

# Phone Bank Best Practices

## Best Practices

1. Decorate the room, have noise-makers, provide give-aways and prizes to your volunteers.
2. If possible, have computers set up in advance so your volunteers can sit down at a work station.
3. Computers with a mouse are more user-friendly than tablets.
4. Headsets are handy so volunteers can type with both hands
5. Set business rules in advance –how will you deal with leaving voicemail? Where should checks be sent? (See section on Business Rules)
6. Center your event around a meal.
7. Post results as you go!
8. Ideal time schedule:
  - 9:30 Volunteers arrive (no later than this time), log in, orientation & training
  - 10:00 Calling begins!
  - 12:00 Lunch and celebration
9. Provide:
  - Power strips at tables
  - Extra cell phone bank chargers
  - Pen & paper at each work station
10. Have extra staff/volunteers available to answer questions and offer situational advice during the phone bank
11. Set up a friendly competition between volunteers/volunteer teams

## Business Choices

Post answers to these business choices on a white board or screen so volunteers can always see the answers.

1. How will you handle leaving messages?
  - a. Will you leave a voicemail? What number should the volunteer give? Note, if volunteers are calling on their cell phones, many times members call back on the volunteer's cell phones because that is what is saved.
  - b. What action should the volunteer take?
    - i. Volunteer clicks "No Answer" leaves notes and the target will reappear in the queue in 30 minutes to be called again (or available to be looked up if the target calls back).
    - ii. Volunteer clicks "Send Email" and personalizes the email. Note, if the target calls the volunteer back, the member's record in the phone bank cannot be recalled. Volunteers should tell the member that he/she already received an email, and can walk the member through the investment process.
2. How will you collect checks if a member doesn't want to pay by credit card?

## Best Practices for Devices

Volunteers Bringing Their Own Devices	Association Provided Devices
<p>Send volunteers (advocates) 2 emails (using the Mass Activity Email Wizard in Aristotle)</p> <ol style="list-style-type: none"> <li>The first email has the Advocate Link and Advocate ID.</li> <li>The second email has the Advocate Password.</li> </ol> <p>For security purposes, always send Advocate login information in 2 emails.</p>	<p>Have each device/workstation set up in advance. Volunteers can log into the advocate panel:</p> <p><a href="https://nar.ai360.aristotle.com/public/fundraising/login.aspx?clientID=2e166870-894a-423a-a6f7-6560a8904c6c">https://nar.ai360.aristotle.com/public/fundraising/login.aspx?clientID=2e166870-894a-423a-a6f7-6560a8904c6c</a></p>
<p>Make sure you've exported the list of Advocate information so you and your team can assist volunteers with the login process in case they forget their user information. See instructions: <a href="http://www.realtoractioncenter.com/phonebanks">www.realtoractioncenter.com/phonebanks</a> &gt;Reference Materials&gt;Day Of Phone Bank&gt;Exporting a List of Volunteer (Advocate) Information.</p>	<p>Make sure you've exported the list of Advocate information so you and your team can assist volunteers with their login information.</p> <p>See instructions: <a href="http://www.realtoractioncenter.com/phonebanks">www.realtoractioncenter.com/phonebanks</a> &gt;Reference Materials&gt;Day Of Phone Bank&gt;Exporting a List of Volunteer (Advocate) Information.</p>
<p>At the phone bank, direct volunteers to click the Advocate Link provided in your email.</p> <p>If volunteers have problems launching the Advocate panel, have them launch a browser they use less frequently.</p> <p>E.g. If a volunteer usually uses Chrome, have him log into the advocate panel using Firefox or Explorer.</p>	<p>Provide each volunteer with his/her Advocate ID and Password.</p>
<p>The phone bank advocate panel will launch, and the first target will appear.</p>	<p>Have all volunteers log in. Upon login, they will land on their fundraising overview page.</p> <ol style="list-style-type: none"> <li>Click the Phone Bank tab.</li> <li>Click the blue button for the phone. Application will launch in a pop-up window. The first target will appear.</li> </ol>
<p><b>Once all volunteers can see their first target, conduct a training to review how to use the phone bank software and the Association's desired business practices for the phone bank</b></p>	

To find Advocate information in Aristotle, go to the volunteer's individual record (search him/her in Quick Search), open the volunteer's record, and look on the right side of the page under the tab for Advocate Functions.