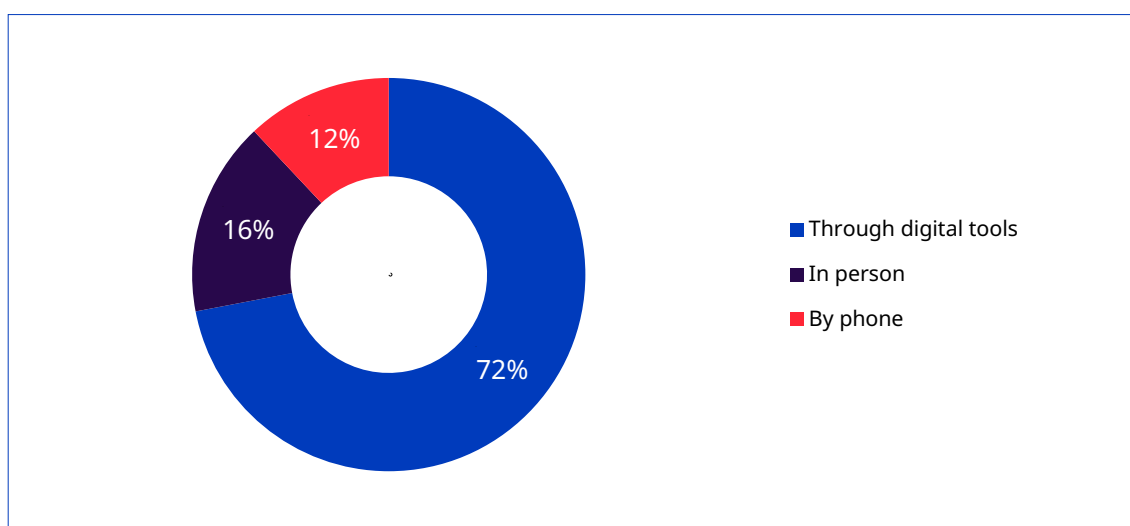
This section documents survey and interview findings about the types of digital tools used in membership engagement; communications; training and advisory services; research, policy work, and related advocacy. Surveys and interviews targeted staff responsible for these roles and functions.⁴

Membership engagement

EBMOs collect two main categories of data on members: institutional data and member needs and interest data. Institutional data includes member identification information such as contact details (e.g., addresses, telephone numbers), demographic information (e.g., sector, size), membership status, and member representatives, among others. Member needs and interest data refer to information about needs or feedback regarding a particular topic, activity, or policy matter.⁵

Digital tools are the primary means to collect data on members, as reported by 72 per cent of respondents. A lower share of respondents reported collecting data in person (16 per cent) or on the phone (12 per cent). Some EBMOs reported doing occasional in-person visits to foster the relationship with members. However, most member information was collected using digital tools such as email, online membership registration and renewal, and online surveys.

►Figure 6. Main means to collect data on members



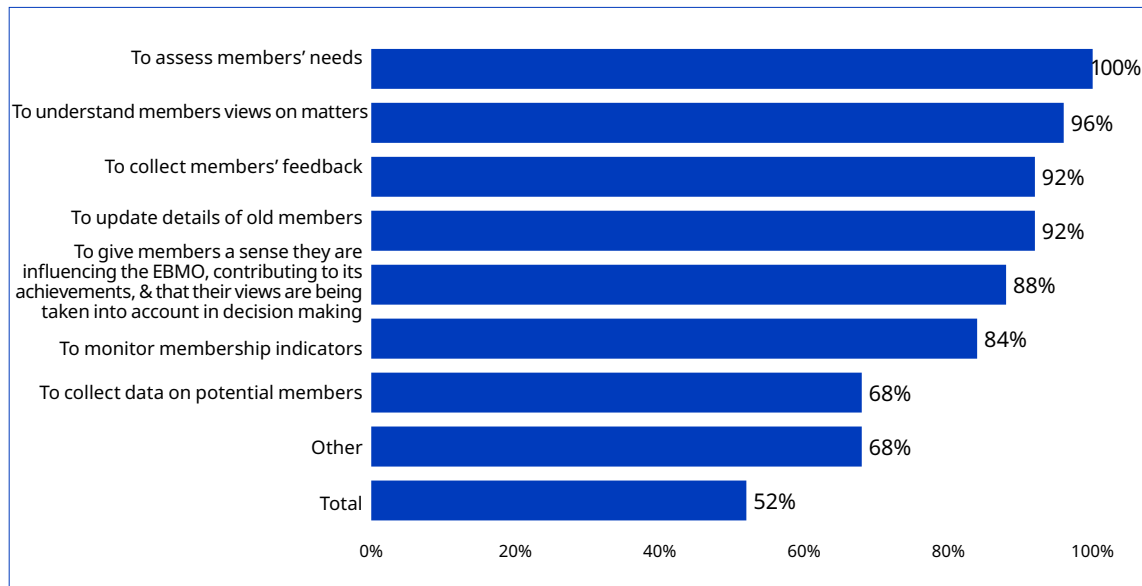
⁴ During interviews, some EBMOs reported using digital tools in addition to the tools mentioned in this section, including Quick Books for accounting, Canvas and Photoshop Suite for design, and Keap for email marketing.

⁵ ILO, 2021b.

The survey also asked about the purpose of collecting data on members. **All surveyed respondents reported collecting data to assess members’ needs.** Other common reasons to collect data on members (see Figure 7), as reported by over 80 per cent of respondents, were:

- To understand members’ views on matters (96 per cent);
- To collect members’ feedback (92 per cent);
- To update details of old members (92 per cent);
- To understand membership satisfaction (88 per cent);
- To collect details of new members (84 per cent).

►Figure 7. Reasons to collect data on members



EBMOs monitor basic membership indicators including the total number of direct members and the percentage of members paying fees. However, there is scope to keep track of additional membership indicators that could provide valuable insights into the EBMO’s size, influence, strength, and viability. EBMOs can measure their performance to learn about and keep track of their membership growth and retention. This information can help EBMOs understand which membership strategies are working. Collecting and analyzing such data is particularly important in membership, as membership fees are the most important source of revenue for EBMOs.⁶

Other membership indicators that could generate valuable insights for EBMOs include the total number of new members, membership growth rate, membership retention rate, membership recruitment rate, and recruitment success rate, among others.

⁶ A 2020 survey found that membership subscriptions accounted for 60 per cent of the average income of 12 EBMOs in the Caribbean (ILO and IOE, 2020).

Box 4. Issuing digital membership certificates

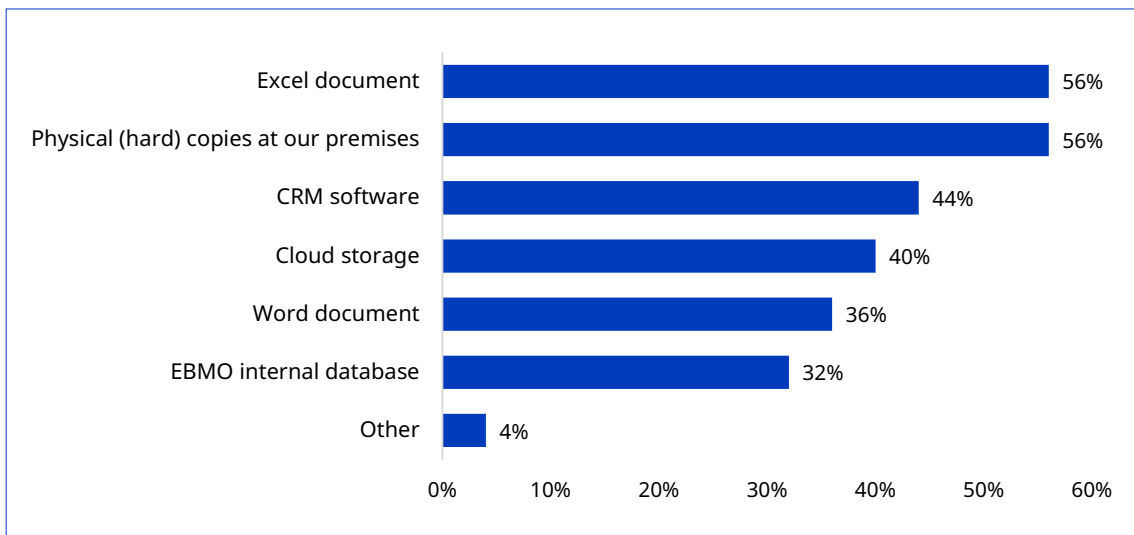
BCCEC issues a membership certificate recognizing organizations when they join or renew their membership. Before COVID-19, these certificates were hard copies that members would collect from BCCEC’s offices. However, members would only sometimes collect the certificates as they could not always visit BCCEC’s office in person.

As COVID-19 restrictions kicked in, BCCEC started issuing membership certificates in digital format and emailing them to members as PDF files. Members provided positive feedback to BCCEC, posted their membership certificates on social media platforms, and tagged BCCEC.

BCCEC has reduced costs associated with producing these certificates because no ink or paper is required to make digital certificates. Issuing digital certificates is a more time-efficient and environmentally friendly option. Given these benefits and members’ positive feedback, BCCEC continues to issue digital membership certificates after COVID-19.

Excel is the most common digital tool to store data on members. Yet, many EBMOs keep physical (hard) copies of members’ data at their premises. Storing data on members in both an Excel document and physical copies at EBMO premises was reported by 56 per cent of respondents. Other digital tools used to store data on members included the CRM software (44 per cent), cloud storage (40 per cent), MS Word document (36 per cent) and EBMO internal database (32 per cent) (see Figure 8).

► **Figure 8. Storage of members' data**



Interviews revealed that EBMOs have reduced the extent to which they use hard copies to collect and store members’ information or are aware of the need to do so. Staff members highlighted the high cost of storage and the difficulty and time spent finding historical files when needed as critical issues related to the storage of hard copies. Most EBMOs do not have policies or guidance to destroy or retire old files. This hampers the efforts to digitalize and creates risks affecting members’ data due to improper use or damage from unexpected events (e.g., fires, cyclones, floods). Climate change particularly impacts

small island states in the Caribbean, which has increased the frequency and intensity of natural disasters such as cyclones. Therefore, physical on-site storage could be at risk of flooding and damage. One staff member noted that her EBMO was considering using a document management system to improve the ease of access to historical documents:

“We still do a lot of physical filing. You may need to keep some files for five or ten years, but you will want to transition those files onto a document management system so that everything is digital (...). We have some physical files at the office and storage.”

Box 5. Main objectives of the CRM software

Eight EBMOs in the Caribbean are using the CRM software, a useful cloud-based tool hosted by ILO's International Training Centre (ITCILO), to manage membership data and improve communications with members. The main objectives of the CRM are:

- Manage and segment data;
- Organize tasks and work within the EBMO;
- Optimize time management;
- Improve internal and external communication;
- Facilitate recruitment of new members;
- Facilitate retention and engagement of existing members;
- Enable knowledge sharing about members.

Source: ITC ILO, 2021.

Increasingly, more EBMOs are adopting the CRM software to store and manage data on members.

Of the 13 EBMOs in the ILO Caribbean member States, 50 per cent started using the CRM in mid-2022, 15 per cent have been using the CRM Before 2021, and 35 per cent still need a CRM system. ITCILO has provided training and technical assistance to EBMOs that recently adopted or renewed the license of the CRM software. ITCILO allows EBMOs to customize pre-defined data fields of information collected and stored on the CRM. For example, EBMOs can specify which economic sectors and enterprise sizes they want in their CRM.

During interviews, EBMO membership staff, who were old CRM users, highlighted the usefulness of the CRM, particularly in terms of tracking past interactions with members and being able to keep members' information in a single location. Thanks to the CRM, multiple staff could access and use data on members to provide advice and guidance to members as required. The latest version of the CRM allows EBMOs to generate invoices that were previously issued using accounting software like QuickBooks. Despite these benefits, the extent to which the staff used the CRM strategically to engage with members or offer tailored/segmented services based on enterprise characteristics (e.g., sector, size, interests) seemed limited. Staff and CEOs from EBMOs who got the CRM license in mid-2022 were eager to embrace its full adoption and enjoy its benefits, as highlighted by a CEO who noted:

“We want to be able to interact more closely with our members. We want to collect data on our members. We want to be able to invoice our members and track the payments. The CRM would allow us to query to get the kind of information that we want.”

Key challenges of using the CRM software include limited or no integration with other digital tools, little time to enter data into the CRM software, and limited coordination with other departments.

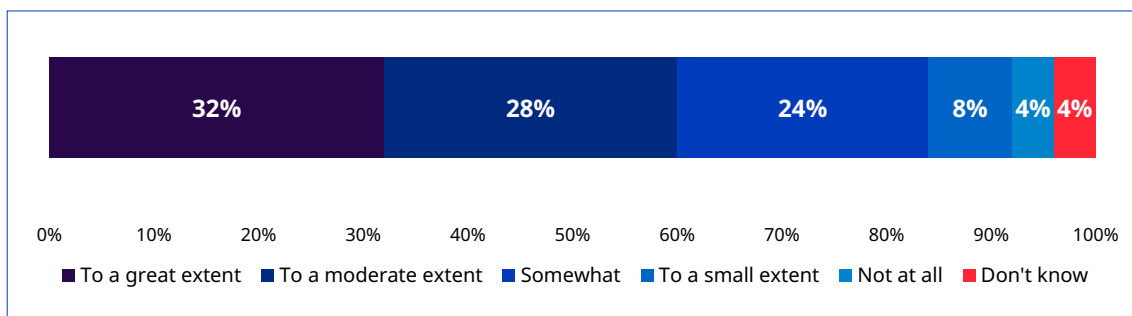
During interviews, staff and CEOs who previously used the CRM highlighted its limited integration with other digital tools, including the accounting system, training platforms, and email marketing tools. They explained that better CRM integration would improve productivity, save time, and reduce manual work processes. For instance, CRM integration with the accounting system would allow EBMOs to have automatic triggers and reminders to manage membership fees and other payments.

One CEO of a medium EBMO was particularly interested in the CRM integration with the accounting system to quantify how membership dues translate into services, discounts, and other benefits. In this way, staff could compare membership fees against benefits to show members what they are getting from their membership. These valuable insights can improve membership retention because it quantifies how and which membership subscription adds value to members.

Most EBMOs are not using members’ data to its fullest extent to offer targeted services to them.

Of the respondents, 32 per cent reported using members’ data to a great extent, and 28 per cent reported using members’ data to a moderate extent for this purpose (see Figure 9). There is an opportunity for EBMOs to analyze and use members’ data more strategically to offer services for different types of members based on their needs, feedback, and characteristics.

► **Figure 9. Extent to which EBMOs use members' data to offer targeted services to them**



The CRM could support systematic storage and data analysis on members and potential members. This tool is the base of a solid membership strategy that can help EBMOs become more representative and derive more revenue from members and non-members. The CRM enables EBMOs to segment data collected to get valuable information about their clients and track EBMOs’ performance. For instance, EBMOs could identify which services are in higher demand and by whom (e.g., enterprises of a particular sector or size) and modify their supply or marketing initiatives. EBMOs could also use the CRM to understand which department needs more resources given the current demand and then shift human and financial resources accordingly to respond to that demand.

Box 6. Offering online platforms to publish job vacancies

ECATT’s Jobs Board is a dedicated space on ECATT’s website where members can publish vacancies free of charge. This benefit allows members to maximize the likelihood of finding the best candidate for their organizations. Non-members can also publish job vacancies on ECATT’s Job Board for a fee.

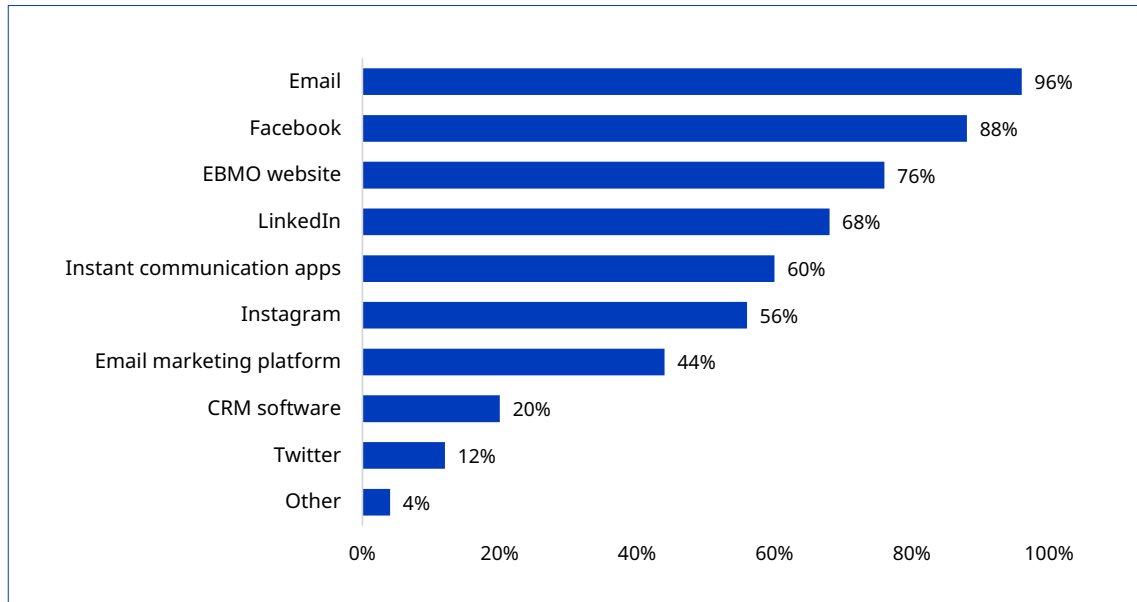
Similarly, BEC supports talent acquisition of member enterprises by publishing their terms of reference for job vacancies on social media platforms, including Facebook and Instagram.

Communications

EBMOs regularly communicate with members to share important information on business matters, training, events, or other activities that they organize. During COVID-19, EBMOs took on a leadership role in sharing information related to government restrictions, health guidance, and valuable updates for members and the wider business community.

Email is the most common digital tool to share information and engage with members. Facebook and EBMO websites were the second and third most common digital communication tools, as reported by over 75 per cent of respondents. Other standard digital communication tools included LinkedIn (68 per cent), Instant communication applications such as WhatsApp (60 per cent), and Instagram (56 per cent), and email marketing platforms including MailChimp and Constant Contact (44 per cent) (see Figure 10).

► **Figure 10. Digital tools to share information and engage with members**



Interviews revealed that medium-sized EBMOs have been putting more time, financial and human resources into updating or maintaining their websites to make them more functional and user-friendly. EBMOs interviewed have updated Facebook pages with their contact information, current events, workshops, etc. Most also have websites with important information, such as their vision, mission, and

services offered. EBMOs are active social media users, and some have recently opened Instagram and LinkedIn accounts. Small EBMOs, however, are constrained in the extent to which they can improve their social media presence due to limited time and human resources to do so, as expressed by a staff member:

“It's hard to put time to focus on getting more content for social media because there's not enough time (...) if I were to focus on that, it would take away from the other duties that I have to do. I'm trying to do some things, but I can't do more. I'm unable to do more.”

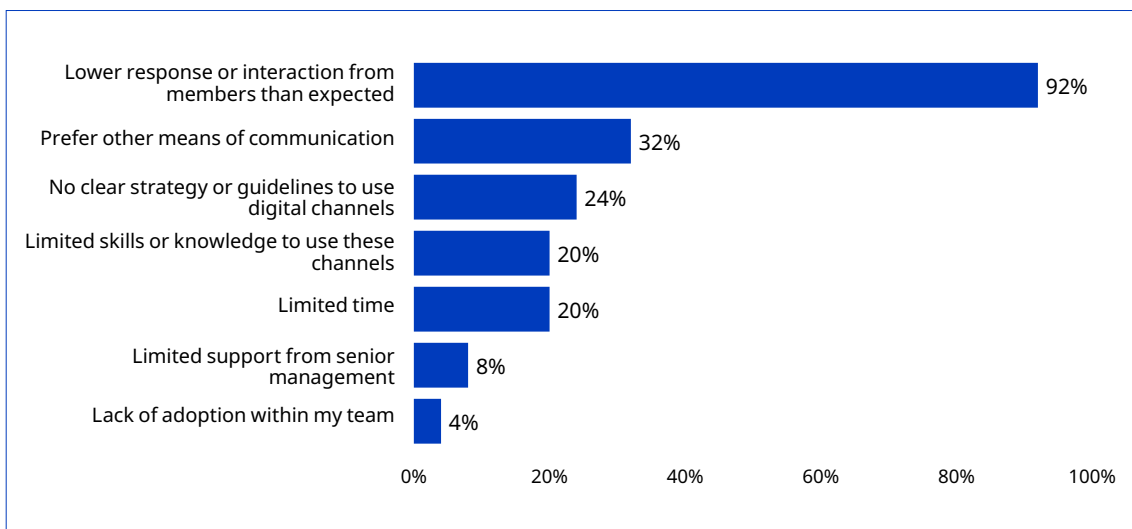
Box 7. Spotlighting members and their services

BCCEC established the Member Spotlight to highlight selected members in a monthly blog post on BCCEC’s website and Facebook page. The Member Spotlight is a marketing opportunity in which members can showcase their services and products online.

Blog posts provide key member information such as leading products and services, year of establishment, and recent successes. Blog posts also include links to members’ websites and social media platforms, including Facebook and Instagram.

Lower response or interaction from members than expected was the most common challenge experienced in the use of digital communication tools. Over 90 per cent of respondents reported this challenge, and it was a common interview theme. Lower response or interaction from members could be linked to members’ preference for other means of communication, as reported by a third of survey respondents. Twenty per cent of respondents reported limited skills or knowledge to use digital communication channels or limited time (see Figure 11).

► **Figure 11. Challenges encountered when using digital tools to communicate with members**

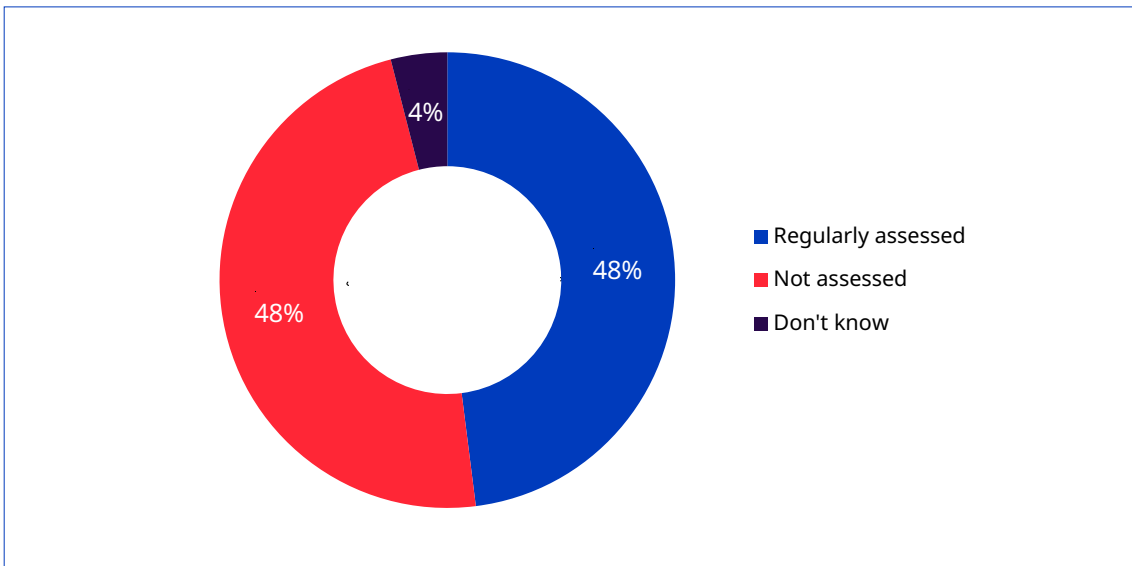


Interviews suggested that EBMOs are looking for alternative ways to communicate with members to improve engagement. In some cases, they communicate with members using WhatsApp groups or private messaging rather than or in addition to emailing. Some EBMOs have identified that members prefer to communicate through other means (e.g., on the phone, in person) and proceed to engage with members in this way, as reported by a membership manager:

“Most people who work at employers’ organizations will tell you that sending email and getting a response from your members could be very difficult. (...) so we go the extra mile by doing membership visits, in which we can find out how they feel about the [EBMO], the services we're offering, what new services they want or need, and if they have any referrals for any other business to join.”

Less than half of survey respondents reported that their EBMOs regularly assessed the impact or effectiveness of digital means of communication (see Figure 12). Interviews suggested that EBMOs do not fully use data resulting from digital communications tools to evaluate their effectiveness. For instance, EBMOs rarely analyze website indicators measuring the traffic, click rate, number of page visits, and number of new or returning visitors. Additionally, EBMOs do not systematically evaluate data insights from Facebook and Instagram (e.g., post reach, engagement, likes, new followers) to measure the audience’s interaction with posts. EBMOs miss learning opportunities from this data to improve digital engagement and increase revenue.

► **Figure 12. Regular assessment of the impact or effectiveness of digital means of communication**



Box 8. Launching live Q&A sessions

Since 2018, ECATT has run the Membership Appreciation Week as a weekly event in which members can access two 15-minute free consultations on industrial relations, human resources, or other topics of interest for employers.

In 2022, ECATT decided to expand the scope of the Membership Appreciation Week to include interactive Q&A webinars. In these live sessions, members can ask questions and get free answers and advice from ECATT's experts and advisors. Members who do not have questions can also join live webinars to learn from questions asked and advice given to other members.

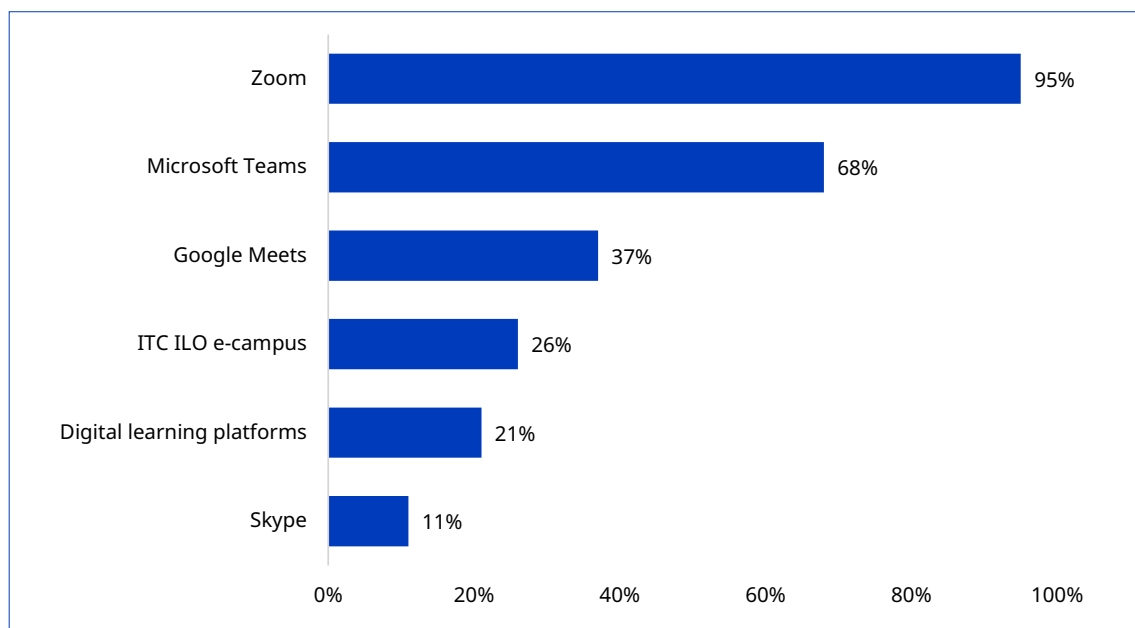
Training and advisory services

Most EBMOs provide or facilitate training courses and workshops for members and non-members. These training sessions generally cover a range of topics, including laws (e.g., minimum wage, taxation, labour), industrial relations, management (e.g., human resources, finance, administration), soft skills, and other business topics (e.g., health and safety at the workplace, trade), among others. Some EBMOs provide individual or group advice and guidance to members on these topics or other issues. Before the COVID-19 pandemic, EBMOs held most training, workshops, and advisory sessions at their premises or other venues rented for this purpose. Having online training sessions or events was different from standard practice. However, government-imposed restrictions and the need to keep services running during the pandemic accelerated the uptake of digital tools for training and advisory services.

Zoom and Microsoft Teams are the most used digital tools to deliver training and advisory services.

These two digital tools were used by 95 per cent of respondents and 68 per cent of respondents, respectively. Other digital tools used for the online delivery of training and advisory services include Google Meets (37 per cent), ITCILO e-campus (26 per cent), digital learning platforms (21 per cent), and Skype (11 per cent) (see Figure 13).

► **Figure 13. Digital tools used for training and service delivery**



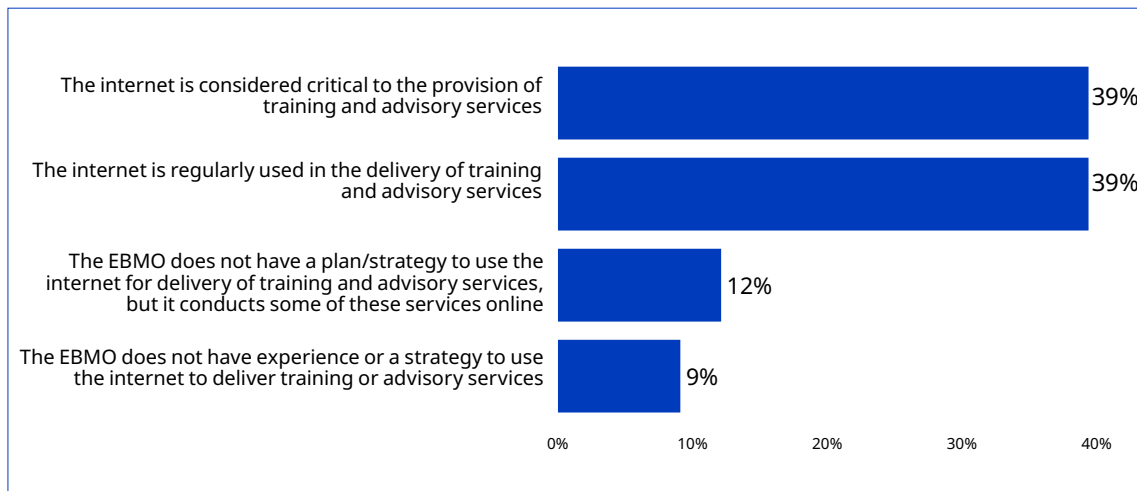
Box 9. Rapid uptake of digital tools for service delivery

Since 2020, EBMOs have quickly adapted to changes brought about by COVID-19 to deliver services online. They conducted online training, meetings, workshops, webinars, and member engagement using Zoom, Microsoft Teams, and Google meets, among other digital tools.

For most EBMOs, this was the first-time delivering services online. EBMOs will continue to use digital tools to deliver services online as they cost-effectively reach a broad audience. Online events also provide members and clients with convenient access and flexibility as they can join online sessions anywhere in the world.

Most EBMOs use the internet in the delivery of training and advisory services. Almost 80 per cent of respondents reported that the internet is critical or is regularly used in providing training and advisory services. Twelve per cent of respondents indicated that their EBMOs do not have a plan or strategy to use the internet for training and advisory services but they provided some of these services online. An additional 9 per cent of respondents reported that their EBMOs do not have experience or the strategy to use the internet to deliver training or advisory services (see Figure 14).

► **Figure 14. Use of the internet in training and advisory services**



In a post-COVID-19 environment, members’ demand for online training is mixed. During interviews, staff reported that some members expected online training and services while others felt more comfortable interacting in person. EBMOs provide hybrid services where participants can join in person or online conveniently. EBMOs are also learning to recognize which services are better suited for an online format, when to mix online and in-person forms, and when to interact face-to-face. Ultimately, choosing online or in-person training comes down to member preferences, as explained by a CEO:

“There's still a good level of satisfaction with the online environment. A small but growing percentage of people are becoming a little online wary. Especially now that we're right at the end of a lot of major COVID restrictions.”

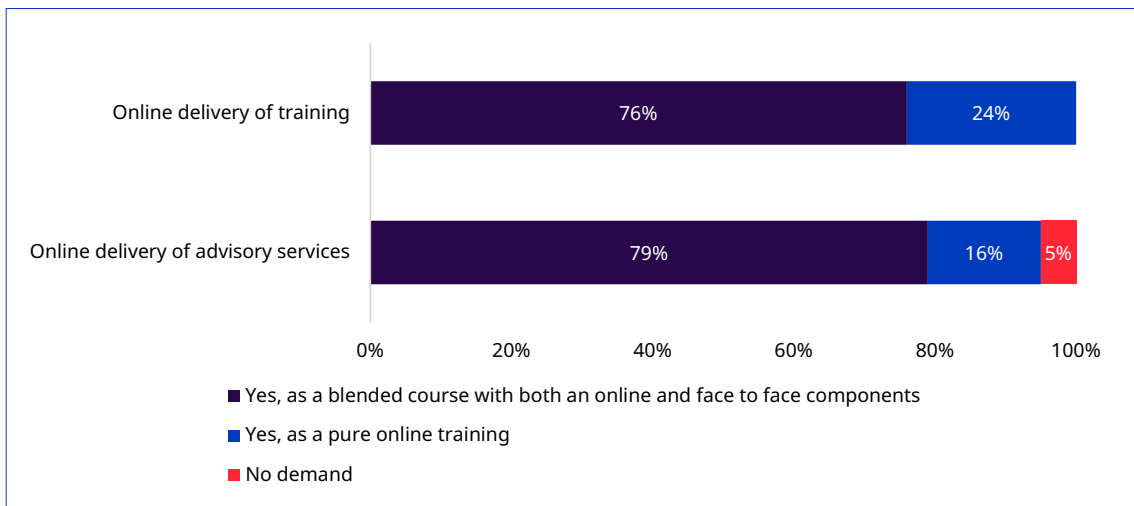
EBMOs delivering online training see tangible benefits from running sessions in this format.

Interviews revealed that EBMOs using training platforms (e.g., ITCILO e-campus) had increased service delivery through additional materials that members could consult online at their own pace. These EBMOs can ask trainees to complete pre-loaded training sessions rather than running these sessions exclusively for small groups or single members. Running sessions on online platforms helps reduce the burden for staff and facilitators because they do not spend time preparing for and delivering these sessions.

Most EBMOs provide training and advisory services with online and offline components.

The survey explored the type of training or advisory service that members demand. Eight out of 10 respondents reported that members demanded online training and advisory services delivered with a blended approach with online and face-to-face components. Additionally, a quarter of respondents indicated that members demanded fully online delivery of training, and 16 per cent of respondents reported that members demanded fully online delivery of advisory services (see Figure 15).

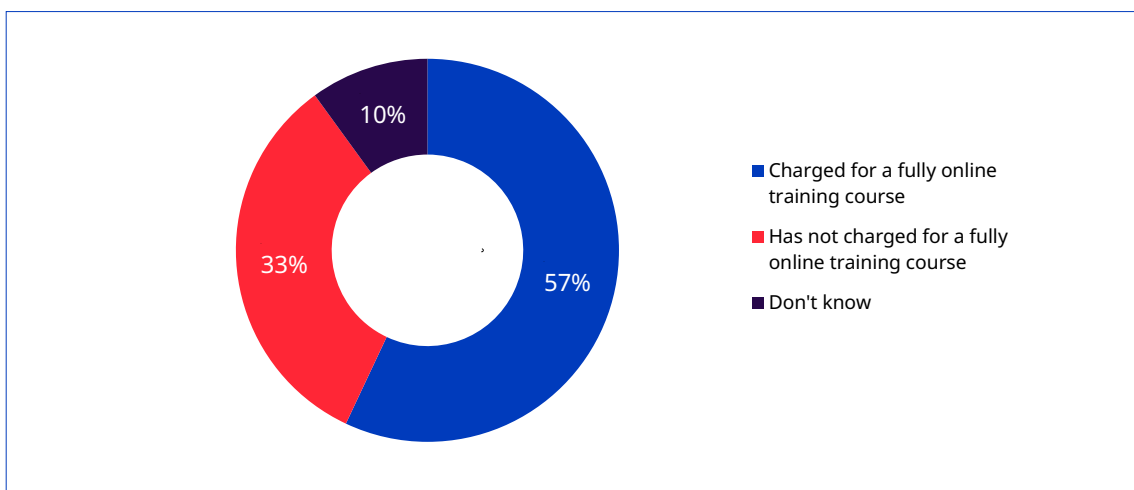
► **Figure 15. Members' demand for online delivery of training and advisory services**



Most EBMOs have charged for training courses delivered entirely online.

Over half of respondents reported that their EBMOs have charged for fully online training courses. A third of respondents reported that their EBMOs have not received any income from these online training sessions (see Figure 16).

► **Figure 16. Respondents from EBMOs that have charged for a course delivered entirely online**



Overall, online training sessions have been cheaper than in-person training sessions, as reported by 75 per cent of respondents whose EBMOs charged for training sessions. An additional 25 per cent of respondents from EBMOs that delivered fully online courses reported that the price of online and in-person training was similar. Online training sessions are cheaper because there are fewer costs associated with running the training, such as venue rental, food, and beverages for participants, facilitators' transport, and hotel if they come from abroad or another region in the country. A CEO of a small EBMO highlighted this:

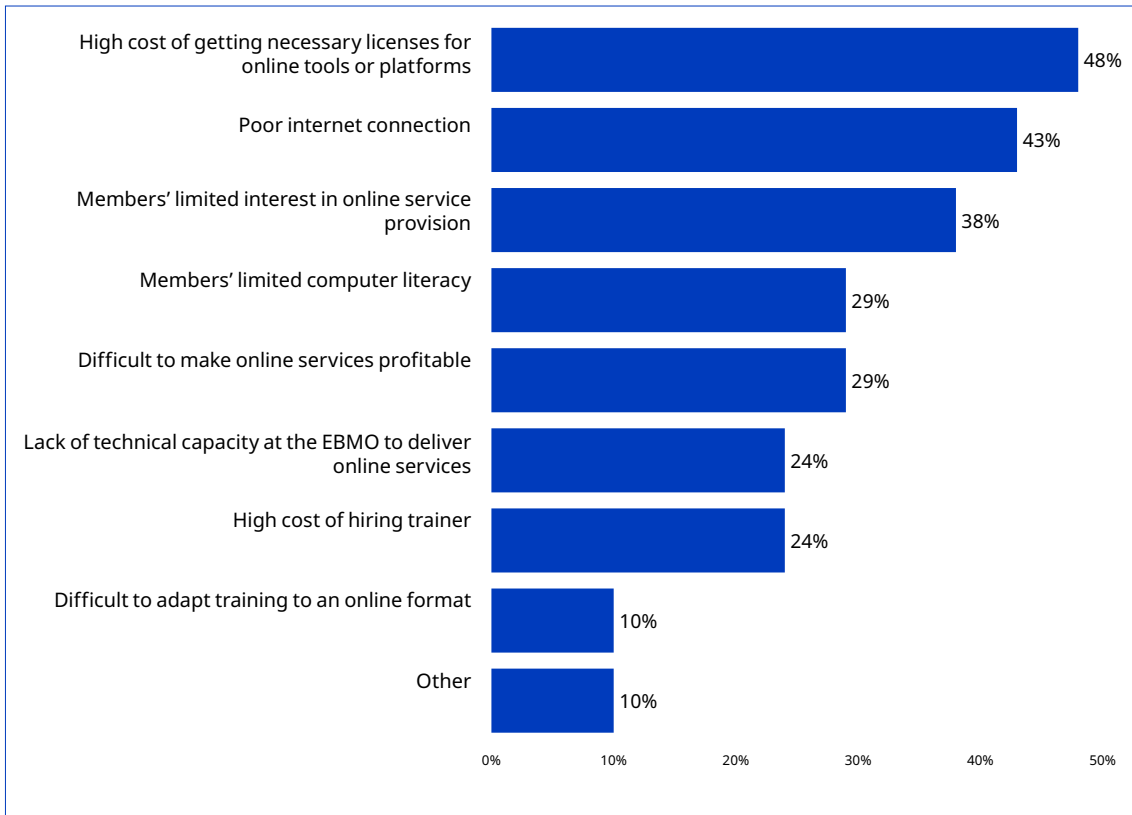
“The Zoom training is much cheaper than the face-to-face [training]. For the face-to-face training, [we] would have to rent a hall because we do not have that kind of conference facility. [We] would have to provide snacks, lunch, and other materials to ensure the workshop is successful.”

Interviews suggested that EBMOs were interested in continuing to entirely full online training sessions due to the relatively lower cost of running them when compared to in-person sessions. However, members' attendance and interest in full online courses have dropped since the lifting of COVID-19 restrictions. EBMO staff indicated that most training and advisory services would continue to follow a hybrid approach in which members can join sessions online or in person, as preferred. Additionally, EBMOs would design training courses so that specific training sessions are in person and other training sessions are online. A training coordinator highlighted that members' appetite for online training is mixed:

“I have noticed [some] persons prefer online training for the convenience of just doing it online. (...) As covid has shifted, we're finding that some persons want to come in and do live sessions. Members' appetite still seems to be for virtual training where you get the information that you need without having to commute to a location.”

The high cost of getting necessary licenses for online tools or platforms and poor internet connection were the most common obstacles to the delivery of online training and advisory services. Almost half of the respondents reported these two obstacles (see Figure 17). Other challenges to the online delivery of training and advisory services included limited interest from members in online service provision (38 per cent), members' limited computer literacy (29 per cent), and difficulty in making online services profitable (29 per cent).

► **Figure 17. Obstacles to online delivery of training and advisory services**



Financial constraints were commonly referred to as a critical challenge to operate or acquire new digital tools during interviews. Limited financial resources can make it difficult to get approval from senior management or board members to buy new tools or application licenses. As a result, EBMOs use digital tools that are freely available online or that the ILO ACT/EMP or ICTILO provide to them. They use free digital tools and upgrade to paid versions if these add value to EBMOs or their members.

The region's internet infrastructure and connectivity have significantly improved over the past decade. However, low internet speed and coverage affect countries in the area to varying extents.⁷ Internet penetration and quality are better in urban than rural areas.⁸ One key indicator that quantifies investment in the national ICT network is the share of Internet users because it shows whether people are accessing and using the internet.⁹ The latest data from the International Telecommunication Union highlights differences in internet use in Caribbean countries. For example, over 95 per cent of people in Bermuda and Aruba use the internet, compared to less than 55 per cent of internet users in Saint Lucia, Belize and Guyana (see Table 1). The diversity in internet access can influence the extent to which EBMOs and their members continue to deliver and access services online.

7 Laughlin, 2020.

8 Fonseca-Hoeve et al, 2017.

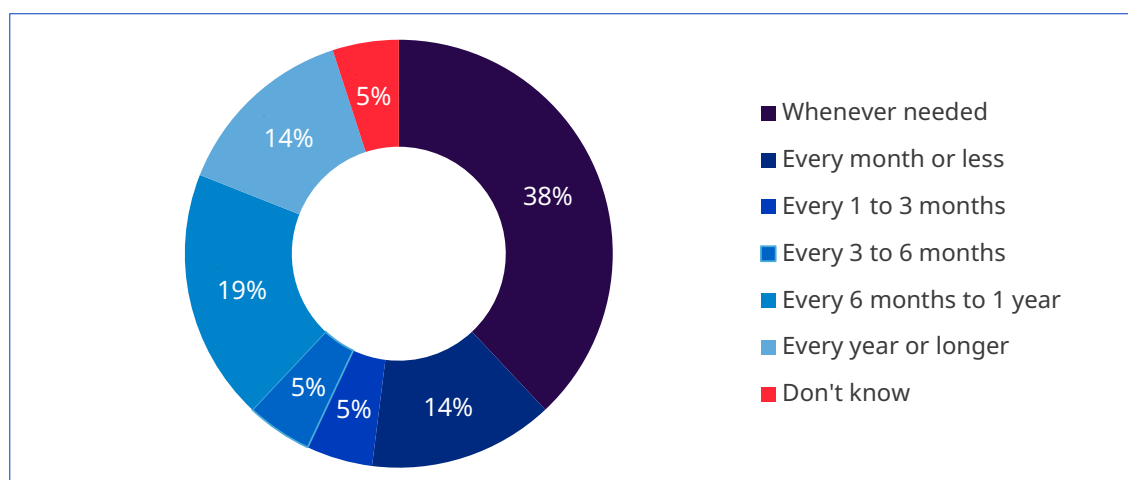
9 Ibid.

► **Table 1. Share of internet users in Caribbean countries, latest year**

Country	Internet users (%)	Year
Bermuda	98.4	2016
Aruba	97.2	2016
Bahamas	87.0	2017
Barbados	81.8	2020
Anguilla	81.6	2017
Saint Kitts and Nevis	80.7	2019
Antigua and Barbuda	73.0	2017
Trinidad and Tobago	70.6	2017
Suriname	70.1	2020
Dominica	69.6	2017
Jamaica	68.2	2018
Grenada	56.9	2017
Saint Vincent and the Grenadines	56.0	2020
Saint Lucia	53.3	2018
Belize	50.8	2020
Guyana	37.3	2017

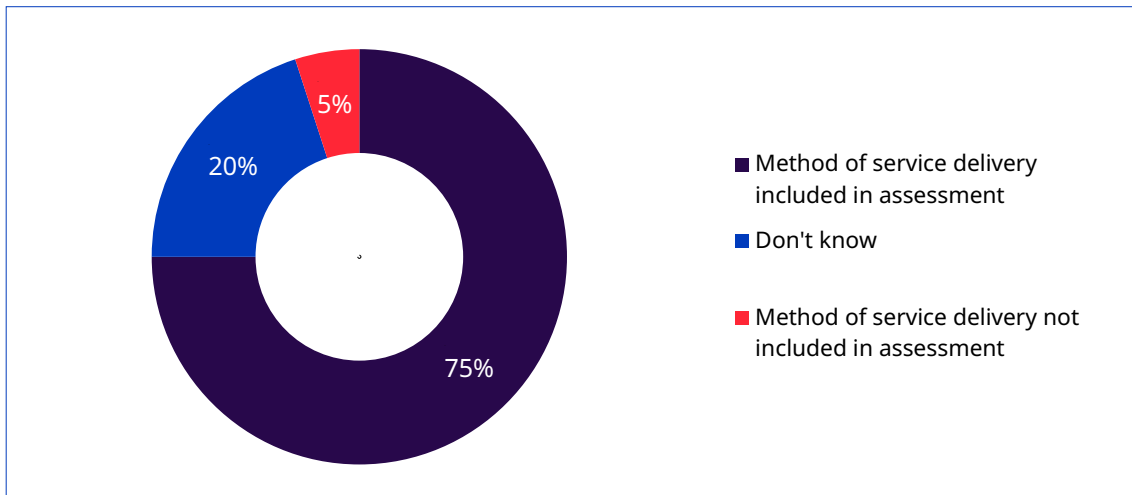
Source: International Telecommunication Union, 2022.

The survey also explored the frequency of assessment of members' demand for training and advisory services. **Of the respondents, 38 per cent reported examining members' demand whenever needed and 14 per cent indicated assessing members' demand every month or more frequently.** About a third of respondents reported assessing members' demand every 6 months or longer (see Figure 18).

► **Figure 18. Frequency of assessment of members' demand for training and advisory services**

Most EBMOs include the service delivery method in assessing members' demand for training and advisory services. Seventy-five per cent of respondents indicated that their EBMOs asked members about their preferred mode of service delivery (e.g., online, in-person, hybrid) in assessing members' demand for training and advisory services (see Figure 19).

► **Figure 19. Method of service delivery included in the assessment of members' demand for training and advisory services**

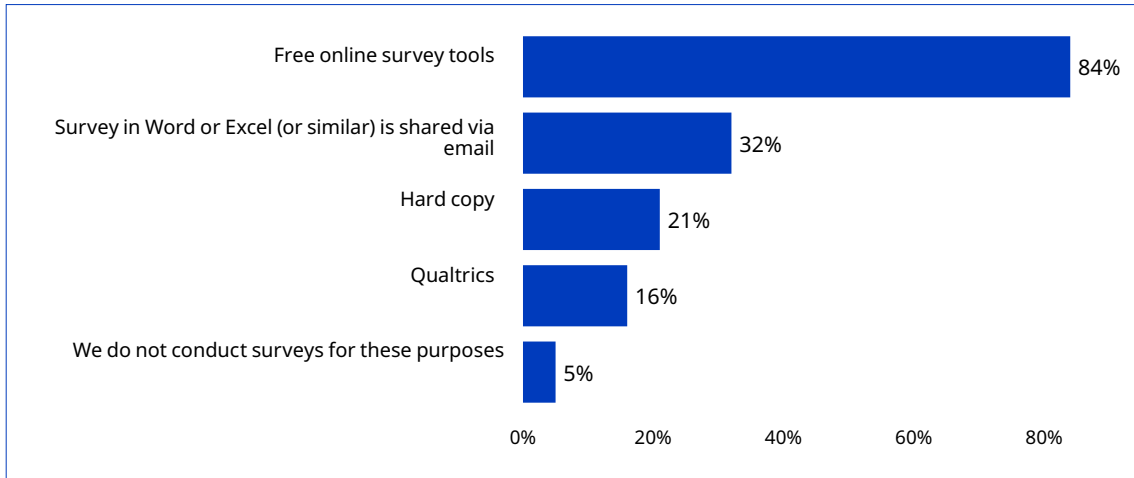


Research, policy work, and related advocacy

EBMOs collect and analyze data on business topics and issues relevant to their members and the wider business community through surveys, workshops, or consultations. Topics researched include industrial relations, compensation and benefits, labour law, and skills. EBMOs collect and analyze data to support EBMO policy, lobbying, and advocacy initiatives. During the COVID-19 pandemic, some EBMOs, including ECATT, BCCEC, BEC, and the Belize Chamber of Commerce and Industry (BCCI), conducted online surveys with companies to better understand the economic impact of COVID-19 and identify business needs. Survey results informed policy discussions with the government and other stakeholders.

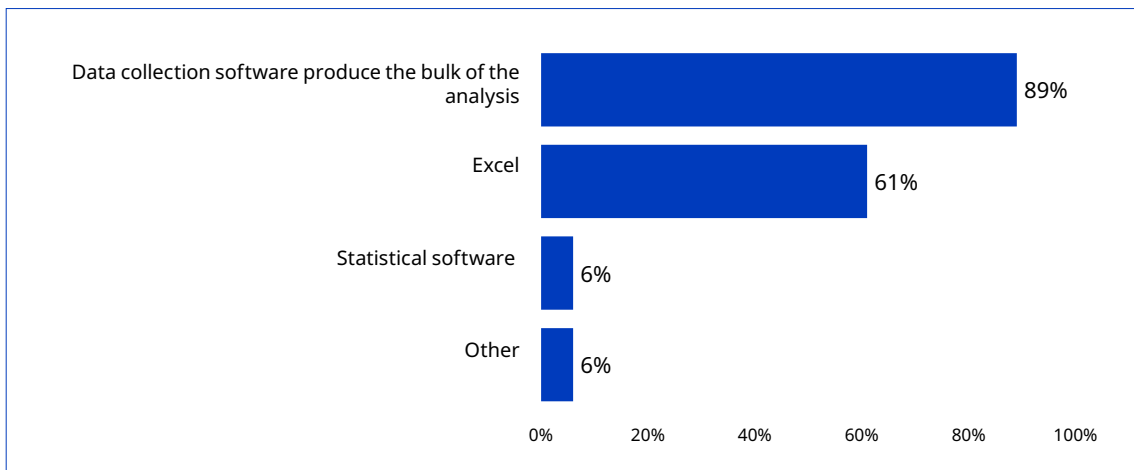
Most EBMOs use free online survey tools to collect data for research, lobbying, or advocacy purposes. About 84 per cent of respondents reported using online survey tools such as Survey Monkey and Google Forms, which are freely available and relatively easy to use. About a third of respondents indicated that soft copies of surveys in MS Word or Excel would be shared via email, completed, and returned by members. In some cases, sharing the survey in MS Word or Excel would be done in addition to the online survey. Lower shares of respondents reported collecting data using hard copies (21 per cent), and Qualtrics (16 per cent), which is a paid online survey tool with advanced analytical features (see Figure 20).

►Figure 20. Tools used to collect data for research or advocacy purposes



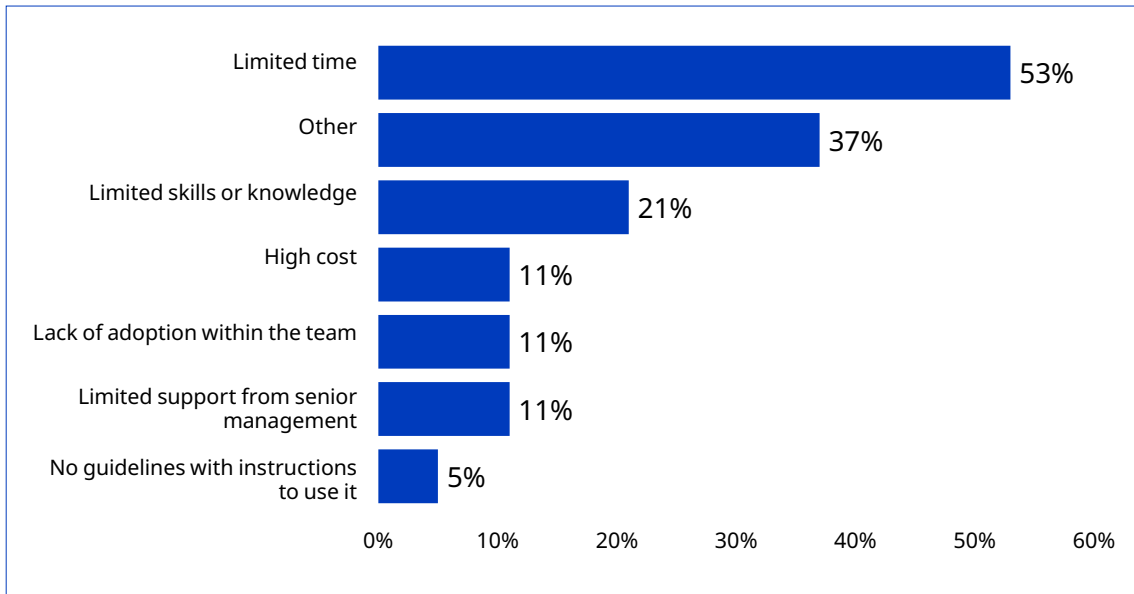
The analysis produced by data collection software is commonly used to analyze survey results. Nine out of 10 respondents reported relying on results produced by data collection software to analyze survey results. Free online survey tools make automatic summaries and visualizations which can provide quick insights into each survey question and the whole survey. Additionally, 6 out of 10 respondents reported using Excel to analyze survey data. Lower shares of respondents (6 per cent) reported using statistical software such as Stata or SPSS or other tools to analyze survey data (see Figure 21).

►Figure 21. Applications used to analyze survey results



Limited time is the main challenge encountered in using digital tools to collect and analyze data, as reported by over half of the respondents. A third of respondents highlighted other challenges, including lower response rates and interaction from members than expected and limited human resources to analyze survey data. Less common challenges included limited skills or knowledge (21 per cent), high cost (11 per cent), lack of adoption within the team, limited support from senior management (11 per cent), and lack of guidelines to use data collection tools (5 per cent) (see Figure 22).

► **Figure 22. Challenges encountered when using digital tools to collect and analyze data**



Box 10. Practical access to legislation using tablets

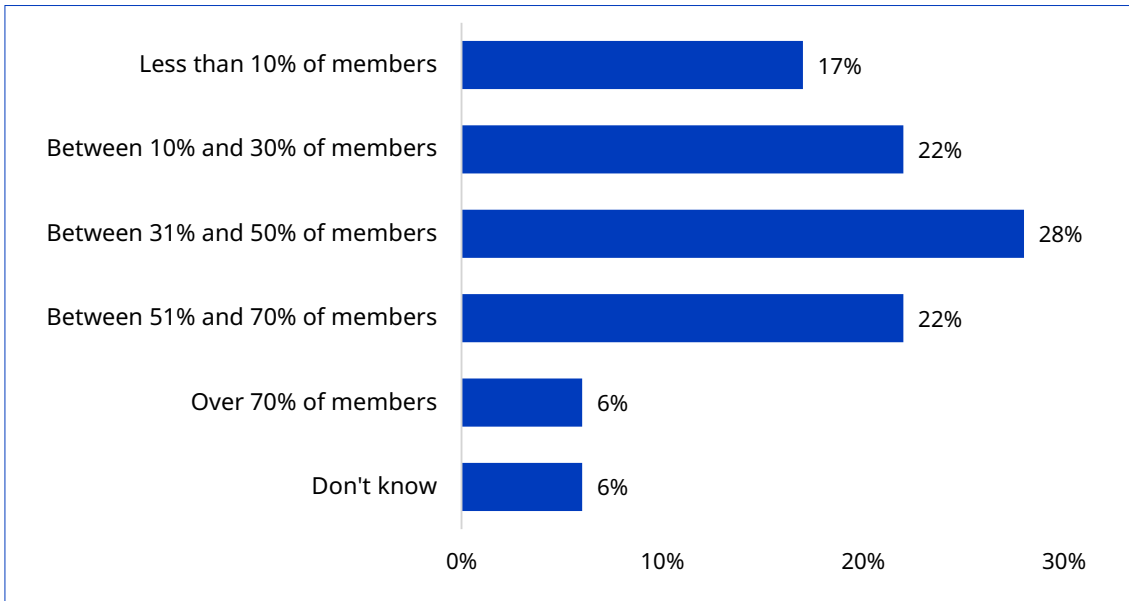
Since 2021, BEC has given officers tablets with an attached keyboard to use in meetings and negotiations outside the office. Through tablets, BEC officers can connect to the central BEC server and access required information, including legislation or other documents.

Previously, officers would have to carry hard copies of legislation or documents required for their meetings and engagements. These documents would be long and, therefore, heavy and impractical to move around. These tablets with remote server access have been very successful at BEC.

EBMO also face difficulties collecting survey responses from members. Four out of 10 respondents reported that less than 30 per cent of members completed EBMO surveys, and 3 out of 10 respondents indicated that between 31 per cent and 50 per cent of members responded to surveys. About 3 out of 10 respondents reported that over 51 per cent responded to surveys (see Figure 23). During interviews, staff members confirmed that they would need to call members to follow up on their participation to increase survey response rates. They reported that it was challenging to get survey responses regardless of length, as expressed by a research officer:

“We'll put the link on our website. But you don't get much participation from that. It's mostly through emails, using outlook to encourage members to participate in the survey. (...) Our surveys are very short, maybe three minutes or ten questions. These are not long or tedious surveys.”

► **Figure 23. Average share of members that respond to EBMO surveys**



Box 11. Facilitating the understanding of national laws

The [BCCI Policy Tracker](#) is a website established in 2019 to improve the understanding of national laws that impact the business community. The Policy Tracker provides members and non-members with access to the following information:

- Recent laws, bills, acts, and regulations by sector as PDF formats.
- Summaries of specific parts of regulations impacting businesses in an easy-to-understand language.
- Policy briefs and research articles.

The Policy Tracker has been very popular among businesses and academia because the Belize Government does not disseminate recent laws or amendments online. The Government mainly uses official gazettes, which are physical publications, to share new legislation, regulations, and decisions of governmental bodies. Official gazettes are not as accessible as the Policy Tracker because there is an annual subscription fee to receive them as hard copies.

Through the Policy Tracker, BCCI provides Belizeans with free, easy, and convenient access to policy on issues that matter to the business community.

3. Do processes and practices support digitalization?

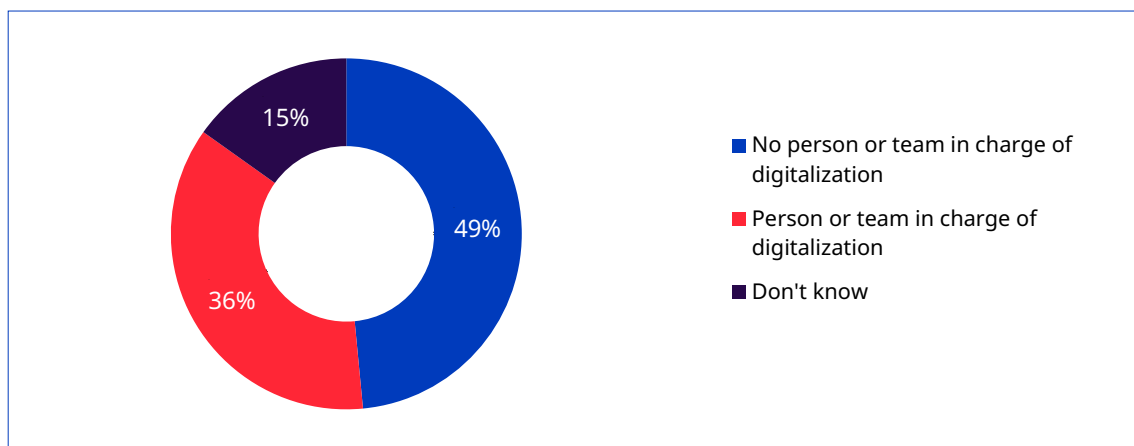
This section documents survey and interview findings about the extent to which organizational processes and practices support digitalization efforts at EBMOs. Processes support digitalization by documenting staff responsibilities and EBMO digitalization priorities and strategy. Three leading practices support digitalization: digitizing operations, systematic information sharing across departments, and recognizing data as a strategic asset.

Processes

EBMOs should have documents that formalize organizational changes to ensure the long-term sustainability of digitalization efforts. Formal and well-structured processes provide a solid foundation to establish and monitor changes that come with the uptake of digital tools. Formal processes guide how digital efforts track against set goals or priorities. They help ensure that staff and leaders are on the same page about changes that the EBMO will experience in different functions as part of the digitalization efforts. They help establish what is expected from staff to achieve the digitalization goals and priorities.

Some EBMOs have designated a person or team in charge of advancing digitalization. Of the respondents, almost half reported not having a person or team to advance digitalization, and about a third reported that there was a person or team for this purpose (see Figure 24). EBMOs in the Caribbean are composed of small teams, and staff members perform multiple functions. Interviews revealed that in medium EBMOs employing at least five staff members, CEOs were leading the effort to digitalize internal operations and service provision. These CEOs generally have a vision for using digital tools within their teams, seek opportunities to try new digital tools to automate manual processes, and encourage the adoption of digital tools among staff members.

► Figure 24. Person or team in charge of advancing digitalization at EBMO

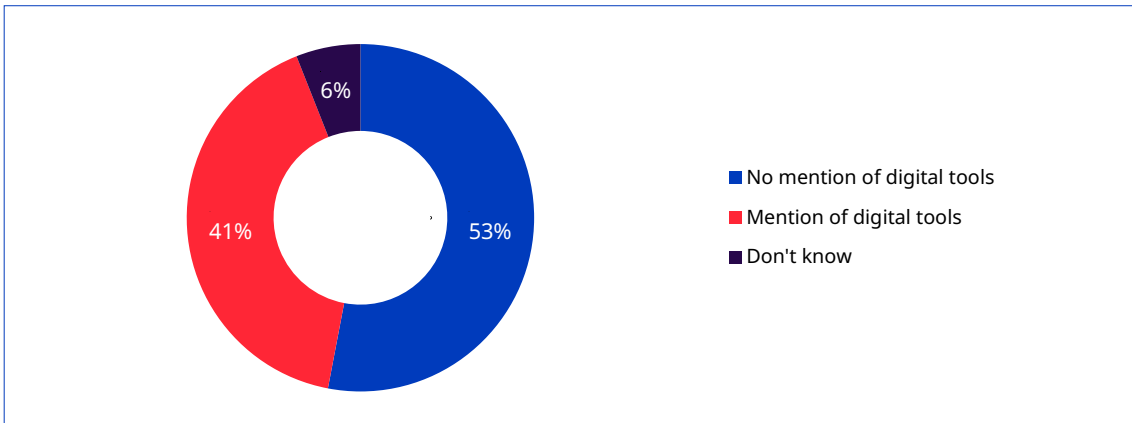


In small EBMOs, however, no person was responsible for advancing digitalization efforts. Additionally, limited human and financial resources were commonly referred to as key obstacles to making organizational changes. In small EBMOs, outdated processes constrain the extent to which CEOs can make decisions independently without having approval from all board members. Getting all board members to agree on matters can be very time-consuming. Slow decision-making negatively impacts several areas, such as the recruitment of new staff and even the recruitment of new members. Lack of agility in decision-making can restrict EBMOs’ ability to respond to organizational changes, including digitalization.

For example, the CEO of a small EBMO highlighted difficulties in maintaining operations running with only two permanent staff members, including himself. This EBMO opened the vacancy of research officer for the first time to start collecting and analyzing data to support evidence-based advocacy. Following the candidate selection, this CEO needed approval from all board members to complete the hiring process. Finalizing the hiring process proved time-consuming and, in the end, this EBMO could not recruit the successful candidate, as the candidate had found another job while waiting to hear back from this EBMO.

Some EBMOs make mention of digital tools to be used in respective roles. Of the respondents, 53 per cent reported that their job descriptions do not mention digital tools, and 41 per cent reported that their job descriptions mention digital tools (see Figure 25). During interviews, staff identified what digital tools are important in their roles. However, most job descriptions or other processes did not specify in a formal manner which tools should be used by whom. Without formal processes, EBMOs risk losing valuable organizational knowledge when staff leave the organization. Formally documenting digital tools in job descriptions and other written procedures is particularly important, considering that some EBMOs reported high turnover and difficulties recruiting new staff during interviews.

► **Figure 25. Job descriptions that mention digital tools to be used in respective roles**



Box 12. Documenting organizational policies

BEC’s Employment Handbook is a documented repository of all organizational policies. The handbook also provides clear information on BEC’s mission, vision, and values and sets expectations for staff conduct and performance.

The Employment Handbook is a living document that is consistently maintained. Policies are added or updated as necessary. There are policies governing the use of BEC’s IT equipment (e.g., laptops, computers) and the use of the internet for organizational purposes, among others.

Practices

Digitalization goes beyond the uptake of digital tools. EBMOs need to change their practices and behaviors to respond to new ways of working and collaborating in an increasingly digital environment. Three fundamental practices support the successful digitalization of EBMOs, namely digitizing operations, systematic information sharing across departments, and recognizing data as a strategic asset. Digitization refers to the conversion of information to a digital format. Digitizing operations can facilitate faster and more convenient access to the information within EBMOs, increase efficiency, and improve data security. Systematic information sharing across departments can encourage collaboration, learning, and innovation across individuals and teams. Recognizing and appreciating data as a strategic asset will help EBMOs make more informed decisions about their operations and services.

EBMOs continue to use hard copies to run their operations. COVID-19 accelerated digitization among EBMOs. Medium EBMOs have digitized specific processes such as member registration and renewal forms, publications, legislation, and invoices. Small EBMOs continue to run a significant part of their operations using hard copies. In some cases, outdated procedures, including the constitution, specify the use of hard copies to run operations in small EBMOs. Interviews suggested that all EBMOs recognize the need to continue digitizing data to increase organizational efficiencies and information sharing. One CEO of a small EBMO noted the importance of digitizing information to support members:

“A lot of our documents are hard copy files, and members cannot access them unless they come into the office, and COVID taught us that members won’t always be able to come physically into the office, and that some information should be shared digitally. Digitizing your information and making it available online is important.”

Information sharing is not systematic across departments. Interviews revealed that staff and managers shared information to support operations and service delivery. Nevertheless, information sharing needs to be more systematic between different roles and departments. Most EBMOs do not have systems or tools to keep or share information across departments, except for the CRM. During interviews, staff who had used the CRM reported that its integration with other accounting or training software was limited. Other EBMOs got the license of the CRM software in mid-2022 and just started using it to share information.

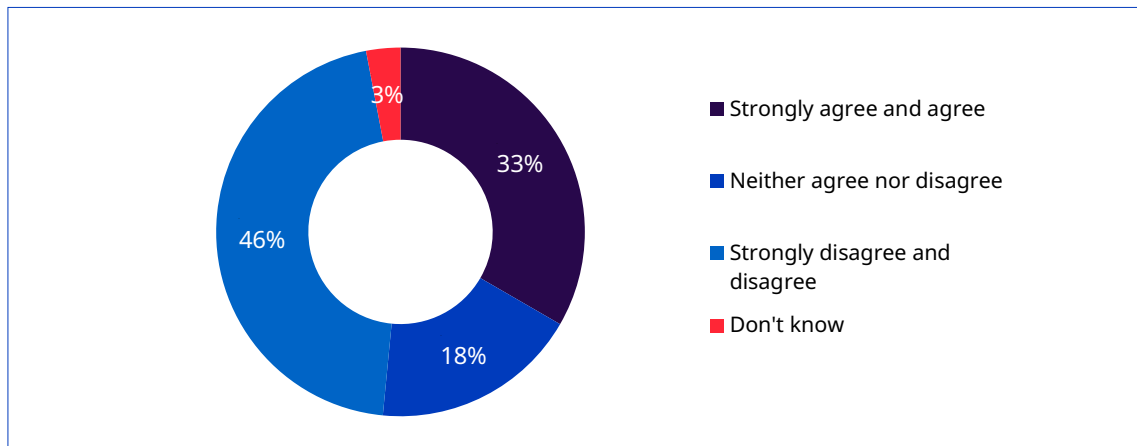
EBMOs recognize that data can help make better decisions, but they miss out on opportunities to use data to improve their performance. Interviews revealed that most EBMOs do not recognize data about their operations and service delivery as important sources of insights to improve operations and gain members. EBMOs do not have quantitative indicators to measure their performance in different departments or projects. They primarily think of data as information collected from members, such as contact details or responses to online surveys.

EBMOs use and appreciate data to varying extents. On the one hand, medium EBMOs are starting to collect and track basic data about their operations (e.g., number of calls received for technical consultations, services most used in a given department, and members’ engagement via email). Interviews indicated that these EBMOs use this data to drive internal productivity and improve collaboration and service provision. On the other hand, small EBMOs are increasing data collection through online surveys with members to support evidence-based advocacy. In both cases, small and medium EBMOs recognize that they could be collecting more data and using it more strategically. A board member from a small EBMO highlighted the importance of data in decision-making:

“We want to be data driven. (...) If you don't have the facts behind you, you can't be very credible. If we can get facts and data, then we can be more credible if we're going to take a stand on an issue. We have been increasingly using Survey Monkey lately. And It's a start because before we were going more by our gut feeling rather than data.”

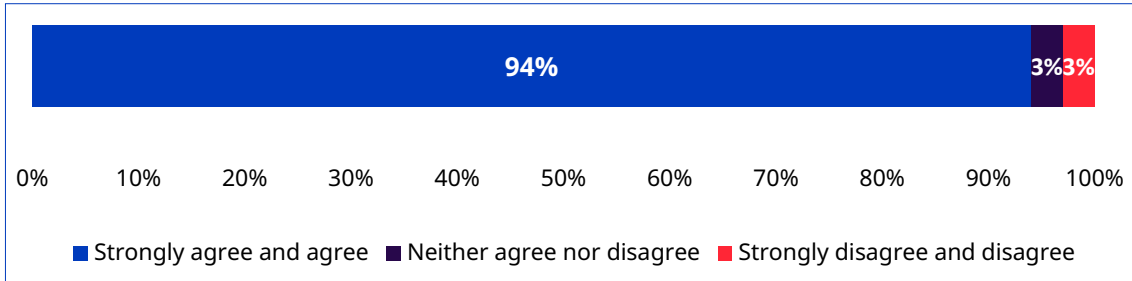
The extent to which EBMOs monitor and measure progress on digitalization is limited. Only one-third of CEOs and board members agreed and strongly agreed that their EBMO monitors and measures progress on digitalization (see Figure 26). Interviews revealed that EBMOs do not formally document digitalization strategies or plans. Likewise, there are no quantitative indicators to measure progress on digitalization across different roles or departments.

► **Figure 26. Extent to which respondents agree or disagree that EBMO monitors and measures progress on digitalization**



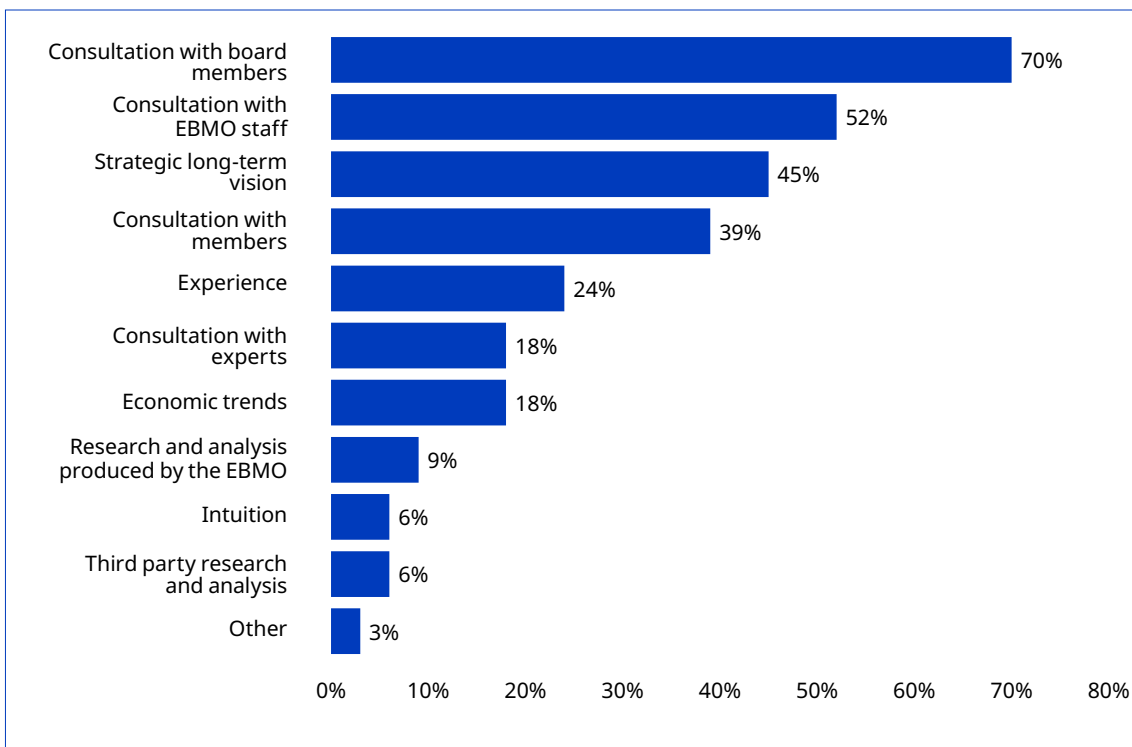
Most CEOs and board members (94 per cent) strongly agreed and agreed that their EBMO recognizes that a new service or product will not be perfect the first time it is launched, but guided by data collected, it will be further developed over time (see Figure 27). Given resource constraints, EBMOs are interested in launching new products or services that could bring more members or increase revenue. Feedback surveys are the primary way to understand what members want and need and how to change services based on members' needs. Interviews revealed that EBMOs do not analyze data from feedback forms in a structured manner. Most EBMOs do not have systems to periodically go through findings or spaces to discuss changes to services in different departments or functions openly. One medium EBMO, however, did report using feedback collected in the planning and strategy for the following year.

► **Figure 27. Extent to which CEOs and board members agree or disagree that their EBMO recognizes that a new service or product will not be perfect the first time it is launched but guided by data collected, it will be further developed over time**



EBMOs’ internal strategic and operational decision-making primarily relies on consultation with members, as reported by 70 per cent of CEOs and board members. Consultation with EBMO staff and strategic long-term vision were the second and third most common factors considered when making these decisions, as indicated by about half of surveyed CEOs and board members (see Figure 28).

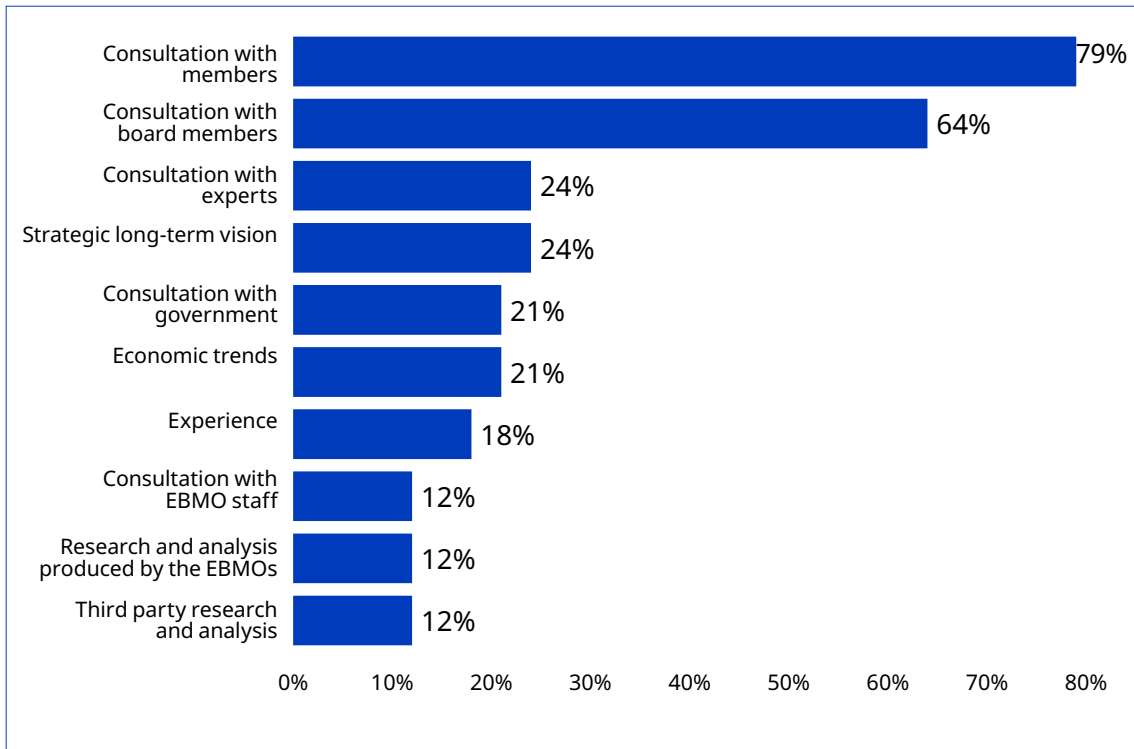
► **Figure 28. Factors considered when making internal strategic and operational decisions at EBMO**



Consultation with members and board members is the most common factor considered when making decisions on public positions adopted or activities pursued by EBMOs. These two factors were reported by 79 per cent and 64 per cent of CEOs and board members, respectively (see Figure 29). Board members are generally business leaders and owners and directors of enterprises. As such, public positions that EBMOs take could personally affect or benefit board members. Interviews suggested that board members of some EBMOs rely on their experience and intuition to make decisions about public positions. EBMOs recognize that data is critical for decision-making, but there is scope to use data more systematically and strategically. One staff member noted the ambivalence of board members regarding the use of data for decision-making on public positions:

“There are those who appreciate data in the organization and there are those who don’t. I have seen certain members of the board who rely on data and hence the research that the [EBMO] does helps a lot in their decision. But there are those who would make decisions based on more intuitive sentiment (...) as opposed to based on data.”

► **Figure 29. Factors considered when making decisions on public positions adopted or activities pursued by EBMO, all results**



EBMOs are aware of their responsibilities for data confidentiality, but most do not have formal data use, protection, and confidentiality policies. EBMOs are careful in storing and managing data collected from members, mainly their contact information or other member details. Staff members practice data security and privacy, but written procedures with additional guidance (e.g., identification of sensitive data, data security protocols, etc.) only exist in some EBMOs. A staff member noted the importance of data protection and confidentiality:

“We are very particular with members’ details to the extent that if somebody calls and says they are from a company that is a member of [our EBMO], unless we have that person’s name on the system as the authorized caller, we will not give them any information. Our practice protects the member in the sense of the data we have on them or their business.”

Box 13. Using data to improve members' engagement

ECATT uses data generated by Constant Contact, an email marketing platform, to analyze members' email engagement trends. Such data include open and click rates. Open rate refers to the share of recipients who opened emails, and click rate refers to the percentage of recipients who clicked on email content.

In addition, ECATT collects and analyzes data on when members are more likely to answer phone calls. Using this data, ECATT found trends and improved members' engagement.

Box 14. Producing data-based reference products

In 2018, the Grenada Employers' Federation (GEF) conducted a compensation and benefits survey, which collected information on salaries and benefits paid to employees of 44 jobs in selected sectors. Using this data, GEF produced the Salary and Compensation Booklet, which compiled critical salary and compensation data, including maximum, minimum, and average wages for these jobs. Salaries and benefits were calculated based on qualifications, certification, and experience of job holders.

GEF was the first Organization in Grenada to compile this information, which can help employers formulate their compensation strategy. The Salary and Compensation Booklet was published and made available to businesses in Grenada at a cost, providing GEF with a new revenue source.

Box 15. Sharing trade data and insights on an online portal

In 2017, BCCEC established the [Bahamas Trade Information Portal](#) as a public-private partnership in cooperation with the Ministry of Financial Services, Trade, and Industry. This trade portal provides enterprises and exporters with easy access to business and trade data, tools, and insights. The following resources are available on this trade portal:

- ▶ Trade information, including statistical reports, analysis, trends, and opportunities for key sectors.
- ▶ Exporter toolkit with tools and guidance to succeed in exporting ventures.
- ▶ Guidance on export and import procedures, trade agreements, and issuing a certificate of origin.
- ▶ Local and international trade news.
- ▶ Information on local and international trade events and shows to promote products.



Schneider
Electric



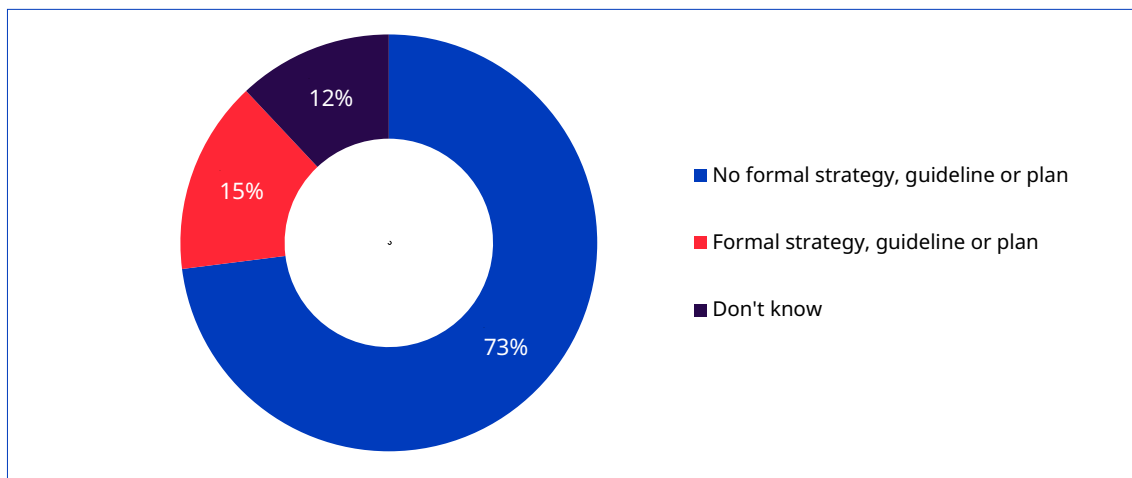
EMC

4. How are EBMOs' capabilities to digitalize?

Capabilities refer to the level of digital skills, abilities, and expertise of EBMOs due to investment in training, staffing, compensation, and other human resources areas. This section documents survey and interview findings about EBMOs' capabilities to digitalize. It also explores whether EBMOs allocate resources and provide learning opportunities to foster sustained use of digital tools.

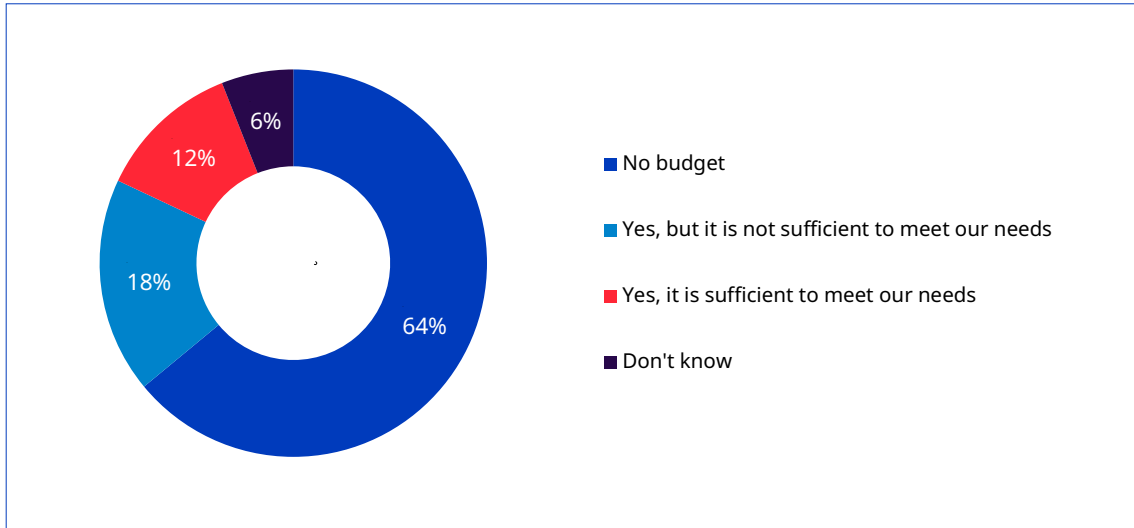
Most EBMOs do not have a formal strategy, guideline, or plan for digitalization. Only 15 per cent of CEOs or board members reported that their EBMOs had a formal strategy, guideline, or plan to digitalize (see Figure 30). Having formal documents to support digitalization can help EBMOs organize their priorities and track progress against set goals over time. None of the EBMOs with a formal strategy or plan to digitalize reported budgeting for it.

► **Figure 30. EBMOs with a formal strategy, guideline, or plan for digitalization**



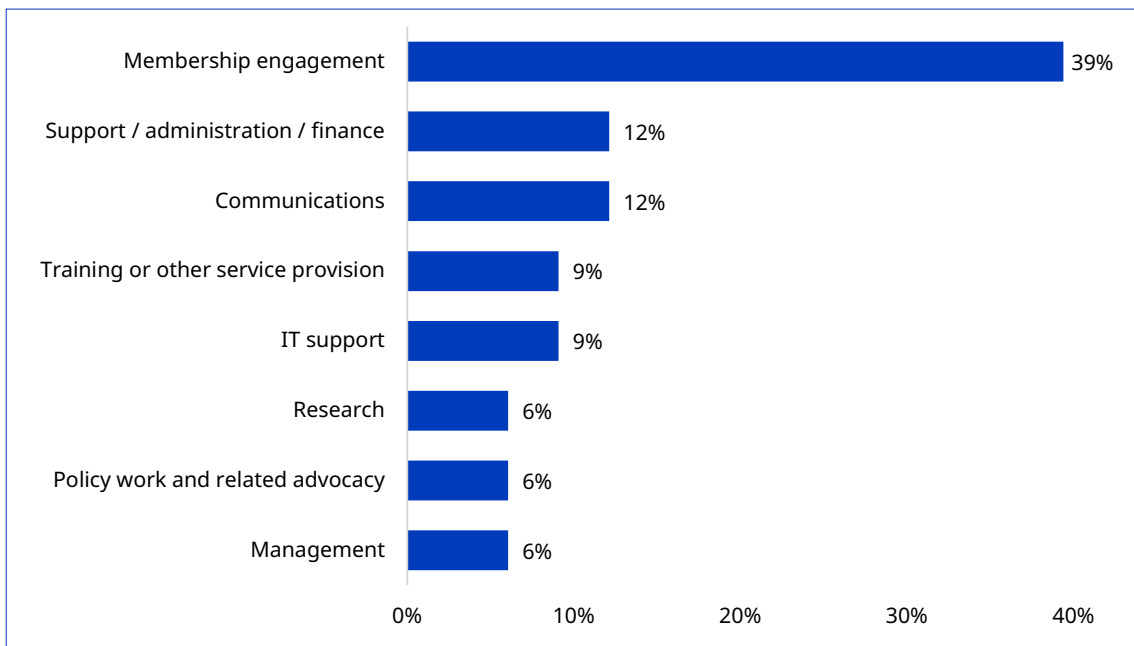
Most EBMOs do not offer training on digital skills. About two-thirds of CEOs and board members reported that their EBMOs do not have the budget for staff training and development to improve digital skills (see Figure 31). Of CEOs and board members, 18 per cent reported having a budget for digital skills training, which was insufficient to meet their needs, and 12 per cent of respondents reported having a budget for digital skills training that met their needs. Interviews suggested that ITCILO is the primary source of capacity building on digital skills for EBMOs. Given limited formal training provided by EBMOs, staff (particularly millennials or younger) reported doing online self-learning to improve digital skills using Google and YouTube. Some EBMOs have paid for specific training courses for selected staff to improve digital skills (e.g., design) as needed.

► **Figure 31. EBMOs with dedicated budget for staff training and development to improve digital skills**



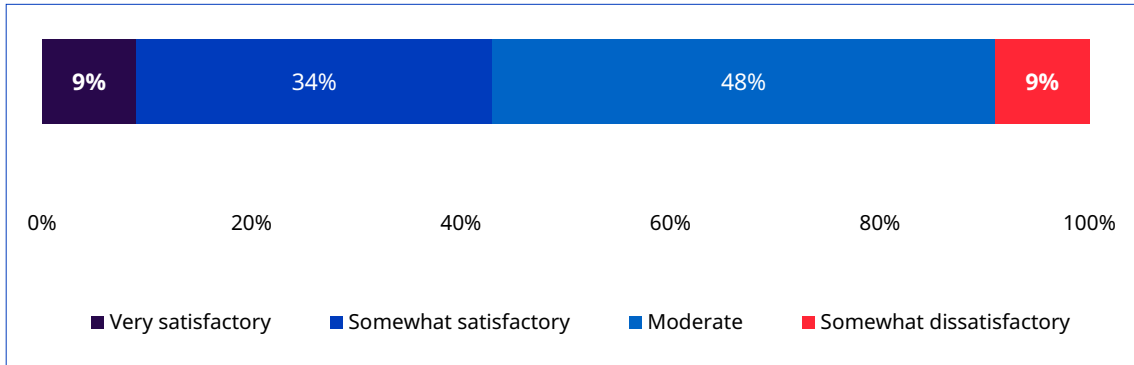
Membership engagement is the human resource area with the most need to build capacity to use digital tools, as reported by 39 per cent of CEOs and board members. Other areas with digital capacity-building needs include support / administration / finance (12 per cent) and communications (12 per cent) (see Figure 32). It is not surprising that EBMOs want to improve the online engagement of members or potential members, considering that membership subscriptions are EBMOs’ primary source of income. Interviews revealed that EBMOs do not have an in-house information technology (IT) person, and some EBMOs struggle to find IT specialists to establish or improve digital services.

► **Figure 32. Human resource area with the most need for capacity building to use digital tools**



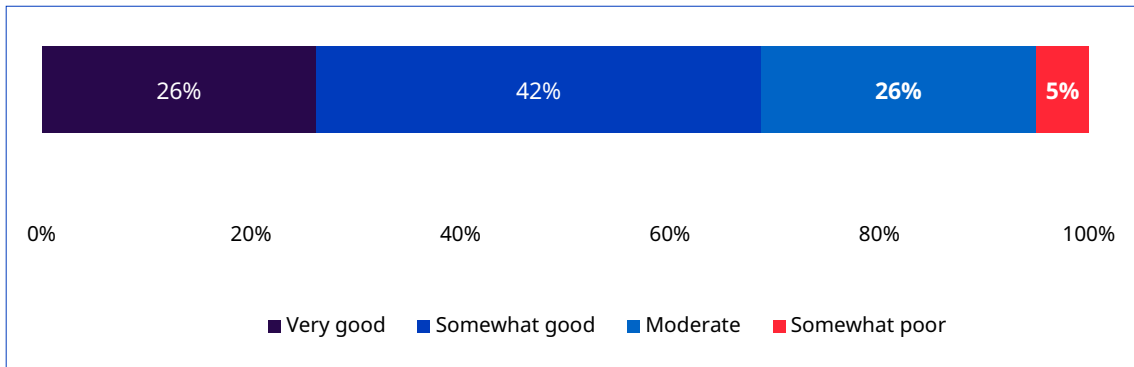
EBMO staff have somewhat satisfactory or moderate digital capabilities and skills. Of CEOs and board members, 43 per cent reported that staff have somewhat satisfactory skills, and 48 per cent reported that EBMO staff have moderate skills to use digital tools (see Figure 33). Only 9 per cent of CEOs and board members reported that staff's skills are very satisfactory. Interviews indicated that EBMOs have collaborative environments in which staff educate each other on using digital tools when required. Knowledge sharing could help improve the overall level of digital skills in EBMOs.

► **Figure 33. Satisfaction with digital capabilities and skills of EBMO staff**



Most EBMOs have very good or somewhat good capability to use data collection and analysis tools. Sixty-eight per cent of respondents reported that staff capability was very good or somewhat good, and 26 per cent of respondents reported that staff capability in using data collection and analysis tools was moderate (see Figure 34).

► **Figure 34. EBMO capability to use tools for data collection and analysis**





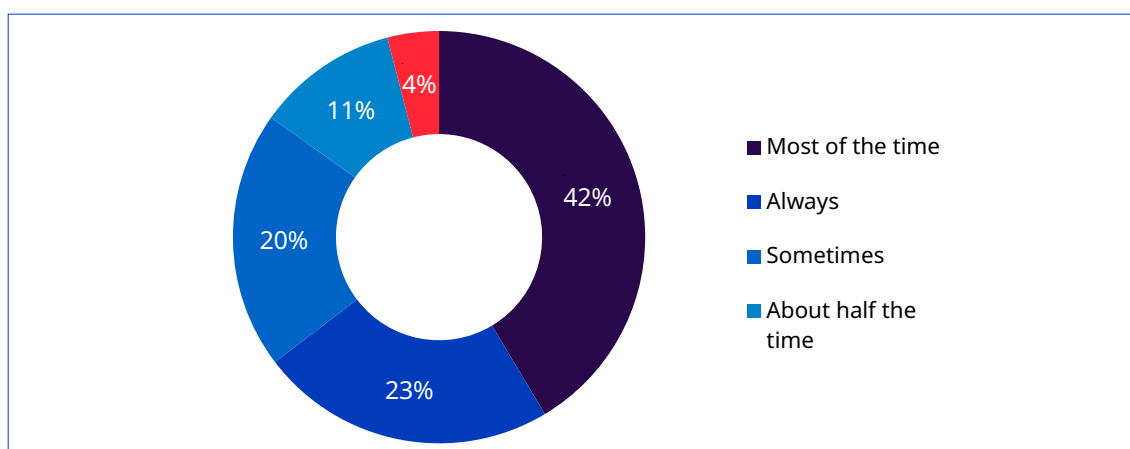
5. Does organizational culture support digitalization?

Organizational culture is a reinforcing set of values, behaviours, mindsets, and practices, which can be conscious and unconscious.¹⁰ Culture provides a common basis of understanding and communication among staff and board members, which can influence their openness to changes, including digitalization and the extent to which they feel included at work. This section documents survey and interview findings to explore whether organizational culture supports the digitalization of EBMOs.

Workplace inclusion can bring many benefits to EBMOs, such as increased innovation, higher productivity, greater trust, stronger collaboration with colleagues, and increased well-being.¹¹ A culture supports digitalization when staff and board members across functions and levels of responsibility enable the adoption of digital solutions to find better or quicker ways to solve problems. In such a culture, leaders see digitalization as a priority, encouraging staff to seek digital solutions first to provide services and run operations instead of manual ones. They reinforce the importance of digitalizing through clear communication and their actions.

EBMOs are inclusive workplaces where staff generally feel valued. Two-thirds of respondents reported feeling valued for who they are and the skills and experiences they bring to their EBMOs most or all of the time. Lower shares of respondents reported feeling valued sometimes (20 per cent), and about half of the time (11 per cent) (see Figure 35). Interviews suggested that EBMOs are collaborative and warm workplaces characterized by teamwork and a sense of belonging. Teams are relatively small, so staff perform multiple functions in their organizations. As a result, staff have opportunities to learn by doing and bring their skills and experiences to EBMOs.

► **Figure 35. Frequency that respondents feel valued for who they are and the skills and experiences they bring to their EBMOs**



10 Westerman et al, 2019.

11 ILO, 2022; Accenture, 2019.

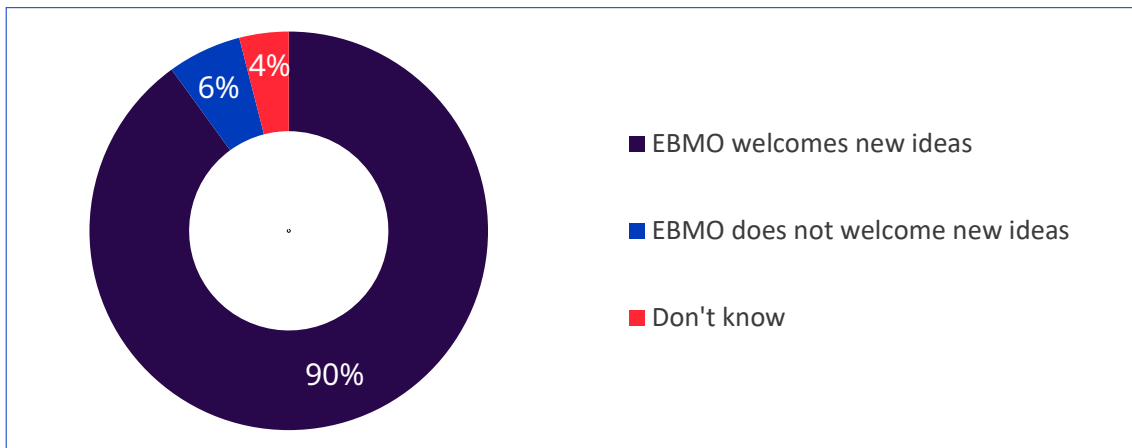
Box 16. Creating spaces to innovate

ECATT's Innovation Committee aims to provide opportunities for information sharing across departments. Committee members, who are selected staff from ECATT's departments, meet weekly to discuss organizational trends, challenges, and issues to come up with solutions or proposals to solve them.

Examples of recommendations by the Innovation Committee include website upgrades to improve member benefits and tweaks to the social media strategy to increase members' engagement. These recommendations aim to increase ECATT's revenue by increasing membership recruitment and retention.

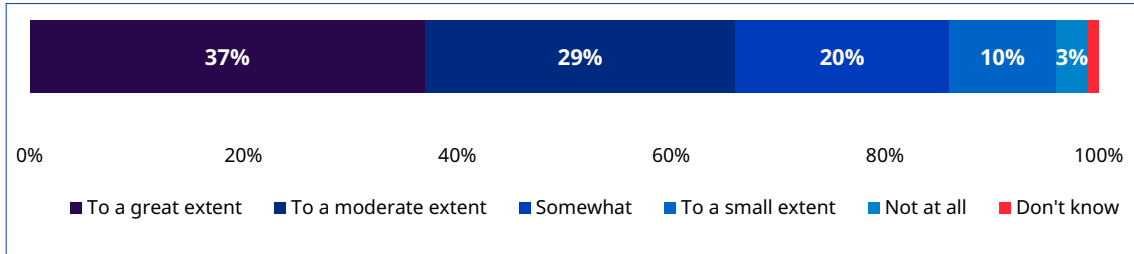
EBMOs are open to change and new ideas. Nine out of 10 respondents reported that their EBMO welcomes new ideas (see Figure 36). Many of these new ideas are related to using digital tools. For instance, new ways to approach members online, collaborate with colleagues online and make flyers for events using digital applications. Overall, EBMOs enable technology adoption in their organizations. CEOs are open to new ways of using digital tools to improve internal operations and increase efficiency and productivity. Staff are open to using new digital tools, if they make their jobs easier. However, they might revert to old and more manual ways of completing tasks if they do not find the right tools for their needs.

► Figure 36. Respondents that believe that their EBMO welcomes new ideas



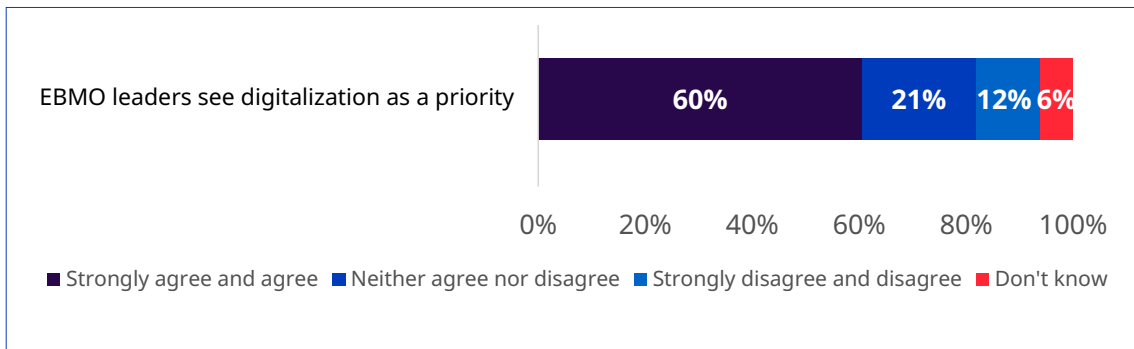
Most survey respondents looked for digital solutions first in their roles. Two-thirds of respondents reported seeking digital solutions first, rather than manual solutions, to a great extent or moderate extent to provide services and run operations (see Figure 37). Interviews also confirmed that staff and CEOs know the importance of using digital tools to improve internal productivity and organizational performance. This awareness is partly related to the acceleration in technology uptake due to COVID-19. In some cases, however, digital tools do not integrate well with existing tools or practices. In other cases, there is limited time to identify the tools that best suit EBMOs' needs, so staff continue doing their tasks in more manual and time-consuming ways.

► **Figure 37. Extent to which respondents agree or disagree that they seek out digital solutions first to provide services and run operations**



Most CEOs and board members reported that EBMO leaders see digitalization as a priority. Six out of 10 CEOs and board members agreed and strongly agreed that leaders see digitalization as a priority (see Figure 38). Interviews suggested that CEOs of small and medium EBMOs showed their commitment to digitalization in different ways. On the one hand, CEOs of medium EBMOs generally have a vision and ideas regarding how their organization could use digital tools. On the other hand, CEOs of small EBMOs recognize that digitalization could bring benefits but do not have a clear vision about how to add value to members using digital tools. Examples of ideas by CEOs of medium EBMOs include automating engagement with members on the website through a bot, launching an online marketplace where members can sell their products or services, and expanding members' online services on the website.

► **Figure 38. Extent to which CEOs and board members agree or disagree that EBMO leaders see digitalization as a priority**

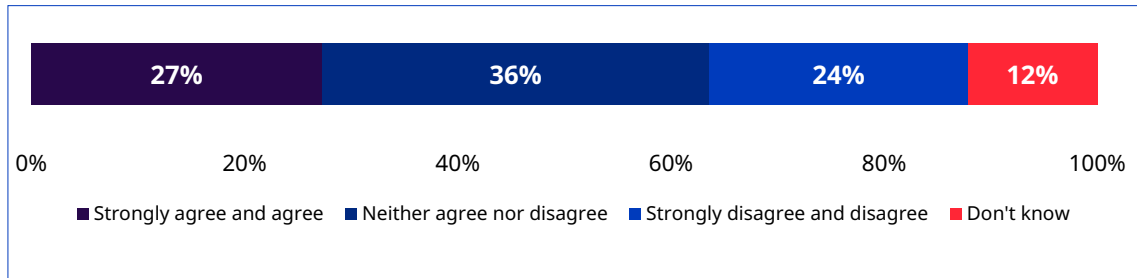


Some interviews suggested a disconnect between board members and the secretariat regarding support for digitalization. Staff did not perceive that board members were entirely on board with digitalization. This perception was related to the board's limited communication about the strategic vision and goals to staff members, which also meant that staff were unsure of a strategic plan for digitalization. Limited financial resources also mean that a strong case must be made to the board to acquire digital tools if they are not freely available. One staff member highlighted the board's limited communication about the organizational vision and mission:

“We know what [our vision] would be on paper (...) But every year the board would have a vision or mission. I think there is a disconnect when it is communicated, it's not fully communicated to the staff. What the mission is or what the agenda is for this year.”

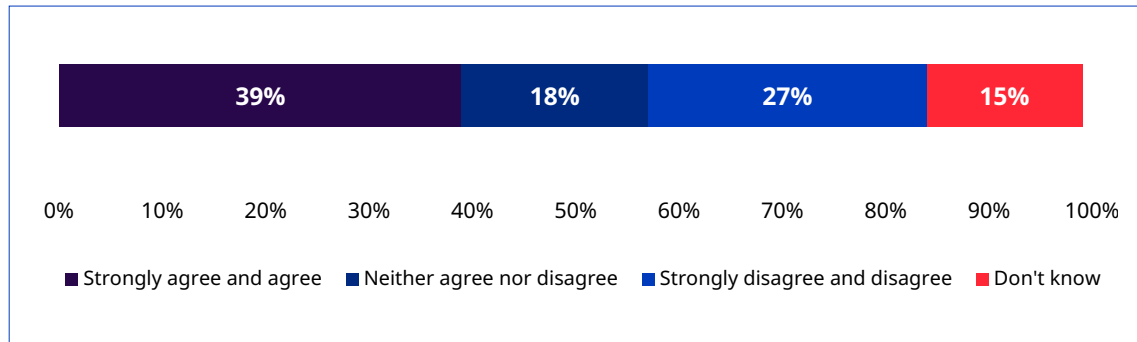
Most staff members are not aware of plans or strategy to digitalize. Only 27 per cent of CEOs and board members agreed and strongly agreed that senior management has communicated digitalization plans or strategy to all EBMO staff (see Figure 39). This lack of awareness results from the fact that EBMOs do not have documented plans or strategy to guide the adoption of data technologies in their organizations.

► **Figure 39. Extent to which CEOs and board members agree or disagree that senior management has communicated digitalization plans or strategy to all staff in the EBMO**



The survey also explored how competitors are influencing the digitalization of EBMOs. **Four out of 10 CEOs and board members strongly agreed and agreed that main competitors outperform their EBMOs in digitalization** (see Figure 41). Main competitors for EBMOs generally are other training providers who offer training on human resources, management, or business topics.

► **Figure 40. Extent to which CEOs and board members agree or disagree that their main competitors are outperforming the EBMO in digitalization**



6. Recommendations

The COVID-19 pandemic accelerated shifts related to the digitalization of EBMOs, particularly regarding digital tools and a new appreciation of data to support members and operations. EBMOs have expanded their services to reach a wider audience using digital tools. CEOs and board members expect digitalization to bring more benefits to their EBMOs, including higher revenue streams, improved communication ability with members and stakeholders, and better member recruitment and retention. Most leaders consider digitalization a priority and believe staff members support this organizational change.

This report explored how EBMOs in the Caribbean use digital tools and examined organizational processes, practices, and culture supporting technology adoption. It also highlighted good digitalization practices in the region. EBMOs are at different stages of their digitalization journey. The recommendations below could help EBMOs derive benefits from digital tools, including higher membership, revenue, and influence. The recommendations are divided into the main areas of research inquiry as follows:

Digital tools

- ▶ **Use new digital tools that fit your needs.** EBMOs should use digital tools that improve productivity and reduce manual tasks. But they should be careful about adding too many tools that might not necessarily fulfill their needs.
- ▶ **Use data stored in the CRM and integrated data collection tools strategically.** EBMOs should use CRM data to offer tailored services to engage with members based on enterprise characteristics, feedback, and needs. They should also use CRM data to identify the current demand for their services and shift human and financial resources accordingly to fulfill that demand.
- ▶ **Integrate data collection and analysis tools.** EBMOs should integrate their websites, social media platforms, email, CRM, Qualtrics and accounting software to capture valuable insights about their members. Greater data availability and analysis will help EBMOs better understand their members and provide them with timely services.
- ▶ **Identify trends to improve communication with members.** Given limited engagement from members, EBMOs should identify what digital communication tools are preferred to enhance engagement. They should analyze engagement patterns to develop communication strategies that improve interaction with members.
- ▶ **Continue improving online presence on their website and social media platforms.** EBMOs should continue to expand their digital presence and use their website and social media platforms to reach members and potential members. They should make incremental improvements to their content to make it accessible to the business community.
- ▶ **Learn from data collected online.** EBMOs should systematically analyze indicators resulting from digital tools, including their website, social media platforms, and email marketing systems. This data provides valuable insights regarding EBMO performance on digital platforms, which EBMOs could use to improve digital engagement and service delivery.
- ▶ **Recognize which services are well suited to an online format.** EBMOs should identify which services are suited for online, in-person, and hybrid formats based on members' preferences, benefits to EBMO staff (e.g., time, productivity), and operational costs.

- ▶ **Assess members' demands regularly.** EBMOs should conduct periodic assessments of members' needs for training and advisory services to inform effective planning of their human and financial resources.

Processes

- ▶ **Designate a person to lead digitalization efforts.** EBMOs should designate one person or team in charge of advancing digitalization. This person should be a staff member who understands the needs of members and the EBMO and can effectively communicate with staff and board members, rather than using an external advisor. All staff and board members should participate in their organizations' digitalization journey.
- ▶ **Review and update processes.** EBMOs, specifically small ones, should review their processes to ensure agile decision-making at operational, organizational, and strategic levels.
- ▶ **Formally recognize and establish digital tools.** EBMOs should identify and specify the digital tools that staff use in different processes, including job descriptions and organizational policies.

Practices

- ▶ **Digitize operations.** EBMOs should continue to convert information to a digital format and run operations using digital tools. As part of this, EBMOs should establish formal rules to retire or destroy physical documents.
- ▶ **Increase systematic information sharing.** EBMOs should use systems, including the CRM software, to guide how staff in different roles and departments share information to steer operations and service delivery.
- ▶ **Value and use EBMO performance data.** EBMOs should collect and analyze indicators about their performance across different roles and departments. Such data provides valuable insights to increase productivity, improve internal collaboration and enhance service provision over time.
- ▶ **Measure progress on digitalization.** EBMOs should set goals and quantitative indicators that help them measure their progress in their digitalization journey. They could review these indicators every year.
- ▶ **Use members' feedback to guide planning and service delivery.** EBMOs should analyze data from feedback forms more systematically to guide the planning of human and financial resources and service delivery. Such data could be analyzed and reviewed every year. Ideally, EBMOs would compile historical trends that could guide long-term planning.
- ▶ **Use data strategically to make decisions.** CEOs and board members should analyze and use data to a greater extent to make strategic and operational decisions, as well as decisions on public positions adopted by their EBMOs.
- ▶ **Establish data management policies.** Develop formal policies with clear guidance to collect, analyze, store, disseminate, retain, and retire data.

Capabilities

- ▶ **Establish an organizational strategy to guide digitalization.** EBMOs should document key goals, ideas, or priorities that guide digitalization in the whole organization or specific functions. These formal processes should be living documents that are updated and improved over time. They help EBMOs track the progress of their digitalization efforts against set goals or targets.
- ▶ **Identify staff digital capability needs.** Identify areas for improvement in using digital tools and provide staff with opportunities to improve their skills. Leaders must demonstrate their commitment to digitalization by providing staff with periodic learning opportunities. EBMOs should allocate a regular budget for this training.
- ▶ **Incentivize online learning.** Staff should continue to foster their digital skills using online resources (e.g., YouTube or Google) as much as possible.
- ▶ **Foster collaborative environments.** EBMO staff should continue sharing knowledge and educating each other on using digital tools to improve productivity, support operations, and service delivery.

Culture and leadership

- ▶ **Encourage friendly and inclusive workplaces.** EBMOs should continue to foster environments that value staff members for who they are and the experiences they bring to their organizations. They can do this by providing staff with learning and development opportunities, fair remuneration, and opportunities for career progression.
- ▶ **Promote innovation.** EBMOs could create formal or informal spaces where staff meet to discuss issues affecting individuals, teams, or the whole organization to find ways to solve them.
- ▶ **Incentivize the use of digital solutions.** EBMOs should promote digital solutions first rather than manual ones to improve productivity and organizational performance.
- ▶ **Communicate clearly about digitalization.** CEOs and board members should communicate to staff why digitalization is essential for their organizations. They should also explain how staff functions will change because of technology adoption. As part of this, EBMO leaders should set expectations regarding using digital tools across different functions. It is important to document changes in job descriptions or other formal processes in a written and formal manner.



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▶ Annex I. Research methodology

This study aimed to understand how EBMOs in the Caribbean currently use digital tools and explore organizational processes, practices, and culture supporting technology adoption. Data collection comprised 23 semi-structured interviews with staff and board members of seven EBMOs in the Caribbean and a regional survey reaching 70 respondents from 18 EBMOs in 17 countries. More information on the interviews and survey is below.

Semi-structured interviews

Twenty-three semi-structured interviews, lasting between 45 minutes and 1 hour, were conducted with staff and board members of seven EBMOs in the Caribbean between October and December 2022. Interviews aimed to explore the following elements of the research:

- ▶ Digital tools that EBMOs recognize in their work, challenges, and good practices in using these tools, current and future technology needs.
- ▶ Digital capabilities, skills, and expertise of staff members in diverse roles and departments, and access to learning opportunities to improve digital literacy.
- ▶ The extent to which EBMO processes and practices support digitalization.
- ▶ Organizational culture, mindset, and leadership commitment to digitalization.

The analysis of these interviews highlighted opportunities, capability needs, and challenges that EBMOs in the Caribbean face to become digital organizations. It also revealed good regional digitalization practices, which appear in boxes throughout the report.

Survey

The survey aimed to quantify digitalization practices, processes, capability needs, and challenges in different EBMO areas, including the perspectives of staff members and leaders. Questions were displayed to respondents based on the role(s) they performed, namely senior management (CEO or board member), training and advisory services, membership engagement, communications, research, policy work, related advocacy, IT, and other functions. All sections were composed of questions related to the critical areas of inquiry in the research, listed below:

1. Digital tools
2. Processes
3. Practices
4. Digital capabilities
5. Culture and leadership

The survey was conducted between October and November 2022, reaching 70 respondents from 17 EBMOs in 18 countries in the Caribbean. It targeted respondents in different roles and departments.

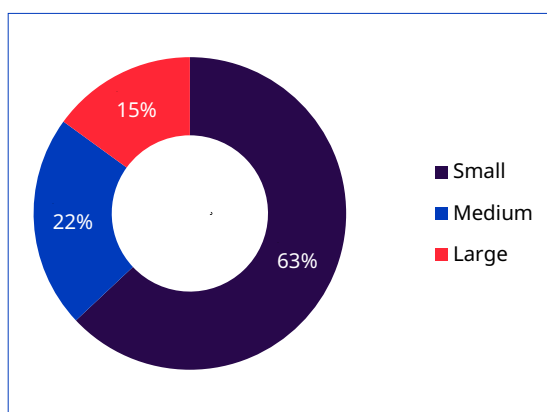


► Annex II. Survey demographics

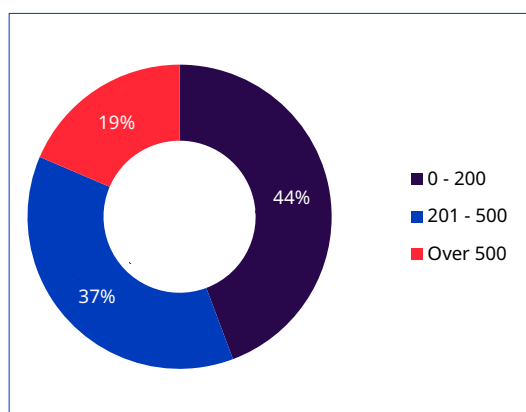
The survey was conducted with 70 respondents from 18 EBMOs in the Caribbean. Most responses (94 per cent) came from organizations operating at the national level, and 6 per cent of responses came from organizations working at the regional level.

Small, medium, and large EBMOs participated in the survey. Of total responses, 63 per cent came from small EBMOs employing five staff or less, 22 per cent came from medium EBMOs employing between six and 10 people, and 15 per cent came from large EBMOs employing more than 11 staff members (see Figure 41).

► Figure 41. EBMOs' sizes



► Figure 42. Direct enterprise members



Surveyed EBMOs had a range of direct enterprise members. Of the responses, 44 per cent came from EBMOs with less than 200 members, 37 per cent came from EBMOs with between 201 and 500 members, and 19 per cent came from EBMOs with over 500 members.

EBMOs were encouraged to have staff members with different functions and board members participate in the survey. This aimed to include diverse perspectives from leaders and staff to learn more about digitalization practices, processes, capability needs, and challenges in different EBMO areas. The online survey displayed questions to respondents based on the role(s) they selected. Respondents were allowed to choose more than one role. All sections were composed of questions related to the critical areas of inquiry in the research, listed below:

1. Digital tools
2. Processes
3. Practices
4. Digital capabilities
5. Culture and leadership

Overall, 12 CEOs and 24 board members participated in the survey. Staff responsible for membership engagement or communications, training and advisory services, research, policy work, related advocacy, other areas (e.g., admin, finance), and IT also completed the survey. Table 2 displays the number and share of respondents by role.

► Table 2 Role of respondents

Role at EBMO	Number	Share
CEO	12	17%
Member of the board of executive committee	24	34%
Membership engagement or communications	25	36%
Other (e.g., admin, finance, etc.)	25	36%
Training and advisory services	21	30%
Research	19	27%
Policy work and related advocacy	16	23%
IT support	3	4%

▶ Annex III. EBMO's survey

I. General information

1. Name of EBMO: _____

2. Country in which your EBMO is based:

- | | |
|--------------------------|------------------------------------|
| ▶ Anguilla | ▶ Grenada |
| ▶ Antigua and Barbuda | ▶ Guyana |
| ▶ Aruba | ▶ Jamaica |
| ▶ Bahamas | ▶ Monserrat |
| ▶ Barbados | ▶ Saint Kitts and Nevis |
| ▶ Belize | ▶ Saint Lucia |
| ▶ Bermuda | ▶ Sint Maarten |
| ▶ British Virgin Islands | ▶ Saint Vincent and the Grenadines |
| ▶ Cayman Islands | ▶ Suriname |
| ▶ Curaçao | ▶ Trinidad and Tobago |
| ▶ Dominica | ▶ Turks and Caicos Island |

3. How many permanent staff members currently work at your EBMO?

- | | |
|--------|-----------|
| ▶ 0 | ▶ 11-15 |
| ▶ 1-5 | ▶ 16-20 |
| ▶ 6-10 | ▶ Over 20 |

4. How many direct enterprise members does your EBMO have?

- | | |
|-----------|------------|
| ▶ 0-100 | ▶ 401-500 |
| ▶ 101-200 | ▶ 501-600 |
| ▶ 201-300 | ▶ Over 600 |
| ▶ 301-400 | |

5. What activities do you perform in your role at your EBMO? **Select all that apply.** These activities encompass everyday tasks even if this is not your official job title.

Please note that different questions will be shown depending on the role(s) you select.

- | | |
|--|------------------------------------|
| ▶ Member of the board of executive committee | ▶ Research |
| ▶ CEO / Executive Director | ▶ Policy work and related advocacy |
| ▶ Training and advisory services | ▶ Information Technology (IT) |
| ▶ Membership engagement | ▶ Other, please specify _____ |
| ▶ Communications | ▶ Communications |

For the purposes of this survey, digitalization is the adoption of data technologies to find better, quicker ways to solve problems and, as such, rely more systematically on the collection, management and use of data.

II. Senior management

(Sections shown to senior managers)

Digital capabilities

6. How satisfactory are the digital capabilities and skills currently possessed by your EBMO?

- | | |
|-------------------------|----------------------------|
| ▶ Very satisfactory | ▶ Somewhat dissatisfactory |
| ▶ Somewhat satisfactory | ▶ Very dissatisfactory |
| ▶ Moderate | |

7. Does your EBMO have a dedicated budget for staff training and development to improve **digital skills and capabilities**? Does your EBMO have a dedicated budget for staff training and development?

- | | |
|---|------------|
| ▶ Yes, it is sufficient to meet our needs | ▶ No |
| ▶ Yes, but it is not sufficient to meet our needs | ▶ Not sure |

8. In which human resource area do you see the most need for capacity building for the use of digital tools?

- | | |
|---------------------------------------|---------------------------------------|
| ▶ Management | ▶ Policy work and related advocacy |
| ▶ Training or other service provision | ▶ Support/admin/finance |
| ▶ Membership engagement | ▶ Information technology (IT) support |
| ▶ Communications | ▶ Not sure |
| ▶ Research | ▶ Other, please specify _____ |

9. What challenges does your EBMO encounter to digitalize? Select all that apply.

- ▶ Limited understanding of what digitalization entails
- ▶ Limited support from EBMO leaders
- ▶ Lack of organizational strategy to guide digitalization
- ▶ Limited time to change processes or operations
- ▶ Lack of suitable software or technology to meet organizational needs
- ▶ High cost of digital tools
- ▶ Limited capacity of staff
- ▶ Poor Internet connection
- ▶ Limited staff buy-in
- ▶ No tangible benefits from digitalizing
- ▶ Limited demand from members
- ▶ Other, please specify _____

10. Does your EBMO have a formal strategy, guideline, or plan for digitalization?

- ▶ Yes
- ▶ Not sure
- ▶ No

11. Is the strategy or plan budgeted for and funded?

- ▶ Yes
- ▶ Not sure
- ▶ No

12. Does your EBMO have a policy or guidelines on data use, protection and confidentiality?

- ▶ Yes
- ▶ Not sure
- ▶ No

Culture and leadership

13. Which of the following shifts related to digitalization did your EBMO experience during the COVID-19 pandemic? Select all that apply.

- ▶ Changing member needs or expectations
- ▶ Increase in the use of digital tools to operate and/or provide services
- ▶ Increase in remote work and/or collaboration
- ▶ Increased spending on data security
- ▶ Increased demand for data to respond to members' needs
- ▶ Increased interest and support from EBMO leaders to use digital tools
- ▶ Increased data collection
- ▶ Increased staff innovation in terms of the use of digital tools
- ▶ Increase in the use of data for decision making
- ▶ Other, please specify _____

Only options selected in Q6 will show in Q7

14. What shifts have been maintained have been maintained after the COVID-19 pandemic? Select all that apply.

- Changing member needs or expectations
- Increase in the use of digital tools to operate and/or provide services
- Increase in remote work and/or collaboration
- Increased spending on data security
- Increased demand for data to respond to members' needs
- Increased interest and support from EBMO leaders to use digital tools
- Increased data collection
- Increased staff innovation in terms of the use of digital tools
- Increase in the use of data for decision making
- Other, please specify _____

15. Select the extent to which you agree or disagree with the following statements:

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree	Not sure
a. Our EBMO monitors and measures progress on digitalization						
b. EBMO leaders see digitalization as a priority						
c. Your EBMO recognizes that a new service or product will not be perfect the first time it is launched but guided by data collected, it will be further developed over time.						
d. Senior management has communicated digitalization plans or strategy to all staff in your EBMO						
e. All EBMO staff understand how their role contributes to the organization's strategic objectives, including contribution to specific targets and results						
f. Our main competitors are outperforming us in the area of digitalization						

16. What main benefits do you expect that digitalization will bring to your EBMO? Select up to 3 benefits.

- ▶ Lower costs
- ▶ Increase collaboration between EBMO departments
- ▶ Improve EBMO competitiveness
- ▶ Increase staff productivity
- ▶ Improve staff engagement and retention
- ▶ Improve ability to measure EBMO performance
- ▶ Improve ability to communicate with members and stakeholders
- ▶ Increase staff's ability to innovate
- ▶ Bring new members and/or increase ability to retain current members
- ▶ Other, please specify _____

Processes

17. To what extent have staff responsibilities and roles been defined to support digitalization at your EBMO?

- ▶ To a great extent
- ▶ To a small extent
- ▶ To a moderate extent
- ▶ Not at all
- ▶ Somewhat
- ▶ Not sure

18. Is there a person or team in charge of advancing digitalization at your EBMO?

- ▶ Yes
- ▶ Not sure
- ▶ No

Practices

19. Do EBMO staff have access to flexible work arrangements (e.g., work from home, flexible schedule)?

- ▶ Yes
- ▶ Not sure
- ▶ No

20. Are board members able to participate and/or vote remotely?

- ▶ Yes, they can participate and vote online
- ▶ Yes, they can participate online
- ▶ Yes, they can vote online
- ▶ No

21. Are EBMO members able to participate and/or vote remotely in Annual General Meetings?

- ▶ Yes, they can participate and vote online
- ▶ Yes, they can participate online
- ▶ Yes, they can vote online
- ▶ No

22. Select the factors you consider when making internal strategic and operational decisions at your EBMO. Select up to three.

- ▶ Experience
- ▶ Intuition
- ▶ Consultation with members
- ▶ Consultation with experts
- ▶ Consultation with EBMO staff
- ▶ Consultation with government
- ▶ Economic trends
- ▶ Strategic long-term vision
- ▶ Research and analysis produced by the EBMO
- ▶ Third party research and analysis
- ▶ Other, please specify _____

23. Select the factors you consider when making decisions on public positions adopted or activities pursued by your EBMO. Select up to three.

- ▶ Experience
- ▶ Intuition
- ▶ Consultation with members
- ▶ Consultation with board members
- ▶ Consultation with experts
- ▶ Consultation with EBMO staff
- ▶ Consultation with government
- ▶ Economic trends
- ▶ Strategic long-term vision
- ▶ Research and analysis produced by the EBMO
- ▶ Third party research and analysis
- ▶ Other, please specify _____

III. Training and advisory services

(Section shown to respondents involved in training and advisory services)

Technology

24. What proportion of your time is focused on the planning and delivery of training?

- ▶ Less than 25%
- ▶ Between 26-50%
- ▶ Between 51-75%
- ▶ Over 75%

25. What would best describe the use of the internet in training and advisory services? Select all that apply.

- ▶ Your EBMO does not have experience or a strategy to use the internet to deliver training or advisory services.
- ▶ Your EBMO does not have a plan/strategy to use the internet for delivery of training and advisory services, but it conducts some of these services online.
- ▶ The internet is regularly used in the delivery of training and advisory services.
- ▶ The internet is considered critical to the provision of training and advisory services.

Q26 shows if respondent selected last 3 options in Q25

26. Which of the following tools are you currently using for delivery of training and advisory services? Select all that apply.

- Zoom
- Microsoft Teams
- Skype
- Google meets
- Digital learning platforms (e.g., Moodle, Google Classroom)
- ITC-ILO e-campus
- Other, please specify _____

Practices

27. Please select the type of demand from members for the following services:

	Yes, as a pure online training	Yes, as a blended course with both an online and offline/ face-to-face components	No	Don't know
Online delivery of training				
Online delivery of advisory services				

28. Have you ever charged for a training course delivered entirely online?

- Yes
- No
- Not sure

Q29 shows if respondent selected "Yes" in Q28

29. How does the rate of online training courses compare to the rate of in-person trainings?

- Online trainings are more expensive
- Online trainings are cheaper
- The price of online and in person trainings is similar
- Don't know

30. What are the top obstacles to online delivery of training and advisory services? Select up to three.

- Poor internet connection
- Members' limited interest in online service provision
- Lack of technical capacity at the EBMO to deliver online services
- High cost of getting necessary licenses for online tools or platforms
- High cost of hiring trainer
- Members' limited computer literacy
- Difficult to make online services profitable
- Difficult to adapt training to an online format
- Other, please specify _____

Culture

31. How often does your EBMO assess members' demand for training and advisory services?

- ▶ Every month or less
- ▶ Every 1 to 3 months
- ▶ Every 3 to 6 months
- ▶ Every 6 months to 1 year
- ▶ Every year or longer
- ▶ Whenever needed
- ▶ Not done / not sure

Q32 shows if respondent selected all options, except for "Not done / not sure" in Q31

32. Is method of service delivery included in the assessment of members demand for training and advisory services?

- ▶ Yes
- ▶ No
- ▶ Not sure

IV. Membership or communications

(Section shown to respondents in involved in membership or communications)

Membership

Technology

33. How does your EBMO store data on members ? Select all that apply.

- ▶ We have a customer relationship manager (CRM) software
- ▶ We store their details in a Word document
- ▶ We store their details in an Excel document
- ▶ We store their details in our own EBMO internal database
- ▶ We store their details as physical (hard) copies at our premises
- ▶ We store their details on the cloud
- ▶ Other, please specify _____

34. How is data on members predominantly collected?

- ▶ Through digital tools
- ▶ By phone
- ▶ By post
- ▶ In person
- ▶ Other, please specify _____

Digital capabilities

Q2 shows if respondent selected "We have a CRM software" in Q1

35. What challenges have you encountered when using the CRM software? Select all that apply.

- ▶ It is difficult to use
- ▶ Other tools are better/easier than the CRM software
- ▶ No guidelines with instructions to use it
- ▶ Lack of adoption within my team
- ▶ Limited coordination with other departments
- ▶ Limited support from senior management
- ▶ Limited time to enter data to the CRM software
- ▶ Limited or no integration with other digital tools (i.e., email client, website, social media, data analytics software)
- ▶ Software limitations in the area of data analysis
- ▶ Other, please specify _____

Practices

36. For what purpose does your EBMO collect data (from/about members)? Select all that apply.

- ▶ To understand members views on matters
- ▶ To understand membership satisfaction
- ▶ To collect members' feedback
- ▶ To assess members' needs (e.g., regarding training and/or other services)
- ▶ To give members a sense they are influencing the EBMO, contributing to its achievements, and that their views are being taken into account in decision making
- ▶ To collect details of new members
- ▶ To collect data on potential members
- ▶ To update details of old members
- ▶ To monitor membership indicators (e.g., membership retention rate)
- ▶ Other, please specify _____

37. To what extent does your EBMO use member's data to offer targeted services to them?

- ▶ To a great extent
- ▶ To a moderate extent
- ▶ Somewhat
- ▶ To a small extent
- ▶ Not at all
- ▶ Not sure

Communications

Technology

38. What digital tools does your EBMO use to share information and engage with members? Select all that apply.

- ▶ EBMO website
- ▶ Email
- ▶ Facebook
- ▶ Instagram
- ▶ LinkedIn
- ▶ Twitter
- ▶ Instant communication apps (e.g., WhatsApp, Viber)
- ▶ Email marketing platform (e.g., Mailchimp)
- ▶ CRM software
- ▶ None
- ▶ Other, please specify _____

Digital capabilities

39. What challenges have you encountered when using these digital tools? Select all that apply.

- ▶ Lower response or interaction from members than expected
- ▶ Lack of adoption within my team
- ▶ No clear strategy or guidelines to use digital channels
- ▶ Limited skills or knowledge to use these channels
- ▶ Limited time
- ▶ Limited support from senior management
- ▶ Prefer other means of communication (e.g., phone call, in person)
- ▶ Other, please specify _____

Practices

40. Are digital means of communication (newsletter, websites, social media, reports, media contacts) regularly assessed on their impact/effectiveness?

- ▶ Yes
- ▶ No
- ▶ Not sure

Research / policy work and related advocacy

(Section shown to respondents in research or advocacy)

Technology

41. What tools does your EBMO use to collect data for research or advocacy purposes? Select all that apply.

- ▶ Free online survey tools (e.g., Survey Monkey, Google forms)
- ▶ Qualtrics
- ▶ Hard copy (in person)
- ▶ We do not conduct surveys for these purposes
- ▶ Other, please specify _____

Q2 shows if respondent selected all options except "we do not conduct surveys for these purposes" in Q1
 42. What applications are used at your EBMO to analyze survey results? Select all that apply.

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

Q3 shows if respondent selected all options except "we do not conduct surveys for these purposes" in Q1
 43. On average, what share of members generally respond to surveys by your EBMO?

- ▶ Over 70% of members
- ▶ Between 51% and 70% of members
- ▶ Between 31% and 50% of members
- ▶ Between 10% and 30% of members
- ▶ Less than 10% of members
- ▶ Not sure

Digital capabilities

44. What would best describe your EBMO capability to use data collection and analysis tools?

- ▶ Very good
- ▶ Somewhat good
- ▶ Moderate
- ▶ Somewhat poor
- ▶ Extremely poor

45. What challenges have you encountered when using digital tools to collect and analyze data? Select all that apply.

- ▶ Limited skills or knowledge
- ▶ High cost
- ▶ Lack of adoption within my team
- ▶ No guidelines with instructions to use it
- ▶ Limited time
- ▶ Limited support from senior management
- ▶ Other, please specify _____

V. IT

(Section shown to IT specialists or outsourced service provider)

46. What would best describe the internet connection arrangement in your office?

- ▶ No internet connection
- ▶ The speed and stability of the internet connection is not sufficient for actual needs
- ▶ Internet connection is stable but tends to be slow at times
- ▶ A fast and stable internet connection available to all staff
- ▶ Not sure

47. What would best describe the availability of IT resources and infrastructure to deliver services to members?

- ▶ Computers, digital tools, and technical capacity needed are not available
- ▶ Computers and digital tools needed are available but technical capacity is not available among all relevant staff
- ▶ Computers and digital tools are available to all concerned staff when needed and there is peer to peer support among staff for their use
- ▶ Computers and digital tools are always available to all concerned staff and there is dedicated technical support in-house to assist whenever needed

48. What would best describe the knowledge and use of IT (e.g., digital tools and the Internet) among your colleagues?

- ▶ Staff have limited or no knowledge of IT
- ▶ Staff have participated in basic IT skills development and are developing their skills further
- ▶ Staff have a basic level of competency and apply IT in their work
- ▶ Staff are sophisticated users of IT for their roles and service delivery

49. Who manages the website updates and maintenance?

- ▶ Staff member
- ▶ External technical support
- ▶ Our EBMO does not have a website
- ▶ Other, please specify

50. Does your EBMO store (most) information on the cloud?

- ▶ Yes
- ▶ No
- ▶ Not sure

51. How often does your EBMO backup its data?

- ▶ Every month or less
- ▶ Every 1 to 3 months
- ▶ Every 3 to 6 months
- ▶ Every 6 months to 1 year
- ▶ Every year or longer
- ▶ Whenever needed
- ▶ Backups are done automatically and continuously

VI. All respondents

(Section shown to all respondents)

Processes

52. Does your job description mention digital tools that should be used in your role?

- ▶ Yes
- ▶ No
- ▶ Not sure

Culture

Organizational culture is a reinforcing set of values, expectations and practices that guide behavior of EBMO staff members.

53. Do you believe that your EBMO welcomes new ideas?

- ▶ Yes
- ▶ No
- ▶ Not sure

54. To what extent do you seek out digital solutions first to provide services and run operations?

- ▶ To a great extent
- ▶ To a moderate extent
- ▶ Somewhat
- ▶ To a small extent
- ▶ Not at all
- ▶ Not sure

55. How often do you feel valued for who you are and the skills you and experiences you bring to your EBMO?

- ▶ Always
- ▶ Most of the time
- ▶ About half the time
- ▶ Sometimes
- ▶ Never

56. How effective are leaders in your EBMO at role modeling and shaping culture?

- ▶ Very effective
- ▶ Effective
- ▶ Somewhat effective
- ▶ Slightly effective
- ▶ Not effective at all

Digitalization examples and good practices

57. Has your EBMO launched a project or initiative using digital tools to add value to members or improve internal operations?

- ▶ Yes – please explain _____
- ▶ No

58. Could you share examples of effective use of digital tools at your EBMO which could be shared with EBMOs in the region?

► Yes – please explain _____

► No

59. Do you have any comments related to digitalization practices, needs and challenges of your EBMO?



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