

**PHONE BANK
HOSTS**
HARRIS
WALZ

PHONEBANKING HOST GUIDE

2024



PAID FOR BY HARRIS FOR PRESIDENT

**HARRIS
WALZ**



DEAR HOSTS FOR HARRIS,

Thank you for hosting a phonebank for Team Harris-Walz!

Phonebanks help us energize, organize, and mobilize voters all across the country through meaningful conversations. Holding these events together helps us:

- Build community, answer each other's questions, and ensure everyone has a good experience.
- Talk with undecided voters to share why we support Kamala.
- Boost turnout through high-quality conversations with real voters.

This toolkit includes resources and information to ensure your phone bank is impactful and successful!

HAPPY HOSTING!
Team Harris-Walz



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BEFORE YOUR PHONEBANK

We have a few easy steps for you to set up your phonebank!

1 Create Your Event in Mobilize

- Fill out the [Host a Phonebank](#) form on Mobilize.
- Phonebanks take 2 hours and can be scheduled any time.
- Make the event private so that it can only be accessed by the people you send the link to. It won't be publicly listed anywhere.
- It will take **24 - 48 hours** for an administrator to **approve** your event.
- See the next page for a guide to posting your event.

2 Build Your List of Invites

- Once you have your Mobilize link, you can invite your friends!
- Begin with the people you know best.
- Consider other communities you're part of, like a book club.
- Encourage your friends to invite their friends.
- **Tip:** You can use Mobilize to track your invites and RSVPs. We've also included an invite tracker at the end of this guide.

3 Get Your Call List

- Talk with your organizer to receive a dialer link.
- Ask everyone who is coming to have their smartphone, laptop, and possibly headphones.
- Test the link before your phonebank to make sure it's all set up!

Phone Bank To-Dos	When
<input type="checkbox"/> Create your event in Mobilize.	24 - 48 hours before invites
<input type="checkbox"/> Invite your friends and ask them to RSVP using your personal link.	1 week out
<input type="checkbox"/> Send out follow-ups to people who have and have not RSVP'd.	3 days out
<input type="checkbox"/> Send out reminders to attendees to bring tech.	1 day out
<input type="checkbox"/> Send out final reminders and a text/call to anyone who you invited but who hasn't responded.	Day of!

HOW TO POST YOUR EVENT ON MOBILIZE

Mobilize is an online platform for our campaign to centrally place all of our events, make our events visible, and follow up with participants who sign up.

Follow the steps below to create and register your phonebank in Mobilize. You can find the event form [here](#).

Step 1. Create your personalized event title: e.g. *Victor's Debate Watch Party*, *Denver Friends Debate Watch Party*, etc.)

Step 2. Set your event visibility to private: event details will be available to only those you share your event link with.

Step 3. Include logistics details for your guests: your address, parking and anything else. If you are doing the event virtually, include the Zoom link.

Step 4. [Optional] Add a co-host here: if you are hosting with a friend.

Step 5. Approval: it will take between 24 - 48 for an administrator to approve the event.

Step 6. The invite: share your event link with your list of invited guests

The screenshot shows the 'Basic information' section of the Mobilize event form. It includes a text input field for 'Event title*' with the placeholder text 'Phone Bank!'. Below this is a 'Photo' section with a large dark blue image containing the text 'HARRIS-WALZ PHONE BANK' in white, with the 'HARRIS WALZ' logo and a Democratic Party icon in the bottom right corner. Underneath the photo is a small caption: 'This image is set by The Democratic National Committee.' Below the photo is a 'Description*' section with the text: 'Join me to make calls to voters to elect Vice President Kamala Harris and Democrats up and down the ballot!'. At the bottom of the section, there is a note: 'You can change or add to this recommended description. Format this text using [Markdown](#).'

The screenshot shows the 'Visibility' and 'Location' sections of the Mobilize event form. The 'Visibility' section has two radio button options: 'Public' (selected) with the description 'Listed on The Democratic National Committee's public feed and on select partner feeds. Anyone can view the event page.' and 'Private' with the description 'Only people with a link can view the event page.' The 'Location' section has a 'Type' section with two radio button options: 'In-person' (selected) and 'Virtual'. Below this is a text input field for 'Event location (required)' with a search icon on the left and a blue arrow on the right. At the bottom of the section, there is a checkbox labeled 'Only attendees can see this location' which is currently unchecked.

COMMUNICATION TEMPLATES

Phonebanks are a fun opportunity to gather with friends and make a positive impact on the election! We encourage you to come up with creative ideas for your event (“Cookies and Calls for Kamala”, anyone?). At the end of the day, there is power in coming together to make calls in community. You can use and customize these templates to invite, confirm, and follow up with invitees.

Invite Email

Subject: Let’s make calls for Kamala!

Hi NAME,

I’m hosting a phonebank at LOCATION on DATE! It goes from TIME to TIME. I’d love if you could join us so we can make calls for Kamala together! We have a once-in-a lifetime opportunity to get her elected, and while making calling seems scary, I know we can do hard things together!

You can RSVP here: [INSERT YOUR MOBILIZE LINK]

See you soon,
YOUR NAME

Thank You Email

Subject: Thank you!

Hi NAME,

Thank you for coming to my phonebank. It was great to see you!

I also wanted to make sure you knew about future volunteer opportunities with Team Harris-Walz. Here is a link with all the virtual and local events: <https://events.democrats.org>.

Thanks for joining us and I hope to see you soon!

YOUR NAME

Confirm Text

Hi NAME, can’t wait to see you on DATE at TIME for our phonebank! Don’t forget to charge your phone and bring headphones. See you soon!



IN-PERSON

Preparing for Your Phonebank

Getting things ready in advance will help your phonebank run smoothly! Here is a list of all the things you'll need to do ahead of time.

- Familiarize yourself with the script and talking points.** Ultimately, the best conversations are the ones where you can share **your genuine enthusiasm** about Vice President Kamala Harris and Governor Tim Walz and also **ask and listen** to what the voter has to say. Our call scripts are carefully crafted and evidence-based. It's important to use the script to help guide your conversations as you're talking to voters.
- Print necessary materials.** See the checklist below for all of the materials we suggest printing for your phonebank.
- Make sure you know how to use the dialer.** You can do this by testing out the link that your organizers gave you or by attending a [national organizing phonebank](#) to see what it's like in practice.
- Read the agenda or create your own.** We've attached an agenda for you on the next page.
- Know how you'll train and support your fellow callers.** You might have very experienced callers or people who are brand-new to phonebanking. Some callers might need more instruction. You can let the pro phonebankers go ahead and do their thing while the others learn the basics. It's good to have a separate space where you can troubleshoot while others are dialing.
- Get some water and snacks ready!** Phonebanking is thirsty work! Having water and snacks available to your phonebankers is appreciated.

Print Checklist (everything is included in this guide)

- Sign in Sheet
- Call Tracker
- Tips for Dialing
- Dialer Instructions

IN-PERSON

Agenda

Here is an agenda for your phonebank. It's best to make calls together for at least one hour so that everyone can get the hang of it!

1. Welcome and Introductions: 10 minutes

- Welcome everyone and thank them for coming.
- Share a little about why you support Vice President Harris and Governor Walz.
- Ask people to introduce themselves, share why they're supporting Harris-Walz, and whether or not they've phonebanked before.

2. Who We're Talking to and Why it Matters: 5 minutes

- Our campaign strategy is to reach voters everywhere! Phone calls are critical to persuade undecided voters and recruit volunteers, share critical voter education information, and mobilize voters to take action with us.
- Phonebanking is a great way for us to talk to lots of hard-to-reach voters.

3. How We're Calling and What We're Saying: 10 minutes

- We will be using a dialer that automatically connects us when someone answers the phone. You can use the dialer from a browser on your phone. It uses a local number, so your number won't be shared.
- There might be periods of waiting in between conversations.
- Preview a script in the dialer.

4. Practice! 10 minutes

- Have people pair off and practice going through the script together.

5. Review Best Practices and Set Expectations: 5 minutes

- See the tips on the next page!

6. Make Calls! 60 minutes

7. Debrief and Take a Photo: 10 minutes

- See the debrief guide in this document.

ONLINE

Preparing For Your Phonebank

Getting things ready in advance will help your phonebank run smoothly! Here is a list of all the things you'll need to do ahead of time.

- Familiarize yourself with the script and talking points.** Ultimately, the best conversations are the ones where you can share **your genuine enthusiasm** about Vice President Kamala Harris and Governor Tim Walz and also **ask and listen** to what the voter has to say. Our call scripts are carefully crafted and evidence-based. It's important to use the script to help guide your conversations as you're talking to voters.
- Get your links ready.** You'll need a Zoom link, dialer link, and a link on [best practices](#) to share with your callers in the chat. You'll also need information on how people can [sign up for their next shift!](#)
- Make sure you know how to use the dialer.** You can do this by testing out the link that your organizers gave you or by attending a [national organizing phonebank](#) to see what it's like in practice.
- Read the agenda or create your own.** We've attached an agenda for you on the next page.
- Know how you'll train and support your fellow callers.** You might have very experienced callers or people who are brand-new to phonebanking. Some callers might need more instruction. You can let the pro phonebankers go ahead and do their thing while the others learn the basics. It's best if you can create breakout rooms on Zoom to talk privately with anyone who needs support.
- Check in!** What are some ways you might share the joy of calling together while you're on Zoom? Think about how you might make it competitive (Bingo?) or fun (dance break?).

ONLINE

Agenda

Here is an agenda for your phonebank. It's best to make calls together for at least one hour so that everyone can get the hang of it!

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- Welcome everyone and thank them for coming.
- Share a little about why you support Vice President Harris and Governor Walz.
- Ask people to introduce themselves, share why they're supporting Harris-Walz, and whether or not they've phonebanked before. Depending on the size of the group, you should do this either through the chat or by coming off mute.

2. Who We're Talking to and Why it Matters: 5 minutes

- Our campaign strategy is to reach voters everywhere! Phone calls are critical to persuade undecided voters and recruit volunteers, share critical voter education information, and mobilize voters to take action with us.
- Phonebanking is a great way for us to talk to lots of hard-to-reach voters.

3. How We're Calling and What We're Saying: 5 minutes

- We will be using a dialer that automatically connects us when someone answers the phone. You can use the dialer from a browser on your phone. It uses a local number, so your number won't be shared.
- There might be periods of waiting in between conversations.
- Preview a script in the dialer. A great way to do this is to share your screen and walk through the different elements in real time.

5. Review Best Practices and Set Expectations: 5 minutes

- Remind everyone that if they're having tech troubles, they can message you privately and you can try to troubleshoot together in a breakout room.
- Ask everyone to mute their Zoom audio and call through their phone so that you can still see each other but not hear each other.

6. Make Calls! 60 minutes

7. Debrief and Take a Photo: 10 minutes

- See the debrief guide in this document.

HOW TO HAVE QUALITY CONVERSATIONS

Say “hello” as quickly as possible. It takes a moment for the dialer to connect callers, so you want to say hello as soon as you get connected. You’ll hear a beep and see a green bar appear with the voter’s name.

Familiarize yourself with the beginning of the script. It’s easy to get flustered the moment you connect to a real voter! Knowing the greeting and introduction will help you make the most of the call.

Follow the script, and make it your own. Our scripts are based on research and carefully written for the voters we want to reach. You should stick to the script, but make it feel comfortable to your voice and style.

Focus on the personal. Try to speak from personal experience as much as possible. Share how something makes you feel or what something has been like for you and your family.

Don’t get into an argument. If someone is being argumentative or wants to debate, don’t take the bait! Keep your interactions positive. If someone wants to argue, thank them and move on.

It’s okay to say, “I don’t know.” If you don’t have the answer to a question or a policy position, let them know you don’t have the answer. That’s totally fine!

Smile while you dial. Yes, we can hear it in your voice when you smile on the phone! Channel Kamala’s joy and don’t forget to smile.



AFTER THE PHONEBANK

Debrief

- Thank everyone for attending your event!
- Talk about how it went! Ask people to share about their experiences. What worked? What was difficult? Any good stories?
- Ask attendees to fill out the call debrief form in the Resources section of this guide.
- As a host, you can provide feedback directly to the campaign through your Mobilize event.

Close Your Event on Mobilize

- Go to your Mobilize event and mark who attended and who didn't make it.
- Submit any feedback to the campaign and let us know if there's anything we can do help!
- Thank you for hosting!

Share the Joy (on Social Media)

- Don't forget to take a picture of the group! Posting action shots and memories online helps build momentum. Maybe a friend will see it and join you next time!
- You can also use Reach to share pictures and content with your friends, family, and other Harris-Walz supporters.

Download Reach using the following QR codes:

Apple:



Android:



Enter the Campaign Code: **HWVDJ3**

PHONEBANK RESOURCES



CALL DEBRIEF

Use this sheet to keep track of your calls! We'll use this to debrief together.

Name:

Phone calls made	Conversations had	Supporters ID'ed	Volunteers ID'ed

What did you hear on the phones today?

How was your experience as a phonebanker today? Any improvements?

Any questions?

Sign in Sheet

Event Name _____

Event Date _____

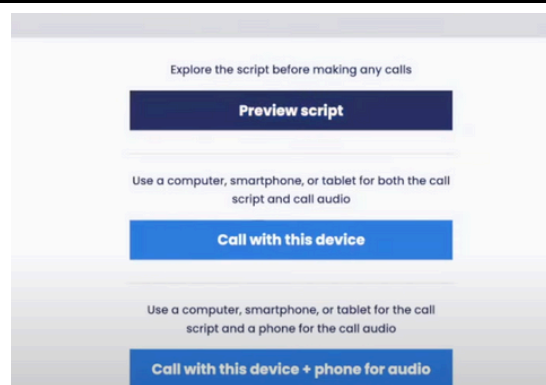
Name	Phone Number	Email	How will you participate?
			<input type="checkbox"/> Reach out to people you know <input type="checkbox"/> Host/attend community events <input type="checkbox"/> Share Campaign Content <input type="checkbox"/> Doorknock for the campaign <input type="checkbox"/> Create Campaign Content <input type="checkbox"/> Phonebank for the campaign <input type="checkbox"/> Reach out to people you know <input type="checkbox"/> Host/attend community events <input type="checkbox"/> Share Campaign Content <input type="checkbox"/> Doorknock for the campaign <input type="checkbox"/> Create Campaign Content <input type="checkbox"/> Phonebank for the campaign <input type="checkbox"/> Reach out to people you know <input type="checkbox"/> Host/attend community events <input type="checkbox"/> Share Campaign Content <input type="checkbox"/> Doorknock for the campaign <input type="checkbox"/> Create Campaign Content <input type="checkbox"/> Phonebank for the campaign
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HOW TO USE THE DIALER

We use a tool called Scale to Win (“the dialer”) to call lots of voters in a short period of time. Because we make different types of calls to voters across the country, you will be given a specific dialer link at the beginning of each volunteer shift.

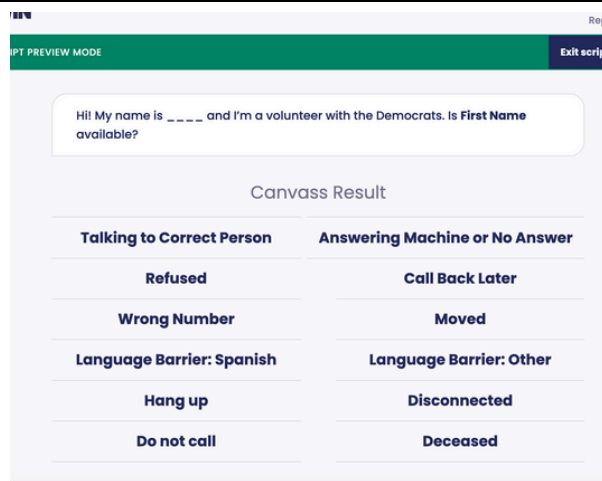
Step 1: Preview the Script

- When you open the dialer link, you will see options to start calls or to preview the script.
- Because scripts may change each shift, make sure you review the script each time.



Step 2: Review Each Part of the Script

- Make sure you’re comfortable with the introduction.
- When you click on “Talking to the right person,” you will be able to preview the full script. Scripts are dynamic, based on the answers you select.



Step 3: Understand Call Results and Orientation

- When you connect to a caller, the bar at the top of the screen will turn green.
- You will see their name and phone number on the right and in the green bar.

YOU ARE SPEAKING TO RUTH End call

CONTACT INFORMATION
Ruth
(212) 000-0000

Hi! My name is _____ and I'm a volunteer with the Democrats. Is Ruth available?

Canvass Result

Talking to Correct Person	Answering Machine or No Answer
Refused	Call Back Later
Wrong Number	Moved
Language Barrier: Spanish	Language Barrier: Other
Hang up	Disconnected

Canvass Results Key

Talking to Correct Person: They answered and are on your list! (Note: sometimes there are multiple supporters in the same household.)

Answering Machine: You got their voicemail

Refused or Hostile: Said they didn't want to talk or were mean

Busy/ Call Back: Mark only if someone explicitly asks to be called back.

Wrong Number: The phone number is owned by a new person.

Moved: They don't live in the location or state where you have them listed.

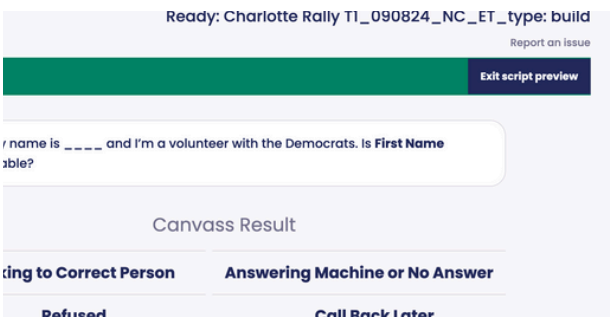
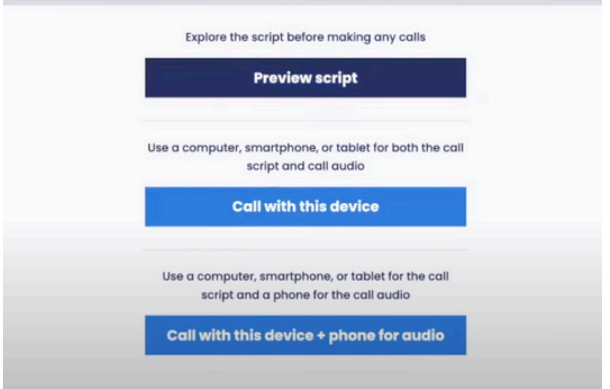
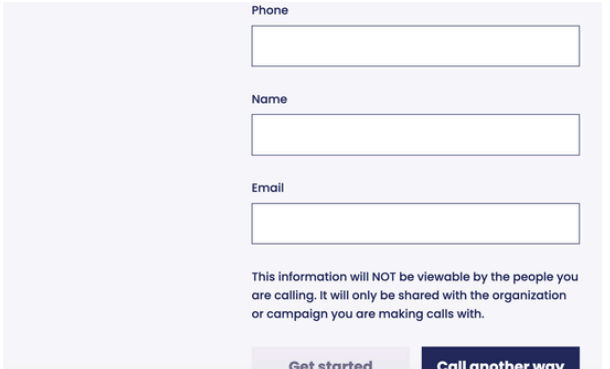
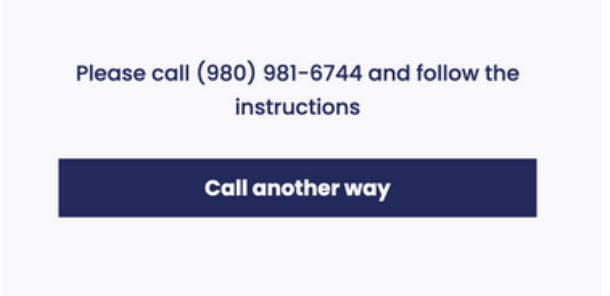
Language Barrier: They speak a language that you don't speak.

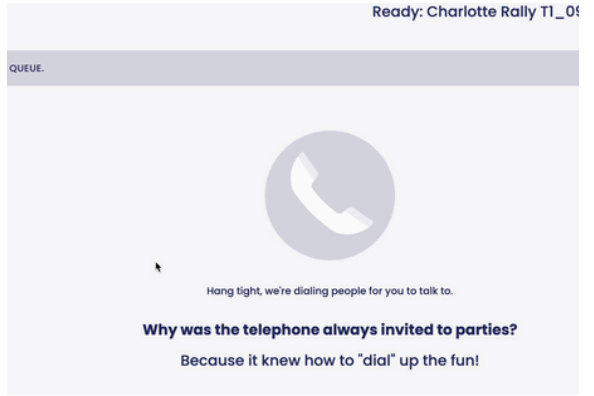
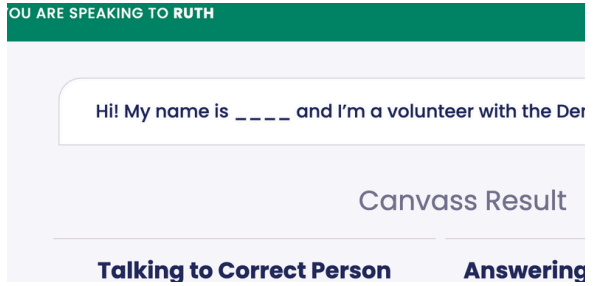
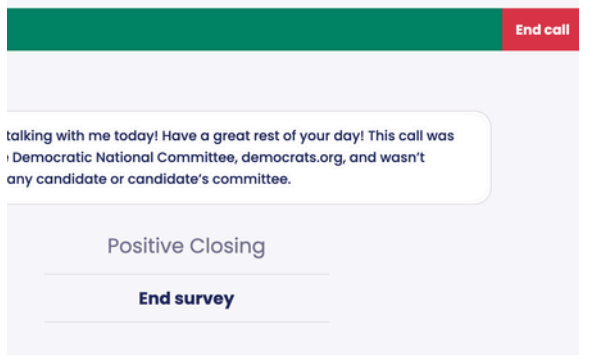
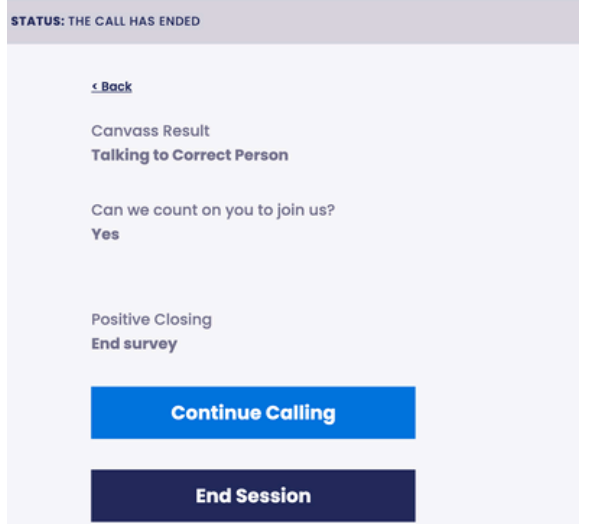
Hang Up: They hung up on you.

Deceased: The person you are looking for has passed.

Do Not Call: If the person specifically asks to be removed from the list.

Not In Service: You get a busy tone or disconnected number.

<h3>Step 4: Close the Script Preview</h3> <ul style="list-style-type: none"> Close the script preview by selecting “Exit Script Preview” on the top right. 	
<h3>Step 5: Select Call Method</h3> <ul style="list-style-type: none"> We recommend “Call with this device + phone for audio.” This provides the best call experience and audio. If you only have one device, select “Call with this device.” 	
<h3>Step 6: Enter Your Contact Information</h3> <ul style="list-style-type: none"> Your phone number will not show up when you make calls! We ask for contact information as a security measure. 	
<h3>Step 7: Call from Your Phone</h3> <ul style="list-style-type: none"> If you selected “Call with this device + phone for audio” you will need to call the phone number to connect your phone to the system. 	

<h2>Step 8: Start Making Calls!</h2> <ul style="list-style-type: none"> • The system will put you in a queue to take calls. • You'll see this gray screen until you connect with a caller. • The wait time between calls varies. 	 <p>Ready: Charlotte Rally T1_01</p> <p>QUEUE.</p> <p>Hang tight, we're dialing people for you to talk to.</p> <p>Why was the telephone always invited to parties? Because it knew how to "dial" up the fun!</p>
<h2>Step 9: Connect!</h2> <ul style="list-style-type: none"> • As soon as you seen a green bar, jump into the script. • Follow along with the dynamic prompts as they appear. 	 <p>YOU ARE SPEAKING TO RUTH</p> <p>Hi! My name is _____ and I'm a volunteer with the Der</p> <p>Canvass Result</p> <p>Talking to Correct Person Answering</p>
<h2>Step 10: Record Results</h2> <ul style="list-style-type: none"> • Select the correct call results as you go through the script. • You can even send text messages through the platform. • You can hang up at any point by clicking "End call." 	 <p>End call</p> <p>talking with me today! Have a great rest of your day! This call was Democratic National Committee, democrats.org, and wasn't any candidate or candidate's committee.</p> <p>Positive Closing</p> <p>End survey</p>
<h2>Step 11: End Call and Finish Survey</h2> <ul style="list-style-type: none"> • Select "End survey" when you are finished recording results. • The "Back" button is your friend if you need to go back and edit any results. • The final screen will give a summary of your conversation. Select "Continue Calling" to get back into the call queue. • If you are using your phone for audio, do not hang up on your phone! 	 <p>STATUS: THE CALL HAS ENDED</p> <p>< Back</p> <p>Canvass Result Talking to Correct Person</p> <p>Can we count on you to join us? Yes</p> <p>Positive Closing End survey</p> <p>Continue Calling</p> <p>End Session</p>

Thank you!

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