

Telephone Bank Guidelines

The following information is a collection of documents that may be used to conduct a phone bank. These documents were developed by Ann Liston, the National Democratic Institute for International Affairs, for the CEPPS-funded Bulgarian program, “Civic Voter Education and Get-Out-the-Vote”, (May 2001).

Included in this document are:

- Manager Guidelines
- Callers Instructions
- Master Control Sheet (Phone Log) and Key

Telephone Bank Manager's Guidelines

You are about to manage an activity that is uncommon in this country. In countries of longstanding democracy, however, the Telephone Bank is a frequently used campaign technique. It regularly produces results to make the effort worthwhile.

At the beginning of the campaign you are most likely to find the idea of operating a Telephone Bank strange, later on you may find it exciting and most likely, by the end of the day, with the campaign drawing to a close, you will hate telephones. That's normal.

You must have the patience of a saint when training your volunteers, checking their performance, or recording results. The challenge is that usually your volunteer callers will not be telephone professionals and therefore may become somewhat frustrated when making their first calls. You will have to patiently encourage them and even do some role-plays with them. Above all, make sure that you treat them with respect at all times.

You may notice that on the very next day callers won't be that frustrated and that's when real troubles can begin. Callers might be tempted to make personal calls using office telephones. You should be prepared to warn them that "*This is not the proper thing to do!*".

Be sure that you take 5 to 10 minutes to chat with your callers before they get down to work. Let them know that you care about them and not just the job they are doing.

Make a reasonable estimate as to how long it will take you to make calls to the targeted group. This will give you an idea about how many hours your callers will have to put in daily and the number of telephones to be in operation.

Good luck!

Telephone Bank Caller's Instructions

Dear friends,

The Telephone Bank technique has been identified as a major voter turnout tool. Remember that your voice and message build the image of our campaign.

Here are some basic instructions for you to follow:

- Before you make voter identification phone calls, make sure that you go through the script and review the questions you are going to ask. You may even want to practice them in a role-play with another volunteer.
- Make yourself comfortable.
- Make sure that you have an adequate supply of pens, erasers and pencils at all times.
- If the person has not picked up after the 4th ring, hang up and make sure to check your list for a follow up call.
- Make sure that you have all phone bank materials handy like your script, master report form to record information, brief candidate information, caller's instruction sheets, questionnaire form and schedule of events.
- Remember that you are not expected to follow the questions word-for-word as they appear on the script. What is more important is that you follow the general vein of the script.
- If you face an unusual situation, try to respond in a natural way. You don't have to know the answers to all the questions you may be asked.
- Make sure that your supervisor supplies you with enough drinks and snacks to last you through the day.
- No matter what kind of person answers the phone, even someone who is rude, make sure that you remain polite and thank them for their time.

Should you have any questions concerning the operation of the Telephone Bank, feel free to call us at: __-__-__

I appreciate your support and assistance.

Sincerely,

Key to Master Control Sheet

Call #: Denotes number of times person has been phoned

T: Denotes call completed

Name: Name of person phoned

Phone #: Phone number of person phoned

Caller: Name of person conducting telephone call

Time: Time caller placed phone call

Comment: (write one of the following in the Comment area)

N/A: no answer

W/N: wrong number

C/B: call back

L/M: left message

The Master Control Sheet can be copied and given out to callers with the callers returning the person in charge at the end of the session

-or-

copies can be made and distributed to callers and then transferred to a master sheet.