

Phone Banking 101

Included in this guide:

- [Voter Contact Calls](#)
- [Getting Started](#)
- [Navigating VPB During Your Calls](#)
- [Best Practices](#)

One of the most critical and vital components to winning an election is **making sure people turn out to vote**. That's why we're focused on phone banking as a tactic to reach voters where they are. This guide will walk you through everything you need to know about phone banking and using Virtual Phone Bank (VPB). VPBs allow volunteers to make calls from wherever they are in support of Democratic parties, organizations, and campaigns.

Remember to have fun with your calls! If you keep this approach in mind, you are going to have a better experience and be more effective talking to voters.

For additional training, you can check out this short recording on [phone banking and using Open VPB](#).

Voter Contact Calls

Directly calling voters is a great way to have important conversations about the upcoming election, making sure they know how to vote and are equipped with the resources they need to safely cast their ballot. The types of phone banking conversations you'll have ahead of election day include:

- Providing early vote information (when applicable)
- Making sure voters have information about how to vote by mail (when applicable)
- Making sure voters know their polling location, if they need to vote in-person
- Helping voters make a voting plan
- For post-primary elections, we actively encourage them to vote for our candidate

You'll always receive a phone banking script and since we phone bank through specific campaigns or the state parties, you'll receive more information to contextualize the purpose and flow of the calls. See below for best practices while phone banking.

Getting Started

If you have already set up your Action ID and have phone banked before, skip to [Navigating VPB During Your Calls](#). If not, let's start with what you will need to call voters:

- **Phone** – You can use your cell phone, home phone, or Google Voice (<http://google.com/voice>). You can also download the Google Voice app from the App Store. We don't recommend blocking the caller ID; most people don't answer blocked calls.
- **Wi-Fi or Internet Access** – You'll need a laptop, desktop, or smart tablet with internet access to use the VPB website.

- **Action ID** – This is how you’ll log into the VPB website (see below). [This link](#) also provides more information.

If this is your first time, select: ‘Create ActionID’

You will need to enter your email address, password, and phone number. If you’re using a smartphone to log on, you may also have to enter your cell phone number. Check your email or cell phone text messages after registering to confirm you’re a real person. When asked to “Enable Two-Factor Authentication,” check “Ask Me Later.”

Secure Your Account

1. Verify Your Email Address

A verification email has been sent to help@swingleft.org. Please click the link in the email. You may lose access to some services if you don't verify your email address soon.

Verification Email Sent

2. Enable Two-Factor Authentication

With Two-Factor Authentication, you'll protect your account with both your password and your phone. You'll be asked to enter a short code anytime you log in from a new device.

Enable Two-Factor Authentication

Ask Me Later

Navigating VBP During Your Calls

Once you’ve logged in, you’ll see who you’re calling and the script. You can see the voter and the voter’s phone number above the script. Take a moment to read the script out loud. Look for the sections where you’ll need to enter information based on your conversation with the voter. After recording this data, you’ll save and proceed to the next call at the bottom of the page.

Preferred Email

Preferred Phone

23-year-old F

I Couldn't Reach

Hi [NAME],

My name is [Your Name] and I am a local volunteer with Swing Left for LOCAL GROUP NAME). We're talking to folks in the neighborhood today about the upcoming election. We believe everyone should be able to participate in our democracy.

[[IF YES]] That's great! I'm talking to a lot of folks who are supporting Democrats in this Legislative District.

[[IF LEAN SUPPORT or UNSURE: Keep engaging in conversation.]]

[[IF LEAN OPPOSE or NO]] - Thank you for your time, have a great day.

Is your voter registration up to date at your current address?

✓ Choose an option

Yes

No

Not Sure/Don't Know

Updated

Needs VRBM

Needs ID

Refused - Hostile

Refused - OL

[[Not Sure/Don't Know]] e talking to lots of folks today with current Updated

[[Needs VRBM]]

[[Needs ID]]

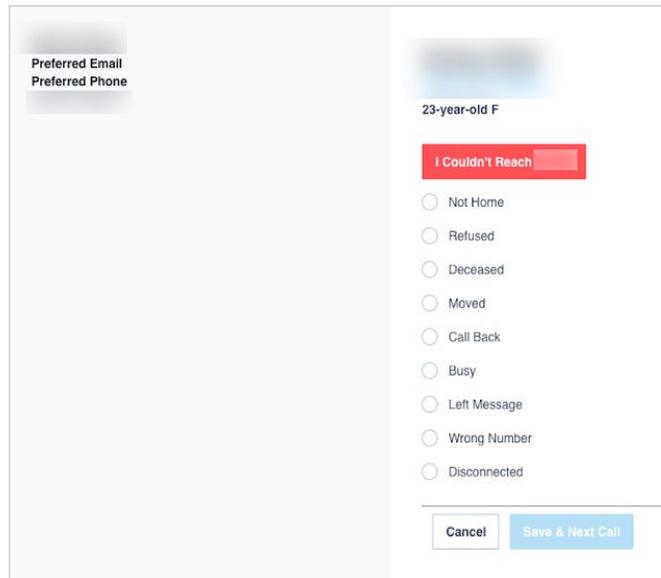
[[Refused - Hostile]] If you need help registering to vote, y

[[Refused - OL]]'s Secretary of State website.

[[IF NEEDS FOLLOW UP]] I'm going to make a note that you need an assist in registering to vote and we'll pass your information to an organization that can get you the help you need.

[[IF UPDATED ON THE SCRIPT]] Thanks for taking the steps needed to

If you can't reach the voter, click the red button beneath the voter's name and provide information about the call before proceeding to the next call.



The screenshot shows a user interface for contacting voters. On the left, there are fields for 'Preferred Email' and 'Preferred Phone'. On the right, a voter is identified as '23-year-old F'. Below this, there is a red button labeled 'I Couldn't Reach'. Underneath the button is a list of radio button options: 'Not Home', 'Refused', 'Deceased', 'Moved', 'Call Back', 'Busy', 'Left Message', 'Wrong Number', and 'Disconnected'. At the bottom right, there are two buttons: 'Cancel' and 'Save & Next Call'.

If you have further questions about phone banking or technical problems, please consult our [Common Phone Bank FAQs guide](#).

Best Practices

Be prepared for 'No' or people hanging up. You may only talk to a few voters in each shift. It's normal to only contact 10% of the voters on your list. If we all work together, we can make a big difference this November. so, please update the response and move on to the next call. Keep it positive with each call and try to talk to as many voters as you can.

- DO practice your introduction with a warm friendly tone. Most people decide whether to take your call within the first minute of your introduction.
- DO "smile while you dial," since this comes across to the person. Also, try standing up during calling if you can because this will help add energy to your conversation.
- DO be respectful of their time. If they can't talk, politely end the call.
- DO try to use their name. If you're not sure you should call them by their first name – ask.
- DO thank them for their time. Even if the call didn't go well or according to plan. It's more important they hang up from a positive experience associated with the campaign.
- DO make sure to track the outcomes of each call correctly. This data is really important for campaigns.
- DON'T talk fast through your script. Take your time when speaking – it's not going to go any better if you speed through it.
- DON'T go completely off script. Please follow the basic script because it was prepared with intentional verbiage to be the most effective but still try to make it your own.
- DON'T speak negatively of other parties, campaigns, or organizations.