



## Virtual Phonebank Management

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A Virtual Phone Bank (VPB) is a great tool for making calls when a computer and internet are accessible for each caller. It brings up a script on the screen where people can enter responses as they go through the course of the call, schedule people for events via the scheduler, and do the data entry right as they are making the calls. This is especially useful for first-time callers, new VAN users, and people who have to work remotely who cannot pull their own lists.

This guide will cover how to pull a typical list, how to set up a Virtual Phone bank and two ways to get that list to people. Keep in mind that the list you use to create the Virtual Phone Bank should NEVER be the same list used for a printed call sheet at the same time. Virtual Phone Banks show people in a random order, so the list must be split ahead of time, usually by pulling a different target or location for each list. It is always safe for multiple people to use one Virtual Phone Bank at the same time – the people on the list will not appear for more than one person.

### Creating a typical list:

In most cases, lists created in SmartVAN require two key pieces of information: what location is being called, and what sort of people you are trying to reach out to. To create that list, click on Create a New List from the main menu of SmartVAN.



**Location:** In many states, location is specified using region/chapter/team names, under the "OFA Region", "OFA Chapter" and "OFA Team" labels – in others, those turfs are still being defined and Counties or Cities are used in their place. Select the location being called.

**Targets:** These are subdivisions of people to be called based on what we know about their involvement with Organizing for Action and past activity during 2012. Hot Leads are either recent online signups, on a volunteer and/or issue-specific form, or people who recently said they wanted to volunteer on a call, while active volunteers have attended events and prospects are people that have not been engaged much yet this year. Generally pull targets separate from each other to make more specific asks and to call through the best list first.

A sample selection set is shown below – when done, click Search in the upper right.



**Location**

State

OFA Region

OFA CO

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**Targets**

Include people in  of the following:

OFA 4.0 : Online Hot Leads

OFA 4.0 : CIR Hot Leads

OFA 4.0 : GVP Hot Leads

### Creating a Virtual Phone Bank:

To create a Virtual Phone Bank, after creating the list you will use specifically for the VPB, you will be on the My List screen (or if not, click Go to My List from the Main Menu). Click on Calls, and click "Set up Virtual Phone Bank List", shown below. This takes you to the VPB setup screen.

#### My List

223 People  
215 Doors  
215 Mailboxes

+ Add People			- Remove People			Narrow People				
Print	Letters	Labels	Calls	Counts	HH Wiz	Save	Split	Sample	Grid	Script

On the following page, the VPB requires a name, Script, and what fields to display during the course of the calls. A common selection set for displayed items is as follows, noting that Address, Phone and Email need to be in the editable section to add updated information.

**Upper Display:** Age, Party, Sex  
**Lower Display:** <Blank>

**Editable Display:** Addresses, Phones, Email  
**Viewable Display:** Districts

- **Start date** and **End date** for your VPB: while this list will only be used for the VPB, someone may want to create a list of the same area at a later date, and if making lists of Hot Leads, remember they only stay hot for a week at most, so in general do not create VPBs with an end date more than a week out.
- **Daily Availability** indicates what time the phone bank will be active during the day, and should not go past 9pm (you can type 9pm and it will format it correctly). Time limit should usually be left blank, as well as Contact Limit.

**Distribute voters by zip code:** do not check  
**Householding:** Show only People in Household from VPB list

**Include Event Scheduler:**  
Check  
**Status:** Active

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## Allow Users to Repeat Session: Only applicable if limits set

Name	Montgomery CIR Hot Leads 06.17
Description	
List Size	223 People
Script	OFA Comprehensive Immigration Reform (CIR)
Upper Display	<input checked="" type="checkbox"/> Age <input checked="" type="checkbox"/> Party <input checked="" type="checkbox"/> Sex
Lower Display	<input type="checkbox"/> Cell Phone <input type="checkbox"/> Congressional <input type="checkbox"/> County <input type="checkbox"/> Date of Reg <input type="checkbox"/> Email <input type="checkbox"/> Home Phone <input type="checkbox"/> Precinct <input type="checkbox"/> Preferred Phone <input type="checkbox"/> State House <input type="checkbox"/> State Senate <input type="checkbox"/> Voting Address <input type="checkbox"/> Voting City <input type="checkbox"/> Voting City and Zip <input type="checkbox"/> Voting City, State, Zip <input type="checkbox"/> Work Phone <input type="checkbox"/> Work Phone Ext
Lower Display Appears	<input type="radio"/> Above the Script <input checked="" type="radio"/> Below the Script
Editable Display	<input checked="" type="checkbox"/> Addresses <input type="checkbox"/> Salutation <input checked="" type="checkbox"/> Phones <input checked="" type="checkbox"/> Email <input type="checkbox"/> Volunteer Profile <input type="checkbox"/> Notes <input type="checkbox"/> Events
Viewable Display	<input checked="" type="checkbox"/> Districts <input type="checkbox"/> Activist Codes <input type="checkbox"/> Survey Responses <input type="checkbox"/> Contact History
Start Date	6/17/13
End Date	6/20/2013
Daily Availability	5:00 PM to 9:00 PM Eastern Standard Time
Calling Round	1
Time Limit	Minutes
Contact Limit	Successful Contacts
Progress Bar	<input checked="" type="checkbox"/> Show Individual Progress <input checked="" type="checkbox"/> Show Entire Phone Bank Progress
	<input type="checkbox"/> Allow users to repeat session <input type="checkbox"/> Distribute voters by zip code <input checked="" type="checkbox"/> Include Event Scheduler
Householding	<input type="radio"/> Do not display Also in Household <input checked="" type="radio"/> Show only People in Household from Virtual Phone Bank list <input type="radio"/> Show all Also in Household
Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive

## Granting Access to your Virtual Phone Bank (needed for yourself as well):

Once the VPB is created, you will arrive at the edit page for your VPB. You may also access this screen from the main menu via Phone Services on the far left menu, clicking VPB, and clicking on your VPB in the list of active VPBs once you find it. This is where you have two options to grant access to make calls into the VPB, noting that a VAN account is required to use VPBs:

- One is using the VPB Code at the top of the VPB editing screen, which is entered in the Virtual Phone Bank List section. This is especially useful if you do not know which users will be using the VPB ahead of time, or if new users are created shortly before a phone bank. An example is shown below:

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### Edit Virtual Phone Bank

Name	Montgomery CIR Hot Leads 06.17 *
VPB Code	2534BH-1369

- The other option is to assign the VPB to specific users so the VPB will appear in their VPB list accessed from the main menu, and this must be done for yourself as well if using this method.

At the bottom of the page, you will find the User Access section, pictured below. Select the users you want to have access to your VPB from the right and click Add, using Ctrl-click or Shift-click to select multiple if needed to save time. When finished, click Save.

**User Access**

Committee: Organizing for Action

Users with access	Users <i>without</i> access
	Stevens, Kate Vangunderson, Mark

Remove      Add

### Using the Virtual Phone Bank:

From the main menu, after being granted access, click Virtual Phone Bank, and either select the VPB or enter the code that was shown in the Edit VPB screen. A sample of this selection is shown below:

**Quick Tasks**



**Virtual Phone Bank**  
Make calls using Virtual Phone Bank



### Virtual Phone Bank

Which Virtual Phone Bank do you want to use?

Montgomery CIR Hot Leads 06.17

Let me select by VPB Code  -

This will bring you to a screen with information about a random person on the list. If the person does not pick up or you get no useful info from them, enter the result at the top and click Save/Next. If a person does pick up, you have the option to switch to someone else in the household if a different person picks up the phone than the person shown (names on the right). The script for the VPB is below, with fields available to fill out in-line on the script itself.

While making the call, mark the appropriate fields, and if you need to schedule the person for an event, click Schedule Volunteer at the top. When completely finished, click Save/Next to move to the next person. The other editable fields (Address, Email, Phone) are below the script.

**Chewbacca Solo**

**M D Age: 106**

**My Campaign ID: 102651173**

Phone Bank Progress

<p><input type="radio"/> Busy</p> <p><input type="radio"/> Call Back</p> <p><input type="radio"/> Deceased</p> <p><input type="radio"/> Disconnected</p> <p><input type="radio"/> Moved</p> <p><input type="radio"/> Not Home</p> <p><input type="radio"/> Other Language</p> <p><input type="radio"/> Refused</p> <p><input type="radio"/> Spanish</p> <p><input type="radio"/> Wrong Number</p>	<p><b>Also In Household</b></p> <p>None</p>
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OR

Hi. Is [NAME] available?

*Note that the Phone Bank Progress scale shows the progress of the phone bank to the total.*



**Scheduling People via Event Scheduler:** Click the calendar icon in the upper right, which will bring up a new window to schedule the person into an event. The events scheduler includes a calendar where you can select one or multiple days. This then populates the right-side of the scheduler with every event occurring on those dates, as well as the shifts, locations, and roles associated with them. You can select multiple dates by using the shift key on your keyboard.

The screenshot shows the "Event Signup Scheduler - Margery Miller" window. On the left is a calendar for June 2013 with dates 19, 20, and 21 selected. The main area contains a table of events with the following data:

Type	Event	Date	Time	Location	Role	Status
<input type="checkbox"/>	The Dream is Now Screening and Phone Bank at PICC	Thu 6/20	5:00 PM - 7:00 PM		Attendee	<input type="text"/>
<input type="checkbox"/>	Team Training with Stephanie Monahan	Thu 6/20	6:00 PM - 9:00 PM		Host	<input type="text"/>
<input type="checkbox"/>	Team Training with Stephanie Monahan	Thu 6/20	6:00 PM - 9:00 PM		Attendee	<input type="text"/>

At the bottom of the window are buttons for "Cancel", "Save", and "Save and Close".

You may restrict the events shown in the list to those matching a specified name, or within a specified radius of a ZIP code. Once you have located the appropriate shift, use the dropdown and mark the person Scheduled if they are coming to the event (or Declined if they said no).