

# OnlinePhoneBanking.com

## Quick Guide

*How to Use This Campaign Tool*

### WHAT YOU WILL NEED

- **Computer with internet connection & browser**  
(*Firefox is recommended on a MAC or PC, but Netscape and Internet Explorer will work. SAFARI is unfortunately not recommended as the color-coding is unreliable.*)
- **Telephone** (cell phone or land line)

### GETTING STARTED

- Position yourself in **front** of your computer with your telephone.
  - Open your internet browser and go to link provided in the email online phone banking invitation you received.
- ★ For courtesy, make your calls **ONLY between 9:00 AM and 9:00 PM Central time**.
  - ★ A hands-free headset also will make typing much easier.
  - ★ Make sure that you are comfortable so that you can make many calls!

### SIGN-IN (FIRST-TIME USER ONLY)

- At the sign-in screen, click on the link "Register New User" at the right.
  - Complete the information fields.
  - Click on the "Register" button.
- ★ The **Full Name** (FirstName LastName) and **Password** that you enter here will be the sign-in info that you will use each time you phone bank.
  - ★ A verification email will be sent to the email address you provide. Follow the instructions within the verification email to complete the registration process.

### SIGN-IN (REGISTERED USER ONLY)

- At the sign-in screen: Enter your registered **Full Name & Password**, and then click on the "Sign In" button.

### CHOOSE YOUR CAMPAIGN

- From the drop-down list, select the appropriate campaign, and then click on the "Choose" button.

### BEFORE YOUR FIRST CALL OF THE SESSION, GET FAMILIAR WITH THE SCRIPT

- **BEFORE MAKING YOUR FIRST CALL**, get familiar with the current script by reading through the full screen and each section.
  - **Once you are familiar and comfortable with your campaign's call content, dial the voter's number and get started!**
- ★ **Be certain that you read the "NOTE (Do Not Read To Voter)" section** (just below the "You Are Calling" section). This section will provide valuable info, including the type(s) of voters you'll be calling in this session.
  - ★ **Sections:** Refer to the next page for details about each section.

### RECORD THE VOTER'S RESPONSES

- **If the voter answers, politely determine to whom you are speaking.** There might be more than one voter listed, so remember to **mark the radio button next to the person's name. DO NOT survey someone not listed.**
- As you read **each question in the survey**, listen to the voter's response and mark the corresponding answer. Reply to the voter according to the script.
- **Ask for &/or verify voter information** as needed when prompted to do so in the script. Enter/Update voter information in the fields provided.

### SUBMIT THE COMPLETED CALL

- When you have completed the current call, click on the "Submit" button.
- ★ Even if this is your last call of the session, **be sure to click "Submit" to conclude your last completed call.** This will ensure that information about your contact with this voter is saved.

### MAKE ANOTHER CALL

- To continue with another call to voters within the same campaign, click on the "Make Another Call" button and repeat the voter call process.
- ★ You can make another call only after you have clicked on the "Submit" button for the previous call.

### CHANGE CAMPAIGNS

- If needed, click on the "Change Campaigns" button to select a different campaign to phone bank.
- ★ You can change campaign lists only after you have clicked on the "Submit" button for the previous call.

### END YOUR CURRENT SESSION BY LOGGING OUT

- To end your current call session, click on the "Log Out" button.
- ★ **Please only log-out after you have clicked on the "Submit" button for the previous call. Please do not close your browser window without first logging out.**

**THANK YOU FOR PHONE BANKING ONLINE!**

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## Quick Guide

Sections within the Campaign Tool

YOU ARE LOGGED IN AS	
<ul style="list-style-type: none"> <li>Displays the <b>User Name</b> under which you are currently logged in.</li> </ul>	<ul style="list-style-type: none"> <li>★ If the displayed name is <u>not</u> your User Name, click the "Log Out" link next to the User Name display and log in using your registered Name and Password.</li> </ul>
YOUR CAMPAIGN	
<ul style="list-style-type: none"> <li>Displays the <b>campaign call list name</b> that you selected.</li> </ul>	<ul style="list-style-type: none"> <li>★ If the displayed campaign name is <u>not</u> the one you need, click the "Change Campaign" link next to the campaign name display and select the correct campaign.</li> </ul>
YOU ARE CALLING	
<ul style="list-style-type: none"> <li>Displays the <b>name(s)</b> and <b>date(s) of birth</b> of the <b>registered voter(s) residing in the household</b> at the displayed address and telephone number.</li> </ul>	<ul style="list-style-type: none"> <li>★ The <b>date of birth</b> can assist you in knowing the age of the person you are surveying &amp;/or in distinguishing between generational relationships for persons with the same name in the same household.</li> <li>★ When asking for the voter by name, listen for the possibility that the voter will correct your pronunciation of their first or last name and <b>use the correct pronunciation thereafter</b> in the call.</li> <li>★ <b>If the section displays MORE THAN ONE voter's name</b>, follow the procedure below: (NOTE: Always be sure to mark the radio button next to the name of <i>the actual person you survey</i>.) <ul style="list-style-type: none"> <li>○ Call the household and, based on the perceived gender of the person who answers, ask for the first name of the same gender provided in the list.</li> <li>○ If you make contact with this person, continue and complete the survey.</li> <li>○ If this person is not available, ask for the next person listed for the household.</li> <li>○ Survey <u>only one</u> person in the household.</li> </ul> </li> </ul>
VOTER RESPONSES – VOTER CONNECTION	
<ul style="list-style-type: none"> <li>Displays possible connection outcomes upon dialing the voter's phone number</li> <li>Mark the applicable <b>connection type</b> for the call.</li> </ul>	<ul style="list-style-type: none"> <li>★ <b>NO CONNECTION:</b> No Answer <u>vs</u> Answer. Voice Mail <u>vs</u> No Voice Mail. Good Phone Number <u>vs</u> Bad Phone Number.</li> <li>★ <b>CONNECTION:</b> Positive Conversation <u>vs</u> Negative Conversation <u>vs</u> No Conversation.</li> </ul>
VOTER RESPONSES – SURVEY QUESTIONS	
<ul style="list-style-type: none"> <li>You will be asking the voter one or more <b>questions</b>, depending on your script.</li> <li>After asking each question, <b>mark the applicable response</b> based on the voter's answer to the question.</li> <li>Based upon the voter's specific response to the question, <b>there may be a follow-up question</b>. Ask the follow-up question &amp;/or verify information as needed, according to the script.</li> </ul>	<ul style="list-style-type: none"> <li>★ Based on the voter's response to the question, <b>follow the color-coded visual cues</b> for follow-up questions &amp; information-gathering in the script: <ul style="list-style-type: none"> <li>○ <b>Green (Good/Go)</b> = Supports us; potential volunteer/donor</li> <li>○ <b>Yellow (Not Sure)</b> = Undecided</li> <li>○ <b>Light Red (Opposes our position)</b> = Does NOT support us</li> </ul> </li> <li>★ If follow-up requires you to enter contact information provided by the voter: Ask, verify, &amp;/or enter the <b>FULL telephone number</b> (area code + 7-digit phone number...<b>with NO spaces or special characters</b>) &amp;/or the <b>FULL email address</b> (identifier@domain.yyy). If possible, read your entry back to the voter: "Is this correct?"</li> </ul>
QUICK FACT CHECK	
<ul style="list-style-type: none"> <li>"Almost done, can I verify your address?"</li> </ul>	<ul style="list-style-type: none"> <li>★ <b>If the answer is "Yes":</b> click the "Yes" checkbox and proceed to the address and phone display. <ul style="list-style-type: none"> <li>○ <b>Ask for &amp;/or verify voter information</b> as needed when prompted to do so in the script. Record or update voter contact information in the fields provided.</li> <li>○ <b>Note on Landline:</b> If the voter does not have a landline but has a cell phone only, enter the cell phone number.</li> </ul> </li> <li>★ <b>If the answer is "No":</b> politely proceed to the next Closing section.</li> </ul>
COMMENTS ABOUT THE VOTER (OPTIONAL)	
<ul style="list-style-type: none"> <li>Free-form text field for you to enter <b>comments about the voter</b></li> </ul>	<ul style="list-style-type: none"> <li>★ Enter <b>relevant comments</b> about the voter's attitudes, beliefs, questions, membership in groups or clubs, or if they work for a candidate, etc</li> </ul>
<p><b>THANK YOU FOR USING ONLINEPHONEBANKING.COM!</b></p>	