



Script Training & Data Integrity

Voter ID Script

You've made it into the phone bank! Now it is time to start calling voters, and recording their responses. See below for a how-to guide to learn the functionality of the Open Virtual Phone Bank system and to review some tips and tricks to make your phone banking more fun **AND** effective!

The image shows two screenshots of a phone bank interface. The left screenshot displays a script for a voter named Mike Voter, including fields for name, phone number, age, and sex. A red box labeled "I Couldn't Reach Mike" is visible. Below the script, a dropdown menu is open, listing various reasons for not reaching the voter, such as "Education Funding", "Climate Change/Green", "Healthcare Access", "Jobs/Economy", "Infrastructure/Trans", "Civil/Human Rights", "Social Security/Reti", "Housing", "Immigration", "Military/Defense/Vet", "Preserve Democracy", and "Local Issues". The right screenshot shows the same interface with the "I Couldn't Reach Mike" button expanded into a list of radio button options: "Not Home", "Refused", "Deceased", "Moved", "Call Back", "Busy", "Left Message", "Wrong Number", and "Disconnected". At the bottom of the right screenshot, there are two buttons: "Cancel" and "Save & Next Call".

Navigating the Phone Bank

The screenshots above reflect what you will see when you are in the actual phone bank. At the top, we have our voter's name, phone number, age, and sex. Call them up and see what happens! If you get them on the phone, go through the script and record their responses as outlined below. If you are not able to talk to them, click on, **"I Couldn't reach _____"** box to record the reason why.

NOTE: You must record a reason why you couldn't reach the voter or fill out the script based on their responses to move on to the the next call using, **"Save & Next Call"**



Responses

Response codes and survey responses have ramifications. So make sure to mark the appropriate code. Even experienced phone bankers mix them up, and it's critical that data coming back doesn't need to be interpreted.

Could Not Reach	
Response	Uses
Not Home	This is the most commonly marked response if we can't reach a voter. Mark this if you get a voter's answering machine, if someone else in their household answers and tells you they are not home, or they are in a rush and ask you to try another time.
RF (refused)	Used when a voter is unwilling to speak or answer specific questions related to the script. If someone simply says that it's their kid's bathtime, NH (not home) is more appropriate - refusals are removed from our contact universe! If someone will not disclose their party preference, you can mark them refused.
Deceased	If someone claims the individual voter passed away, express your condolences and let them know that this person is still a registered voter with the Secretary of State's office.
Moved	Mark this response if it is stated that the voter no longer lives there.
Wrong Number	Mark this response if someone specifically tells you there's no one by [voters name] at that number.
Disconnected	Mark this only if you get an automated message saying something to the effect of "The number you are trying to reach has been disconnected/no longer in service/cannot be completed" these are all synonymous for " Disconnected " on a virtual phone bank.
Call Back/Busy/Left Message	Never mark these. Although they seem helpful, please mark people that ask for a call back as " Not home " and any call with a busy tone as " Not home " as well. Leaving messages seems like a good use of time, however statistically it is not. What makes the impact is your conversation with the voter on the phone, not the message. Additionally, we need to verify that we are talking with the correct voter according to our list. We run a strategic program and we want to gather data on specific voters.



Canvassed	
Issues Question	<p>This is our deep listening question that allows us to check in with voters and find out what is most important to them. Just ask, “What issue would you like our elected officials to be focusing on?” and record their answer keeping in mind the following:</p> <ul style="list-style-type: none">• Here we are trying to identify voters top of mind issues. Many voters are focused on several issues, but try to find out what issue is MOST important to them and record accordingly.• Sometimes, a voter will have a very specific issue they are focused on that will not be reflected in the options on the drop down list. If this is the case, either choose the closest option or enter “Other,” at the bottom of the list.
Party ID	<p>For data integrity purposes, this is our most vital question. Filling out the Party ID question, “What Party did you mostly vote for in the last election?” helps our database figure out where our Democrats are to keep them on our lists and filters out Republicans to tighten up our targeting.</p> <ul style="list-style-type: none">• 1s (Dems) is marked when a voter explicitly commits to supporting Democrats up and down the ballot. Do not mark 1s if someone simply says they can't stand Trump, but does not say if they will vote for Democrats. 1s are prioritized for GOTV and we only want our strongest supporters in that category. Only mark 1s for confirmed support of Democrats.• 2s (Lean Dem) use your judgement here. Not all of our Democrats are as enthusiastic as our 1s. Mark a voter a 2 if they say they mostly vote for Democrats, but aren't quite as supportive as our 1s.• 3s (Unsure) mark someone a 3 if they do not indicate a strong preference either way• 4s (Lean GOP) same here as with the difference between 1s and 2s. Mark someone a 4 if they are a Republican, but not necessarily as strong as a 5.• 5s (All GOP) are used when a voter explicitly states they will not support any Democrats. Do not mark all voters at a specific address when your target's partner says that “everyone here is voting Republican!” - they're removed from our contact universe, and sometimes, families have different views. Only mark 5s for voters who strongly oppose all of our candidates.• 6s (3rd Party) these are people that explicitly mention supporting candidates from alternative parties.



Volunteer

Our final question is also extremely important. Grassroots organizing is all about calling people in to join us in the important work of getting Democrats elected. **We will never get more volunteers if we don't ask!** Make sure to take your time at the end of the call to finish up with a call to action! (If you mark someone yes or maybe, they will get a call from our organizing team to get them plugged into our organizing work!)

- **Yes** I'd like to help elect Democrats this year :)
- **Maybe** I can help elect democrats this year :/
- **No** I don't want to help elect Democrats this year :(

Calling Tips & Tricks

Conversation should be natural, but ask all the questions. A big thing to remember, you don't have to have all the answers! If you get a specific question that you don't know the answer to, that's okay. Say you don't know and pivot to why you are here today volunteering to elect Democrats. What makes you vote for Democrats?

- **Smile While You Dial!** Smiling actually changes your tone of voice and this comes across to the person on the other end of the phone.
- **Don't get sucked into debates** - our job is to identify and turn out supporters, not change minds!
- **Keep it conversational** (Don't be a robot!).
- Be direct and to the point. **Concise conversations** mean more calls to other voters!
- Let the phone ring **4 times**, mark 'em not home and move to the next one!
- **Wrong numbers- we love 'em.** Get those wrong numbers out of the system before GOTV!