How to Text Bank

HOW TEXTBANKING WORKS

Most textbanks use online software that allows you to have text conversations with supporters very quickly via your computer. Each software is different so it is important to adapt what you learn from this guide to your specific texting tool.

Through texting you can help guide supporters to an action or event that's relevant to them and update them on campaigns in their area. Campaign staff or volunteer leaders should provide you with training and support during your first couple textbank shifts. Many volunteers really enjoy textbanking and keep coming back for more!

GETTING SET-UP

Step 1: Make an account on the textbank tool the campaign is using.

Step 2: Connect with a volunteer community that can provide you with support, links to resources with more information. This should usually be organized by the campaign you're texting with and is oftentimes hosted on Zoom or a chat platform like Slack or Discord.

SENDING MESSAGES

Once you have been assigned your first batch of texts, the initial message should usually be loaded for you. Repeatedly click the "send" button (using your mouse or the enter key) until all texts are sent. You must send all the initial texts you are assigned before moving on to the next step!

ANSWERING REPLIES

Once you have sent all of your initial texts, refresh your dashboard to see the number of replies you've received and click on "Respond" to go to the new messages and start replying.

USING RECOMMENDED REPLIES

When you're ready to respond to a text reply that you received please use the pre-written responses provided at the bottom of the page by campaign organizers to help you answer the most commonly received questions for that campaign.

Find the reply that relates to the text reply you have received, click on it, and that language will simply populate into your texting conversation.

Feel free to add personal salutations into the reply before you click "send" to make it feel more personal, or to customize it for a situation that is a little different than the ones outlined in the recommended replies.

However, please remember that these responses have likely been carefully formulated and approved by the campaign team, and we'd like you to use them whenever it is appropriate to do so.

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Don't see a recommended reply for the situation you're dealing with? Don't know which one to select? It's always okay to check in with a campaign leader or fellow texter to see if they have some guidance for you.

CLOSING & OPTING OUT

There are usually two very important functions on you texting software to be aware of:

CLOSE - Once you have had a conversation and gotten a clear answer or a final response from someone, you may click the "Close" button at the bottom of the text conversation to move that conversation off of your screen. Doing so will not delete the conversation, it will move the conversation to a separate folder that you can access from your dashboard. This function helps keep your texts organized so you know which conversations you still need to respond to.
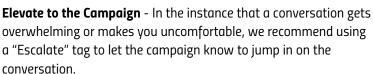
OPT-OUT - Sometimes you will encounter people who no longer wish to receive text messages from RepresentUs. Sometimes they will politely ask to be removed from our list, and other times they won't be so polite. A common response is "STOP", which many people type because they think we are an automated system (like when you receive text updates from your bank or pharmacy). Regardless of the manner in which the request is made, please click the "opt-out" button at the bottom of the conversation to remove this person from our contacts. Don't worry about sending another message to them to confirm the Opt Out, as that might provoke further agitation. It's best to leave it there.

TAGGING CONVERSATIONS

Some texting software allows you to tag conversations to let the campaign know what conversations need attention.

Moved - Sometimes you'll be sending texts into a specific region with an ask that requires the person you're talking to to live in that area. When you encounter someone who has moved out of state, we recommend using a "Moved" tag to let the campaign know to update their info.

Wrong Number - Sometimes you'll text a different person than what's on file who doesn't want to be opted out. In these cases, we recommend using a "Wrong Number" tag to let the campaign know to update their info.

Elevate to the Campaign - In the instance that a conversation gets overwhelming or makes you uncomfortable, we recommend using a "Escalate" tag to let the campaign know to jump in on the conversation.

SIGNING OFF FOR THE DAY

One of the most important things to note when asking for a text assignment is that you will not only be responding to people who reply to you right away, but also to people who respond to you later. When signing off for the day, some software have a feature you can use to release your texts to make sure they get answered after your shift is finished.

Best Practices

Before you sign on and start texting, here are three very important principles to ensure that you and the people you interact with have a positive experience:

- **RESPECT** - You will have a wide range of texting conversations, some of which will be very heartwarming and easy, and some that will be more challenging. We encourage you to offer lots of enthusiasm for anyone who is willing to have conversations with you, whether or not they initially agree with your position on a campaign. However, please know that you are not expected to engage in conversations with people that are disrespectful to you, and in turn, we ask that you never get into arguments or speak disrespectfully to anyone you are texting on behalf of the campaign. While it's a good policy to be persuasive and patient with people, we don't want you to waste your time having a lengthy conversation with someone who has no intention of participating in our asks or changing their mind about an issue. Sometimes your conversation will be planting a seed that will need to be watered by future interactions with RepresentUs, so a few back-and-forth messages with only the pushbacks we have pre-written for you are enough. We want you to focus on conversations where you can make an impact.

- **CONSENT** - It is legally imperative that if anyone asks to be removed from our list, you remove them. Please do not continue to text anyone who says "STOP," "do not contact me anymore," "please remove me from your list," or anything else that implies they do not want to communicate with you.

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