

# How to Phone Bank

Phonebanking is one of the best ways to communicate with your audience and community. It's a great way to combine scalability with in-depth conversations and engagement. This guide will help you prepare to be as successful as possible on the phone with advanced calling tips. It's important to use these tips and make sure your team gets them as well. Phonebanking success *is* team success!



## BE YOURSELF AND BE PREPARED

### Be Yourself

- **Make the script your own.** A phonebank script is essential for success. It helps to keep every caller in sync on the same talking points and information about the subject of the phonebank. However, you rarely want to go word for word on your script. This will help you avoid coming off flat or robotic and allow you to connect to your contact. This will also give your message more weight as the contact will be able to tell that you are speaking from the heart and not just reading from a script that someone else wrote.
- **Be sincere & authentic.** Every phonebanker is different. We all have our own ways of communicating that may be informed by our personality, cultural background and passion for what we are calling about. The best phonebankers use their own personality and unique way of communicating to their advantage and stay authentic to how they naturally speak. This goes along way to:
  - » Communicating the passion of the movement and inspiring action
  - » Making a connection with the person on the other side of the phone
  - » Giving your message more weight
- **Being a volunteer is better than being an expert.** You never need to feel like you know everything. Many phonebankers are wary about getting started because they feel like they will hurt the campaign by not being able to answer every question. If you run into a question you can't answer, no biggie, you can always let your contact know that you are a grassroots leader, not a political expert but that you'll relay their question to someone who can address it.

### Be Prepared

- **Practice the script.** While everything we mentioned in the "Be Yourself" section is 100% true and important to understand, just being yourself won't be enough to find success on the phone. You'll also need to have a good understanding of the script so you know:
  - » Where to find **key talking points** when you need explain or answer a question
  - » The **general flow** of an ideal conversation and all the information you need to communicate and record.
  - » Where you can find **extra resources** like FAQs, follow-up asks and more information.
- **Do your research on the current campaign.** This doesn't need to be extensive, though you want to have a general understanding of the greater campaign that you are supporting. This will help inform your approach to the conversation, your tone and all of the possible twists and turns that your conversation could take.

- **Know the Plan.** The most important thing to have completely internalized is the specific mission of the phonebank you are joining. Everything you do on the phones should be in the service of this mission and fully understanding the mission will help you stay 100% on the path to many successful calls.

## ERADICATE LIMITING BELIEFS

### Shift The Power

- **You are not asking for a favor.** This is big. So many phonebankers have a tough time on the phone because they are nervous about asking for a favor from someone they don't know. This is 100% understandable. If we were asking for favors from random people that would be WEIRD. But phone banking is not about favors.
- **You are bringing value!** Making calls is a service to your community. You are making it easy for your audience to get key information and take action on issues of importance to them. As a phonebanker if we can go into each conversation with this level of confidence and self-assurance we'll find much more success. Your contact will be able to pick up on this and thus be more inclined to engage with the call. No one wants to do random favors for an organization, but people really want to do things that will help give them more power and representation.

### Why People Say No (or Hang up)

- **It's not personal.** No answer, hang ups and even a cranky contact here and there are totally normal parts of every phonebank. Don't take any of this personally.
- **Nothing to do with you.** Who knows what's going on on the other side of the line. We'll never be able to reach everyone on the phone and it's likely that no matter who made the call, the call would have ended up like this.
- **It could be a bad day... move on.** Have a tough call or lots of no pick ups? Hang in there and in most cases your luck will turn. Being able to sift through the challenging calls is a great service to the team because it will allow others to get to the folks who may be a supporter.

## INTRO, ASSUMPTIVE SALUTATION & ADDRESS CONCERNS

Good introductions are the most important part of the call and your call script. This is especially true for cold calling where you may be trying to reach people who haven't heard of your organization, your movement or even the specific subject that you are calling about.

The cold nature of these conversations means that your introduction will likely make or break the call as it will be the time in which your contact decides whether to hear you out or not. That means extra special attention on how you are introducing yourself and your focus, is more than worthwhile.



### Greet the person as if you know them

- **“Dan!” or “Hey Dan”.** One awesome tip is to avoid sounding like your calling from an organization or campaign at the outset of the call. Start the call with a friendly, upbeat tone and act as if you just connected to an old friend who you’ve been trying to get a hold of. Say their first name as if you know them.

### Put them at ease right away

- **Honesty and transparency.** Sometimes as phonebankers we feel as though we need to hide the purpose of the call and wait until later in the script to describe what we are calling about. You should always strive to do the opposite. Come right out and as soon as possible let them know why you are calling and what your intentions are.
- **“I’m not calling to ask for money.”** Unless you are doing a fundraising phonebank, this is something you want to mention right away. So many people are wary of fundraising calls, that if they hear you are from an organization they’ll assume that’s what you are calling about.

### Experiment

Trial and error. Ultimately, it is important to understand that each list is different. So as long as you’re sticking to the talking points, experiment with what works for you on this particular list.

### SET UP, MIRROR & FIND COMMON GROUND

The set up is the thrust of the call. This is where you can answer questions, communicate information and build tension toward your ask by explaining the problem at hand, the urgency for action and the solution that it will lead to.

### Adjust to your contact:

- **Volume & Pitch.** We want to be in sync with whoever we are talking to. This will help us make connections and inspire action. Trying to follow your contact’s lead and match their energy level is a great way to encourage rapport. If they are positive and upbeat, bring the pep and take it up a notch. If they sound a bit tired or more subdued, take it easy and bring it down.
- **Speed & Cadence.** Always important to make sure that you are not rushing through your call. Slow down, take pauses and emphasize key parts of your script. This will help give your message more weight, make you easy to understand and help you project confidence over the phone.



### Find Common Ground

- **Listening & intuition.** One of the best things to do at the front of the call is to ask questions. Get your contact talking and sharing with you. This will help engage them on the call and help you avoid talking “at” them rather than “with” them. You’ll also have an opportunity to learn more about who you are talking to which you can use to help connect them to the issue you are calling about.

- **Share the disdain for the problem.** A great way to build rapport with your contact, is to connect over the frustration that you both feel. Allow your contact to elaborate on how this affects them and validate that feeling with them by hearing them out and expressing your concern.
- **Use this to transition into the “ask”.** Everything you are doing in the second part of the call including sharing information, asking questions and explaining your campaign, should be in service of leading into your main ask for the call. A successful set up should make your ask easy and natural.

## THE ASK, MAKE IT A STATEMENT & EXPRESS GRATITUDE

Your ask is your grand finale. It’s where you take all of the great things that you have done on the call (including, introducing yourself, introducing the campaign, making a connection, building rapport, answering questions and explaining the need for action) and put everything together with a hard ask for action.

### Make it a statement

- **Confident & casual.** Your ask, though it may be a question, should sound more like a statement than anything else. We want to go in to the ask assuming that your contact will say yes, and phrase your questions accordingly. Using phrases like “this is something you can do, right?” OR “In a moment, we’ll connect you with this resource, does that sound good?” are great ways to encourage positive responses with assumptive language.
- **Low tone of voice.** Try to avoid raising your tone during your ask, which can communicate a level of unsureness. Land your ask on a low tone of voice to project confidence.



## EXPRESS GRATITUDE

- **Thank them regardless of outcome with sincerity.** We always want to increase the positive image of the campaign and thus it’s important you do whatever it takes to leave your contact off and feel the best possible feeling about your interaction. Approach the conversation with grace, empathy, and appreciation for their time.
- **“You really helped us all out today.”** For successful calls, explain the impact they are making and make them feel proud for doing their part. This will help encourage them to do more in the future.