INDIVISIBLE

Phonebanking Toolkit

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Phonebanking has been around for over 40 years, and in the last decade, it's really revolutionized the way we connect with people about the causes we care about. It's the second most effective way to reach contacts (right after canvassing) and in some places, like rural areas, it can be even more efficient, helping us gather a lot of data quickly!

Phonebanking is one of the most accessible ways to take action, and it's the second most effective tool for reaching out to voters. You can join in from almost anywhere, using reliable information to ensure you're connecting with the right people.

At Indivisible, we primarily use two different phonebanking platforms. Depending on the year, only one platform may be available. If phonebanking feels a little intimidating at first, don't worry! It gets easier with every dial. In this toolkit, we'll guide you through the differences between phonebanking platforms, provide step-by-step instructions, and help you build your confidence in no time!

PLANNING A PHONEBANK 101
Choose a date & location

When planning your phonebank, pick a time when people are likely to be home—weeknights and weekends are best for meaningful conversations. Consider setting up regular phonebanks to consistently engage contacts.

Phonebanking can be done from home, making it easy for those with limited time or who live far apart.You can utilize phonebanking during key outreach efforts to engage and turn out voters, as well as to connect with potential new Indivisible members. You can even hold virtual phonebank events over Zoom to connect with the other members of your Indivisible group.! If you prefer in-person gatherings, hosting an event can really help build camaraderie—just make sure the space is comfortable, clean, and accessible.

Phonebanking can (and should) be fun! To make it more fun, try creating a theme, playing soft background music, and setting small goals with prizes. Don't forget to

encourage breaks and provide snacks to keep everyone's energy up and motivation high!

Register & Recruit Canvassers:

After setting the time and location, be sure to register your event on the [Indivisible events map](#). This helps us promote it to people in your area and makes it easier for you to publicize and gather commitments.

Create a list of potential attendees and start reaching out—call neighbors, post flyers, share in local Facebook groups, and ask each participant to bring a friend. Two weeks before your phonebank, you should follow up with those who haven't responded to your invite and ensure you reach out to those who have RSVP'd at least three times before your event. We recommend following up two weeks, one week, and the day before the event.

Follow up with those who haven't responded, and the night before the event, confirm with your RSVPs to ensure they'll be joining you.

Roles

Once your phonebanking team is all set, it's super helpful to assign some roles to keep things running smoothly.

- **For in-person events**: Have someone take charge of setting up the space and getting any supplies or fun items ready.
- **For virtual phonebanks**: Make sure someone's managing the platform and can share music or slides as needed.

In either case, you should have a trainer who can give a quick 10-15 minute training on how to phonebank the tool's you'll be using, and offer support if anyone needs help.

Hubdialer

Hubdialer is a predictive dialing platform that hides your phone number and automatically dials, skipping busy signals and voicemails to maximize your conversations. It's simple to use—**all you need is a computer and a phone!**

While the auto-dialer works, you'll hear mellow music until someone answers. When you hear a beep, it's time to start your conversation. (That's when the fun begins!)

It's a bit different from how we usually make calls, but that's the beauty of it. Auto-dialers let you focus on the script and capturing data. It might feel a bit odd at first, but this system allows you to jump straight into the script when someone answers! Want to learn more about how Hubdialer works? Check out our quick ten-minute [training video](#)!

NOTE: Hubdialer phonebank campaigns may not be available year-round and are only offered for large national events. A pre-written script will be provided for all campaigns. To find current Hubdialer phonebanking opportunities, please reach out to your state organizer or check the events calendar

STEP-BY-STEP PROCESS

- ☐ **Join a campaign:**
  - ○ Hubdialer requires users to join a phonebank campaign. Reach out to your state organizer or check the events calendar for available opportunities in your area.
- ☐ **Login**
  - ○ Make sure to check the box if you're a first time user.
  - ○ Enter your email, campaign ID, and the passcode provided.
- ☐ **Prepare**
  - ○ Once you're logged in, read the script thoroughly. Make sure to review the questions you'll ask based on different responses, and once you've looked through all the information, move to the next step.
- ☐ **Get Started**
  - ○ Click "Let's Get Started." A phone number and Dial In Code will appear on your screen.
  - ○ Use your phone to call the number displayed on the screen, enter the Dial In Code when prompted (***NOTE:*** The dial in code is different from the passcode).
  - ○ Listen for the automated message to receive a confirmation code, and
  - ○ enter the confirmation code on your screen.
  - ○ **DO NOT HANG UP**– Click let's get started and the autodialer will start dialing! Get ready to have some great conversations!
- ☐ **Wrap Up**
  - ○ When finished, click "Log Out" in the top right corner of your screen, and you'll be all set to go. Thank you for taking the time to make some calls!

OpenVPB

OpenVPB, or Open-Virtual Phonebank, is a platform from VAN that connects users with contacts, tracks data in real time, and helps build relationships with contacts both locally and statewide. OpenVPB is also highly customizable for groups and their specific needs, whether that's reaching out to voters, inviting community members to an event, or bringing new Indivisible members into the fold. *Indivisible groups across the country have been using VAN since 2018*, and now you can join them to engage members in your community!

If you're hosting a phonebank, you'll need to create a VAN account through Indivisible. Simply fill out this [application](#), and the data team will reach out to discuss next steps. Be sure to submit your application at least one month before your planned phonebank, since the data team handles many requests and needs time to process them! Don't forget to check out our [OpenVPB 101 video](#) to learn more about how this tool works!

STEP-BY-STEP PROCESS

- ☐ **Develop Script**
  - ○ Every play needs a script, and phonebanks are no different! Scripts help phone bankers stay on message and provide the necessary information to communicate effectively with contacts.
  - ○ Your phonebanking script should include a friendly greeting, a brief introduction, key talking points, and questions to engage the contact. It should also have a clear call to action and a polite closing. If the person declines, be sure to offer alternative ways to get involved, and thank them for their time before moving on!
  - ○ Need some inspiration? Click [here](#) to get inspired or use one of Indivisible's pre-approved scripts!
- ☐ **Getting Started**
  - ○ Click on the OpenVPB link (provided by your group leader or event organizer if you're not the host).
  - ○ Click 'Get Started' and log in with your Action ID.
  - ○ If you don't have an Action ID, click [here](#) to create one. .
- ☐ **Join the Phone Bank**
  - ○ Once logged in, click 'Join a Phone Bank.'
  - ○ If prompted, enter the 11-14 digit Virtual Phone Bank Code from the link (e.g., ABCDEFG-1234567).
  - ○ The system will load, displaying your first contact's information and the script.

- ☐ **Contact Layout**
  - ○ **Left Side**: Contact's details such as phone number, city, and state.
  - ○ **Right Side**: Contact's name, phone number, and the script to guide your conversation.
- ☐ **Start Chatting**
  - ○ Use the drop-down fields in the script to record the contact's answers.
  - ○ If the contact doesn't answer a question, leave that field blank but input any other responses!
  - ○ Stick to the script, but make it your own! Have a real conversation and share why you care about this issue.
  - ○ Click 'Save & Next Call' to move on to the next contact, and have more great conversations!

- ☐ **Wrap Up**
  - ○ When you're ready to wrap up, click the "Stop Making Call" button which saves the information for the current contact and ends your phone banking session.
  - ○ Thank you for taking the time to make some calls!

Tips & Reminders

- ● **Smile While You Talk**: It might sound silly, but smiling can really make a difference—it comes through on the other end! Think of it as saying hello to a stranger you want to befriend.
- ● **Practice Makes Perfect**: The more you phonebank, the easier it gets. You'll soon see that you'll start feeling like a phonebanking pro!
- ● **Hang-Ups Are Normal**: Don't let hang-ups get you down; they're part of the process! Remember, you're not alone in encountering contacts who do not want to engage with you. (or are rude!)
- ● **Prioritize Safety**: While it's great to make connections, keep your personal details to a minimum. Safety first!
- ● **It's Okay Not to Have All the Answers**: Let the person know you're a caring volunteer don't be scared to direct them to resources for more information if needed.

After Phonebanking

Celebrate your success by capturing the moment with photos and videos, sharing them on social media, and tagging @IndivisibleTeam so we can help celebrate your hard work!! Seeing familiar faces can really encourage newcomers to join in on the fun!

Afterward, debrief with your phonebankers to discuss what went well, any challenges they faced, and their best conversations, using their feedback to continuously improve your phonebanking training.

And don't forget to follow up with your phonebankers! Reach out to thank them for their hard work, let them know how much you appreciate their efforts, share how many dials were made and supporters identified, and encourage them to sign up for their next phonebank shift!