# PHONEBANKING BEST PRACTICES

## GENERAL TIPS

1. **Have a Script**
   - Typically the campaign will provide a script for you, which is provided via Open VPB (oro other dialer system).
   - Follow the script and ask all the questions, and mark the answers down.

3. **Know your Candidate**
   - Know your candidate - who are they, why are they running, what is their message?

4. **Don't Argue**
   - If they have made up their mind who they are voting for and it is not your candidate, thank them for their time and hang up.

5. **Don't Engage**
   - If the individual starts yelling at you (sometimes they feel a bit freer doing this over the phone than in person) politely thank them for their time and hang up, do not engage.

6. **Find a quiet spot**
   - Do not phonebank in a noisy coffee shop or in the room with your barking dog or loud family. You want a quiet environment where you and the person you are calling can hear well without ambient noise.

7. **Smile :D**
   - Through the phone! Yes, do it! It will carry through in your voice.

## AND KEEP IN MIND . . .

- There will be a LOT of no answers. This is completely to be expected, and partially why it's important to have so many people on the phones.
- Do not leave voice messages unless instructed by the campaign.
- Later in the election cycle, people may say they have been called many times. This is in part because there are many different groups calling and, by law, many are not

allowed to coordinate with each other. The best way to respond is simply to be a human, follow the script, and be courteous. (By the way, one reason Sister District coordinates so closely with campaigns is to minimize this kind of multiple calling!)

- You may be concerned about calling from another state, and this is understandable. We've found this has not been a problem. Most of the time, your conversations will not last long enough for this subject to come up. And if for some reason it does, feel free to respond however you are comfortable. We've found that volunteers have gotten positive reactions from people when explaining that they are calling from somewhere else, but have taken time out of their days to make these calls because of how important the elections in Virginia are this year.

## IF YOU'RE HOSTING A PARTY . . .

1. If the date of your party is not during SDP Open Hours, please email Sam Alcabes at phonebank@sisterdistrict.com so that he can make the sure the campaign has enough dials in the system and someone will be on call to help in case there are any questions.

2. As a host, you should try to check out the system ahead of time so that you can know what to expect and so that you can assist your guests. If you haven't already, register an account with OpenVPB yourself to familiarize yourself with the phonebanking registration flow (or if the campaign is using something different than OpenVPB, do this with whatever online software the campaign provides).

3. Think about how to best recruit volunteers. One volunteer found that coupling phone banking with a postcard-writing exercise added some fun and gave people who are nervous about calling a "gateway" to making calls.

4. When you're choosing your venue/location, make sure you have extra outlets/strips to plug in computers and charge phones. Remind people to bring headphones and extra chargers if they have them. A white board can also be handy to write down the wifi info, etc.

5. Prepare a notice to distribute online and by email to possible volunteers. Here is a sample script:

> *Join us for a phone banking event for _____ on _____,*
> *___, _____ when we'll be making calls for _____, the*
> *Democratic candidate running for _____ in the _____*

*election within the ___th district of _____ in ___. The phone bank will be from ____ to ____. You can come for some or all of the time. Light refreshments will be provided, but feel free to bring something to share. Please RSVP to _____ at [Insert email]. Location to be provided upon RSVP.*

*[Insert something interesting about the candidate and why you are supporting him or her]*

*Don't forget to bring your own laptop, cell phone, chargers and a headset and to create an account, if you don't already have one, at www.opevpb.com before arriving if you can.*

You may also want to ask any first time phone bankers to arrive 15 to 30 minutes early so that they can get some help in setting up.

Finally, after receiving each RSVP, send a follow up email reconfirming date and time, and including your contact phone number and the address of the venue. For privacy, we advise against putting your address in any public listings.

6. Make a packing list and make sure that you have everything with you before leaving for your venue. Here is a sample list. If your party is at home, then go through this list before guests arrive.
    a. Name tags and pens
    b. Copies of any instructions, sample scripts, and other materials
    c. Your laptop, headset and cellphone
    d. Instructions for any extra activity along with activity supplies (e.g., postcards, pens, markers, stickers)
    e. Whiteboard pens (optional; only needed if using a whiteboard and if not available at venue)
    f. Extra headset that plugs into standard cellphones (optional)
    g. Extra laptop if available (optional)
    h. Snacks/beverages

7. Upon arriving at the venue, check for power outlets and consider how callers can be arranged so they have sufficient space to each make calls.

8. Write on whiteboard or distribute any wifi login and the phonebank contact number that is provided in case there are questions.

9. Set out name tags with pens and forms. Set up any extra activity such as postcard writing. Put out some snacks/waters/drinks.

10. When a critical mass has arrived, provide an overview to the volunteers of the process for making a call, and remind everyone why calls are so important. It can also be good to set expectations here---many times, no one picks up the phone, and this is ok.

11. For first time phone bankers, if you do not offer to train prior to the start of the phone bank per above, then you may want to offer to do an extra walk through after getting experienced phone bankers started. Typically there is a very specific script that is desired and this is provided in the caller software and everyone needs to have that information.

12. Thank callers and let them know about any future phone bank or candidate-related events that are planned. Find out how to best follow up with them.

13. Pat yourself on the back. You've done great work, and the candidate is so appreciative!