



# SETTING UP A PHONEBANK

Never set one up before? No worries! It's easy.  
Make sure you bring your cellphone to use!

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## FIND A LOCATION

### Where to Look

- Rooms in community centers
- Coffee shops or restaurants
- Someone's dining room

### What to Look For

- Free, open, quiet space
- Wireless internet connection

### Other Things to Think About

- Parking will make or break your phonebank.
- If it's a business building, you should make sure the security features don't make it impossible to get into the building.
- Bathrooms. An important detail.

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## RECRUIT VOLUNTEERS

*To have an effective phonebank, you'll need at least  
10 people for 3 hours, or 30 people for 1 hour.*

### Recruitment Ideas

- Call/email your personal contacts
- Post a flyer (sample included) at your church, community center, school; leave flyers at meetings of other organizations that might be interested (limit your printed materials to 500 or fewer)
- Put it up as an event on Facebook
- Email your MyBO group listservs
- Make sure it gets added as an event in local Democratic party newsletters, calendars
- Reach out to the local student community—colleges and high schools

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## RUNNING THE PHONEBANK

- OFA will provide you with a call script and the numbers—through paper sheets or an online phonebanking tool
- Tally the calls as you're making them, and announce them on a regular basis—progress will keep your group upbeat
- Your work doesn't exist unless it's been reported to the campaign. Recruit data enterers to do data entry while you're making calls! Timely and complete data entry is critical—submit completed data entry and the day's total tally sheet at end of day.
- Consider having snacks and drinks available (bottles of water are always good)
- Don't forget to thank your volunteers, and use the opportunity to ask them to sign up for another phone bank or activity.

*For more information, check out Grassroots Financial Guidelines,  
available at: [my.barackobama.com/guidelines](http://my.barackobama.com/guidelines)*



# KEEPING YOUR TEAM MOTIVATED

Remind everyone why we're here:

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## KEEP THEM ON TASK

There's no need to talk policy issues—you can direct people to the website for specifics. The important thing to get across that Barack's candidacy is change we can believe in. Phonebankers should tell voters why they're drawn to Barack: personal stories and experiences are what this campaign is all about—connecting us to each other.

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## THE NUMBERS GAME

Use your tally sheet to keep your phonebank motivated. Tally your calls as you go and announce the milestones! There's nothing more encouraging than knowing how many people you've convinced today and top callers should be recognized for their hard work. Count 'em up.

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## HAVE SNACKS AND DRINKS AVAILABLE

Some pretzels, bottles of water or juice, cheese and crackers, grapes can keep people on the phones and noshing during the times when they start thinking maybe it's time to go home for the day.



# PHONEBANK DATA ENTRY

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## DISTRIBUTING CALL LISTS TO MAKE ENTRY EASIER

Make sure you know who has which pages of your list. When the data entry person goes to enter all the information, having all the completed pages in order will make his or her life a lot easier.

If you're having a phonebank on Saturday, Sunday, Monday, and Wednesday, give out call sheets from the top of your pile and try not to distribute pages randomly.

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## THINGS YOU NEED TO KNOW TO DO YOUR DATA ENTRY

- Your login info as assigned. Check with your phonebank captain for this.
- The name of the script you're using for the phonebank. Check with your phonebank captain for this.
- The list number (11 digits) on the bottom of your call sheet.

It'll look like something like this:

*My List · List 901494-45421 · Page 1*

- The voter ID of the first person listed on your sheet.

It'll look something like this:

*VAN ID: 7205433*



# DATA ENTRY STEP-BY-STEP

1. **Go to** *votebuilder.com* and **log in** using the login and password assigned to your group.
2. The first screen you'll see when you login will ask you to select a state. **Select** "*VoteBuilder Pennsylvania.*" Then select **continue**.
3. Now you're in the main menu. On the right hand side, there's an option under Load Data that's called "*Grid View.*" **Click** on this.
4. It brings you to a new page where you are asked which list you want to use. **Select** "*Let me select a list number.*" and **type** in the list number you found on the bottom of the sheet. Hit **next**.
5. This brings you to a screen that says Grid View. On here, you will:  
SCRIPT: Select the name of the script your phonebank is using from the drop down menu.  
CANVASSER: volunteer  
DATE: will automatically jump up.  
SOURCE: Calling.  
**Do not change anything else on the screen.**
6. Hit **next**.
7. You'll end up on another screen that says Grid View. It'll have a bunch of voters on it. **Select** "*Go to VoteBuilder ID.*" from the options at the top of the screen. **Enter** in the voter id at the top of your call sheet. (This makes sure that you're in the right place on your list.) **Wait** for the page to reload.
8. **Check** and make sure that the name in the top left corner matches the name of the voter on your list and just spot-check to see if the next five people are in the right order too.
9. As you scroll to the right on the page, you'll see the questions on the call sheet reflected. So, for example, the results drop down will give you the same options as your call sheets (not home, left message, etc.) all the way through presidential preference and any other question that may be on the script. **Select** the appropriate responses in each field for each voter.
10. Every ten or fifteen voters **hit save** because otherwise the system will log you out and your work will be lost.
11. When your work is completed, make sure you've **hit save** and just **logout** of VoteBuilder.
12. Draw a **line** through the paper call sheet so you know it's been data entered.