How-to: Phonebank

Goal
Contact petition signers to get them more involved in your campaign.

Best Practices

• Set phonebanking goals
  o Making phone calls is the best way to contact someone once they sign a petition.
    ▪ It’s more personal than email and gives you calculable results.
  o Like petitioning, your group will be more focused and successful if you set goals for contacts and yeses while phonebanking.

• Brainstorm asks
  o Think about what you need people to do before you start calling.
  o Lead with the most important thing they can do, but be ready with a second ask. The key is to get them more involved at whatever level they can help. Some common asks:
    ▪ Come to your next meeting?
    ▪ Help collect more signatures?
    ▪ Make a phone call to your target?

• Don’t do it alone (if you can help it).
  o Phonebanking (a.k.a. funbanking) is way more fun with a buddy or two. Make it a group activity if you can.

• Smile while you dial!
  o You may not notice it, but if you smile while phonebanking, your friendliness comes through on the other end.

• Use phone ear glue.
  o You can’t buy it in a store, but it’ll help your phonebanking rates if you keep your phone to your ear as much as possible. Don’t take long breaks between calls – just long enough to track your conversations.

How-to

1) Set goals for your phonebank
   • How many yeses do you need?
     o Remember the rule of halves
       ▪ Half the people you contact will say yes to your ask
       ▪ Half the people who say yes will follow through
     o You can expect to contact about 10 people/hour

2) Get your phonebanking materials ready
• The list:
  o If you’re calling with a group, make sure you have enough phone numbers for everyone to call (expect a rate of 10 contacts/hour).
    ▪ If you don’t have enough numbers – collect more petitions to get them!
    ▪ You should call everyone on your list, whether or not they checked the volunteer box, just make sure you take them off if they ask not to be contacted again.

• The “rap” (or script):
  o Just like with petitioning, a phonebanking rap is important to have so that everyone is giving the most compelling pitch, especially for new volunteers.
  o Rap structure:
    1. Introduction
      - “Hi, is this____? Hi! My name is_____ and I’m a volunteer with Food & Water Watch!”
    2. Context: briefly explain the problem, solution, and why we need they’re support
      - “Fracking threatens our water because….“
      - “We’re fighting back by…”
      - “We’re building grassroots support in our community to show __(target)__ that he/she should ______(your campaign goal)______.
    3. Strong ask
      - “Can you come to our meeting tomorrow?”
    4. Thanks! Confirm details
      - “Great, we’re looking forward to seeing you at ___(date, time, location)________!”

3) Track your calls
• Make sure everyone keeps good records while they phonebank.
  o Add columns onto your excel file for:
    ▪ Contacted?
      • Yes (Y), No (N), or Left Message (LM)
    ▪ Response
      • Yes, No, Maybe (to what you’re asking)
    ▪ Other notes
      • Is there other useful information you should remember about this person?
- e.g. they own a coffee shop, have a relationship to your target, are a member of the media, etc.

- Keep track of who you contacted, what they agreed to, and any notes, so you can refer back the next time you contact them.

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<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
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<tbody>
<tr>
<td>1</td>
<td>First Name</td>
<td>Phone</td>
<td>Contacted?</td>
<td>Coming to event?</td>
<td>Other notes?</td>
</tr>
<tr>
<td>2</td>
<td>Jerry</td>
<td>870-741-7150</td>
<td>N</td>
<td></td>
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<tr>
<td>3</td>
<td>MaryLou</td>
<td>482-921-9326</td>
<td>Y</td>
<td>Y</td>
<td>She can bring cookies</td>
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<tr>
<td>4</td>
<td>Deborah</td>
<td>360-840-5067</td>
<td>N</td>
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<tr>
<td>5</td>
<td>Linda</td>
<td>203 696-0806</td>
<td>LM</td>
<td></td>
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<tr>
<td>6</td>
<td>Diane</td>
<td>561-846-0213</td>
<td>Y</td>
<td>N</td>
<td>Might be able to make the next meeting</td>
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