



## Phone Banking

### Outline

- Overview of Logistics
- Understanding the Materials
- Tips on Communications
- Role Play Video
- Role Play with real scripts

Making phone calls to voters, known as phone banking, is a critical element of any political campaign. Phone banking is one of the most inexpensive and resource-efficient tactics to contact voters and deliver a message.

Although not as persuasive as canvassing, phone banking allows you to reach voters that canvassers cannot due to time or geographic constraints. The speed and efficiency of phone banks make them ideal for any type of voter contact including **voter identification, crowd building for events, volunteer recruitment, voter persuasion and GOTV.**

### It works!

If you can give us 2 hours a week over the course of a Typical 24 week Campaign, you can do amazing things.

During a two Hour Phone Shift, you can talk to 20 voters. If you do this for 24 weeks = 480 Voters X 1000 Volunteers = **480,000 voter contacts**

### Targeted Voters

The Campaign has created a target list of specific voters that we need you to find and speak directly about the campaign. With your help, we are creating a Database of our Voters on who we need to call on Election Day. These lists are part of overall program to identify, persuade and ensure that the Voters we call on Election Day are our supporters.

The Voters on your list are compiled by a team of volunteers and data professionals over the course of the campaign.

We may be confirming their support or even confirming they are not supporters. By Election Day we want to be only calling our voters to get them to the Polls.



## A typical phone-bank packet contains:

- List of voters (call list) and tally list, call scripts and candidate’s position papers, and campaign literature.

**THE WALK LIST**

**Polling Location**  
Polling Location: Eisenhower Executive Office Building, 1650 Pennsylvania Ave

WASHINGTON 01 · Pennsylvania Ave · Even **Precinct, Street, Odd/Even**

<b>VAN ID</b>	<b>Target</b>	<b>Results</b>
2995909 54 M D	<b>Obama, Barack</b> 1600 Pennsylvania Ave NW Washington, DC 20006 (123) 456-7890	<input type="checkbox"/> Deceased <input type="checkbox"/> Inacc <input type="checkbox"/> Moved <input type="checkbox"/> Not Home <input type="checkbox"/> Other Language <input type="checkbox"/> Refused <input type="checkbox"/> Spanish <input type="checkbox"/> Vacant <input type="checkbox"/> Candidate ID <input type="checkbox"/> Support <input type="checkbox"/> Undecided <input type="checkbox"/> Oppose
2463208 52 F D	<b>Obama, Michelle</b> 1600 Pennsylvania Ave NW Washington, DC 20006 (123) 456-7890	<input type="checkbox"/> Deceased <input type="checkbox"/> Inacc <input type="checkbox"/> Moved <input type="checkbox"/> Not Home <input type="checkbox"/> Other Language <input type="checkbox"/> Refused <input type="checkbox"/> Spanish <input type="checkbox"/> Vacant <input type="checkbox"/> Candidate ID <input type="checkbox"/> Support <input type="checkbox"/> Undecided <input type="checkbox"/> Oppose

Obama GOTV · List 18229542-61484 · Page 1

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**List Name, Number**

**PHIL MURPHY**

## The Calls Lists

The Voter:

- Voter Name
- Voter Address
- Voter Age, Gender and Party Affiliation (D=Dem, R= Republican)

## Campaign Survey

The information that each campaign wants you to collect will vary from campaign depending upon where they are in the process. Many of the questions are to confirm the accuracy of the Voter lists. Most important, is the Voter supporting our campaign or do they need more persuading?

This is important, over the last few years, the accuracy of the Voter Lists has **decreased**. It’s not unusual for a list to have 25% or more mistakes. This has been caused by the increase in mobile phones and the trend to not use landlines.



## Phone Banking 101: Be Prepared:

- Know your specific goals – if you don't know why you are calling or how many calls you are expected to make, ask!
- Get familiar with the script so you can make the words your own.
- Stay on message and always keep the script handy.
- Use whatever data is provided about the voter to your advantage: Is the voter male or female? Young or an older adult? A frequent or infrequent voter?
- **If you are using your own phone and want to block your number from being displayed temporarily for a specific call:** ○ Dial \*67. Enter the number you wish to call (including area code). ○ Tap the Call button. The words "Private," "Anonymous," or some other indicators will appear on the recipient's phone instead of your mobile number.

## Follow the proper procedures:

- Ask for the individual by the name found the voter list.
- Identify any other voters in the household who are not on the voter list.
- Do Not Leave a message if no one answers the phone. (unless instructed by the campaign to do otherwise) **Move quickly:**

The more calls you complete each hour increases the number of quality contacts you can make. Avoid talking to a single voter for more than 5 minutes.

- The more calls you complete, the better it is for the campaign.
- You should have a goal to make at least 30 calls and 10 contacts per hour.



## Tips for Phone Banking:

- **Stand Up** — Standing up while you make calls keeps your energy and enthusiasm high. Move around while you're talking to keep your blood flowing.
- **Smile As You Talk** — Voters will sense a happy demeanor on the other end of the line. Keep a mirror handy to check that you're smiling while you talk.
- **Connect with the Voter** — Always be courteous. Say your full name and where you are from. Be casual and relaxed. Find ways to relate to the person you are calling.
- **Ask Questions** — Do not dominate the conversation. Asking voters open-ended questions is a great way to get them engaged in a dialogue with you.
- **Don't Be Afraid to Say, "I Don't Know"** — Never guess the candidate's position on anything. Always refer voters to the candidate's website, where details of all the major issues can be found. If you can't answer a question, write it down along with the voter's contact info and then follow up with the voter later.
- **Ask For Help** — Find out if the voter would like to volunteer for the campaign. Ask if the voter would like to donate money. If so, refer them to the campaign's website.
- **Listen More, Talk Less** — Along with asking voters questions goes listening to their answers. Listening is especially important in persuasion calls.
- **Forget Your Last Call** — Don't worry if you get hung up on or yelled at. Brush it off and quickly move on to the next call. Dwelling on negative experiences will make you less friendly to other voters.
- **Keep Accurate Records** — Mark the callers appropriately on the tally sheet. For example, if you are hung up on, you would mark "do not call." If the voter is not home or not available, you would note that so another call can be made to the voter at another time. If a voter asks to be taken off the call list, include it in your notes.
- **Multiple Voters linked to one phone number/Address-** Ask the voter about the other voters in the household, gather information. **You are part of a Team!**
- If you find yourself with a new volunteer, or a group of new volunteers, take the opportunity to familiarize them with canvassing and phone banking.
- Tell them what you enjoy about canvassing phone banking. Describe an especially interesting contact or the time you moved a voter towards your candidate.
- Talk about conquering your fear of calling strangers and knocking on doors. Use examples of people who have overcome their initial shyness and what helped them get comfortable talking to voters.
- Role-play with the script. The trainer (you) can be the voter and an experienced volunteer can be the canvasser. Switch or break into groups to role-play and rehearse. Let everyone participate!



## Victory 2017 Phone Script (Sample)

Hi, is \_\_\_\_\_ available? Hi \_\_\_\_\_. My name is \_\_\_\_\_ and I'm with Victory 2017 in your neighborhood to talk about how Phil Murphy, Sheila Oliver, and the entire Democratic ticket will fight for a stronger, fairer economy, for every New Jersey family. They'll work to grow our middle class by creating good jobs, guaranteeing equal pay, and fully funding our public schools for real property tax relief. After eight years of Chris Christie and Kim Guadagno looking out for the special interests, we need leaders who will have our backs.

Q1. Can we count on your support for Phil Murphy for Governor and Sheila Oliver for Lieutenant Governor in the November 7th election? **[If supporting Phil and Sheila, proceed. If Undecided then go to UNDECIDED message]** Great! I am so glad to hear that.

Q1A. Would you be willing to volunteer with our campaign?  
**[If yes mark indicate on you walk sheet and proceed to lawn sign ask]**

Q1B. Would you be interested in a lawn sign? **[check box and Go to Question 2]**  
**\*\*\*If the voter supports Phil and Sheila and answers yes to any of questions 1A-1D then mark them as a strong supporter. If they support Phil and Sheila and do not answer yes to questions 1A1D mark them as a lean supporter.\*\*\***

Q2. Will you be supporting the Democratic Legislative team of Senator Richard Codey, Assemblyman John McKeon, and Assemblyman Mila Jasey? **[Mark response and Go to Close]**

✓ **[If UNDECIDED, check UNDECIDED under ID]** I can certainly understand not being sure yet. Phil Murphy, Sheila Oliver, and the entire Democratic Ticket will fight for a stronger, fairer economy for every family in New Jersey; unlike the Christie and Guadagno administration which has only looked out for corporations and those at the top. **[Go to Question 2]**

✓ **[NOT SUPPORTING, check STRONG or LEAN OPPOSE under ID]**

Thanks for sharing your opinion with us. This year is an important one. After years of some of the least productive Leadership in New Jersey history, our state faces some major challenges. We hope you continue to stay engaged, watch the debates, and give every candidate's views a fair chance.

**[CLOSE] [When you have reached a natural stopping point, wrap up politely.]**

Well, thanks for taking the time to discuss these important issues facing our state. We hope you'll keep this conversation in mind and consider voting for Phil Murphy, Sheila Oliver, Senator Richard Codey, Assemblyman John McKeon, and Assemblyman Mila Jasey and the entire NJ Democratic team in the November 7th election



## Sample Script: Murphy Primary (Sample)

Hello, my name is \_\_\_\_\_ and I'm a volunteer calling from the Phil Murphy for Governor Campaign. Can I speak with \_\_\_\_\_?

I'm calling today to talk about the upcoming Primary Election for Governor in New Jersey. It's probably the most important governor's race in our lifetime.

**Q: Are you planning to support Phil Murphy for Governor in the Democratic Primary on June 6th?  
(Indicate response on call sheet)**

- **Strong Support**
- **Lean Support**
- **Undecided**
- **Lean oppose**
- **Strong Oppose**

*[If Undecided]* This election for Governor in New Jersey this year is going to be more important than ever. Not only do we need to undo the damage done by Chris Christie over the last 8 years, we also need a Governor that will oppose Donald Trump and his agenda. Phil is a strong progressive committed to building a more fair economy.

*[If Opposed]* Thanks for your time. Have a nice day. **Hang up**

*[If Supportive]* Thanks for your support. Our campaign is built on grassroots supporters like you getting involved to help us spread the word.

**Q: Are you able to help us by making phone calls for Phil next Tuesday, May 16th at 6:15 PM here in Bernardsville? If no ask same question about Thursday, May 18<sup>th</sup> same time , same location.**

- **Yes**
  - **Great! Record on call sheet and tally sheet.**
- **Maybe**
- **Later**
- **No**

Thank you so much for talking with me. Have a great evening

For more information go to [Murphy4NJ.com](http://Murphy4NJ.com).