

Phonebank Training Guide



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Introduction

This guide provides an introduction to phonebanking with Sister District. Leaders who are hosting phonebank parties will find useful step-by-step instructions on how to build and run their events. Callers will find information about why we phonebank, and tips on how to phonebank effectively.

If you have any questions about troubleshooting during your event, contact your Field Manager. If you have any questions about building an event, reach out to your organizing staff member. Your staff contacts are listed in the [Sister District Directory](#).

Why Phonebank?

There are five main reasons why we at Sister District emphasize this particular tactic throughout each election cycle.

1. **Best remote option for voter contact:** The research bears out what campaign organizing experts tell us: *speaking* with voters is the best way to identify, persuade, and motivate them to cast ballots for our candidates. And indeed, you'll notice scripts change over the course of an election cycle as directed by goals of: identifying and/or persuading, and/or motivating voters to turn out. From a remote position, phonebanking is #1.

Example: Let's say you find an undecided voter and tag them as such in the phonebank system. The next day, the campaign's Organizer can pull a list of all undecided voters, hand it to her most persuasive local volunteer (may be the candidate in some cases) to have follow-up conversations.

See: [SDAN Field Research Overview](#)

2. **It's what our candidates ask for:** To help with voter contact, field directors, campaign managers, and candidates ask us to focus primarily on *speaking* with their voters.
3. **An opportunity to recruit locally:** Conversation is also the best way for us to help recruit local volunteers.
4. **Cleans the lists:** Conversation (or being stopped short of conversation) helps us "clean" the campaign's voter list so local volunteers and mailers connect with the right voters with the right messages at the right times.

Example: Let's say you find a Republican who will never ever vote for your candidate. You tag that person as such in the system. When the campaign pulls up a list of voters for canvassing the next weekend, that voter won't be on that list. This prevents a campaign organizer or local volunteer from wasting time with someone who won't vote with us, and frees up time to speak with others who might.

See: [Phonebank. It's Worth It.](#)

5. **Frees up time for local volunteers:** The calls we make are calls *local* volunteers don't have to make. This means that campaigns can put more - - and in some cases nearly all - - of their local volunteers "on the doors." This is ideal since face-to-face conversations with voters is our #1 tactic overall.

Case Study: In 2019, Sister District endorsed Pam Iovino in a PA State Senate special election. Our volunteers made 100% of the phone calls her field director needed to reach as part of the campaign's field plan. This meant the campaign was able to put all local volunteers on the doors. Pam won that race by 4 points and took over a seat that had been controlled by Republicans for five decades.

Instructions for Phonebankers

Step 1: Get comfortable with phonebanking

If you're new to phonebanking or would like a refresher, start by reading through this document with particular attention to the content and links on page 2. If you want more information, watch these videos:

- [Why it's effective](#)
- [How to make a persuasion call](#)
- [How to make a commit to action call](#)

Step 2: Meet your candidate

Find your candidate's page at <https://www.sisterdistrict.com/candidates/>. Click the Dossier button to access additional information about the candidate.

Step 3: Using the Sister District phonebank system

Keep track of your dials

Keep a pen and paper handy to keep a running tally of your total dials. When you're finished, share your dial total with your phonebank leader so your good work can be counted in your team's totals! If you have a hard time keeping track along the way and your phone allows, you could look in your "recent calls" log.

Log in

1. Locate your candidate's page at www.sisterdistrict.com/candidates.
2. On the candidate's page, scroll down and click on the **Phonebank** link (sketch of a telephone) on the right side of the page.
3. On the password page enter the password shared with you by your phonebank leader or Field Manager. We have the same password for all candidates, all phonebanks, all cycle. **IMPORTANT:** Keep this password secure - please don't share on social media and only share with those who will be phonebanking with us.
4. At the bottom left of the candidate's phonebanking page click the blue button **Start Phonebanking**.
5. You'll need to either create your Action ID or log in with your existing Action ID.

To create an Action ID:

1. On the "actionid" login page, click **Create an ActionID account**.
2. Fill in the form, check the **Privacy Policy** checkbox, and then click **Create Account**.
3. Check your email for the "Welcome to ActionID" mail and click **Confirm My Account**.
4. If you aren't redirected back to the virtual phone bank use the original link to get back to the login page and use your newly created Action ID to login.

Make calls

The top of the page shows the name and phone number of the voter you're calling. The left-hand side of the page contains other helpful information such as age, gender, and polling place when it is close to Election Day.

The image shows two screenshots of the Open VPB contact interface. The left screenshot shows the 'Contact' screen with a 'Next' button at the top. The right screenshot shows a 'Were they available?' pop-up dialog box over the contact information.

1. Use your phone to call the number
TIP: Headphones or earbuds advised for hands free calling.
2. Do one of the following:
 - If you couldn't speak with the voter, near the top of the page click **I Couldn't Reach <name>** and choose the most appropriate option.
 - If you are able to contact a voter, select the most appropriate response from the pull-down menus or check boxes after each question.
3. Click **Save & Next Call**.

The image shows a screenshot of the Open VPB contact interface. A 'That's it!' pop-up dialog box is overlaid on the contact information, indicating that the user should click 'Save/Next' to save their responses and move on to the next call.

4. Record that completed dial in your running tally

Tips for Phonebankers

Prepare/Role Play: Before beginning your calls to voters, do some role playing so you can feel more comfortable delivering the script. Be sure to have the tools you'll need like a pen, tally sheet, water, the campaign dossier/website.

Stick to the Script: While it's ok to make the script conversational, the scripts are written in a specific way for an intended purpose. The closer you can stick to the script, the better.

Data is Critical: Please make sure to record the data from every call that most closely corresponds with the call's outcome. If you have questions, please ask.

Practice makes Perfect: You will get better and more comfortable as the calls go on. Everything you're doing is helping. Just try to be someone that you'd like to talk to.

Forget the Pleasantries: It may feel a bit awkward to not say, "how are you?" and jump right into the script when you call a voter, but most of the time it will give them an opportunity to get out of the call before it starts. Try jumping right into the script; you'll have a lower hang up rate.

It's Okay Not to Know: If you don't know the answer to a question, feel free to say that you're a volunteer and don't know but that you can pass their info on to the campaign to get them the information they need. Feel free to take some notes to pass on. Don't make something up.

Don't Engage the Opposition: If a voter indicates their support for an opponent or says something rude or inappropriate, politely thank them for their time and move on.

Listen, Ask Questions, Tell Your Story: While we'd like you to stick to the script, after you get out the campaign talking points with a who is undecided, feel free to ask questions and listen - - you can add why you support the candidate, and maybe even persuade them!

Stay Positive/Set Expectations: Normal contact rates are between 10-20%. Sometimes we'll find voters who are not interested in speaking with us and/or won't be voting for our candidate - remember, this is a victory!

Only Leave Voicemails if the Script Asks You To. Our goal in phonebanking is to *speak* with as many voters as we can. Leaving voicemails takes valuable time, and reduces our ability to have conversations. In rare instances a campaign will actually need us to leave voicemails but only for a particular list of targeted voters. If this is their strategy, we'll be directed to do so in their script.

Option - use Google Voice: You may wish to download the Google Voice app to change your cell phone number to a local number. This may give you a higher contact rate.

Smile While You Dial: Really do this! It shows through the phone :D

Troubleshooting

If you are a phonebanker and have difficulty with anything related to the Virtual Phonebank System, alert your phonebank leader.

If you are the phonebank leader (this includes phonebanks of 1 :), review the following to troubleshoot. If you need to contact your Field Manager, information is listed on the bottom right of the candidate's phonebanking page. Note that if you have trouble with Zoom or have questions about training and re-shifting attendees, please contact your Organizing Manager. Your staff contacts are listed in the [Sister District Directory](#).

If you get a “phonebank complete” message

As phonebanking efforts ramp up, you may log in to make calls for a candidate and receive a “phonebank complete” message. If that happens, here are your steps:

1. Alert your Field Manager, Ore or Oscar, listed at the bottom right of the candidate page. Also listed in the [Sister District Directory](#).
2. Explain to your phonebank attendees that this is a good sign! It means that previous volunteers have completed a pass through the list, and the campaign will now provide a fresh list that reflects the data collected during the last round of calls. In other words, the process of cleaning lists and targeting voters is working as it should!
3. Quickly move your phonebankers to make calls for one of your other candidates.

If you get a message saying “enter VPB code”

The VPB code is the last part of the URL after the final /. Example:

https://www.openvpb.com/vpb_bycode/53F913G-926099 VPB code would be **53F913G-926099**.

If the password to get into your candidate’s Sister District phonebank page is not working

Note that this is the password you would have received from your phonebank leader or Field Manager. We have the same password for all candidates, all phonebanks, all cycle.

- If you are copying and pasting the password, try typing it manually instead. You might have a space or some incorrect character.
- Try opening the page and logging in using your browser's private/incognito mode.
- Try clearing the cache and cookies on your browser.

If you’re invited to “edit Action ID” when you sign in or create Action ID

- If you cannot exit the edit mode, quit your browser and start the login process from the beginning.

Instructions for Phonebank Leaders

If you're organizing a virtual phonebank: see [Virtual Phonebank Step-by-Step Guide](#) and [Zoom Guidance](#).

Building Your Phonebank

Planning

1. Pick a date and time that fits in the open call times listed on your candidates' Sister District page. Weekends and evenings are great. 2 hours is a good length of time. We suggest advertising "We start dialing at 5pm - - if you want training, join us at 4:45pm".
2. Submit the [Phonebank Notice Form](#) so your Field Manager knows to be on hand to help you during your phonebank, and so we know the good work you're doing and include the results of your hard work in our progress-to-goal totals.
3. Visit the [Resource Library](#) for a rich collection of materials on phonebanking.

Recruiting

4. Start recruiting! Here are the steps we suggest: A recruitment process might be:

Now: Send out a Save the Date email w/ RSVP link ASAP. Make calls and send texts along with it. Share the RSVP link on social media, talk to your neighbors, rope your friends in. Personal outreach makes all the difference. Our recent SDAN study found that [calls and texts more than doubled attendance rates versus just sending email](#).

A week later: Send a proper invitation email with compelling messaging a week later. Continue calls and texts.

One week out: Make one last round of invitations, ask people to bring friends.

Day before: Send a reminder email to phonebank RSVPs with the following:

- a. Candidate page URL
- b. Candidate dossier
- c. Instructions for logging into the phonebank system - - invite them to try logging in in advance of the phonebank to save time

Morning-of: Send text messages to confirm RSVPs are coming.

Pro tip: Take every opportunity to remind folks to bring laptop & charger, cell phone & charger and ear buds. And friends!

5. Focus your recruitment on your friends, colleagues, neighbors, and other people you know, in addition to Sister District volunteers. Ask them to invite a couple people each. Be creative. Make it

personal. Help them understand why we phonebank using the information at the top of this document.

For help with messaging and framing your mission: get to know your [candidates](#), the stakes for the [state](#), and how this work fits into our [2020 Strategy](#). Also check out the [2020 Recruitment Messaging Memo](#). See the final section of this document, Disarming Fears and Correcting Misconceptions.

Preparing

6. 1-2 weeks out: prepare how you'll train your volunteers! Work with your Sister District Organizing Manager on how to do an effective, concise training. Get clear on your dials-per-minute goals, your sign-in system, and go over any and all tips to help gain effectiveness and efficiency.
7. Create a sign with the wifi information
8. Have your sign-in sheet ready (and name tags if you use them)

Running Your Phonebank

Sample Phonebank Agenda and Tick-tock

Arrival/Sign-in

2-5minutes

1. Sign people in (here's [sample a sign-in form](#)) in a way that recruits people for upcoming events/team roles. Remember that the only way people get on your volunteer list is if you sign them up or if they sign up at www.sisterdistrict.com/volunteer.
2. Connect! Welcome them, point out the restroom, wifi sign, snacks, introduce them to someone
3. Ask everyone to get on the wifi and keep a piece of paper and pen handy to count their dials

Training

10mins

4. Establish purpose and goals - use Why Phonebank? messaging above
5. Make sure phonebankers know what success looks like. It's a success if:
 - a. We find an undecided voter. Why: we report that intel to the campaign, they'll pull a list of all undecided voters and hand it off to their best, most persuasive local volunteer.
 - b. We find a wrong number. Why: if the campaign volunteers aren't spending time dialing wrong numbers, they can reach more voters.
 - c. We find a voter who won't vote with us in a million years. Why: the campaign will remove that voter from their list of targets. This prevents the next volunteer from wasting time with someone who won't vote with us, and frees that volunteer to speak with others who might.
6. Set expectations
 - a. A good contact rate might be around 10-20% - don't be discouraged!

7. Talk about efficiency and tracking dials, that you'll be reporting on total dials and dials-per-minute so everyone will know your impact and progress and so you can make sure all your good work is counted in Sister District's totals
 - a. Example: Our goal is to talk with as many voters as possible, so let's dial fast! We're here, so we might as well be as efficient as possible in the time we have. We'll be reporting on dial efficiency when everyone shares their total dials, it'll be fun!
8. Have volunteers follow along with you to access the Sister District phonebanking system. See the Instructions For Phonebankers section above.

Pro Tip: if some are having trouble with the tech side of phonebanking, get everyone else through the training and get them making calls and then go back and help others.

9. Help coach and encourage phonebankers throughout
 - a. Listen in and congratulate people on approaches taken during calls - - share with the group
 - b. Celebrate successes! If someone finds an undecided voter or someone who won't be voting with us or recruits a volunteer, they should be identified and celebrated.

Pro Tip: Get a bell. If a phonebanker has a victory (undecided voter, persuading a voter, recruits a volunteer, etc.), they ring the bell and everyone cheers!

Finishing Up Your Phonebank

1. Have all phonebankers share their dial totals with you. Report to folks how many dials you made. Celebrate!!
2. Suggested: Fill in phonebank results on the Phonebanking tab of your Team Spreadsheet (if you need the link, connect with your Organizing Department contact). Share your Dial Efficiency with your phonebankers. Celebrate!!
3. Do a quick debrief before people leave: Any funny stories? Call out some of the successes
4. Make sure people are signed up for another shift or for the next event before they leave
5. Thank each person personally
6. If you're participating in the Metric Dashboard Program (we suggest it!), you can use the Phonebanking tab of your team spreadsheet to sum up your total dials and report by week. See: [Metrics Dashboard Program Guide](#)
7. Add new volunteers to sisterdistrict.com. The only way for people to make it on your team's volunteer list is if either you or they submit the form at www.sisterdistrict.com/volunteer.

Phonebanking At The Edge of Greatness

There are phonebanks and then there are PHONEBANKS! The difference between a winner and a dud is the extent to which participants 1) maximized the number of conversations with voters and 2) enjoyed the experience. We'll take each of these aspects in turn.

Maximize Conversations through Dial Efficiency

Our goal in phonebanking is simple: we want to have effective conversations with as many voters as possible. To maximize the number of conversations we have with voters, we can either increase capacity - - more phonebanks, more phonebankers - - or make more dials given a fixed number of phonebanks and phonebankers.

How do you increase total dials with a fixed amount of phonebanks and phonebankers? Get phonebankers fired up to dial fast, reduce the time between dials, and generally create a culture of efficiency. It gets fun when everyone understands the strategic value of dial efficiency and focuses on making the most of their time. This means that phonebank hosts and trainers need to talk up Dial Efficiency and get your phonebankers bought in. When you report to the group at the end of the phone bank your total dials, you also report Dial Efficiency.

Messaging idea: "Thank you for coming; we're all here giving up some of our weekend and time and energy. So let's be as efficient as we can to make the biggest impact we can. Dial like the wind!" Let attendees know you'll be crunching and sharing the numbers based on the number of dials they report at the end of the phonebank.

What is a good rate for efficient dialing? It depends, but you want to be somewhere in the range of 1 to 2 minutes per dial. At the Sister District phonebanking event in Portland OR during GOTV in 2019, during which all callers were focused on efficiency, phonebankers averaged 1 minute per dial.

You can track Dial Efficiency for every phonebank on the Phonebanking tab in your Team Spreadsheet. When your phonebank is over, input total dials, select total dial time using the pull-down menu, input total phonebankers and viola! You'll get a minutes-per-dial result. If you need help with your team spreadsheet or with using the Phonebanking tab in particular, let your Organizing Department contact know!

Ideas to increase efficiency:

- See if you can take 15mins or less for volunteers to begin making calls after they've signed in (see the "10-minute Phonebank Training" Program below).
- Withhold food! Just kidding. But not really. The best-run phonebanks do not have people eating while they dial. We suggest taking a 7-10 minute break right in the middle for people to eat, use the restroom, stretch their legs, etc. Make efficiency funny! Do a silly countdown: "one minute of pizza remaining, eat fast everyone we have an election to win!"

Phonebanker Enjoyment

We find that enjoyment is most closely linked to proper training and good time management. The motivation to make calls comes after a volunteer really understands the value of the tactic and precisely how their phone calls help their candidates' campaigns. It comes after a caller sees examples of someone making calls and feels confident making their own. It comes when callers know what success looks like and feel good about all the small victories that add up while calling. The following are a few ideas to help your volunteers enjoy their experience:

- Great training that includes example calls is most important.
- Some people need more time and space to study the script and learn more about the candidate before jumping in - support them in this, give those people time.
- Make sure phonebankers know what the victories are. Finding someone who will not vote with us is a victory. A disconnected number is a victory. An undecided voter is a victory. Recruiting a volunteer is a massive victory. Tell people why.
- Celebrate victories! If someone finds a Republican who won't ever vote with us, they should get to share that and be celebrated with applause. Same if someone finds an undecided voter.
- It's enjoyable to focus on efficiency - making phonebanks more crisp and energized is a good thing.
- Provide room for people to share stories of good and tricky/funny calls.

Bonus Track: Disarming Fears and Correcting Misconceptions

A note from Head of Organizing Neal Morgan: Some volunteers have concerns about phonebanking for the first time and some have not enjoyed past experiences with the tactic. In my experience, disappointment is an outcome of poor training, including improper expectation-setting for contact rate, not identifying and celebrating successes, not framing the value of the tactic appropriately, no focus on efficiency. If someone has had a bad experience in the past, encourage them to give it another try. In addition to the Why Phonebank? section at the top of this document and related materials throughout that make the case for this tactic, the following might be useful in invitation conversations.

Common Fear #1: I don't want to get yelled at by Republicans!

This is an exceedingly rare outcome of a phone call. Here's why: because of resource constraints, campaigns do their best to only target voters who are in the ballpark of voting with them. That "universe," or list of persuadable or likely voters is created using voter registration data, information inherited from past Democratic campaigns in the district, and sophisticated research that indicate probabilities for an individual's voting preference. You will definitely find voters who will in no way want to vote with your candidate, sure, but that is a natural part of the process - you say thank you for your time and move quickly to your next dial - the experience is like water off a duck's back for a well-trained phonebanker who knows they just had a phonebanking victory!

Common Fear #2: I don't know enough, I won't be any good

Campaigns create scripts for us and ask us to follow the scripts closely. Those scripts are written carefully to discover the information the campaign needs about those voters and share the messages the campaign needs to share at a given point in an election cycle. If something comes up that isn't provided in the script, it's OK to say something like "I don't know the answer to that, but I encourage you to go to the candidate's

website for more information,” and ask another question of the voter, pivot to shared values on which you can connect. If you feel like engaging in a conversation, it’s not facts and figures that help us connect with voters; it’s listening with care, asking questions, and speaking from the heart that really matters.

Common Misconception: Phonebanking can’t be useful because you speak with so few people

The research reviewed for the [SDAN Field Research Overview](#) factors in what we call “contact rate,” or the percentage of voters spoken with out of the number of dials she makes. We can do things to help increase contact rate, like making calls on the weekend and evenings, but generally contact rates tend to hover between 10-20%. That might feel like a low number of actual conversations in a given hour, and it’s understandable that someone might feel unproductive if they’re not enjoying their time. But it only feels like a low rate *if the dial volume in a given hour is low!* In other words, if a phonebanker is dialing slow, taking leisurely breaks, and listening all the way through the voicemail greeting before hanging up, they’re not going to speak with many voters in an hour even with a higher-than-average contact rate. The plan, then, should be to focus on speeding things up to increase totals dials and thus maximize opportunities for conversation. To increase motivation for dial efficiency, make sure phonebankers are informed that finding wrong numbers and “no-way” voters are victories. Celebrate those victories. Make sure they understand the value of the tactic. Make sure a phonebanker has been told that 10-20% contact rate is normal, that it’s still our best remote voter contact tactic.

Final thought: Go forth and dial like the wind! Your candidate’s future constituents will thank you ;)