

Phone Bank Common Scenarios

1. The member just said he's closing a sale at the end of the month and can't pay until then."

Answer: Send the member an email and personalize it, reminding him to pay at the end of the month.

2. The member says, "I need to come by the Association office, can I stop by and pay by credit card then?"

Answer: Yes. Put the member in "call back" status and put a note in. Then Association staff will be able to recall the target at a later date/time to collect the credit card information.

3. "The person I'm supposed to call has already been contacted by another volunteer. What do I do?"

Answer: Collaborate! Ask your fellow volunteer if he would like to call the member back or if you should.

4. "I do not want to call the target (member) that is on my screen. What do I do?"

Answer: Collaborate! Ask one of your fellow volunteers if he/she would like to call the target instead. If yes, the original volunteer should put the target in "Call Back" status. The second volunteer can then use the "search for a target feature" to get the target's record.

5. "I want to call a specific person. How do I do that?"

Answer: Use the "search for a target" feature. If that person is part of the target list and has NOT already been contacted by another volunteer, you can access the record.

6. "The member wants to make an investment, but is uncomfortable giving me his credit card information because he doesn't know me."

Answer: Give the phone to an Association staff member, and have him/her take the credit card information (and process via the phone bank). If the member is still uncomfortable with that, you can send him the email link, but then wait on the phone while he processes the investment.

For more information, go to:

www.realtoractioncenter.com/phonebanks

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