

WisDems Phone Banking FAQ:

I've never phone banked before and I'm excited/nervous/queasy – talk me down!

Welcome to the Best Phone Banking Team in the Country™! There will be a team of volunteers staffing the Zoom to make sure you have a great experience. At the top of the session we'll train all callers on the script as well as the dialer that we use (Scale to Win – more on that later). There will be time after the training for a Q&A as well as a Chat moderator fielding questions in the Chat (more on Chat later!). If you still need help one of our friendly volunteers will work with you in a breakout room. We have helped thousands of other first-time volunteers make great calls - You've got this!

I'm technically challenged, can I do this?

YES! We have had callers of all ages and abilities successfully connect with voters and our volunteers will help get you set up. The most important thing is getting to the Zoom and that link will have come to you from Lydia Myer OR Mobilize depending on how you signed up. If all you can do is get into the Zoom, we can help you from there.

What kind of equipment do I need?

You will likely join the Zoom on a computer or tablet. You CAN join on a smartphone but that can be challenging so we advise against it. When you're making calls we find it helpful if you have ear pods, headphones or a headset so you have the best audio quality but you don't need it.

What if I'm running late? Should I cancel?

Please don't! Join us when you can – if someone is talking in the Zoom sit tight and we'll get to you and make sure you are trained to get going. We do take attendance in the Zoom so if you are late/a no show you will get a friendly text from us reminding you. If you forgot and can join then, go for it! Otherwise you'll be given a link to reschedule.

I'm in the Zoom. Why does the trainer keep mentioning the Chat? I don't know what that is.

The Chat is a function of the meeting room that allows us to share information and respond to questions. The Chat doesn't automatically open up so once you're in our Zoom you should look at the bottom toolbar on the Zoom screen, and look for the talk bubble icon with the word CHAT. This should either launch a white window to the side of the Zoom screen OR a separate window. Our Chat Monitor will frequently drop links and helpful info there and it's also a great place to ask questions that the Chat Monitor will answer.

The trainer said to raise your hand if you have a question. I'm waving mine but they don't see me. Help!

In Zoom you can digitally raise your hand and in a large group we can see all of those and help people in order that they raised their hand. To do so we're going to go back to that bottom row on the Zoom toolbar and look for the icon that says REACT. Hit that and you will see a button to RAISE HAND. Select that and a digital hand will appear in your screen and we will call on you!

Okay now the trainer is telling me to Leave Computer Audio. Why? I want to hear the caller don't I?

To use Scale to Win and have the voter hear you, you need to leave the audio in the Zoom so Scale to Win can use your microphone. To do this, go back to the lower tool bar on Zoom (where you found Chat!) and look at the lower left icon. This microphone might say Mute or Audio under it, and to the right you'll see this symbol $\wedge$. If you select that a menu will pop up and near the bottom it will say Leave Computer Audio. Once you hit that, you won't hear the Zoom and we won't hear you making calls. Win win! If you need to come back to ask a question, that left icon will now look like headphones with a green arrow and the option to hit that to Join Audio. Hit that and boom, you're back in.

What is Scale to Win? Why are we using that?

Scale to Win is a dialer that is being used nationally to contact voters. It is an auto dialer that does an excellent job connecting phone bankers to voters while weeding out voicemails and busy lines. The script is built into it and you will be able to preview the script and the functionality before making a call.

When can I start making calls?

After the training is over if you think you're ready then go ahead and click that link in the chat that looks like this:

Ready to Make Calls?
Scale to Win Link:

(link)

Happy dialing!

I don't want people to see my number/call me back. I know that's not a question.

With Scale to Win the dialer generates a Wisconsin based number for you, voters will NOT see your number. Heck you can even use a fake name if you want. The main thing is having a great conversation with a voter.

I'm making calls and nobody hears me, help!

First off check that you Left Computer Audio and didn't just mute yourself. If you did, let's go back to the Scale to Win page (click the link again to start over). If you initially selected Call with This Device (so just using your computer or tablet for example), try the option to Call with This Device + Phone for Audio. If you're still having issues you can raise your hand (the digital kind under REACT) and we will help you out!

I'm in the Zoom and I see people are talking but I can't hear them. What's happening?

Remember when we told you that you need to Leave Computer Audio to make calls? That lets you stay in the Zoom in case you need help, but not hear everyone else making calls. It's all good!

I'm making calls and nobody wants to talk to me? Why? I'm nice!

Wisconsin voters get a LOT of phone calls and honestly most people will probably hang up on you or tell you nicely they don't want to talk. That's to be expected. However the margins in Wisconsin elections are SO SMALL that one meaningful conversation can really make an impact. Maybe you connected someone who had an issue with VoPro help (more on that!) and now they have a plan to vote! Maybe you gave them the MyVote website (you'll hear about that in training) and they found their new polling place. Maybe you talked to someone who was tired and just not in the mood to vote this year and YOU made a connection with them that motivated them to get out and vote. THAT COULD MAKE THE DIFFERENCE IN WISCONSIN.

I heard something about this in the training but I'm still lost. If I get someone on the phone but don't get any answers, when should I mark Call Back Later and when should I use Refused?

The easiest thing to remember is "when in doubt, select Call Back Later" – it means just that! If a spouse or kid answers the phone, Call Back Later (they might tell you that the voter votes Dems and not to worry but we need to hear that from the voter themselves). If they say it isn't a good time, Call Back Later.

Now let's get into some more nuanced situations. So you asked for the person and you know it's them. You identified yourself and that you're calling from WisDems and they hang up. You might be thinking "Refused" but this is still Call Back Later because they don't know WHY you're calling. Maybe they think you're asking for money? Maybe it's just a bad time? Call Back Later gives us a chance to get them again.

But maybe you identified them as the right person, you identified yourself and asked them if they plan on voting Harris for President. At this point they may hang up, tell you they don't discuss politics, or just say they don't want to tell you. In this case, we're likely not going to get information from this voter and now we can use Refused.

I talked to a voter but I marked an response incorrectly. Did I break democracy?

With 99.99999% certainty you did NOT break democracy. A great thing about Scale to Win is you can use the Back arrow at the top left portion of the script to go back to whichever page you need to correct. As long as you're still in a voter record and haven't asked to make next call you can go back and make changes.

Speaking of Wisconsin, I don't live there. What should I say if someone asks where I'm from? Also I don't know who their local candidates and issues are. What do I say if someone asks?

Much of the volunteer leadership team is from out-of-state as are many of your fellow phone bankers. Some of us live in reliably blue districts so we put our efforts towards Wisconsin because we know about those narrow margins and can make a difference here. If someone asks where you're calling from, it's fine to say where you live and reiterate that this election is so important to you (maybe because of a specific issue that you're passionate about), that you decided to spend your volunteer hours helping this state instead. Don't be surprised if they thank you for that! When it comes to local elections and ballot initiatives, the Scale to Win script will auto populate with the Dem candidate names so you can provide them that as name recognition for down-ballot is really important. We will also have WisDems positions on any ballot initiatives. If a voter wants more info and has the time you can google any candidate for their official site and share that with them as well.

Finally, our chat moderator will be putting in links with talking points for the main candidates and issues so if someone asks you a question you can likely find an answer there.

How come I keep seeing the same phone number after I speak to a voter?

Make sure you're not hanging up/disconnecting your phone in between calls. If that's the case the number you're seeing is the number to call in to get the dialer going for you.

I just talked to a Republican and they were mean to me. Why are we calling Republicans?

First, I'm sorry that happened to you. Second, we try to build our lists so we're talking to likely Dem voters but in Wisconsin voters there do NOT register by party to in spite of thousands of hours spent screening voters there's always a chance a Republican will slip in. If this is the case you can thank them nicely for their time and end the call. We don't engage in debates because we have likely Dems we want to talk to and get them the voting information they need!

The trainer talked about Voter Assistance Hotline but Scaled to Win has a button for VoPro Help. What's the difference?

No difference, just two ways of referring to one great organization. This is a dem-friendly organization that helps voters with a variety of issues. If you're talking to someone who has a definitely issue you can use that button and that will connect them. It's a great number to also give people who haven't voted yet just in case.

If something sounds iffy definitely pass on this number and if you feel it's necessary you can also flag this to the volunteer leadership in the Zoom. We would ask that you write down the voters name and number and private message that to Lydia Myer or the Chat Moderator. It's important we keep information private and not put it in the main chat.

The person I talked to said they already voted. Is that true?

Maybe yes, maybe no! They could have returned their absentee ballot very recently but generally it's a very fast turnaround from receiving a ballot to being removed from our list. You can tell a voter "that's great! As soon as your ballot is registered you will come off our list and stop getting calls. There's a great resource – myvote.wi.gov where you can track your ballot to make sure it's received."

We hope at this point you can still determine who they voted for so you can ask if they're comfortable if they're sharing who they voted for/if they typically vote for the Dem ticket. If they're enthusiastic Dems you can mark all that and ask if they want to volunteer.

Wow I'm doing this and I'm talking to so many great Wisconsin voters. (Alternatively, wow so many people are hanging up on me and I'm discouraged). I want to talk about this and hear from other callers about what worked for them. What should I do?

We have a debrief that starts ten minutes before the end of the shift for you to all share your experiences! We're looking for that one inspirational call, or maybe one you could use suggestions for handling differently in the future. A vol leader will moderate the debrief so our phone bankers can share their experiences to make you feel even more confident for your next session.

Next session? I have to do this again???

YUP! Now that we have you we need to help us get across the finish line. We'll be sharing links in the Chat with ways to sign up for future shifts. You're a pro now and we need all the time you can give us.