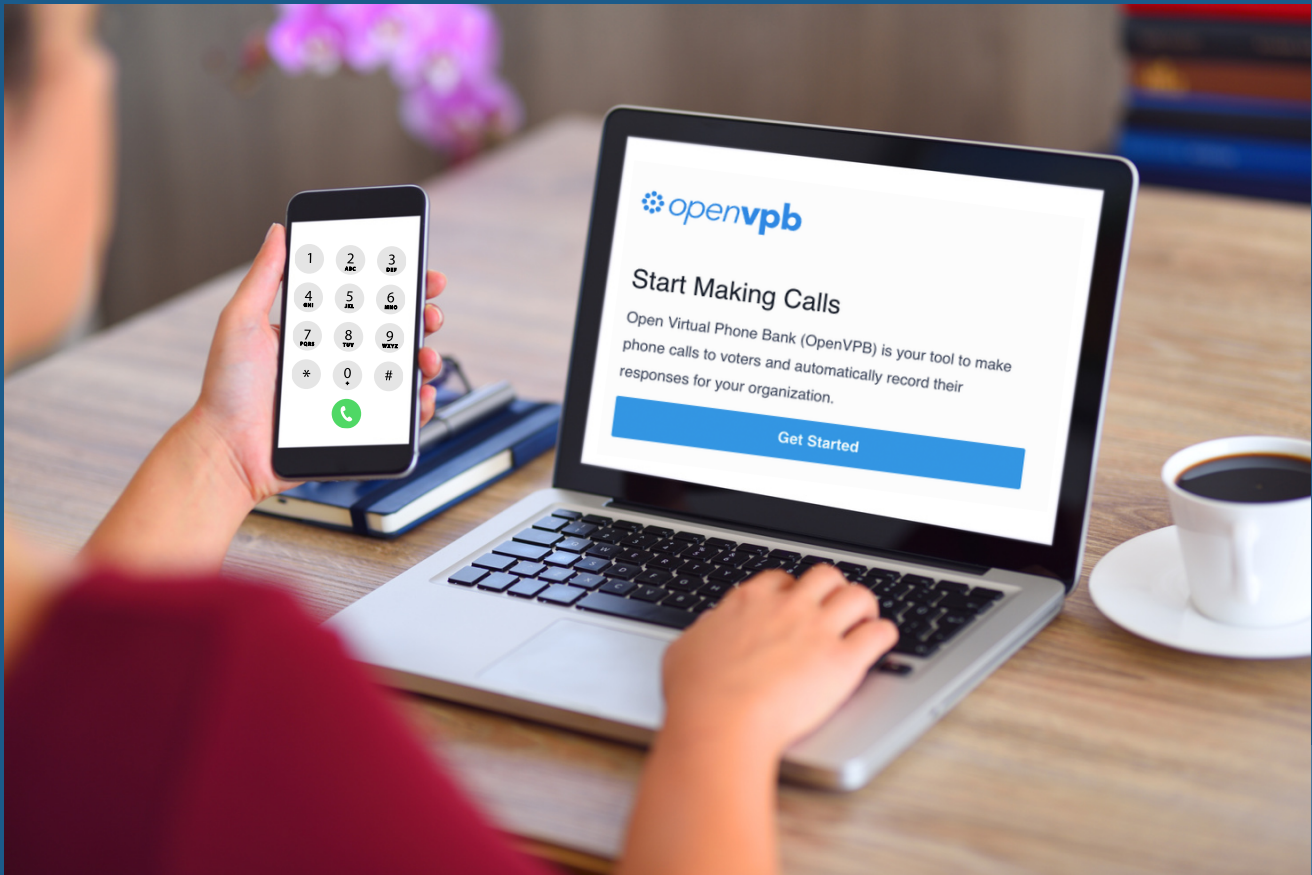


# BUILDING BRIDGES FOR AMERICA



# How to Phone Bank



# An app and a conversation

DIRECTLY TALKING TO VOTERS AND ASKING THEM TO VOTE IS THE MOST EFFECTIVE WAY TO WIN A CAMPAIGN. PERIOD. A ONE-ON-ONE CONVERSATION IS STILL MANY TIMES MORE POWERFUL THAN ANY MODERN TOOL. TECHNOLOGY DOES HELP TO RECORD DATA THAT HELPS CAMPAIGNS ORGANIZE AND WIN.

WHEN YOU VOLUNTEER FOR A CAMPAIGN, DIRECTLY CONTACTING VOTERS MEANS:

1. YOU WILL USE AN APP ON YOUR PHONE OR COMPUTER.
2. YOU WILL HAVE A CONVERSATION WITH A VOTER.
3. YOU WILL RECORD DATA FROM THAT CONVERSATION INTO THE APP.



BUILDING BRIDGES  
FOR  
AMERICA



# The App

The campaign will tell you which app they are using for the phone bank. Below are instructions for one of the most common apps, OpenVPB from NGP VAN. First you get your Action ID. Then you log into Open VPB.

## Create your Action ID

1. Go to this website <https://accounts.ngpvan.com>
2. Already have an account? Log in to make sure your info is up to date. If you need to create an account, click Create an Action ID Account
3. Enter your email address, password, and phone number
4. You will receive a confirmation email to confirm your Action ID number.

## The App

### Log into OpenVPB



1. Go to this website

<https://www.openvpb.com/virtualphonebank>

2. Login with your Action ID number

3. Enter the Virtual Phone Bank Code provided by the campaign

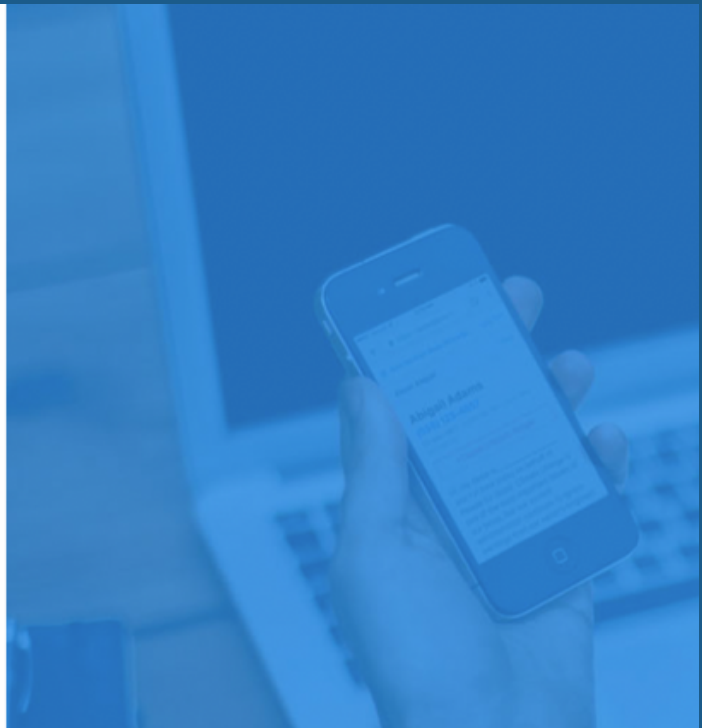
4. Click to Join a Phone Bank



### Start Making Calls

Open Virtual Phone Bank (OpenVPB) is your tool to make phone calls to voters and automatically record their responses for your organization.

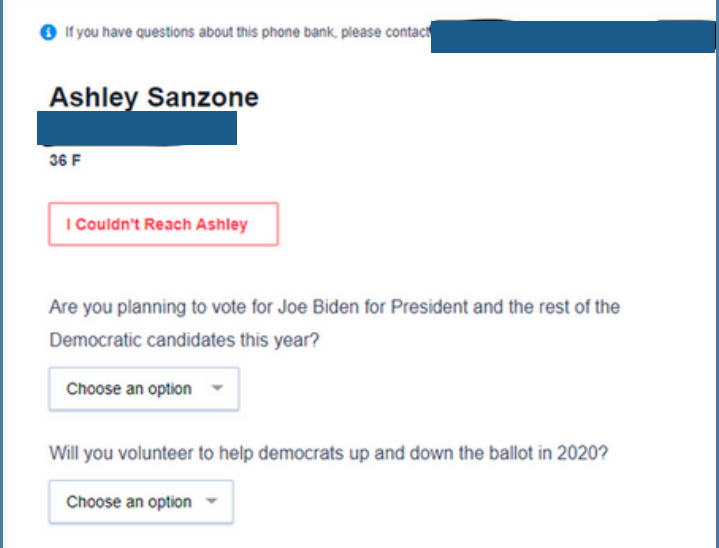
Get Started



# The App

## Making Phone Calls

1. The person's name, phone number, and the script will appear for the first call.
2. Before you start, familiarize yourself with the script and questions. The script is prepared by the campaign so you cover the points that are most important.
3. You are not a robot, so prepare to adjust what you say to make it natural for you. Talking with voters will feel more like a conversation.
4. Call from your phone by manually typing in the phone number to make the call. If you do not want to use your personal phone number to make calls, you can get a Google Voice phone number for free.



If you have questions about this phone bank, please contact [REDACTED]

**Ashley Sanzone**  
[REDACTED]  
36 F

I Couldn't Reach Ashley

Are you planning to vote for Joe Biden for President and the rest of the Democratic candidates this year?

Choose an option ▾

Will you volunteer to help democrats up and down the ballot in 2020?

Choose an option ▾

Note, some larger campaigns pay for autodialers where you call directly from your computer.

# The Conversation

## When there is no answer

1. The campaign will suggest whether or not to leave a voicemail. If you do leave a message, keep it short so you can spend more time on one-on-one conversations.
2. Choose the "I Couldn't Reach" button and select the reason. Not Home is the most common response you will use when phone banking.
3. Click Save & Next Call

Ashley Sanzone  
36 F

**I Couldn't Reach Ashley**

- Not Home
- Refused
- Deceased
- Moved
- Call Back
- Busy
- Left Message
- Wrong Number
- Disconnected

# The Conversation

## When the person answers:

1. Take a breath. Smile. Say hello and introduce yourself. Be courteous and upbeat.
2. Verify the person's name. Follow the script and prompts and record their answers.
3. If the app shows Also in the Household, ask for each person listed and record the answers for each person.
4. Thank them for their time and ask them to vote.

Are you planning to vote for Joe Biden for President and the rest of the Democratic candidates this year?

Choose an option ▼

Will you volunteer to help democrats up and down the ballot in 2020?

Choose an option ▼

# Best Practices

## When to make calls

The best times to call voters:

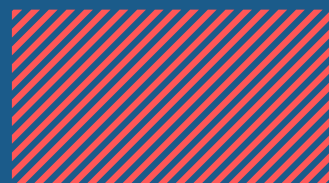
Monday through Friday  
between 4:00pm to 8:00pm

Saturday  
between 12:00pm and 6:00pm

Sunday  
between 12:00pm and 5:00pm

Do not make calls before 10:00am or after 8:30pm.

Plan to spend an hour or two a week making calls. A practiced phone banker will make about 45-50 calls per hour. Ask a friend to make calls with you. It both doubles the number of calls and it is fun!





# Best Practices

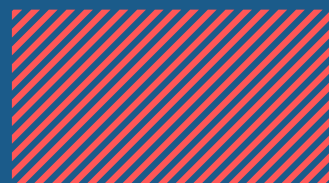
## When the person is a supporter

- Confirm you have reached the correct voter.
- Thank them for their support and welcome them to the team.
- Share specifically how you became a volunteer. Invite them to volunteer as well.
- Ask them to make a plan to vote. Encourage them to invite three other people to vote with them.

# Best Practices

## When the person is NOT a supporter

- Verify that you have reached the correct person
- Be kind and stay strong in your values. Simply thank them for their time and hang up. Do not waste time by engaging people who will not vote for your candidate.
- When someone is rude or mean toward you, it can hurt. Reach out to a fellow volunteer or friend to share what happened and how it felt. Don't bottle it up, address when it hurts and get the support.



## Best Practices

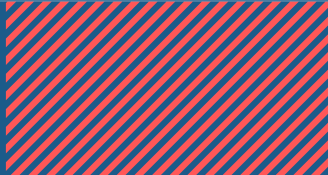
### When the person says to stop

- When the person specifically asks to be removed from the call list, let them know you can opt them out and they will be permanently removed from contact lists. Verify who you are talking to. This is critical, relatives or friends of the voter cannot opt them out.
- Once confirmed, under the I Couldn't Reach button mark them as Refused.

### "How did you get this number?"

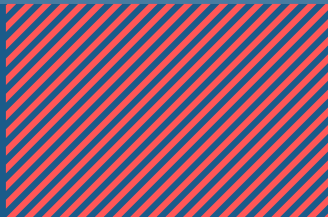
- VAN uses publicly accessible state voter files which include a phone number.

### When it is the wrong number

- Verify the number and the name.
  - Apologize for the mix up.
  - Under I Couldn't Reach, select Wrong Number.
- 

# Best Practices

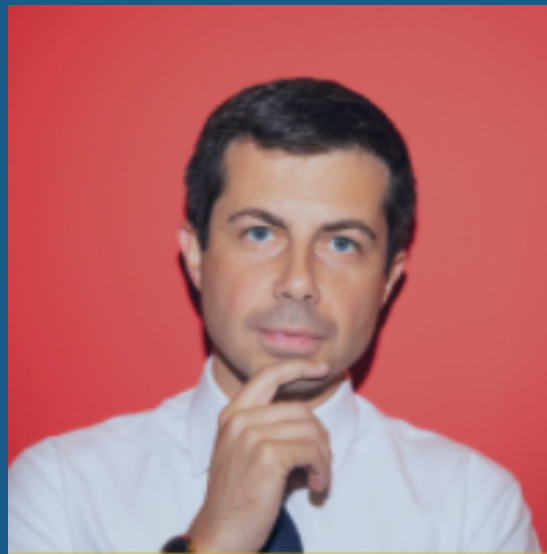
## When the person is unsure

- Show them respect and value who they are by saying you understand that it is difficult decision. Ask them to share how they are feeling.
  - Focus on listening and ask follow up questions to get them beyond talking points and thinking and feeling for themselves. Be open and curious.
  - Look for connections. Open up to share why the election is important to you and how the candidate in office will effect your life or your loved one's life.
  - If they ask specific questions of the candidate, it is okay to say you do not know. Then say "let's look that up" and guide them to the candidate's website. This is an opportunity to show them how they can learn more about the candidate.
  - When you feel you have made a connection, thank them for sharing and welcome them to continue to learn more about the candidate.
- 



**Maya Angelou**

"PEOPLE WILL FORGET WHAT YOU SAID.  
PEOPLE WILL FORGET WHAT YOU DID.  
BUT PEOPLE WILL NEVER FORGET HOW  
YOU MADE THEM FEEL."



**Pete Buttigieg**

"HOW PEOPLE FEEL ABOUT YOU  
IS LARGELY DRIVEN  
BY HOW YOU MAKE THEM FEEL  
ABOUT THEMSELVES."

# THE BEST WAY TO CONNECT AND BE HEARD IS FIRST TO ACTIVELY LISTEN.

AN EFFECTIVE ORGANIZER'S GREATEST SKILL IS TO LISTEN. TO BE HEARD AND UNDERSTOOD FIRST YOU NEED TO OPEN THE DOOR OF UNDERSTANDING. PRACTICE THESE BASIC HABITS AND SKILLS TO SHOW YOU ARE LISTENING AND WATCH AS THE CONVERSATIONS YOU HAVE GROW DEEPER.

## AVOID DISTRACTION

Set your intention to listening.  
No daydreaming or multi-tasking.  
Remove things that might keep you from paying attention.

## REFLECT, PARAPHRASE OR CLARIFY

Repeat back what you have heard  
“It sounds to me like you are saying...”

## PAY ATTENTION

Do not use this time to prepare for a rebuttal. Ignore the divides and listen for the connections.

## DO NOT INTERRUPT

Allow the other person to finish what they are saying.

## USE DOOR OPENERS

Keep them engaged and talking  
“Tell me more”  
“That’s interesting”

## DO NOT ARGUE

“I can tell you are very upset/frustrated”  
“I know that it has been hard for you to change gears”

**REFLECT  
AMBIVALENCE**

“So, on the one hand you want \_\_\_ and on the other you don’t think you can \_\_\_\_\_”

**LOOK FOR  
COMMON  
GROUND**

“Where do you think we could find common ground?”  
“We agree on this, what else do we agree on?”

**EXPRESS  
YOUR  
ATTENTION**

Words and phrases like “Oh”, “I see”, “uh huh” and “hmm” show that you are listening.

**CREATE  
DISSONANCE**

“Tell me (describe to me) what your feeling are on \_\_\_\_\_”  
“Can you tell me what is keeping you from supporting \_\_\_?”

**SHOW  
EMPATHY  
FOR THEIR  
FEELINGS**

“I am hearing you say that you are frustrated because \_\_\_\_\_”

**WRAP UP**

“Thank you for talking with me.”  
“I appreciate your opinion and understand your concerns.”

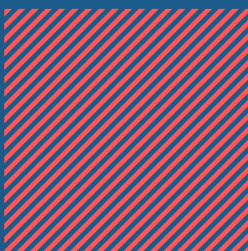


# Make the ask

- A person is more likely to do something when they are personally asked to do it.
- Asking is showing that you respect their participation.
- Do not assume their answer, make them say it.
- Phrase the question so they give a response.

"CAN I COUNT ON YOU TO VOTE FOR PAUL ON NOVEMBER 8TH?"

"WE NEED VOLUNTEERS TO MAKE CALLS LIKE I AM DOING SO PAUL CAN REACH OUT TO MORE VOTERS. CAN I SHOW YOU HOW TO SIGN UP FOR A SHIFT?"





# Next Steps

Volunteer with a campaign or your local party and get practice having these conversations.

Further build your skills and confidence to talk with voters by completing our Power Series courses. Learn to have effective conversations with people you know, and with voters who do not agree or do not care. Be prepared to make the hard ask to invite others to volunteer and donate. And get the tools you need to counter disinformation.

**BUILDING BRIDGES FOR AMERICA**

**THE POWER SERIES**

Build your political power one conversation at a time.

**COURSES & WORKBOOKS**

WEBSITE

<https://www.buildingbridgesforamerica.com/training>

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