



## HOW TO

# Remote Phone Bank with NGP VAN's OpenVPB and OpenVPB Connect

[Getting Set Up](#)

[Start Making Calls](#)

[Phone Banking Best Practices](#)

[Common FAQs about Phone Banking and Open VPB](#)

[Setting up Google Voice](#) *(optional)*

## How do you get started with an Open Virtual Phone Bank (Open VPB)?

### What is a Virtual Phone Bank (VPB)?

Virtual Phone Banks allow volunteers to make calls from home in support of Democratic parties, organizations and campaigns. You'll be making calls on your phone and using your computer or tablet to review the script and voter information you need to make the calls. OpenVPB also has a new version of its software called OpenVPB Connect which allows you to call using your computer if desired or through your phone manually.

### Getting Started with OpenVPB

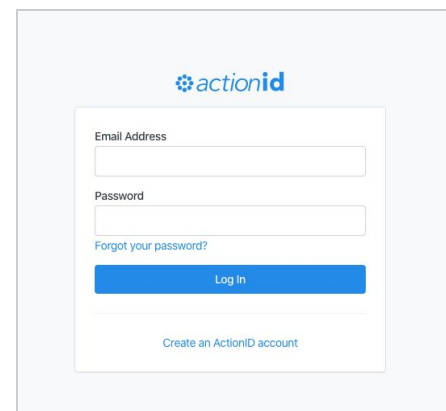
- **Gather the tools you'll need:**
  - **Phone (optional if the campaign has OpenVPB Connect) and headphones:** Most campaigns now have started using OpenVPB Connect which allows you to call through your computer. You can also still call through your phone if you prefer that.. If you are calling through your computer, you should make sure you have a good set of headphones that you can connect to your computer and that the speakers on your computer work. If you prefer to call through your cell phone or home phone or the campaign you are working on does not have OpenVPBConnect, you can make calls through your cell or home phone. The voter may be able to see your phone number, but we rarely have problems with voters calling volunteers back. You can set up Google

Voice on your cell phone in order to mask your phone number if desired.

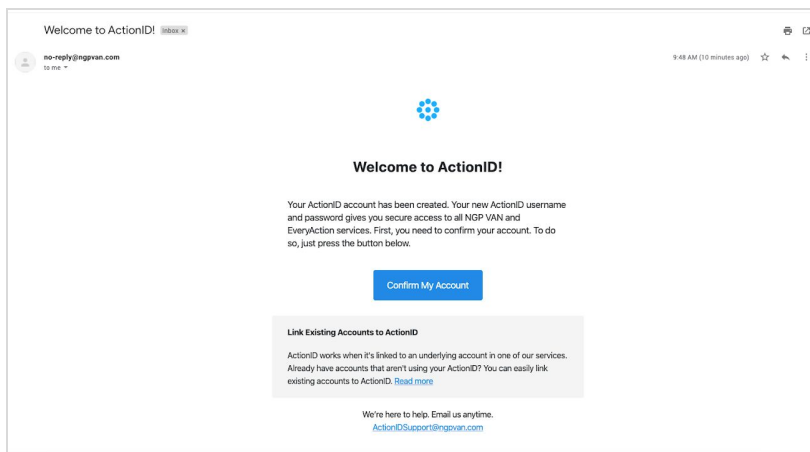
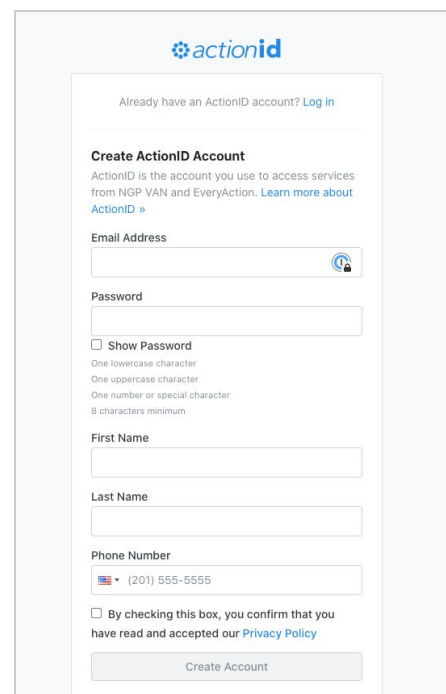
(<https://voice.google.com>). [Here's more info on Google Voice.](#)

- You can also block caller ID (\*67), but this may cause more voters to ignore the call. [Learn more in our FAQs.](#)
- **A computer or tablet and Wi-Fi or Internet Access:** You'll need a laptop, desktop, or smart tablet with internet access to use the VPB website.
- **Set up your Action ID.** [You can set up your ActionID at this link.](#) This is the password and username you'll need to log into this VPB and other phone banks using the Virtual Phone Bank software created by NGP VAN. **You will only need to do this once. If you already have your ID, skip to the next step.**
- **Pro Tip:** If you've canvassed in the past using the MiniVan app on your smartphone, you may already have an Action ID. You can click "Forgot Your Password?" to retrieve your password.

**Enter your email address, password, and phone number** (you don't need to use this phone number to make calls). If you're using a smartphone to log on, you may also have to enter your cell phone number. When asked to "Enable Two-Factor Authentication," check "Ask Me Later."

A screenshot of the ActionID login interface. At the top is the 'actionid' logo. Below it are two input fields: 'Email Address' and 'Password'. There is a link 'Forgot your password?' below the password field. A blue 'Log In' button is centered below the fields. At the bottom, there is a link 'Create an ActionID account'.

- **Look for an email** in the email account you provided (or a text if you set up your account on your phone) to confirm your Action ID account.

A screenshot of an email from 'no-reply@ngpvan.com' with the subject 'Welcome to ActionID!'. The email body features the ActionID logo and a heading 'Welcome to ActionID!'. Below the heading, it states: 'Your ActionID account has been created. Your new ActionID username and password gives you secure access to all NGP VAN and EveryAction services. First, you need to confirm your account. To do so, just press the button below.' A blue 'Confirm My Account' button is provided. Further down, there is a section titled 'Link Existing Accounts to ActionID' which explains that ActionID works when linked to an underlying account and provides a link to 'Read more'. At the bottom, it says 'We're here to help. Email us anytime.' with a link to 'ActionIDSupport@ngpvan.com'.A screenshot of the ActionID account creation page. At the top is the 'actionid' logo. Below it is a link 'Already have an ActionID account? Log In'. The main heading is 'Create ActionID Account'. Below this, it says 'ActionID is the account you use to access services from NGP VAN and EveryAction. Learn more about ActionID'. There are input fields for 'Email Address', 'Password', 'First Name', and 'Last Name'. The password field has a 'Show Password' checkbox and a list of requirements: 'One lowercase character', 'One uppercase character', 'One number or special character', and '8 characters minimum'. There is a 'Phone Number' field with a dropdown for country code and a text input for the number. At the bottom, there is a checkbox 'By checking this box, you confirm that you have read and accepted our Privacy Policy' and a 'Create Account' button.

If you are having trouble setting up or recovering your Action ID username and password, [check out additional FAQs below](#).

## Start making phone calls with Open VPB

- **Log in to the VPB with your Action ID here to make calls. Once you've logged in, you'll see who you are calling and the script.** You can see the voter and the voter's phone number whom you are calling above the script. Review the script and check out the questions for which you'll be recording data in a drop-down field embedded in the script.

The screenshot shows a web browser window titled "Open Virtual Phone Bank". The address bar shows "openvpb.com/VirtualPhoneBank/LoggedIn/C64E83B-942861". The page has a "VPS Test" button. On the left, there are fields for "Preferred Email" and "Preferred Phone". The main content area displays a script for a 23-year-old female voter. The script includes a greeting, a statement of purpose, and a series of conditional prompts based on the voter's responses. A dropdown menu is open, showing options: "Choose an option", "Yes", "No", "Not Sure/Don't Know", "Updated", "Needs VBSM", "Needs ID", "Refused - Hostile", and "Refused - OL".

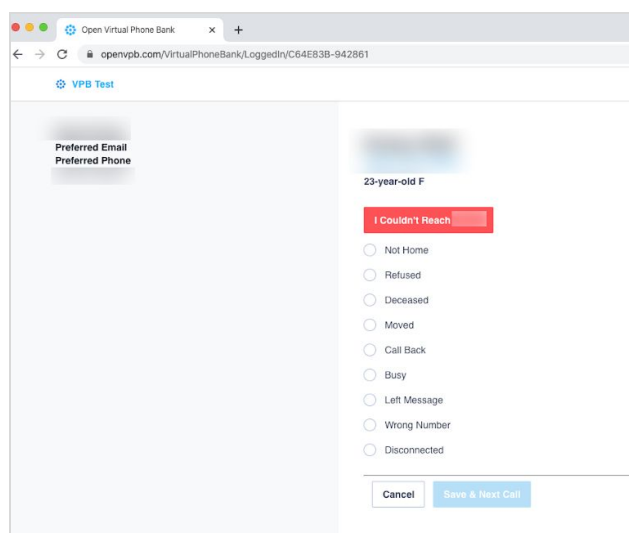
- Sometimes there will be multiple voters or names associated with the household and you'll see that in the upper right corner of the script also. Make sure to ask about both voters if you reach someone at that number. You might also see multiple numbers for a voter, and if so, the software will automatically ask you if you want to call additional numbers if you don't reach the voter at the first number.

The screenshot shows a call control panel. At the top, there are two tabs labeled "Martha" and "Martha". Below the tabs, there are three buttons: "Call" (with a phone icon), "Skip", and "Save & Next Call".

- **Call the voter listed using the “Call” button at the top right of your screen (if the campaign is using OpenVPB Connect).** If this is your first time using OpenVPB Connect, your browser may ask if it can access your microphone and you should allow it to do so. Clicking this call button will call the voter through your computer using a campaign-provided number. Using the “Call” button will not use your phone number. If there is no “Call” button, the campaign may not be using OpenVPBConnect, and you’ll need to dial the numbers manually through your cell or home phone.
- **If you reach the voter,** record the data directly in the script using the drop-down boxes throughout the script. You will not be able to move on to the next voter unless you’ve recorded an answer to at least the first question requested in the script. Do your best to record as much data as you receive from the voter. After recording this data, you’ll save and proceed to the next call at the bottom or top of the page.



- **If you don’t reach the voter,** you can click the red button beneath the voter’s name and provide information about the call before proceeding to the next call.



If you have further questions about phone banking or technical problems, please consult our [Common Phone Bank FAQs guide](#).

## Phone banking best practices

Be prepared for voters telling you ‘No’ or hanging up. You may only talk to a few voters in each shift. If we all work together, we can make a big difference in 2020.

### Here are some additional tips:

- **You won’t reach many voters and that’s okay - maybe less than 10%.** The races we are working on will be won or lost by slim margins so every conversation counts.
- **Be kind, empathetic, and understanding.** Keep in mind that you might be calling voters during an uncertain time.
- **Review the script and practice** before you start calling—take time to get familiar before you begin dialing.
- **Set a goal.** Commit to a specific time frame and hold yourself accountable. It’s harder to stay focused when you are at home, so hit your goals and take breaks where you need them.
- **Practice your introduction** with a warm friendly tone. Most voters decide whether to take your call within the first minute of your introduction.
- **Smile while talking,** this comes across to the voter. If you are able, you can try standing up during calling to help add energy to your conversation.
- **Be respectful.** If they can’t talk, politely end the call and thank them for their time. Even if the call didn’t go well or according to plan. It’s more important that you end the conversation on a positive note.
- **Use their name.** If you’re not sure you should call them by their first name—ask.

### Here’s what to avoid:

- **Don’t talk too fast** through your script. Take your time when speaking to make sure the voter hears what you have to say.
- **Don’t change the meaning of the script.** It’s good to put things in your own words, but avoid fundamentally going off the intention of the prompts in the script. It was prepared to be most effective and compliant with campaign finance law.
- **Don’t interrupt.** Let them finish their thought and then respond.
- **Don’t leave messages** (unless indicated in the script)—this is usually not an effective use of time.
- **Don’t call at unusual hours** in the time zone you’re dialing into. Generally, it is OK to make calls between 10am and 9pm in a voter’s timezone.
- **Don’t be afraid to say “I don’t know.”** It’s better to admit you don’t know than to give incorrect information. Try to find the answer for them, and if not ask the best way to follow up. Reach out to your phone bank leader when you’re done dialing to get the question answered.

## General Phone Banking Questions

**Q: Will voters I call be turned off by the fact that I am calling from outside their district?**

A: Voters are often called from out-of-district/state volunteers and it rarely comes up. You don't need to tell voters where you are calling from, but if they ask, be honest. Let them know you are calling into their district because the race is critical to the 2020 election. Let them know that their vote is important to you and to a lot of people outside of their district. If you are unfamiliar with a particular Super State, review the [Super State page](#) and if applicable, the candidate's own campaign website.

**Q: How long does it take to phone bank?**

A: You can phone bank for as long as you like, but it's always good to set aside a chunk of time that works for you. As a general rule, you'll average about 30 calls an hour, with about 5-10 conversations an hour; in other cases, you'll get wrong numbers and some people may even hang up on you. You may see around a 10% success rate. Don't get discouraged! Phone banking is most effective when we have real, honest conversations about why we're supporting our candidate and capture the information we need from voters.

**Q: What if I talk to someone else at the phone number who is not the voter indicated?**

A: Only record data for the voter listed in the VPB. If they are not available, click the pink button indicating that you could not reach the voter.

**Q: Do I have to stick to the script?**

A: Yes. Please follow the script. It was prepared using language and a structure that campaign staff knows to be most effective. Before you begin, take a moment to read the script out loud and practice a few times. That will help it feel a little more natural and comfortable.

**Q: If I get voicemail, should I leave a message?**

A: No. Your time is better spent contacting the next voter.

**Q: I seem to have lots of wrong numbers. Is there something wrong with my list?**

A: Probably not. There may be a lot of wrong numbers, and that's okay. Voter files are not always current, so with every number you call you are helping to refine the list.

**Q: I'm getting complaints about being called multiple times. Should I stop calling?**

A: No way! Voters will receive a lot of calls from other advocacy organizations like Swing Left, directly from the campaign, etc. You are not going to dissuade them from voting with your call. On the contrary, we know that it takes multiple contacts to get lower propensity voters to show up and vote. Be friendly and go through the script and if they don't want to talk just thank them for their time and move on to the next call.

**Q: The voter I'm talking with has a specific question that would be best handled directly by the campaign (for example, the voter would like a ride to the polls, would like to volunteer, or has an issue-specific question). How can I put the voter in touch with the campaign?**

A: If it's an issue-specific question, shoot us an email at [team@swingleft.org](mailto:team@swingleft.org) and we can work on getting an answer through our relationship with each campaign. If the voter wants to connect with the local campaign to ask for a ride to the polls or find out about volunteering, suggest that they reach out to the campaign directly using the email address on the campaign website.

**Q: I'd like to stop calling for the day.**

A: Thank you for volunteering! Instead of clicking "Save & Next," just click the "Stop Making Calls" button at the bottom of the script once you have completed your last call.

## OpenVPB Technical Questions

**Q: Does my number show? Should I block Caller ID?**

A: If the campaign you are helping uses OpenVPB Connect, you can call through your computer using a campaign-provided phone number. Just use the "Call" button at the upper right hand corner of your screen.

If the campaign is not using OpenVPB Connect or you cannot use your computer's audio, you can use your cell phone, home phone, or Google Voice (<https://voice.google.com>). With Google Voice, you can create a new number that you can use just for phone banking for free. You can download the Google Voice app wherever you get your apps. You can also block caller ID (\*67), but this may cause more voters to ignore the call.

If you'd like to use Google Voice, review the steps outlined in this [guide to setting up Google Voice](#) or [Google's help for using Google Voice on your phone](#) and [other videos](#) on using Google Voice on your phone. Google Voice has some features you'll want to review. For example, you can adjust settings in the app to ensure that any calls returned by voters will not ring through to your phone. In addition, Google Voice routes your call through their system which might make your phone look like it is dialing a different number from the one you typed in. If you want more than one Google Voice number, you will need to set up multiple Google accounts.

**Q: What if I can't hear the voter through my computer audio?**

A: If you are calling through your computer with OpenVPB Connect, please be sure you have a good headset and microphone connected to your computer. Also, you will need to be able to



adjust your computer's audio settings so that voters can hear you and you can hear them. Please dial from your phone (landline or mobile) if you are unable to call successfully from your computer.

**Q: How do I see who to call?**

A: Once you log in to the VPB, you will see your first call pop up. On the left side of the screen, you'll find some basic information about the voter, and in the center of the screen you'll see their name, phone number, and the script to use.

**Q: Where can I find a script for Virtual Phone Banking?**

A: After you log in, you'll see the script in the center of the screen and information on the left. Take a moment to read the script out loud. Look for the sections where you will need to enter information based on your conversation with the voter. This information is very important, so make sure you review it first, and input that data!

**Q: How do I save my answers?**

A: The system has prompts that are easy to follow. If you were unable to contact the voter, you'll click on the "I couldn't reach [Voter Name]" button at the top of the script, select why you were unable to contact them, and then press the "Save & Next Call" button. When you connect with a voter, you will complete the field embedded in the script. At the bottom of the page, it will prompt you to "Save & Next Call."

**Q: The script has an error. What should I do?**

A: Thank you so much for letting us know—good catch! Please send us an email at [team@swingleft.org](mailto:team@swingleft.org) with a screenshot or picture of the error and any information identifying where you saw it (candidate you're calling for, date you made the call).

**Q: I am trying to login to OpenVPB but keep getting an error message. Help!**

A: First, if you haven't phone banked with a VPB before, the first step is to click on "Create Action ID" and follow the prompts from there. For best results, we recommend doing this on a laptop, desktop, or tablet (rather than a smartphone), and enabling two-factor authentication. If you have just created an Action ID and are attempting to log on for the first time, make sure you have verified your identity by checking your email and following the instructions provided. You may also wish to double check that your email address and password have been entered correctly. Finally, in many instances, [clearing your cache/browsing data and cookies](#) will address the issue.

**Q: I have phone banked before, and forgot my password. Now I'm having trouble resetting my Action ID password for OpenVPB. Can you help?**



A: If you are trying to login to OpenVPB and you're experiencing difficulty with password reset, first check your junk or spam folder for the reset link. Please note that Action ID passwords must have an upper case letter, a lower case letter, a number or special character, and be more than eight characters long. Also consider whether you may have used a different email address or misspelled your email address when you initially registered. If you think either of these scenarios are possible, please create a new Action ID on OpenVPB.

**Q: I keep getting an invalid password message. What should I do?**

A: First, double check that you don't have caps lock on. As you enter your password, note that when you created your Action ID password, it had to have an uppercase letter, a lower case letter, a number or special character, and be more than eight characters long. If neither of these tips help, try resetting your password by clicking the "Forgot password?" link under the login fields. Then click the reset password link in the email OpenVPB sends you. It might take a few minutes to receive your password reset link. Don't forget to check your spam/junk folder if you don't see the email at first.

**Q. None of this is working for me. Any other recommendations?**

A: You can contact NGP-VAN, the firm that created OpenVPB, Monday through Friday, 9am to 6pm ET at 202-686-9330.

## Guide to Google Voice

If your phone bank software requires you to call from your own phone, you have the option of setting up a Google Voice account to conceal your personal phone number. Google Voice is a free service to place and receive phone calls that runs off of Wi-Fi or cellular data. Here's a step-by-step guide to set up Google Voice on a computer or cell phone:

### Computer Set Up

First, go to the [Google Voice website](#).

1. The page will prompt you to select which device you'll be using the service on (Android, iOS, or web). Click Web.
2. You'll be asked to sign into your Google account and accept terms and conditions.
3. Google will give you a phone number to match your region, so type in your desired city or area code and choose one from Google's available selection.
4. You'll then be prompted to verify your existing phone number, so click "Verify", type in the number you want Google to forward your calls to and click "Send code".
5. Once you receive Google's text or call, type it into the website and click "Verify".
6. To confirm that this is the number you want your calls forwarded to, click "Claim". You can change this number later.
7. It will prompt you to click "Finish" twice, then you're done setting it up.

### Mobile Device Set Up

1. Download the Google Voice app for free on your iPhone or Android phone.
2. Once downloaded, open the app and sign into your Google account.
3. Click "Continue" to accept terms and conditions.
4. Search for your desired area code or type in your city to pick a phone number, then tap "Select" once you've found one you want.
5. Follow the prompts to finish setting up.

### How to Use Google Voice

To make a call through Google Voice, go to "Calls" and type in the number. In the setting menu, you can set up and listen to voicemail, block numbers and customize other preferences. You can also send and receive text messages through Google Voice using Wi-Fi or cellular data.