🎧 Making Calls as a CallHub Agent

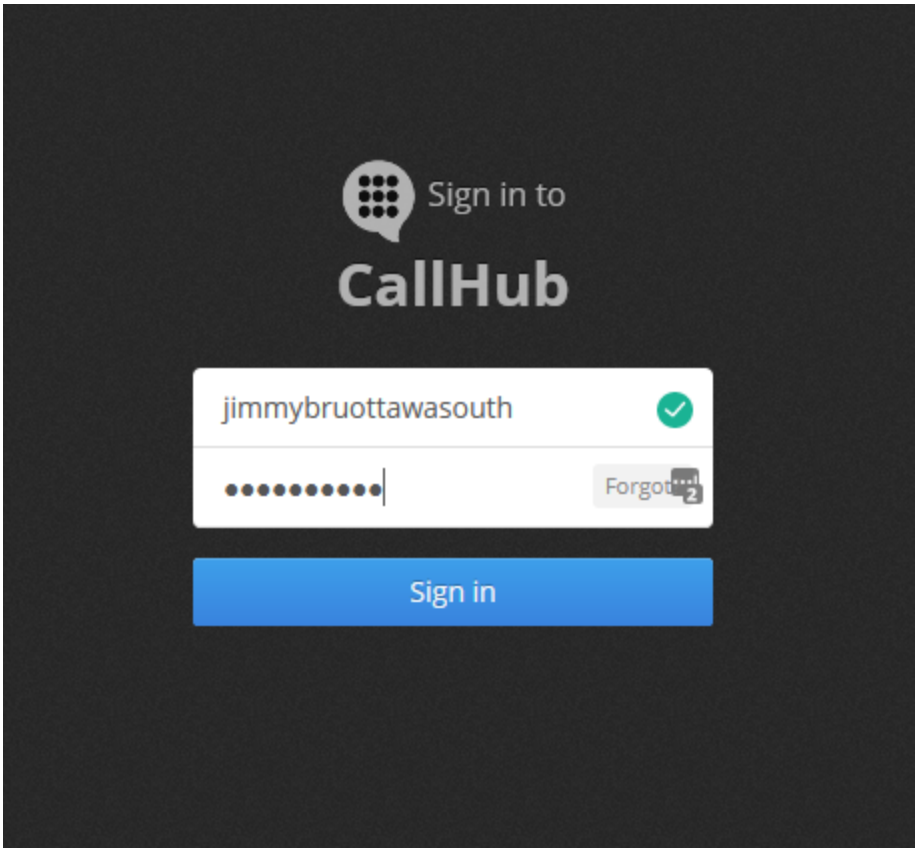
Requirements for using CallHub

- A computer with an internet connection
- Google Chrome (you must use this to follow this tutorial, download it **here** if you don't have it installed already)
- A microphone connected to your computer (a built in microphone that most laptops has will work, or you can use a headset)
- Headphones or a headset

Test your microphone before trying to make calls. Go to **https://online-voice-recorder.com/**, and attempt to record yourself speaking. If the website asks for permission to use your microphone, say **Yes.** If you can hear yourself speaking when you play back the recording, then your microphone is good to go and you are ready to use CallHub.

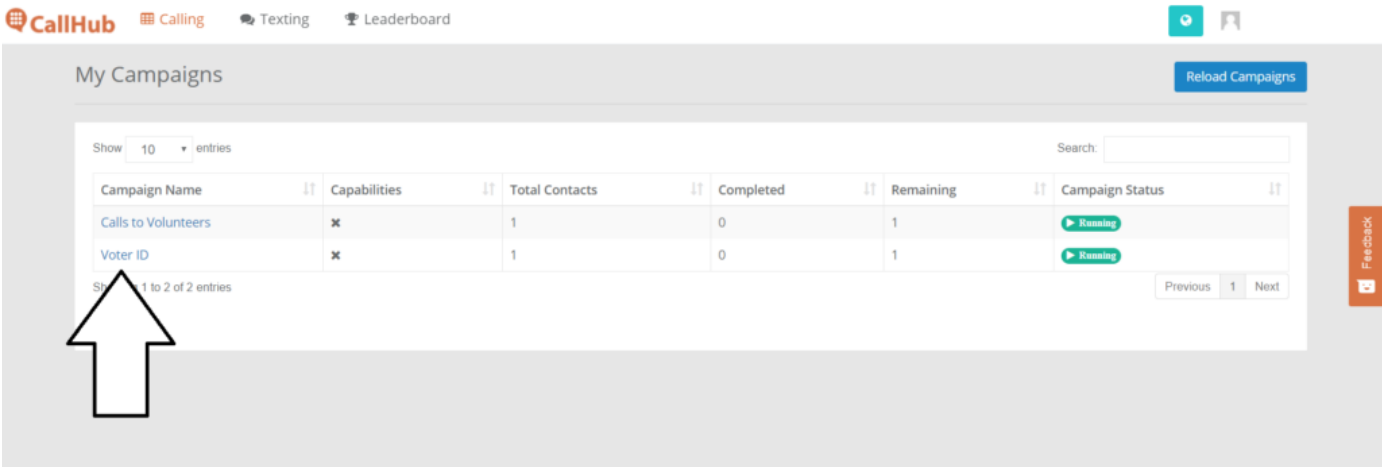
> ℹ️ **Note that if you are running the latest version of Mac OS X** (Mojave or Catalina) you will need to **take an extra step** to enable your microphone for Google Chrome.

Log into CallHub at **https://app.callhub.io**



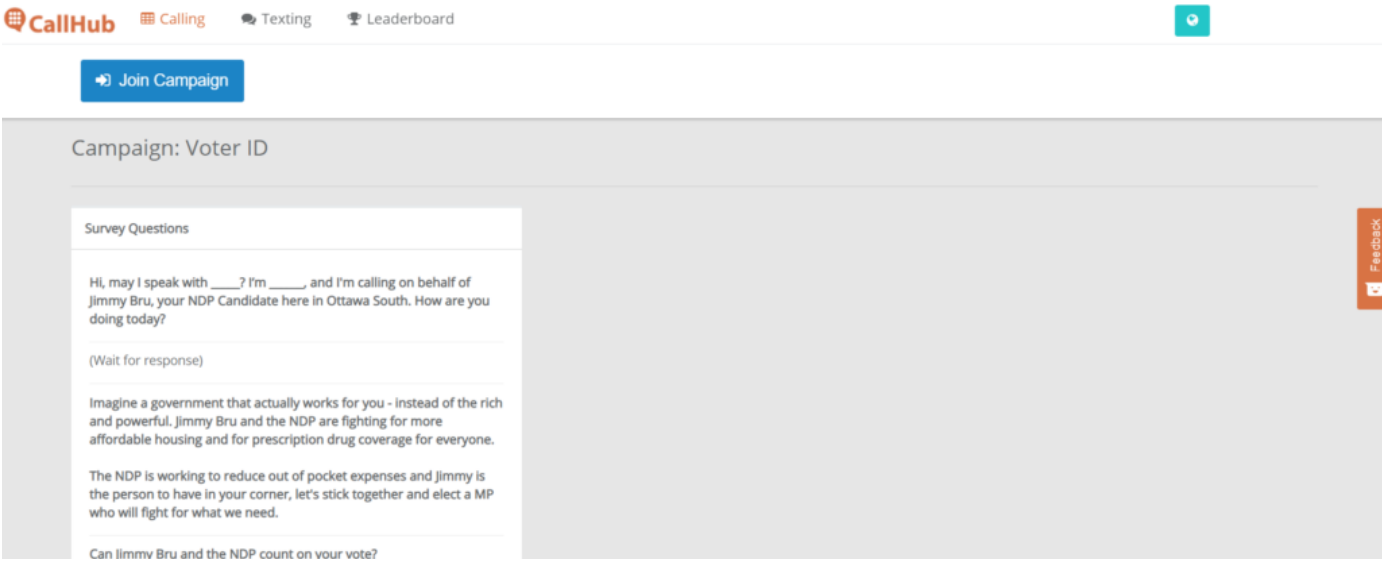
Enter your agent username and your password.

> ℹ️ Don't have a user account? Ask your campaign manager to create one. Once your campaign manager creates an account for you, you will receive an email that will let you set up your account.

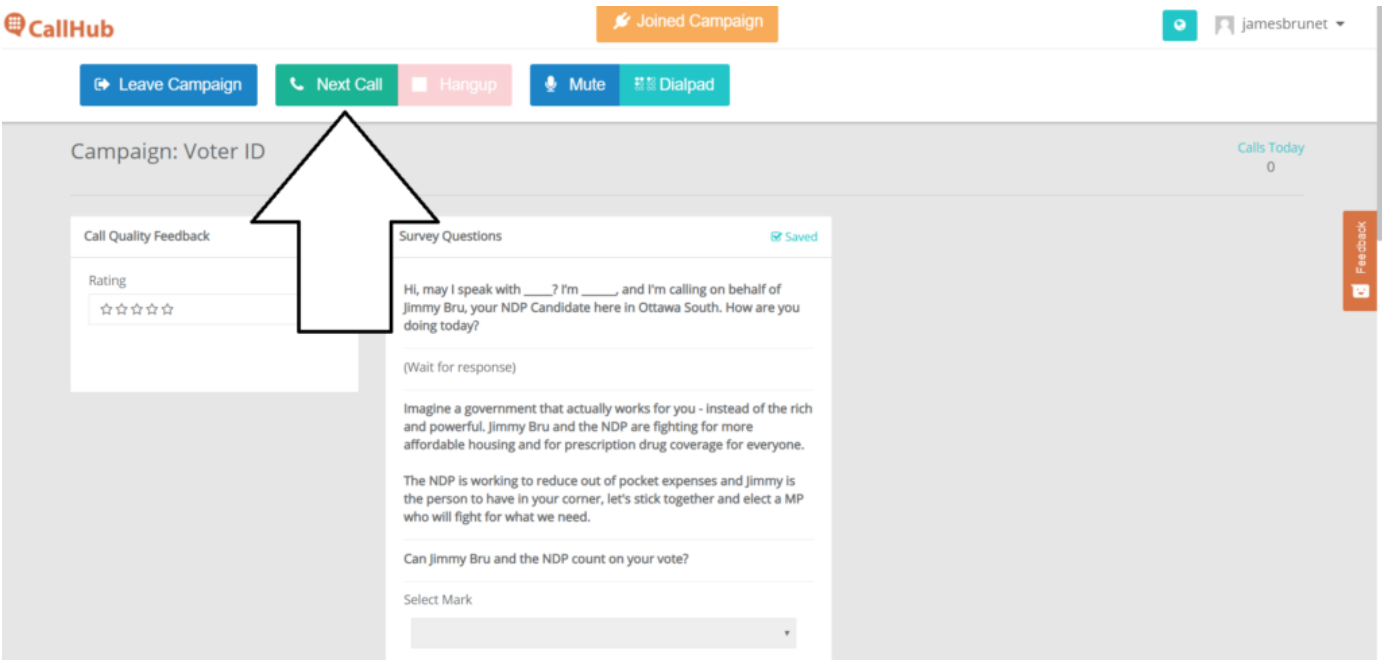


Once you've logged in, you'll either be sent directly to one call campaign (if your campaign manager has only assigned you to one), or you will see a list of campaigns to choose from. If you see a list of

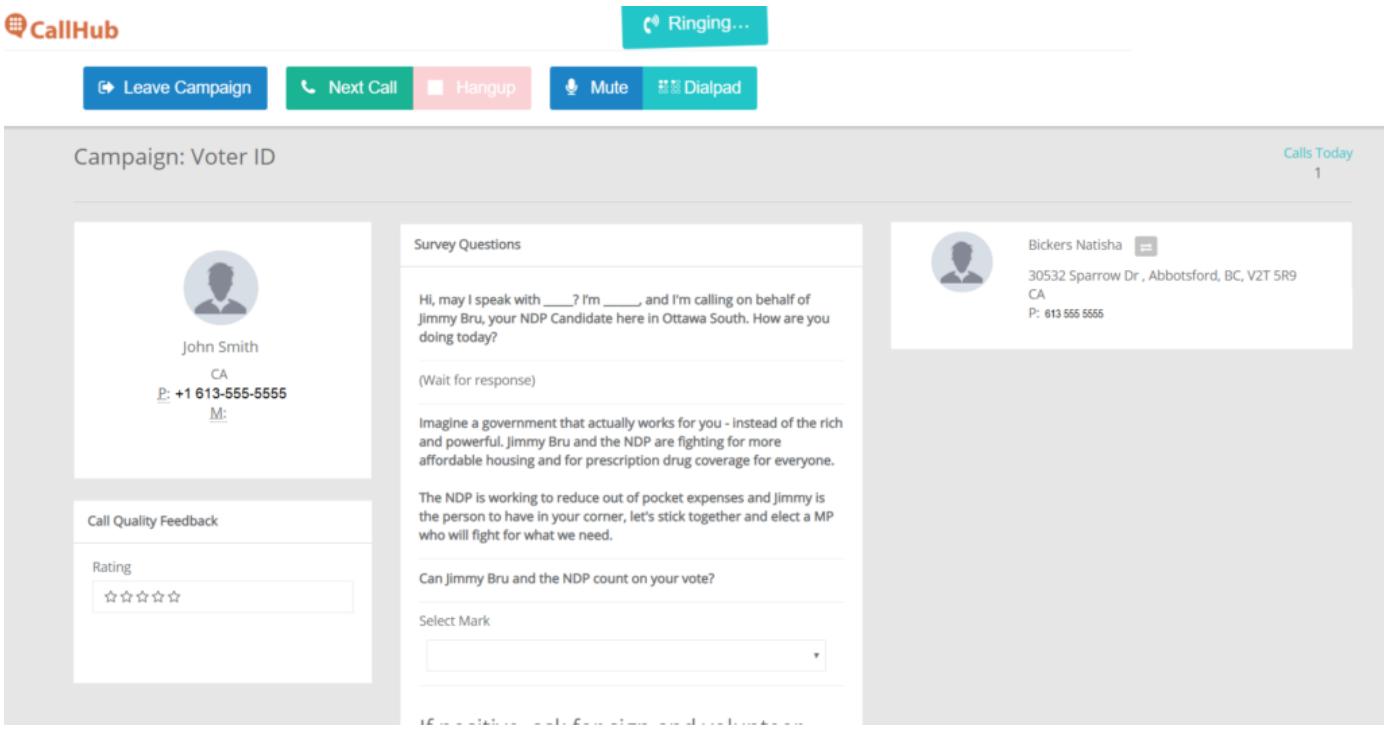
campaigns, click on the name of the one your campaign manager directs you to use.



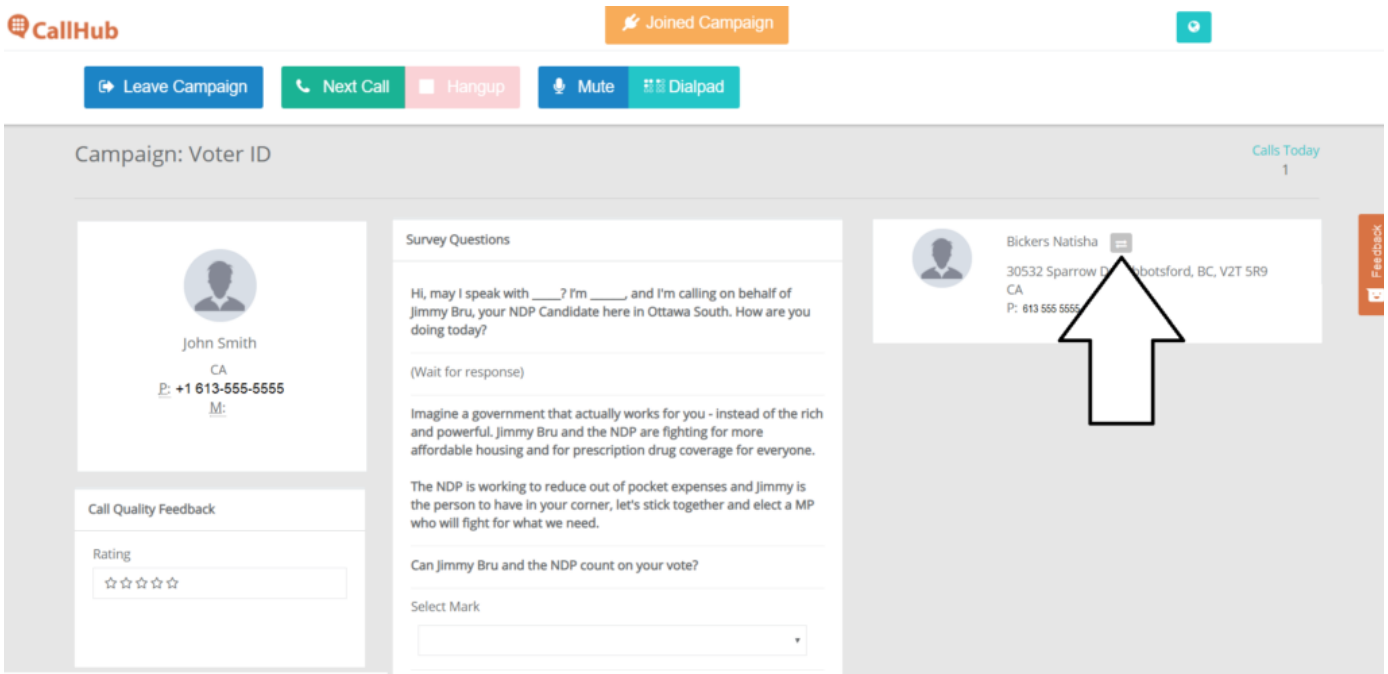
A canvass script will appear. Click **Join Campaign** to get started calling.



Click **Next Call** to start calling the next person in the call campaign.



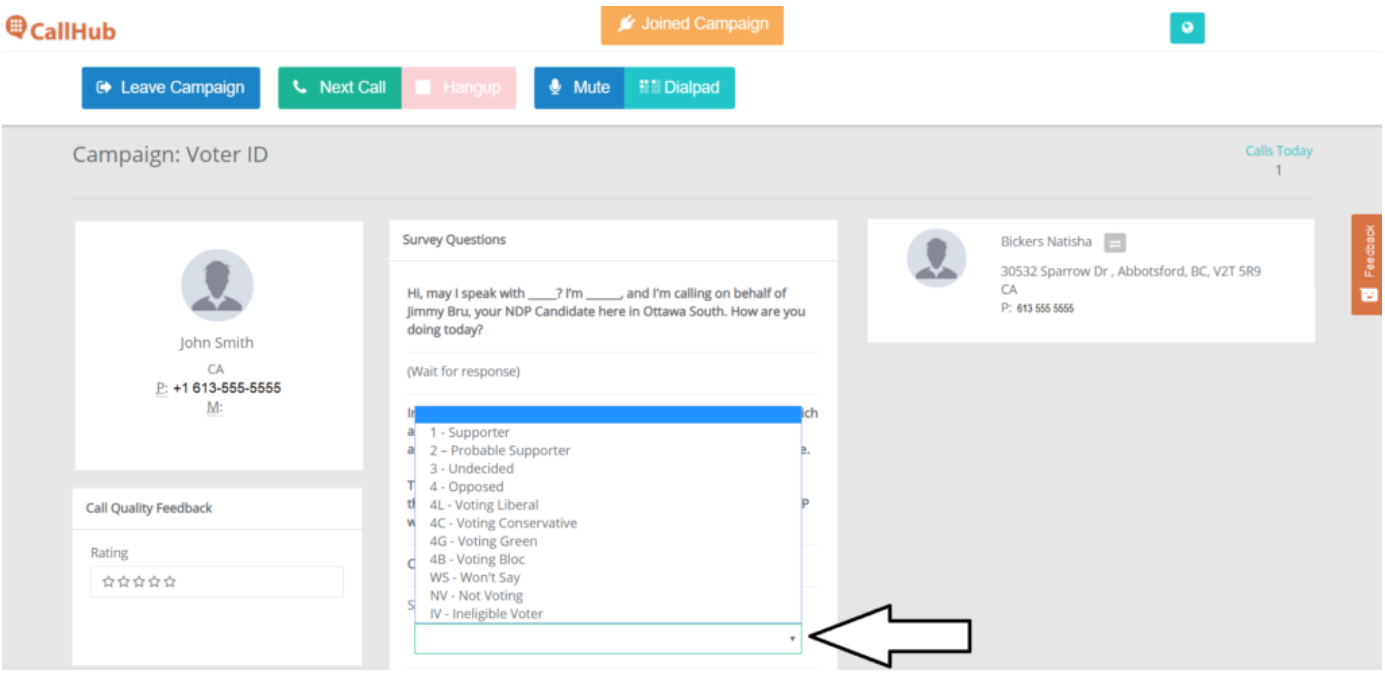
The person you are calling (on the left) and any of their household members (on the right) will appear on your screen. While the phone is ringing, you will see the **Ringing** animation at the top of the screen.



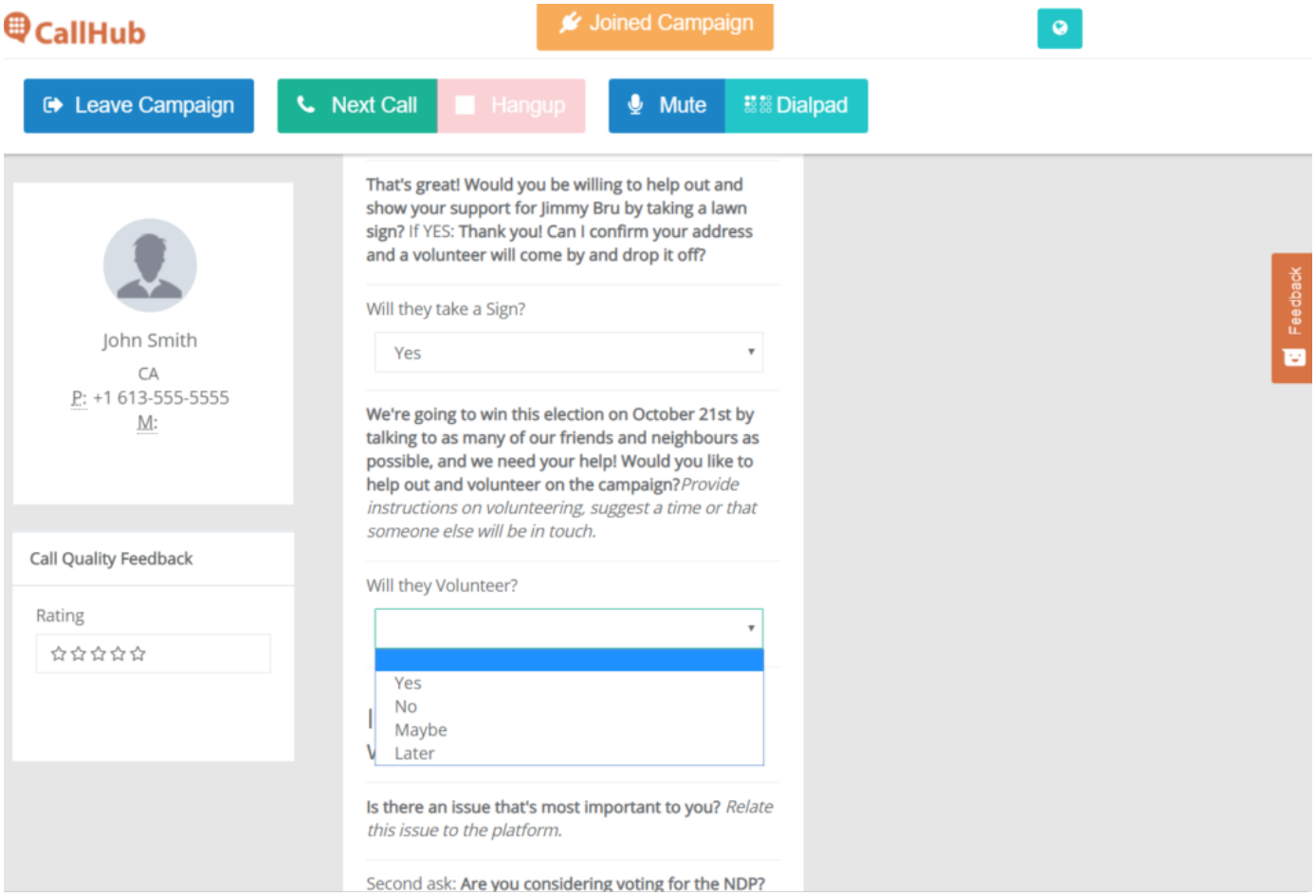
If someone picks up the phone, the script first tells you to ask to speak to the person on the left. In this example, that person is **John Smith.** If they are unavailable, and the person on the line is someone else in the household, swap to that person by clicking the swap icon.

In this example, Natasha picked up and John was out of the house, so we clicked the swap icon on

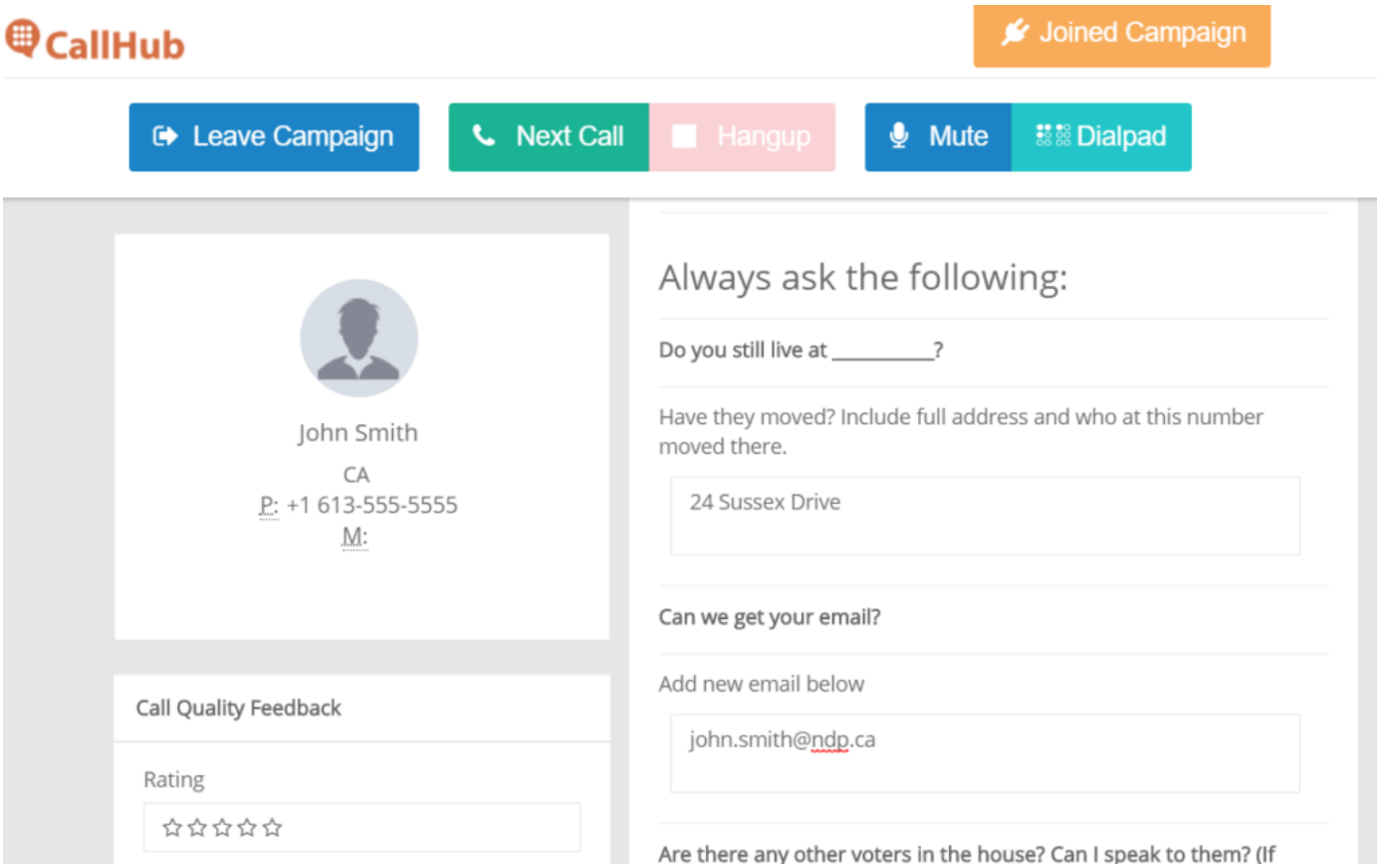
Natasha to enter a mark for her instead.



After reading the script introduction, ask the voter if they can count on your vote, and give them a mark by opening the **Select Mark** dropdown and picking an option.

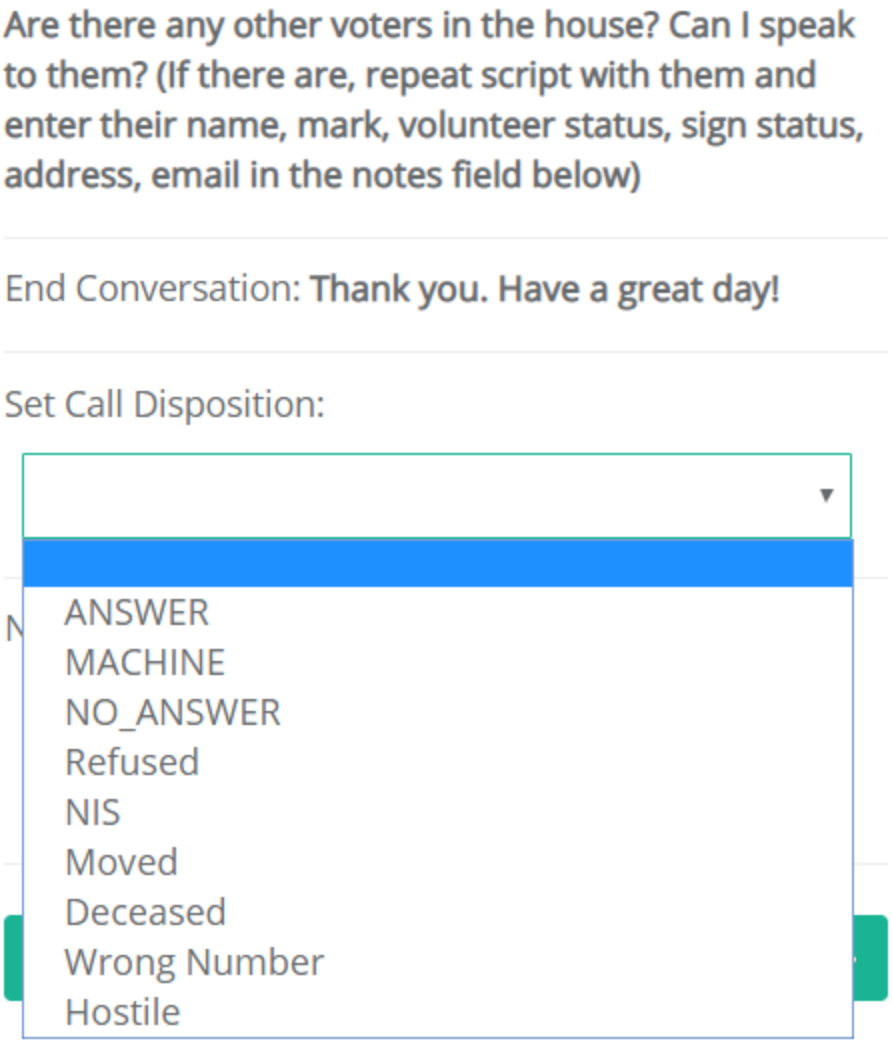


As you continue reading the script, mark whether or not they want to take a sign or volunteer.



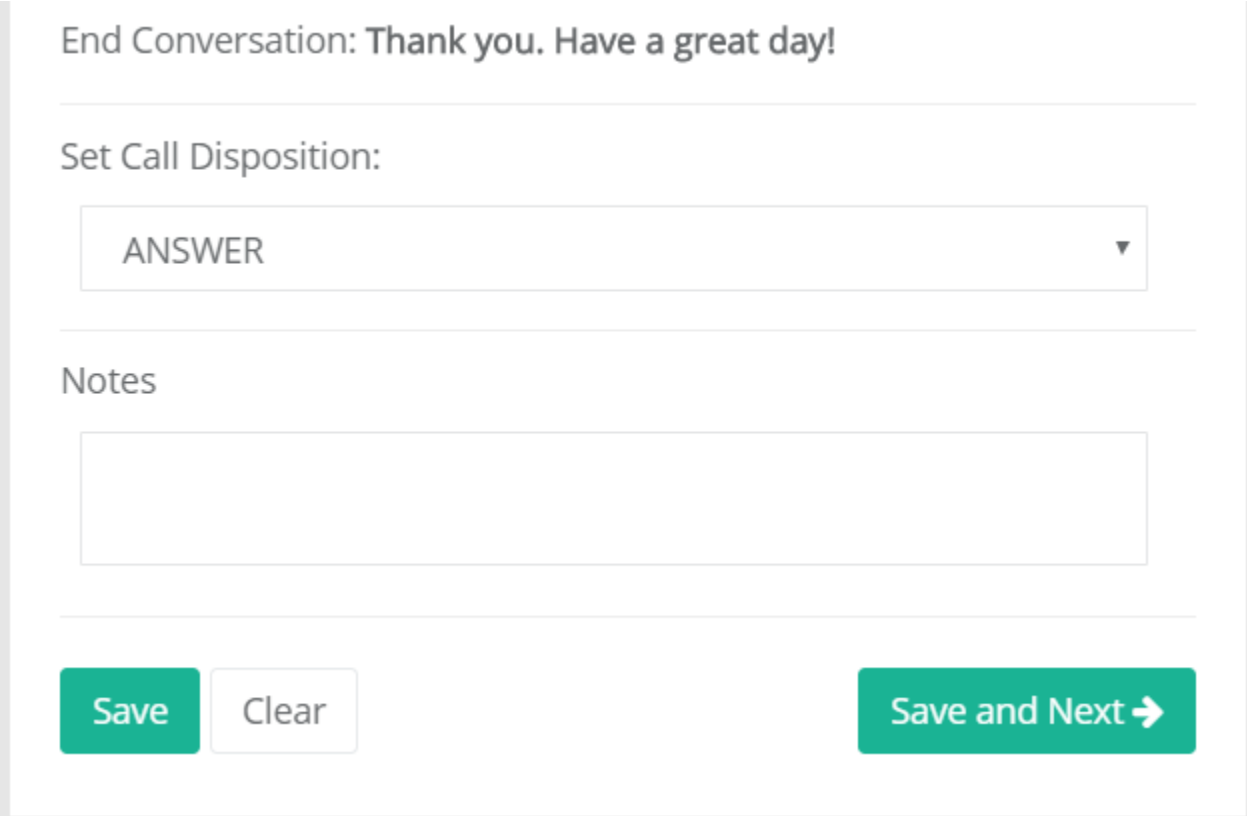
Make sure to confirm their address, and if they have moved, make sure to enter their new address. As well, make sure to ask for their email. In this example, John moved to 24 Sussex Drive and gave us his email, so our agent data entered it into the text box.

When you're done asking for someone's email, **make sure to ask if there are any other voters in the house** you can talk to. While you are unable to directly enter a second mark for that additional person (CallHub only lets you fill out the survey once per call), you are able to put the next person's mark and their contact information into the Notes field at the bottom of the survey.



After the call has completed, set the **Call Disposition**.

- ANSWER: You had a conversation with a person
- MACHINE: You got an answering machine
- NO_ANSWER: The phone kept ringing until CallHub gave up and disconnected the call automatically
- Refused: Someone picked up, but couldn't talk to you
- NIS: The number was not in service. CallHub usually catches this automatically, so it's pretty rare to actually have to choose this.
- Moved: The person you were trying to reach moved away from the current address
- Deceased: The person you were trying to reach is no longer alive
- Wrong Number: You reached the wrong person, and they are not a household member of the person you were trying to reach, or you reached a business.
- Hostile: The person was hostile to you. This will mark them as do-not-contact.



After you have set a disposition, enter any notes (this is also where you'd enter data about other household members if you get a chance to speak to them), and then click **Save and Next.** You will automatically start calling the next person in the campaign.