

The Movement email guide for reps in Prospect & Bectu

Version 06 – August 2026

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

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



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

Movement Login: You must be logged in to the Knowledge Hub to access Movement. Click 'My account > Email my members'. On the Movement login page select the relevant sign in button.

Movement permissions are determined by your rep role*.

(*Secretary, Assistant Secretary, Chair, Vice Chair, Member & Recruitment Secretary, Organiser, Communications Rep have access.)

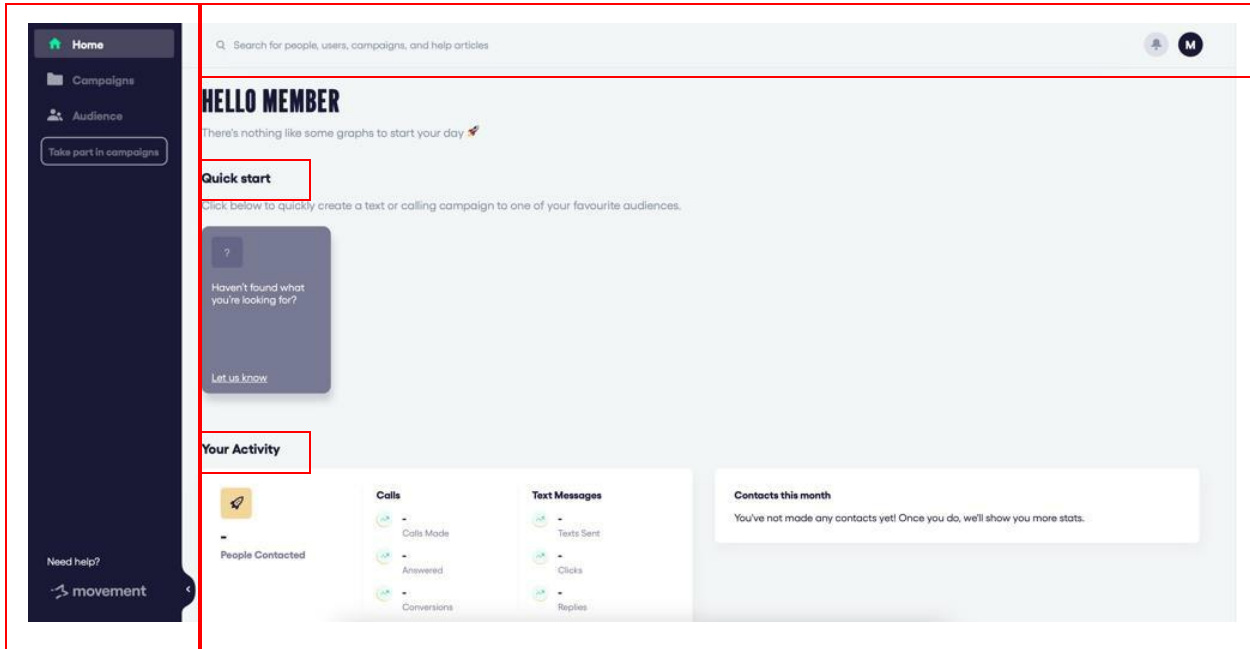
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Find your way around Movement

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

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



Home

The first page displays 'Quick start' templates if you have saved any. Use these as a starting point to build a new dynamic search or static list. Beneath this 'Your activity' shows headline statistics about recent campaigns (not in use).

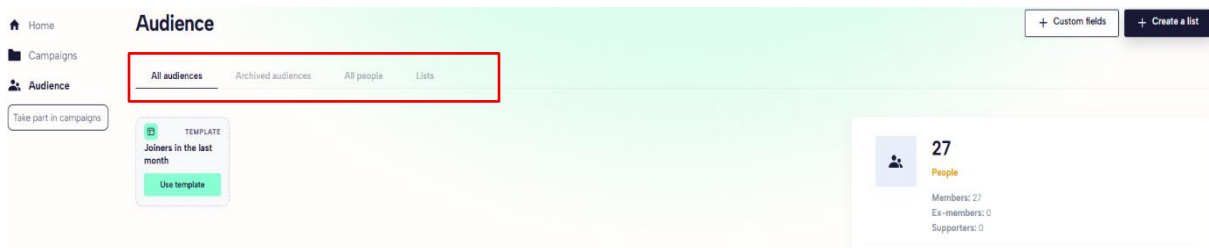
Audience

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

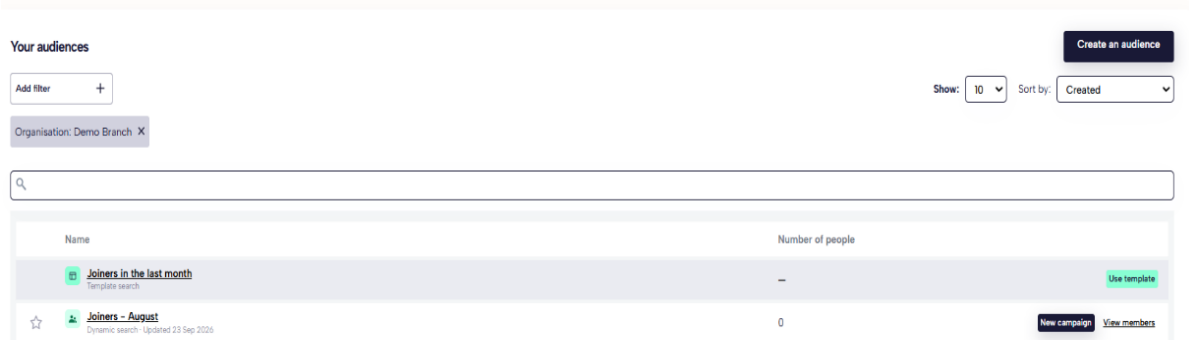
The main content window shows four tabs across the top.

1. The '**All audiences**' tab shows all dynamic search and static list audiences, saved search templates are displayed at the top of this tab.
2. '**Archived audiences**' show those that are no longer in use.
3. '**All people**' displays a list of people you can email.
4. '**Lists**' show only the static audiences created by upload or pasting in details.

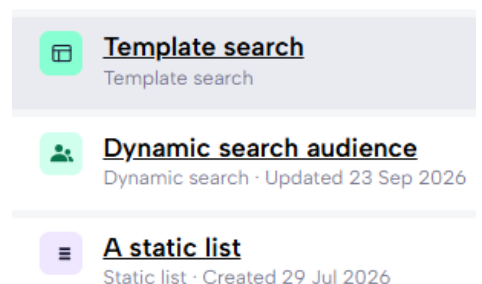
On the right-hand side, there's a count of the members you have access to.



The lower part of the Audience page shows 'Your audiences'. Below each audience 'Name' you see the audience type (Template search, Dynamic search or Static list) and the date it was created or refreshed to update the count. The listing can be sorted alphabetically or by the number of people in it.

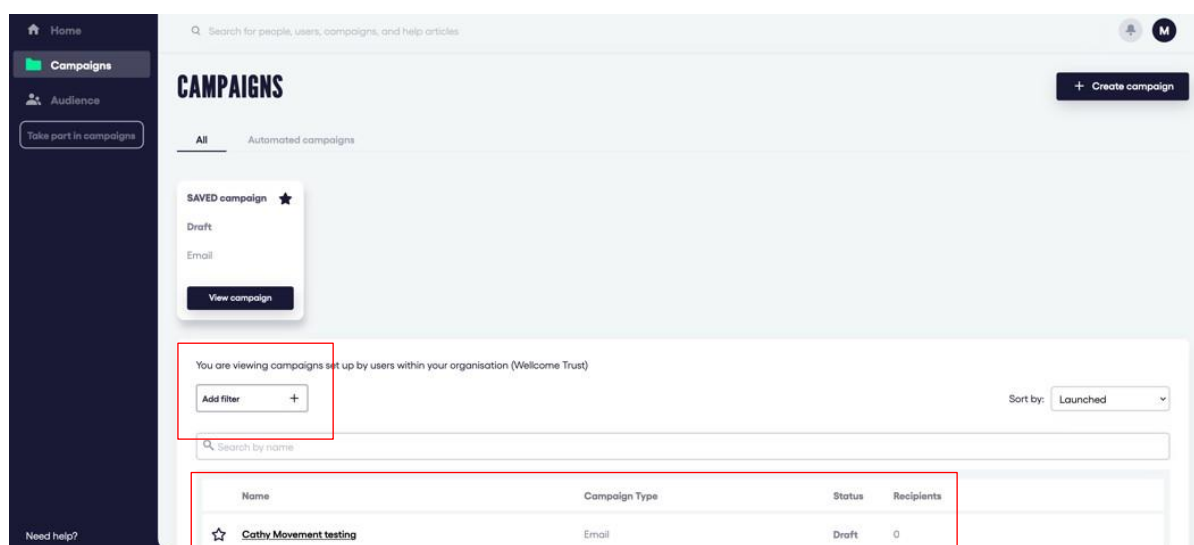


Dynamic search based audiences and templates are denoted by a green icon, Static lists by a grey icon. The column on the right can be used to launch a campaign or view members, or in the case of a search template, use that saved search as the basis of a new search.



Campaigns

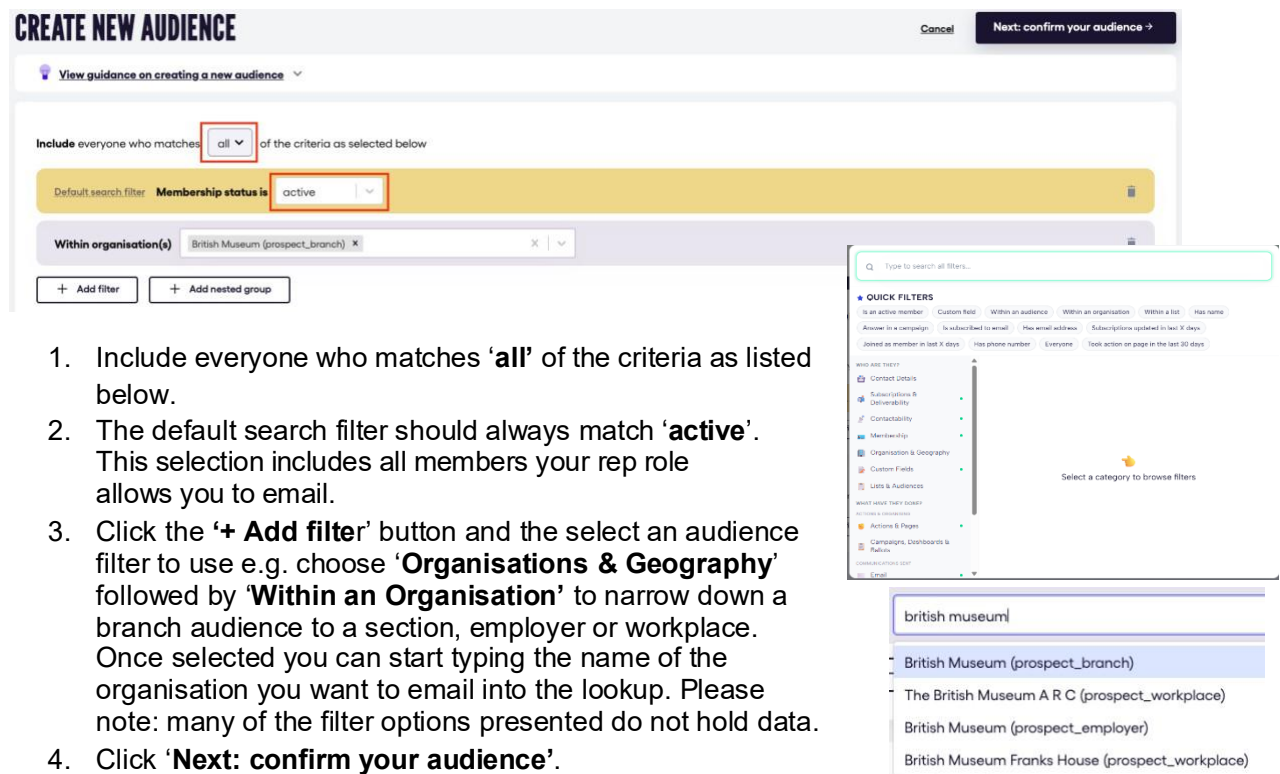
The Campaigns list page shows all campaigns, their status (e.g. 'draft' or 'sent') and the number of recipients. It's possible to filter and sort the campaign list or search for mailing campaigns by name. If you click the star to the left of the campaign name, it will be saved above the main list for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



Create a dynamic search based audience

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

Click the '**Create an audience**' button at the top-right of the 'Your audiences' section on the Audience page. This will open the audience builder where you can follow the steps below:



The screenshot shows the 'CREATE NEW AUDIENCE' interface. At the top, there's a 'Cancel' button and a 'Next: confirm your audience →' button. Below the title, there's a link 'View guidance on creating a new audience'. The main section is titled 'Include everyone who matches' with a dropdown menu set to 'all'. Below this, there's a 'Default search filter' section with 'Membership status is' and a dropdown menu set to 'active'. Underneath, there's a 'Within organisation(s)' section with a text input containing 'British Museum (prospect_branch)'. To the right of the main interface, there's a 'QUICK FILTERS' sidebar with various filter categories like 'Is an active member', 'Joined in a campaign', etc. Below the sidebar, there's a search bar with the text 'british museum' and a list of search results including 'British Museum (prospect_branch)', 'The British Museum A R C (prospect_workplace)', 'British Museum (prospect_employer)', and 'British Museum Franks House (prospect_workplace)'.

1. Include everyone who matches '**all**' of the criteria as listed below.
2. The default search filter should always match '**active**'. This selection includes all members your rep role allows you to email.
3. Click the '+ **Add filter**' button and then select an audience filter to use e.g. choose '**Organisations & Geography**' followed by '**Within an Organisation**' to narrow down a branch audience to a section, employer or workplace. Once selected you can start typing the name of the organisation you want to email into the lookup. Please note: many of the filter options presented do not hold data.
4. Click '**Next: confirm your audience**'.

Note, in the lookup the same name can be used for branch, employer or workplace. In this case look for the organisation type in the brackets that follow the name.

The criteria above will be sufficient to email all opted-in members in a branch. To create more advanced audiences add multiple filters and choose whether to create an audience that matches 'all' or 'any'.

A '**nested group**' allows you to combine 'all' and 'any' criteria. The audience scope can be limited by setting filters that will exclude members.

If you would like to create an audience by entering a **code** for a branch, section, subdivision, employer or workplace you can do this by adding a 'Custom fields – Custom field text' filter.

After you click to confirm your audience, the number of people who match its criteria will show. If this number doesn't match your expectation, return to the previous page to edit the criteria. You can click to '**View people in the audience**'. Proceed by clicking '**Next: name your audience**'.

After naming your audience, you have the option to save it as a template so that it's added as a quick start audience. To use a template audience in an email campaign, the campaign must be launched from the link in the Quick Start. A template audience cannot be added to a campaign at a later stage.

An audience can also be shared with people in your branch section and sub-sections.

Ex-member details are removed from Movement on a daily basis.



Should you save an audience as a template?

While it's possible to save your search as a template, this is not a necessary step. Unlike a regular audience, you cannot send a mailing to a template search.

Search templates are intended to provide a shortcut to creating more complex audiences. Saving a search as a template will save your filter settings – but this is only useful if you need to further refine the audience before sending your mailing.

Create a static list audience

Lists offer an alternative to criteria based search audiences and can be created via the + Create a list button near the top-right of the Audience home screen.

A list can either be uploaded as a .csv or .xlsx file or pasted into the space provided on screen.

You must include either the preferred email address that is registered with Prospect/Bectu or a membership number. If the information added matches an existing member in Movement, the contact record will be added to your list.

Once a list has been created, it's possible to add additional people via a lookup. On the list details page, there is an **'Add people'** button above the listing. Use this to find members to add using their name, email or membership number. Once you find the matching contact, click to add them to your list.

When viewing the list, each member row has a red **Remove** button at the end to easily remove them from the list.

Unlike search audiences which are dynamic and will automatically update if you refresh the count or use them in a mailing, a static list is fixed. You will need to manually add or remove your members. Members in lists who leave the union or who you no longer have access to mail, are removed from your list.

Lists are useful for creating audiences that aren't easily defined by data we have in Movement.

Create and send an email campaign

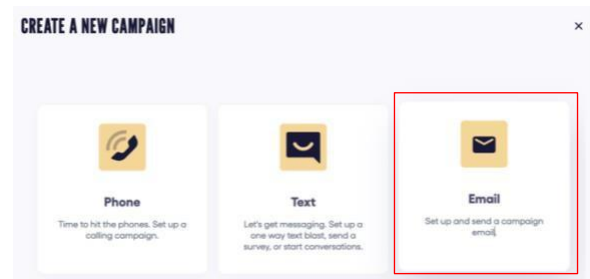
To start a new mailing click the dark **+ Create campaign** button near the top-right of the main window of the 'Campaigns' page.

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

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

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

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



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

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

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

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

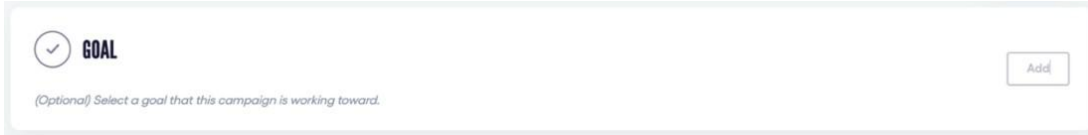
The  at the start of each stage will turn green when edits to a section have been saved.

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

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

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

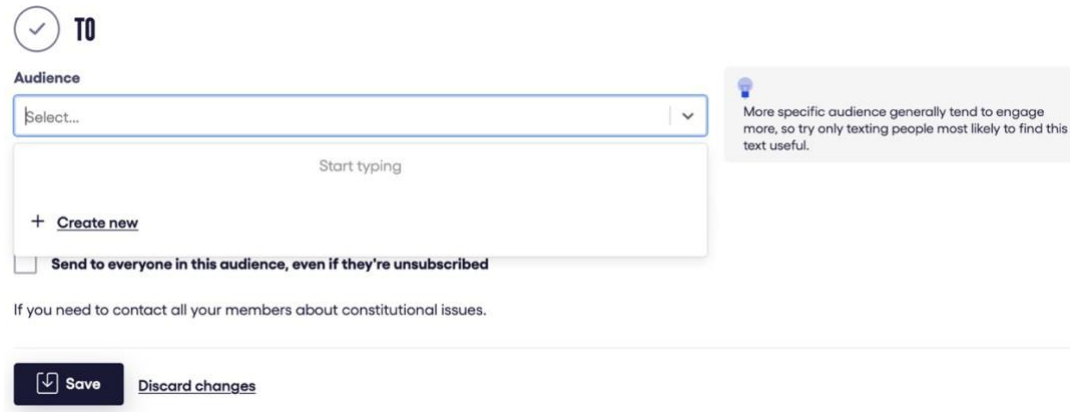
1. Goal



The screenshot shows a step titled 'GOAL' with a green checkmark icon. Below the title is a hint: '(Optional) Select a goal that this campaign is working toward.' At the bottom right, there is a button labeled 'Add'.

Goal is an optional step and not really relevant for us. It allows you to group multiple campaigns to make it easier to track results across long-term initiatives.

2. To



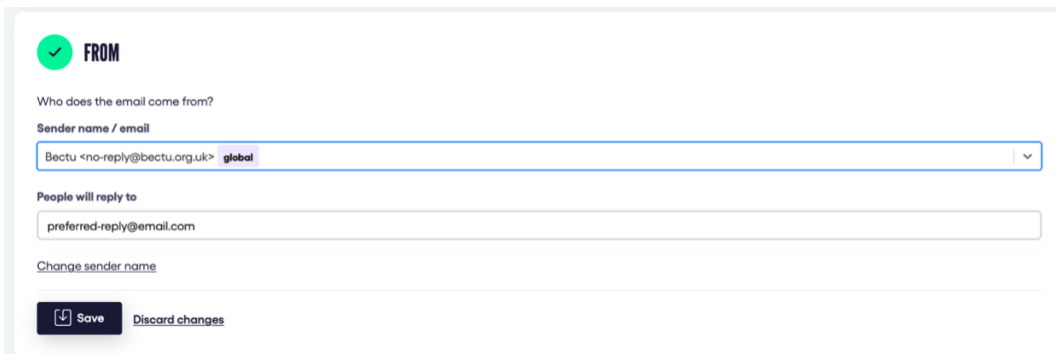
The screenshot shows a step titled 'TO' with a green checkmark icon. Below the title is the label 'Audience'. There is a dropdown menu with 'Select...' and a downward arrow. Below the dropdown is a text input field with the placeholder 'Start typing'. To the right of the input field is a button labeled '+ Create new'. Below the input field is a checkbox labeled 'Send to everyone in this audience, even if they're unsubscribed'. Below the checkbox is a hint: 'If you need to contact all your members about constitutional issues.' At the bottom left, there is a button labeled 'Save' with a green checkmark icon. At the bottom right, there is a link labeled 'Discard changes'. To the right of the main form, there is a light gray box with a lightbulb icon and the text: 'More specific audience generally tend to engage more, so try only texting people most likely to find this text useful.'

To use an existing audience, select it from the dropdown or click '[+ Create new](#)' to define a new one. (Remember – template audiences cannot be added here – to use a template audience start the email campaign from the Quick start link) See [Create a new audience for your mailing](#).

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

Click '**Save**' to proceed.

3. From



The screenshot shows a step titled 'FROM' with a green checkmark icon. Below the title is the question 'Who does the email come from?'. Below the question is the label 'Sender name / email'. There is a dropdown menu with 'Bectu <no-reply@bectu.org.uk>' and a downward arrow. Below the dropdown is the label 'People will reply to'. There is a text input field with 'preferred-reply@email.com'. Below the input field is a link labeled 'Change sender name'. At the bottom left, there is a button labeled 'Save' with a green checkmark icon. At the bottom right, there is a link labeled 'Discard changes'.

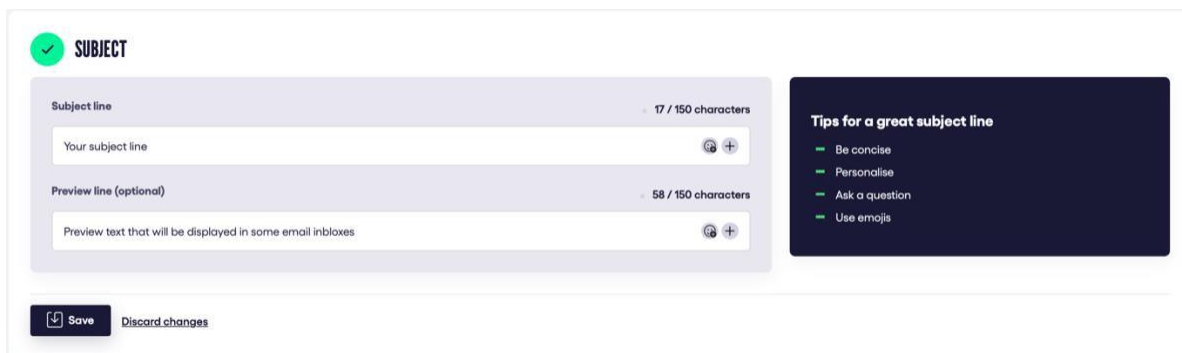
Choose the relevant sender email address – either 'Bectu <no-reply@bectu.org.uk>' or 'Prospect <no-reply@prospect.org.uk>'.

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

Click '**Change sender name**' to update the default, 'Bectu/Prospect' sender names – e.g. your branch pr a personal name.

Click '**Save**' to proceed.

4. Subject



Enter a subject line and optionally, include preview text. Some email clients display the preview text in the inbox and it can encourage engagement. There are tips on creating a good subject line on the right of the screen.

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

Click '**Save**' to proceed.

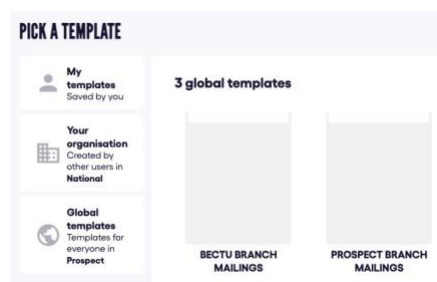
5. Content

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

If you are a Bectu rep please select the **Bectu template**; if you are a Prospect rep please select the **Prospect template**.

The templates include a header, the correct footer with social links, address and unsubscribe that can't be edited.

Selecting a template, opens the content editor.



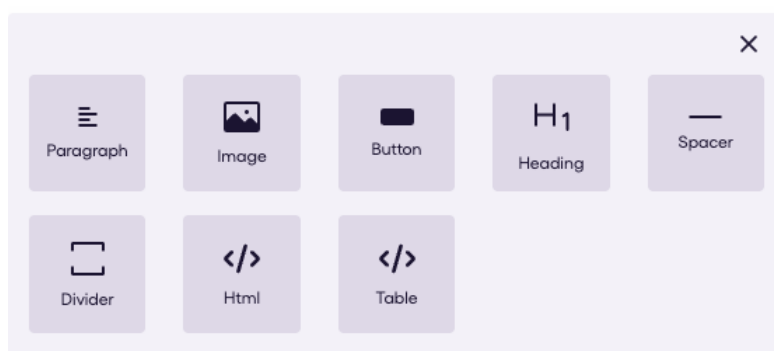
Editing your email

An email is made up of blocks. When you click in to start editing your email, by default you'll be presented with a 'paragraph' block.

To add another block you can click the  that appears above or below an existing selected block. To insert a block into the email click it in the list.

The block options are:

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



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

Using the paragraph block



The first tab is the 'Visual' editor. From left to right, the buttons illustrated above give you the following options:

- Change font size
- Change font family/type
- Bold your text
- Italicise your text
- Underline your text
- Add a hyperlink
- Change the alignment of your text
- Add a bulleted list
- Add a numbered list
- Use merge tags
- Insert a table

The second tab presents an option to edit content in HTML.

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

Using merge tags

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

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

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

A merge tag is editable if you switch from the Visual to HTML view. You can also create a new one by typing the tag name inside {{ }}. If you follow the tag name with a pipe ('|') then 'default:' you can add the fallback text within quotation marks.

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

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

First name | Last name | Email | Member no. | Status | Employer | Workplace | Branch | Section | Sub Section | Bectu Division | Bectu Subdivision | Join date

Merge fields relating to address and phone numbers are empty - this information is not available in Movement.

Using images

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

Using buttons

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

Sharing Files

Inserting file attachments is not good practice in bulk mailings. They increase the size of the mailing and the chances of it being blocked by a recipient's mail server. Instead, we suggest you upload files as resources to the new branch pages on the Knowledge Hub. Alternately, you can use a cloud service like One Drive or Google Drive and share the link in the email.

It is possible to upload files to Movement when creating button links. The file will be stored on the Movement server and a link to it will be attached to the button click.

Links to web, email and phone

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

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



Link best practice and avoiding spam filters

If you include a full url in the email copy, the address will change to one from "<https://movement.prospect.org.uk/link?data=.....>" with a long trailing hash and this will be displayed in the recipient email. This facilitates click tracking.

This long link can break the template! To prevent your link text from being converted we recommend you type descriptive text and link it.

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

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

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

Add your own contact details

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

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

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

6. Settings



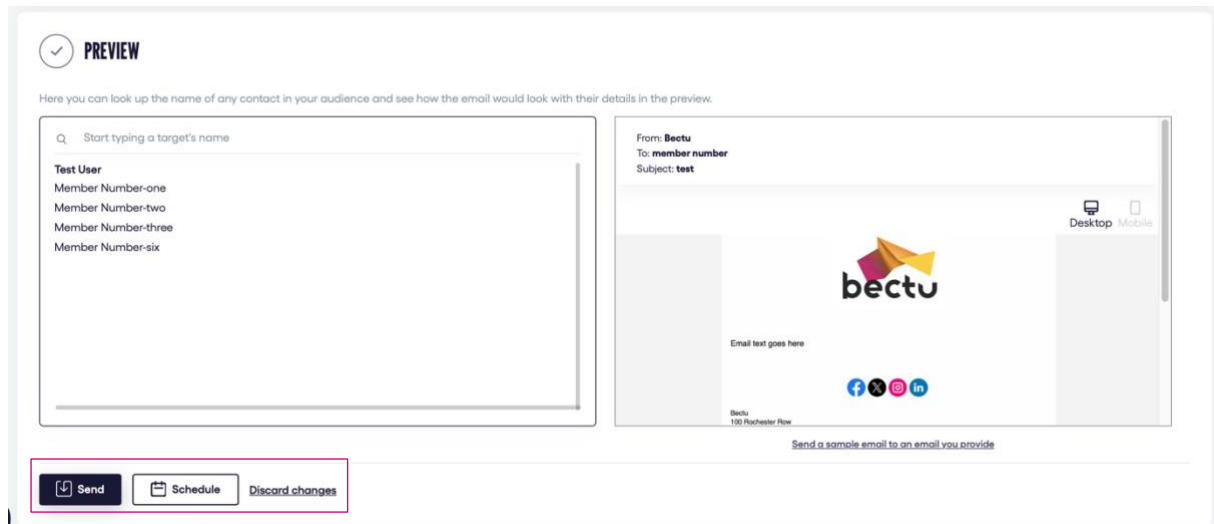
SETTINGS

[Edit](#)

This campaign is using recommended settings.

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

7. Preview and send



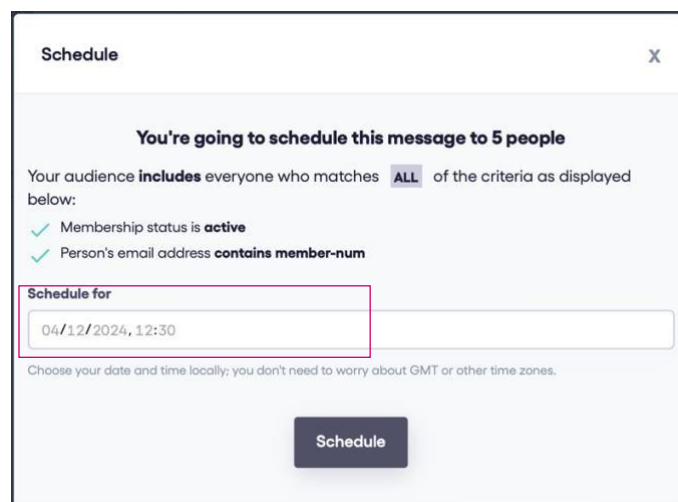
A preview email which can be toggled between desktop and mobile view will appear with a list of its intended recipients to its left. If you use merge tags you can view how the email appears to different recipients by selecting their name in the left-hand list – there's a recipient search above the list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

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

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

Scheduling a send for a later time

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



CC additional recipients

After clicking 'Send' or 'Schedule' it's possible to CC up to 10 additional recipients. We recommend you use this to send a copy of your email to your branch official.

Check campaign statistics

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

	Name	Campaign Type	Status	Recipients	
☆	Branch Update, September Sent at: 17th September 2024, 14:56	Email	Sent	1,291	74% Opened
					1% Clicked

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

< **BRANCH UPDATE, SEPTEMBER** sent

Manage ▾

Overview

Details

1,291
recipients

Email blast
campaign type

17/09/2024
sent at

Audience name

Bectu
sender name

74%
open rate
956 opens

1%
click rate
11 clicks

0
unsubscribes

1%
bounce rate
8 bounced

Links

- 3 - <https://twitter.com/bectu>
- 2 - <https://www.facebook.com/BECTUOfficial>
- 2 - <https://bectu.org.uk/privacy/>
- 2 - <https://www.instagram.com/bectuunion/>
- 8 - <https://>
- 5 - <https://>
- 4 - <https://>
- 3 - <https://>
- 2 - <https://>



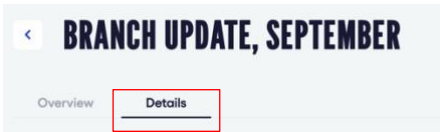
A high bounce rate is problematic and can be the result of an incorrect email address or emails being trapped by a spam filter. Anything over 2% is high and rates above this, or an upward trend should be investigated.

To see which emails bounced, filter the table of recipients at the foot of the Details tab by the word "bounced". You can also create an audience of bounced contacts via the audience builder. If a member's email is bouncing, ask them to update their contact details with us.

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



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



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

All Emails

Add filter +

FirstPrevious12345...87NextLast

Name	Email	Opened	Clicked	Status	Opted out
		✓	✗	delivered	✗
		✓	✗	delivered	✗
		✓	✗	delivered	✗
		✓	✗	delivered	✗
		✗	✗	delivered	✗
		✓	✗	delivered	✗
		✗	✗	delivered	✗
		✗	✗	delivered	✗
		✗	✗	delivered	✗
		✓	✗	delivered	✗

Look up a contact record

Member records in Movement are synced to the central member database each day. New members are added to mailing lists if they meet the list criteria and the records of ex-members are removed.

The screenshot shows the 'MEMBER NUMBER-THREE' profile page. On the left is a sidebar with 'Summary' (selected), 'Custom fields', 'Verify', and 'Activity'. The main content area is divided into three sections: 1. A central card with a purple circular profile picture, the name 'MEMBER NUMBER-THREE', ID '720260', status 'Current member', and join date '01/01/2023'. 2. 'Personal Details' showing 'Age: 24 years old' and 'Email: member-number-three@hotmail.com'. 3. 'Areas' listing various roles and divisions like 'Bectu', 'ENDEMOL PRODUCTIONS', and 'REGIONAL PRODUCTION DIVISION'. At the bottom, 'Subscriptions' shows toggle switches for Email, Phone, Sms, and Whatsapp, with corresponding 'Last changed' dates.

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

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

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

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

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

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

The screenshot shows the 'Activity Log' section with a date filter set to 'Thu, Nov 21, 2024'. It contains two entries, both labeled 'Email - Blast'. The first entry at 4:00 pm states 'Member was sent an email blast from the campaign: Test Campaign 2 (cloned)'. The second entry at 3:36 pm states 'Member was sent an email blast from the campaign: Test Campaign'. A 'Load more' button is at the bottom left, and 'Add filter' and 'Last 14 days' controls are at the top right.

Get support while using Movement

If you encounter any issues while using Movement, the quickest and most efficient way to get help is to contact the Digital Projects team at web@prospect.org.uk.

The more information you can provide when seeking support the better, for example:

- Be specific about the issue When did you experience the issue?
- What device and browser were you using?
- Include screenshots, screen recordings if possible etc

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

Please do not report bugs to Movement directly.

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

****As per the existing guidance on using online membership lists:***

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