



HOW-TO DRAFT: VOLUNTEER-LED PHONE BANKING

This doc was designed to travel. Please feel free to share this link around with other progressive campaigners. You can download this (look under File menu top left) in several formats.

Disclaimer / request for your help	2
Summary	2
Who's doing it?	2
Impact/ Why do this?	3
When this might not work for you	5
What this requires (people, resources, etc.)	6
Setup steps / stages	8
Troubleshooting	11
Further resources	13
Attribution	13



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](https://creativecommons.org/licenses/by-nc/4.0/).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



Disclaimer / request for your help

This is a work in progress that is meant to evolve over time with input from campaigners. At the moment, the tips and ideas here reflect the voices of the [contributors/reviewers listed below](#). We are always looking to add more voices of campaigners that have knowledge and experience on this topic. If this is you, please contact us here: blueprintsfc@gmail.com.

Summary

Volunteer-led phone banking uses campaign volunteers to reach out to voters and supporters through phone calls and is now most often supported by software that helps dispatch calls among volunteers and log progress. Phone banking is effective for supporter identification, voter persuasion, event invites, fundraising, volunteer recruitment, and Get Out The Vote (GOTV) efforts.

Who's doing it?

LGBT rights group [NEAT](#) made more than 70,000 calls to voters to help pass legislation for same-sex marriage in the United States.

[Organizing For Change](#), a coalition of environmental organizations in Canada, used phone banking to drive more than 60,000 calls to British Columbia voters to get them out to vote in their recent provincial elections.

Other groups using phone banking include [Human Rights Campaign](#), [GetUp!](#), [The Greens Party](#) (Australia), The [Australian Conservation Foundation](#), [The Wilderness Society](#), [Democrats Abroad](#), and [AVAAZ](#).



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



Impact/ Why do this?

- Have personal conversations at scale
- Communicate with voters when door-to-door just isn't feasible
- Have passionate volunteers living in non-election states call across state lines to voters in swing states
- Gather valuable information about voters that will affect campaign messaging.

To engage people in personal conversations

Phone calls are a personal medium of communication that lets your campaign forge long term relationships with people. When voters hear the voice of a passionate volunteer on the other side of the line, advocating for a cause they believe in, they are more likely to hear them out. Phone calls are also a great platform to engage people in open-ended conversations of the sort which have been [proven](#) to change people's minds.

Collect data on preferences and supporter levels

Most phone banking tools come with built in surveys that allow volunteers to collect data on supporter levels, voter issues, supporter interests, event invites and more. The data is then used to create targeted messaging for future outreach. If the tool has robust integrations, all collected data instantly flows back to campaign management software/databases like NGPVAN, Action Network, NationBuilder etc.

When [Organizing For Change](#) used phone banking for their Get Out The Vote drive, they partnered with researchers at the University of California Santa Barbara to run experiments during the calls in order to measure the effectiveness of the approach in engaging people on the issues they talked about. Overall, they found that using phone banking helped increase voter turnout by 7%.



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



Run a distributed campaign

Once you've created a phone banking campaign, volunteers can sign up from around the world to make calls on behalf of your candidate or cause. A dearth of local volunteers won't put a dent on your outreach efforts. Supporters can sign up to make calls from the comfort of their homes, talk to the people on the contact list using their phone or browser, and have all the data flowing back to the central database. A strategy many campaigns follow is to run their ground game with local volunteers and have volunteers living elsewhere make phone calls.

Easier onboarding for volunteers

All it takes for a volunteer to start making calls for your campaign is to sign up on the campaign website through an embeddable form. These volunteers can then log into the agent console of the phone banking tool to receive access to calling scripts, surveys, event invites, and of course get assigned people to be contacted. Bear in mind that not every volunteer will follow through on their commitment to support your campaign. Many phone banking tools solve for this by dynamically assigning contacts to volunteers. That means, a volunteer is only assigned a person to call if they are actually logged in and ready to make the call. Volunteers can make as many or as little number of calls as they want and organizers can be safe in the knowledge that no contact is left out.

Scalable outreach

If you don't have a dearth of volunteers and are not stressed for time, manual dialing is a great way to reach out to people. But as the campaign progresses, you'll want to scale up outreach efforts, and automated dialers are more suited to handling higher call volumes. Campaigns usually go with manual dialers or automated dialers during the voter identification and voter persuasion stage and use the predictive dialer for Get Out The Vote calling at key moments.

As a campaign grows and build alliances with other organizations and grassroots groups, these organizations can be easily integrated into a central phone-banking platform, making it easy for the groups to collaborate their calling efforts without having to worry about duplicating efforts and ringing the same supporters more than once. For Organizing For Change's GOTV campaign, 24 groups all agreed to allow OFC access



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](https://creativecommons.org/licenses/by-nc/4.0/).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



to their lists in order to segment and sort them, ensuring voters were only called by one organization and that each organization had a list that matched their capacity.

Drive Lobbying Strategies

Several phone banking platforms offer a “patch-through calls” features, which can be used to connect supporters to their elected representatives, or other campaign targets, in order to drive mass lobbying efforts. [NEAT](#) uses this tactic in their campaigns for LGBTQ+ justice: *“When we find people that support an issue, we can transfer them at their request to leave a message with their local elected official to let them know how they feel.”*

When this might not work for you

When you don’t have enough volunteers

Calling is a people-heavy task. And depending on the type of calling you’re doing you’ll need from a handful to tens or hundreds of volunteers to run phone banks. A single volunteer manually dialing through a list can dial around 35 numbers and talk to about 10-15 people (not everyone on your list is going to pick up the phone). If you’re using an automated dialer that’ll increase to about 45 dials and around 25 conversations per hour. With a predictive dialer, it increases to around 110 calls dialed and 45 conversations. Bear in mind that these numbers are dependent on your contact list. Compare it to a [peer to peer texting campaign](#), where a single volunteer can reach out to an estimated 1000 people in the span of an hour and you’ll see that, you’ll need to recruit a lot of volunteers to reach out to the same numbers as you’d with peer to peer texting.

No database of numbers

If you’ve not built up a database of people with contact numbers, you cannot run phone banks. And the quality of your phone banks depends a lot on the quality of your lists. For example, if you are using voter lists obtained from state party offices, there’s a good chance that you’ll encounter a lot of bad numbers. Platforms like NGP VAN have their own database of contacts that they make available to Democratic candidates in the



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to’s and more info at: www.blueprintsfc.org



U.S., which are of higher quality than state voter lists. You can also use private list vendors like [L2 Data](#), [Aristotle](#), [Target Smart](#) etc.

You need a budget to use automated dialers

Automated dialers can give you a three fold increase in the efficiency of your calling. But unlike manual phone banks where volunteers make calls from their personal phones, calls made through an automated dialer are paid for by the campaign. They won't burn a hole in your wallet, but if you're on a tight budget, make sure to create a detailed plan and budget before you start making calls.

For reference: A browser based calling platform will cost you around 3¢ for one minute of conversation. i.e. a single volunteer making an hour of phone calls will cost you around \$1.5 with an auto dialer (45 dials, 25 contacted) and around \$2 with a predictive dialer (110 dials, 45 contacted). To put that into perspective, reaching out to a 10,000 strong contact list will cost around \$350 with an auto dialer and \$400 with a predictive dialer.

When you want to drive rapid response actions

Rapid response actions are time-sensitive actions that require you to reach a large audience in a limited time. For an effort like GOTV, were you have a day or more to drive voters to the polls you can make do with a Predictive Dialer. But when it's a rally to be held in a matter of hours, or a protest that requires on the spot updates, calls aren't the best option to get the word out. [Peer to peer texting](#) or text broadcast is more suited to this scenario.

What this requires (people, resources, etc.)

A central plan and database

It's imperative that you keep track of who you are contacting, how many times each person has been contacted, and that all the calls tally up to the final goal. The 2016 Bernie Sanders primary campaign succeeded in their massive volunteer-driven voter contact effort because they managed to split up the voter universe into finely targeted lists that were distributed between volunteer leaders in local chapters. Volunteers would engage the assigned list, gather information (supporter levels, issues, event RSVPs etc) and update it to the central database. Having a central plan and database helps avoid



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



the problem of different local chapters/volunteers contacting the same people over and over, resulting in a lot of wasted effort that doesn't contribute to the final goal, and ends up frustrating your supporters. Ideally, you should use a campaign management software/database like NGPVAN, Action Network, NationBuilder or any other database to keep track of your calling, or at the very least make sure that you are collating all the data into excel sheets.

Contact lists

You need to build, purchase, or rent quality contact lists of phone numbers that are up-to-date. Without it, your volunteers will spend more time listening to dial tones and marking bad numbers (unless it's an automated dialer which skips bad numbers) on survey forms than on actual conversations. [Phone number verification](#) tools and list append software like [Accurate Append](#) can help you filter out bad numbers and update the data on your lists.

Volunteers

Depending on the type of calling you're doing (voter ID, persuasion, GOTV), the dialing mode you're using (manual, predictive, auto), the number of voters to be reached, and time to be spent talking to an individual, your volunteer requirements will vary. Plan ahead for your phone banks considering all of these factors. Wellstone has a good [PDF resource on Volunteer Voter Contact Formulas](#) that'll help you with planning.

Software

Without a good phone banking tool, you'll have to resort to printing out call lists, having volunteers got through the list to make calls and have them enter the data back to a central database. A phone banking tool takes care of all of that, leaving a volunteer free to have meaningful conversations.

Phone bank organizer(s)

Most people signing up as volunteers to make phone calls will have little to zero experience making phone calls and using a particular software to do so. A phone bank organizer can be a volunteer themselves or a paid organizer who is assigned to volunteer groups to manage training and onboarding into the campaign. Once the phone banking



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



campaign gets rolling, the organizer also makes sure that volunteers are filling in survey responses, having engaging conversations, and avoiding arguments.

Funds

While some phone banking campaigns are distributed, ie. performed by volunteers from their own chosen locations with their own computers, centralized phone banking operations (all volunteers under the same roof) cost money for office space and equipment. Make sure you budget according to the number of people you have to reach. You can save on costs by asking volunteers to bring their own devices, be it laptops or cellphones. Opting for browser-based calls lets you further cut down on costs with the added benefit of not needing to install any software.

A browser-based calling platform will cost you around 3¢ for one minute of conversation. i.e. a single volunteer making an hour of phone calls will cost you around \$1.5 with an auto dialer (45 dials, 25 contacted) and around \$2 with a predictive dialer (110 dials, 45 contacted). To put that into perspective, reaching out to a 10,000 strong contact list will cost around \$350 with an auto dialer and \$400 with a predictive dialer.

TCPA Compliance (U.S.)

The U.S. TCPA (Telephone Consumer Protection Act) regulations prohibit calls to cellphones using automated dialers. Make sure that you're only using automated dialing to contact landline numbers. For calling cellphones, stick to manual dialing, either using printed call sheets or a virtual phone bank like [Collective Calling](#) or the [VAN Open Virtual Phone Bank](#). Both these tools make the process of manual dialing easier by displaying contact details that volunteers use to dial from their phones and letting them record call details on-screen, thus saving time on data entry.

Setup steps / stages

Define and prepare phone banking campaign objectives

When setting up an initiative such as supporter identification, voter persuasion, event invites, fundraising, volunteer recruitment or Get Out The Vote (GOTV) efforts, define



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



targets in terms of minimum-maximum amounts of people to be reached and calculate the staff/time required to execute.

As a reminder, here are some benchmarks to help with planning:

A single volunteer manually dialing through a list can dial around 35 numbers and talk to about 10-15 people (not everyone on your list is going to pick up the phone). If you're using an automated dialer that'll increase to about 45 dials and around 25 conversations per hour. With a predictive dialer, it increases to around 110 calls dialed and 45 conversations. Bear in mind that these numbers are dependent on your contact list.

Choose your dialing mode

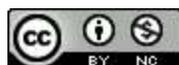
Choose the mode of dialing that you're going for – automated or manual and then sign up for an account on a phone banking platform.

If selecting manual dialing because you are dialing cell phones in the U.S. or you want to let volunteers use their own phones, you can still make use of a virtual phone bank system like [Collective Calling](#) or the [VAN Open Virtual Phone Bank](#). Both these tools make the process of manual dialing easier by displaying contact details that volunteers use to dial from their phones and letting them record call details on-screen, thus saving time on data entry.

When selecting an automated dialer (using a phone banking software platform) here are two further options to consider:

Auto Dialer: The Auto Dialer lets you control the speed of dialing and the time when the call is to be placed. After a call, the volunteer has time to fill in surveys and notes, and then click a button to place the call to the next person on the contact list.

Predictive Dialer: A Predictive Dialer constantly evaluates the number of free volunteers, number of calls getting dropped, and the average ring and talk time. It uses the data to adjust the number of dials being made, and screen unanswered calls to maximize the time your volunteers spend talking. You'll need at least six volunteers making calls at a time to make the most of a Predictive Dialer.



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



Upload your list manually or use integrations

When using phone banking software, upload your contact list as a CSV file or use integrations to directly sync contacts from your database into the phone banking tool.

Create your phone banking campaign

Start creating your campaign. This is where you add surveys for collecting data, add events, and set the schedule for your calling campaigns. Again, if the phone banking tool has integrations with tools like NGP VAN, Action Network etc., you can directly import events and surveys from these platforms into your phone banking campaign.

Recruit and assign volunteers

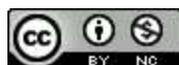
If you already have volunteers recruited into your campaign, you can use their email to directly add them to calling campaigns. If not, use embedded forms provided with the calling tool to allow people to sign up to make calls from your website.

Managing teams (collaboration)

Nurture an environment of collaboration where an open channel of communication exists between your volunteers and they feel comfortable seeking help from each other. You can onboard new volunteers to a Slack channel or WhatsApp group and encourage them to talk over these channels across the duration of campaigns. Having all your agents together on a communication tool also lets organizers quickly convey instructions and campaign updates.

Analytics and Reporting

Your calling campaigns bring in loads of data that should be parsed to optimize future outreach efforts. Set daily goals and track the progress you've made on your list. Measure agent occupancy rate (percentage of time volunteers spend on calls against idle time), call drop rates, reach rate (percentage of calls that were picked up), number of call attempts and other metrics that you can use to improve your phone bank.



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](https://creativecommons.org/licenses/by-nc/4.0/).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org



Testing the tech beforehand

As much as we hope that platforms will perform flawlessly, Celine from Organizing for Change flags the need for testing of the phone banking system before deploying with large numbers of volunteers.

“Another big learning moment for us around tech, was that we needed to test things more rigorously. At peak times, the predictive dialer and server shutdowns started happening. We need to figure out a way to test the tech at the volume that we will be calling.”

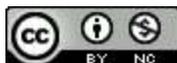
Troubleshooting

Tech issues

Though tech providers work on preventing this, phone banking software can jam up, servers can fail and this can be frustrating for volunteers, who already feel daunted by the challenge of calling up people they don't know.

To address this, Celine Trojand from Organizing for Change reported the following practices:

- “In some cases, when the predictive dialer didn't work and volunteers called multiple people, all we could do was be as communicative as possible with the solutions. It helped to have people on phone support to communicate with volunteers and walk them through troubleshooting. It was important to let everyone know the problem and the solution. Being responsive and letting people know we were working hard for them was key. We also had a couple of analog back ups -- solutions like a folder a phone numbers in spreadsheet form. If someone was having so much trouble that they couldn't use the tech, we would go analog.
- We had to prioritize our volunteer experience so that they would come back. We were very responsive, communicative and has many plans to knock down a list.



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](https://creativecommons.org/licenses/by-nc/4.0/).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org

Data entry

Data gleaned from every phone banking campaign goes into tailoring future outreach efforts. Whether it be the people identified as supporters, or those who agreed to attend an event, collating the data is crucial when deciding your next step. If volunteers making calls are not properly advised on the importance of data collection, many of them tend to focus just on the conversations and the calling script without marking responses on the survey forms. You can avoid the problem by incorporating a training routine into your phone banks for new recruits that takes them through the whole process. The training module doesn't need to be live. It can be in the form of a presentation, a Trello board, or a pre-recorded video.

Predictive dialer

When using a Predictive Dialer, the people at the other end of the line can experience a slight delay (1s - 1.5s) between picking up the call and getting connected to a campaign volunteer. The Predictive Dialer essentially calls a list of telephone numbers, screens them and then connects only answered calls to free volunteers. While this ensures that volunteer talk time is maximised, it also causes the slight delay after pickup. The first instinct of a person picking up the phone is to say 'Hello', and by the time your volunteer gets connected, that person would have been done with the initial greeting and will be waiting for a response. If your volunteer is not aware of this, it can be slightly off-putting. But if they are, they can just go ahead with the script without waiting for a greeting.

Bandwidth issues

Campaigns that have had a large number of volunteers making calls through a browser can face issues with loss of call quality, calls getting dropped, and longer wait times. The issue appears for virtual automated dialers and is attributed to higher loads on the internet without enough bandwidth to handle these loads. Make sure that you have enough bandwidth to allocate 1MBps to each volunteer making browser based calls.



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](https://creativecommons.org/licenses/by-nc/4.0/).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org

Further resources

Tools: Phone banking platforms

- [CallHub](#) (International)
- [Hubdialer](#) (U.S.)
- [LiveVox](#) (International)

Phone banking guides

- [What is a predictive dialer?](#)
- [Automated Vs Manual phone banking](#)

Great phone banking tutorial video from DemLabs:

- [Improve Your Phone Banking Skills](#)

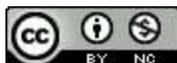
Attribution

Input and resources for this how-to were provided by:

[Augustus Franklin](#) and [Tony Kokkad](#) from [CallHub](#), [Deepak Puri](#) from [DemLabs](#), [Celine Trojand](#) from [Organizing for Change](#)

This guide was prepared and reviewed by:

[Augustus Franklin](#), [Tony Kokkad](#), [Tom Liacas](#), [Chris Alford](#), [Celine Trojand](#)



This work is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

For commenting permissions and other feedback, contact us at: blueprintsfc@gmail.com

Full library of how-to's and more info at: www.blueprintsfc.org