



## Neighbors on Call's guide to liking, or at least tolerating, phone banks

No matter how you feel about phone banking, **there's something we all agree on - how important this election is!**

We hope you find these resources helpful.

### 9 Strategies for Motivation and Self-Care

1. **Plan a reward for yourself after calling** - a walk, a drink, chocolate, whatever works.
  - o Give yourself little rewards along the way: Take a deep breath and say "way to go" to yourself every 5 calls."
  - o Congratulate yourself for your **contribution**. It takes all of us and **for some of us, this is really, really hard!**
2. **Place a reminder of your motivation for phone banking where you see it** (a copy of Gene Nichol's *Indecent Assembly* or Nancy MacLean's *Democracy in Chains* or a picture of your grandchildren - whatever reminds you about just how important this election is)
3. **Find your most comfortable, inspiring place to sit** to make your calls: good chair, enough lighting, your porch
4. **Review the candidate's website or remember when you heard them speak** last so you **feel reconnected** with them and why you want them in office
  - o On many phone banks, you get to meet the **candidates**.
  - o Follow them on social media or sign up to get information from their campaigns.
5. **Tally calls as you go** - otherwise it may be hard to see **progress** 
6. It's okay to **take a break** or two (you don't have to call non-stop for 2 hours). Stop when you need to

7. Make brief notes about **calls that went really well** - have them on hand as a reminder (and as an antidote for the calls that feel bad). (And share them with the others in the phone bank google chat!) Examples:
  - I spoke with a woman who lost her job in the pandemic, has 4 children and is relying on her 70 year old African American mother, who works in healthcare, for food. She said she always voted and will again, but it's nice to know good things about the people you're voting for. She thanked me for calling!
  - I spoke with a man in Wake County who said "I am a white man. The democratic party needs me. Sign me to help."
  - I was on call #47 (of the 50 I promised myself I'd make) before I spoke with someone who wanted to volunteer. Glad I didn't give up earlier!
  - A volunteer said they made about 70 calls and had one good conversation ... along with a few hang-ups. It's hard to stay positive, but at least they helped one person solve a problem, which is more than they would have done if they hadn't been on the phone bank!
  
8. Have **realistic expectations**
  - Phone bankers' hit rate **will be low** - don't be discouraged (some people might be relieved :) - One of the goals of these phone banks is to clean up the campaign's database. However you feel is **all OK!** Your participation is important and helpful. Cleaning up the list saves the campaign money and time that can be used for other things!
  - Being prepared for the **range of people who answer** the phone -- some who will hang up immediately, others who will have thoughtful conversations.
  - Most candidates will not prohibit leaving messages, even if they don't encourage it. Develop a **1 sentence message** that emphasizes the candidate's **name** and "**when** you vote" in November. (Only takes a few seconds and is like leaving a door hanger with canvassing)
  
9. **Finally, commit to do it again. :) This is very important work!** (even though it may be hard!)

### **5 Pro-tips to help you feel prepared, organized, and supported**

1. **Use the script as a support.** Feeling prepared for what to say and how to say it can make all the difference for your comfort level when you get to talk to folks.
  - **Review the script before you start calling**
    - The script is usually sent as an attachment or a link in the confirmation email sent the day before the phone bank.
    - You can review it ahead of time, or take a few minutes to review it during the phone bank time before you start calling.

- Read it out loud a few times. Maybe ask someone to role play with you.
- **Modify the script if you need to - within reason**
  - Keep in mind the campaign crafted the script with the priorities and messages they think are important, so don't change the meaning.
  - To make something feel natural to you, it's ok to say the same thing but in your own words.
  - It's also a good idea to read over the campaign website so you are able to use that information to talk to people about the candidate.

## 2. Make a plan for leaving voicemail messages

- Some campaigns suggest not leaving messages for various reasons, like maximizing your call time, and avoiding messages left at wrong numbers. Other campaigns are ok with us leaving messages.
- If the campaign says it's ok to leave messages:
  - Review the voicemail script, if provided by the campaign, OR
  - Prepare a **1 sentence voice mail message** based on the full script that - most importantly - emphasizes the candidate's NAME.

## 3. Lean on your support system.

There are a variety of people from NoC and the campaigns available to help support you and provide information to help you feel comfortable and knowledgeable throughout the phone banking process. Rest assured that you can reach out to any of these people - they value you immensely, and are happy to help. Here's a list of "who's who", roughly in the order you will encounter them in a phone bank.

- **The phone bank coordinator.** This is a person from NoC who will send you emails about the phone bank. You usually don't need to interact with this person, but you can email them if you need to (for example, if it turns out you can't make it after all).
- **The NoC point person.** This person's name and contact information is in that "hour before" email. They are available 30 min before the phone bank time officially begins. Feel free to check in with any questions about getting started.
- **The campaign manager.** This person works for the candidate, and will be leading the Zoom meetings before and after we start calling.
  - In the Zoom meeting before we call, they will explain the script and talk about "who" is on the call list (for example, whether they are Democrats or Unaffiliated; lower-frequency or higher-frequency voters)
  - They also bring the group back together in a Zoom meeting after the calling time is over, so we can talk about how things went.
- **The Google Hangout.** This is a casual, ongoing chat among all the phone bankers during the call time (link is in the "hour before" email).

- You are welcome, but it's totally optional. This is the place where we ask questions, share information & encourage each other
- Some people download Hangout on their phone and follow along there, or you can "pop out" Hangouts as a small window on your laptop.

**4. Above all, remember that you only have to "be yourself" to make real connections with people and spread the word about these amazing candidates.** A few suggestions to help you bring your best self to the calls:

- If you fumble a few words or have an awkward interaction, know that it's ok! That's the way it goes sometimes.
- Find a quiet space, mute your devices, and reduce distractions so you can focus on having great conversations.
- Avoid giving the impression that you're an outsider (e.g., say "We are reaching out to people in the community today", rather than "This is Jane Doe calling from Chapel Hill").
- If someone is difficult, like if they start getting upset or arguing with you, just say thanks for your time and politely end the call.
- If someone has a question you can't answer, just make a note and ask the campaign to follow up. If you don't know, don't guess.

**5. Remember the bottom line:** With each and every call you make, you're helping build the path for this candidate to win. It's a lot of work, but we are sharing the load, and **this is how we win.**