

# Making Calls as a CallHub Agent

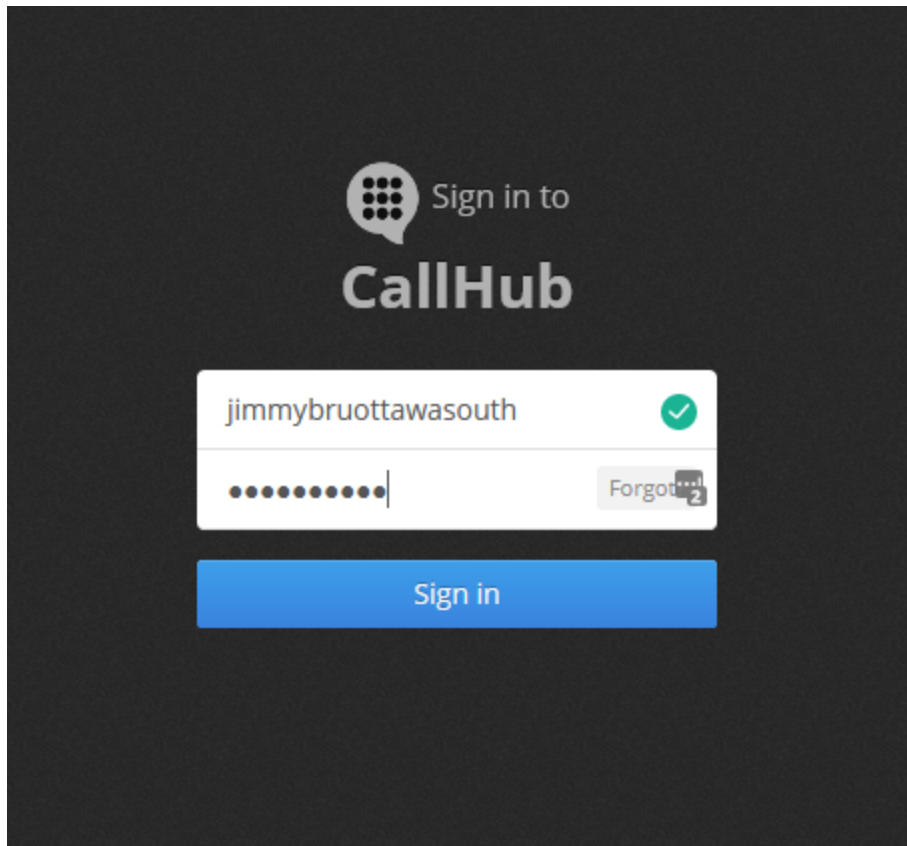
## Requirements for using CallHub

- 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.

**i** **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>



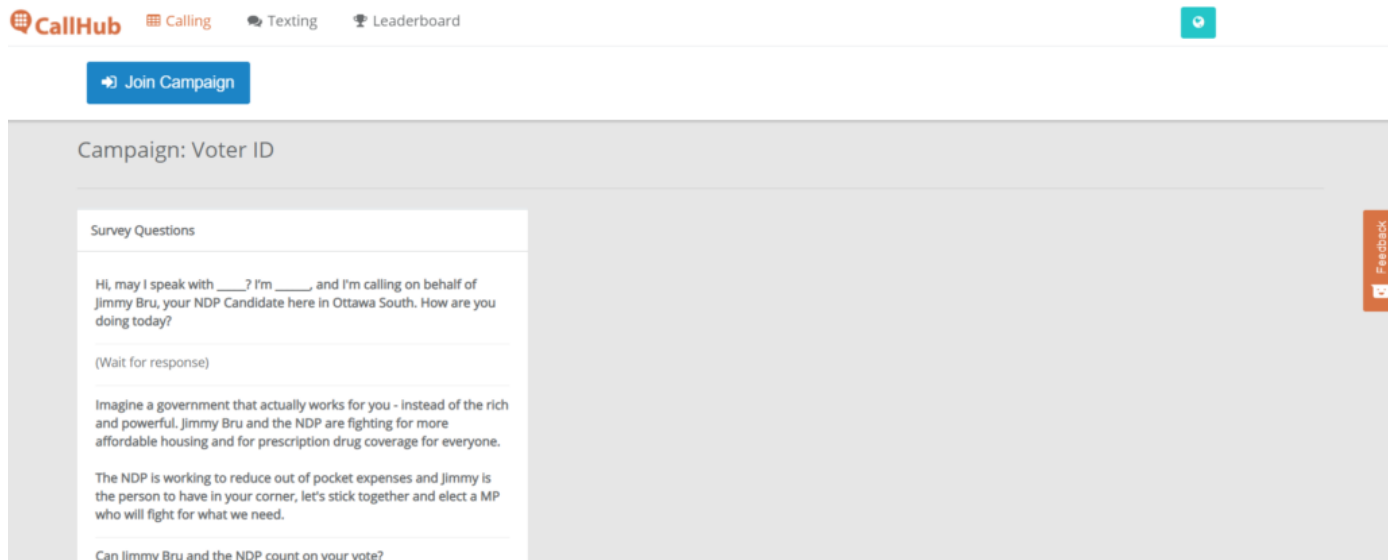
Enter your agent username and your password.

**i** 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.

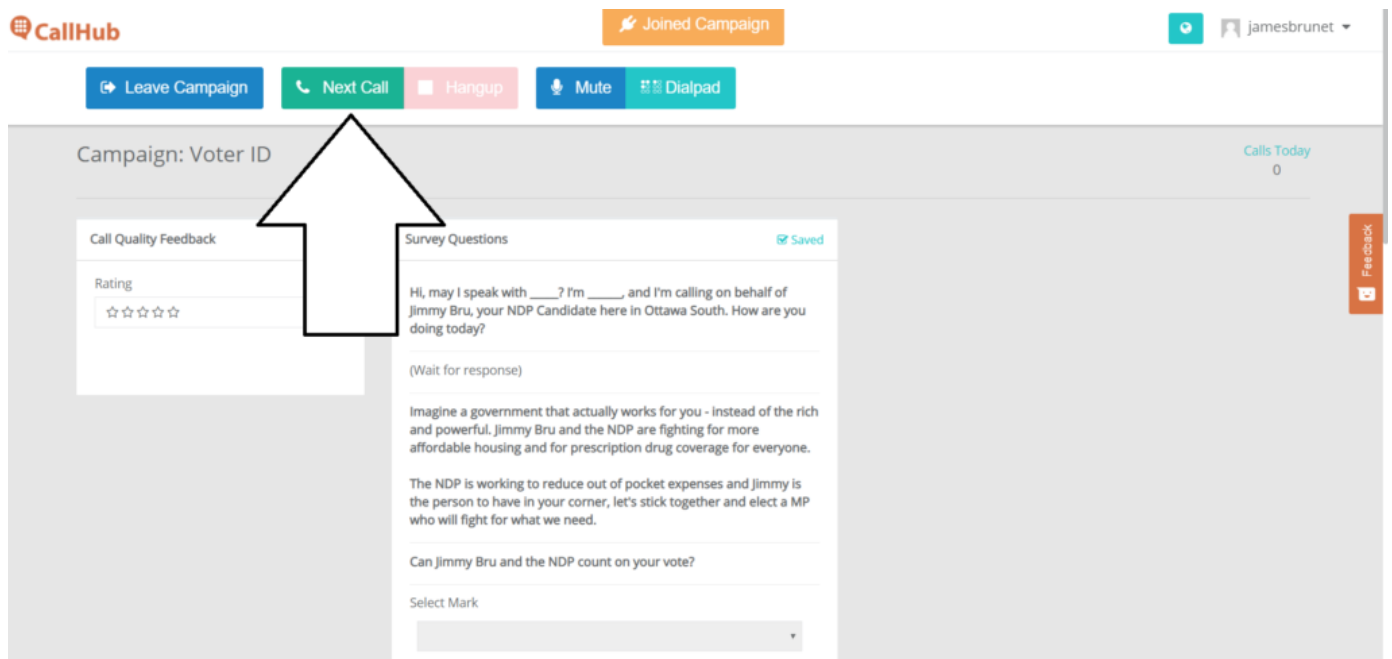
| Campaign Name       | Capabilities | Total Contacts | Completed | Remaining | Campaign Status |
|---------------------|--------------|----------------|-----------|-----------|-----------------|
| Calls to Volunteers | ×            | 1              | 0         | 1         | Running         |
| Voter ID            | ×            | 1              | 0         | 1         | Running         |

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.

Campaign: Voter ID Calls Today 1



John Smith  
CA  
P: +1 613-555-5555  
M:

Survey Questions

Hi, may I speak with \_\_\_\_? I'm \_\_\_\_, and I'm calling on behalf of Jimmy Bru, your NDP Candidate here in Ottawa South. How are you doing today?


(Wait for response)

Imagine a government that actually works for you - instead of the rich and powerful. Jimmy Bru and the NDP are fighting for more affordable housing and for prescription drug coverage for everyone.

The NDP is working to reduce out of pocket expenses and Jimmy is the person to have in your corner, let's stick together and elect a MP who will fight for what we need.

Can Jimmy Bru and the NDP count on your vote?

Select Mark



Bickers Natisha

30532 Sparrow Dr., Abbotsford, BC, V2T 5R9  
CA  
P: 613 555 5555


Call Quality Feedback

Rating

☆☆☆☆☆

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.

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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.

The screenshot shows the CallHub interface during a call. At the top, there is a 'CallHub' logo, a 'Joined Campaign' button, and a 'Calls Today 1' indicator. Below these are control buttons: 'Leave Campaign', 'Next Call', 'Hangup', 'Mute', and 'Dialpad'. The main interface is titled 'Campaign: Voter ID'. On the left, there is a profile card for 'John Smith' with contact information: 'CA', 'P: +1 613-555-5555', and 'M:'. Below this is a 'Call Quality Feedback' section with a 'Rating' field showing five stars. On the right, there is a profile card for 'Bickers Natisha' with contact information: '30532 Sparrow Dr, Abbotsford, BC, V2T 5R9', 'CA', and 'P: 613 555 5555'. A vertical 'Feedback' button is on the far right. The central 'Survey Questions' section contains the text: 'Hi, may I speak with \_\_\_\_? I'm \_\_\_\_, and I'm calling on behalf of Jimmy Bru, your NDP Candidate here in Ottawa South. How are you doing today?' followed by '(Wait for response)'. Below this is a dropdown menu with the following options: '1 - Supporter', '2 - Probable Supporter', '3 - Undecided', '4 - Opposed', '4L - Voting Liberal', '4C - Voting Conservative', '4G - Voting Green', '4B - Voting Bloc', 'WS - Won't Say', 'NV - Not Voting', and 'IV - Ineligible Voter'. A white arrow points to the dropdown menu.

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.



Leave Campaign

Next Call

Hangup

Mute

Dialpad



John Smith

CA

P: +1 613-555-5555

M:

Call Quality Feedback

Rating



That's great! Would you be willing to help out and show your support for Jimmy Bru by taking a lawn sign? If YES: Thank you! Can I confirm your address and a volunteer will come by and drop it off?

Will they take a Sign?

Yes

We're going to win this election on October 21st by talking to as many of our friends and neighbours as possible, and we need your help! Would you like to help out and volunteer on the campaign? Provide instructions on volunteering, suggest a time or that someone else will be in touch.

Will they Volunteer?

Yes

Is there an issue that's most important to you? Relate this issue to the platform.

Second ask: Are you considering voting for the NDP?

Feedback

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


Leave Campaign

Next Call

Hangup

Mute

Dialpad



John Smith  
CA  
P: +1 613-555-5555  
M:

Always ask the following:

Do you still live at \_\_\_\_\_?

Have they moved? Include full address and who at this number moved there.

24 Sussex Drive

Can we get your email?

Add new email below

john.smith@ndp.ca

Are there any other voters in the house? Can I speak to them? (If

Call Quality Feedback

Rating

☆☆☆☆☆

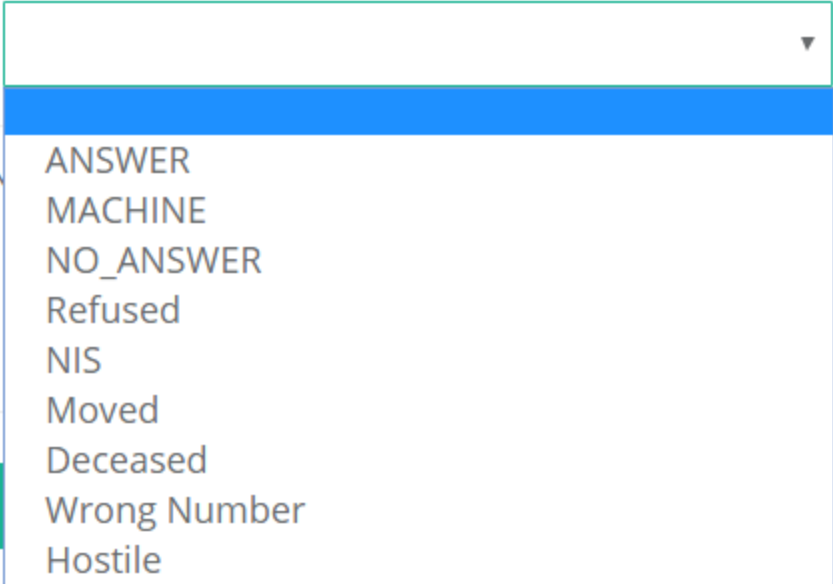
Make sure to confirm their address, and if they have moved, make sure to enter their new address. As well, make sure to ask for their email. In this example, John moved to 24 Sussex Drive and gave us his email, so our agent data entered it into the text box.

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.

Are there any other voters in the house? Can I speak to them? (If there are, repeat script with them and enter their name, mark, volunteer status, sign status, address, email in the notes field below)

End Conversation: **Thank you. Have a great day!**

Set Call Disposition:



A screenshot of a dropdown menu for setting call disposition. The menu is open, showing a list of options. The top option, 'ANSWER', is highlighted in blue. The other options are: MACHINE, NO\_ANSWER, Refused, NIS, Moved, Deceased, Wrong Number, and Hostile. The menu is framed by a blue border and has a green bar at the bottom.

| Disposition  |
|--------------|
| ANSWER       |
| MACHINE      |
| NO_ANSWER    |
| Refused      |
| NIS          |
| Moved        |
| Deceased     |
| Wrong Number |
| Hostile      |

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.



End Conversation: **Thank you. Have a great day!**

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Set Call Disposition:

ANSWER ▼

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Notes

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Save

Clear

Save and Next →

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.