

## How to Create a Phonebank in Votebuilder

Phonebanking can be an efficient way to connect with voters, especially during Get-Out-the-Vote efforts. Follow these steps to set up a Virtual Phone Bank in Votebuilder.

1. Create a list. Use the same process you have been using to build the universe your campaign needs to call.
2. Once you run your search, click the Phones icon and choose "Set up Virtual Phone Bank List"
3. "Use this static list"
4. Fill in the information.
5. For the script, be sure that you built a script unique to phonebanking, especially if you are doing GOTV.
6. When choosing the end date, think about how long you want volunteers to be able to access this phone bank- what is the goal of the phonebank? Will matchbacks effect who you should be spending volunteer time contacting?
7. Publish to openvpb.com.
8. Show all also in household.
9. If you are calling during GOTV, be sure that the "exclude anyone who has Early Voted or Absentee Voted" is checked. If matchbacks have started, Votebuilder is automatically set to check this box, but it is worth it to double check.



## Votebuilder Predictive Dialer

To use the Predictive Dialer in Votebuilder, you must request access from the State Party. They will bump up the level of your account and you will have to provide them with a phone number to serve as the outbound caller id number. This is the phone number voters will see pop up on their screen. We suggest setting up a google voice number to serve this purpose. Google Voice numbers are connected to a real number (so either the campaign manager's phone or a campaign phone number) but if voters call the number back it is not someone's personal line.

*When using the Predictive Dialer, each person making calls needs to have their own user account (with an Action ID login in your campaign's Votebuilder committee).*

### User Account Set-Up:

1. Create free Gmail accounts for however many volunteer user accounts you want to have. I would recommend 5-6 accounts especially since the predictive dialer works the best with 5-6 callers.
2. Follow the new user set-up in Votebuilder, creating a user account for each email address you created- set them up as Field (5) Super Volunteer. This is a good example of what the user accounts should look like in Votebuilder:

The screenshot shows the 'User: Strauss Volunteer 4' profile page in the DNC VOTEBuilder Washington interface. The page is divided into several sections:

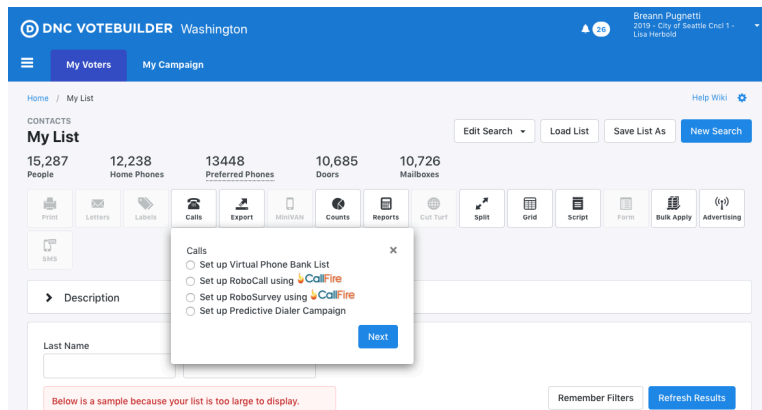
- ActionID Profile:** Displays the ActionID Email (straussvolunteer4@gmail.com), Name (Strauss Volunteer 4), and Phone Number ((616) 560-3848).
- Status:** Includes radio buttons for 'Active' (selected) and 'Inactive', a 'Date Expires' field, and a checkbox for 'Set the time'.
- Committees:** A table showing committee access. The table has columns for Name, Person Access, and User Profile. The entry is '2019 - City of Seattle Cncl 6 - Dan Strauss' with 'District Access' and 'Field (5) Super Volunteer' access. A 'Delete' link is present. Below the table is an 'Add Committee Access' link.
- Teams and Divisions:** Shows 'No Team or Division Assignment' and an 'Assign to a Team' link.
- User Groups:** Includes an 'Add New User Group' link.
- Name:** Fields for 'Account Name' (Straussvolunteer4), 'Last Name' (Volunteer 4), 'First Name' (Strauss), and 'Middle Name'. The 'User ID' is 1748835.
- Linked Person Records:** Includes a 'Link new Person Record' link.



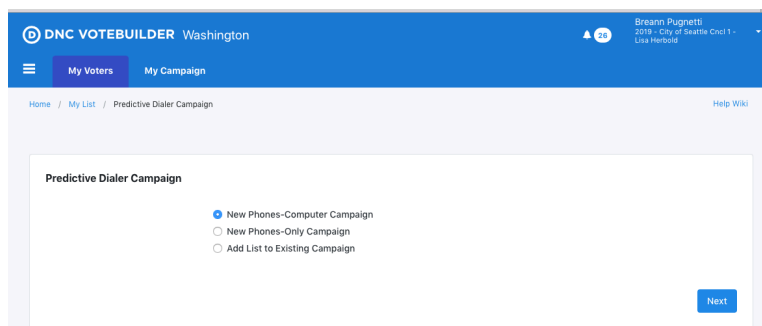
3. Set up each new user with an Action ID- Use your phone number for the 2-factor log in. When you are logging folks in during the phonebank, you will have to set them up one at a time.
4. Accept the invite in each volunteer Gmail account, in order to connect the Action ID to the committee.

## Predictive Dialer Set-Up

1. Create a new list.
2. Click the “Calls” icon and choose “Set up Predictive Dialer Campaign”



3. Choose “New Phones-Computer Campaign”



#### 4. Set Up tab:

- a. Don't worry too much about the Invitation Text, Volunteers will click into the Predictive Dialer when they sign into the volunteer accounts.
- b. Be sure that you have previously created and saved a full script for phone banking in the scripts section of Votebuilder- you will be able to select from a dropdown menu when setting up the Predictive Dialer Campaign.
- c. Decide if you want volunteers to be able to leave messages while making calls. If you'd like them to leave messages be sure to click the check box for "Connect Callers to Answering Machines"
  - i. If you are calling known supporters for GOTV, it can be helpful to leave messages reminding folks to vote for your candidate
  - ii. If you are making persuasion calls, and choose to leave messages, don't remind folks to vote, incase they are not a supporter.
- d. Leave the Transfer field blank.

The screenshot shows the 'DNC VOTEBuilder' interface for a 'Washington' campaign. The user is logged in as 'Breann Pugnetti' (2019 - City of Seattle Council 1 - Lisa Herbold). The navigation bar includes 'My Voters' and 'My Campaign'. The breadcrumb trail is 'Home / Predictive Dialer Campaign / New'. The main heading is 'New Phones-Computer Predictive Dialer Campaign'. Below this is a tabbed interface with 'Set Up' selected, followed by 'Display', 'Schedule', 'Users', 'Payment', and 'Approval'. The 'Set Up' form includes the following fields and options:

- Leads (Phone Numbers): 8,547
- Campaign Name\*: GOTV 8/1
- List Name\*: GOTV 8/1
- List Description: (empty text area)
- Invitation Title\*: GOTV 8/1
- Invitation Text: (empty text area)
- Script\*: Herbold Volunteer Phonebank (dropdown menu)
- ☒ Connect Callers to Answering Machines
- Transfer: (201) 555-0123 (with a US flag icon)

At the bottom right of the form are two buttons: 'Save And Exit' and 'Next'.



5. **Display tab:** This is mainly personal preference but some tips:
  - a. **Householding:** It can be helpful to see everyone in the Household, in case someone besides the voter you are looking for answers or is available to speak. It is best practice to ask for the voter you are looking for specifically- but that does not always happen and talking to any voter is better than none.
  - b. **Display with Name:** I recommend displaying the age.
  - c. **Show Additional Info:** Some of this info can be helpful depending on the type of universe you are calling into.
  - d. **Additional Info Appears:** personal preference
  - e. **Editable Display:** I do not recommend volunteers editing any information

The screenshot shows the 'DNC VOTEBuilder' interface for a 'Washington' campaign. The user is logged in as 'Breann Pugnetti' with a notification badge showing '55'. The navigation bar includes 'My Voters' and 'My Campaign'. The main heading is 'New Phones-Computer Predictive Dialer Campaign'. Below this is a tabbed interface with 'Set Up', 'Display', 'Schedule', 'Users', 'Payment', and 'Approval'. The 'Display' tab is active, showing various configuration options:

- Householding:**
  - ☒ Do not display Also in Household
  - ☐ Show only People in Household from Predictive Dialing List
  - ☐ Show all Also in Household
- Display With Name:**
  - ☒ Age
  - ☐ Party
  - ☐ Source File Sex
- Show Additional Info:**
  - ☐ Congressional
  - ☐ County
  - ☐ Date Effective Registration
  - ☐ Date of Reg
  - ☐ Early Vote Address
  - ☐ Early Vote City
  - ☐ Early Vote Location
  - ☐ Early Vote Phone
  - ☐ Likely Party
  - ☐ Polling Address
  - ☐ Polling City
  - ☐ Polling Description
  - ☐ Polling Location
  - ☐ Precinct
  - ☐ Preferred Email
  - ☐ Preferred Phone
  - ☐ State House
  - ☐ State Senate
  - ☐ Voter File VANID
  - ☐ Voting Address
  - ☐ Voting City
  - ☐ Voting City and Zip
  - ☐ Voting City, State, Zip
- Additional Info Appears:**
  - ☐ Above the Script
  - ☒ Below the Script
- Editable Display:**
  - ☐ Self-Reported Demographics
  - ☐ Addresses
  - ☐ Salutation
  - ☐ Phones
  - ☐ Email
  - ☐ Activist Codes
  - ☐ Survey Responses
  - ☐ Notes
  - ☐ Contact History

At the bottom of the form are buttons for 'Prev', 'Save And Exit', and 'Next'. The footer indicates '© 2019 NGP VAN - Privacy Policy'.



6. **Schedule tab:** Schedule for when you will be calling into this universe
7. **Users:** In order for volunteers to access the Predictive Dialer Campaign you must add the volunteer accounts (and any other user account) to the “With Access” box in the Predictive Dialer set-up.

The screenshot shows the 'Users' tab in the DNC VOTEBuilder Washington interface. The page title is 'New Phones-Computer Predictive Dialer Campaign'. Below the title are tabs for 'Set Up', 'Display', 'Schedule', 'Users', 'Payment', and 'Approval'. The 'Users' tab is active. It features two columns: 'With Access' and 'Without Access'. The 'Without Access' column contains a list of names: C, C; Coutsoubos, Christena; Dye, Nathan; Folsom, Nancy; Gustavson, Jeffery; Herbold, Lisa; Joshi, Marthili; Pugnetti, Breann; Riel, Natalie; and Scott, Gunner. There are 'Remove' and 'Add' buttons at the bottom of these columns. At the bottom right, there are 'Prev', 'Save And Exit', and 'Next' buttons.

8. **Payment:** When setting up your first Predictive Dialer campaign, you are able to set up your payment options while setting up the campaign.
  - a. Click on the Account Dropdown
    - i. Choose the Predictive Dialer Account that you set up for your campaign
  - b. Click “Purchase More Minutes” and follow the steps to set up a payment card

The screenshot shows the 'Payment' tab in the DNC VOTEBuilder Washington interface. The page title is 'New Phones-Computer Predictive Dialer Campaign'. Below the title are tabs for 'Set Up', 'Display', 'Schedule', 'Users', 'Payment', and 'Approval'. The 'Payment' tab is active. It features an 'Account' dropdown menu and a 'Purchase More Minutes' button. Below these, there are labels for 'Calling Minutes Available', 'Equivalent Volunteer Hours', and 'Equivalent Dollar Amount'. At the bottom right, there are 'Prev', 'Save And Exit', and 'Next' buttons. At the bottom left, there is a copyright notice: '© 2019 NDP VAN - Privacy Policy'.



9. **Approval:** agree to the terms and conditions to complete set-up for the Predictive Dialer campaign

Once the Predictive dialer is set up, it will appear in the Quick Tasks menu in Votebuilder on each account that you granted access. “Quick Tasks” are located on the Main Menu in each. NOTE: The Predictive Dialer is NOT the same as the Virtual Phone Bank that is listed in Quick Tasks, a second Phone Icon will appear below that with the name of the Predictive Dialer Campaign that you created.

