



# Phone Bank Guide

## How to use the MoveOn Dialer

### Quick Links

1. [Training video](#)
2. Dialer: <https://www.MoveOn.org/Call>
3. Training Slides: <https://MoveOn.org/Trainingslides>
4. Quick Guide: <https://MoveOn.org/Phonebankquickguide>

### How to Make Calls

Step 1: Disconnect Zoom audio.

Step 2: Open your browser and connect to the dialer by typing [www.MoveOn.org/Call](https://www.MoveOn.org/Call) into the address bar.

- Please note: As long as you are able to disconnect from the audio, you are allowed to stay in the main room to make calls. If you are having trouble disconnecting from audio, you should visit a Tech Support breakout room or disconnect from Zoom entirely and rejoin the group 15 minutes before the call ends, for a debrief.

### Tips on Using the Dialer

#### Step 1: Access the dialer

Open your web browser and navigate to [MoveOn.org/Call](https://www.MoveOn.org/Call). You will see a screen with three options: "Preview script," "Call with this device," and "Call with this device + phone for audio."

#### Step 2: Review the script

Click "[Preview script](#)" to familiarize yourself with the flow of the conversation. Of course, you'll make it your own so that it flows more naturally when you are speaking with a constituent. At the end of each page of the script, there will be different answers to choose based on how the caller responds. The script varies slightly based on each response, so be sure to click all the different answers and review! And remember, *the script is a guide, not a rule*.

**Pro tip:** Inform the caller that you are a member, phone-banking, and you are not looking for donations!



### **Step 3: Choose how to connect**

Now, you can decide how you want to access the dialer. If you have intermittent internet connectivity where you are, we recommend using the “this device + phone” option. Otherwise, use “call with this device.”

### **Step 4: Logging in**

After clicking “call with this device,” you will be prompted to enter some personal information. Your name and phone number will not be visible to the voters you call. This is only for MoveOn’s internal tracking to see who is making calls on our dialer. If you choose the “call with this device + phone for audio,” you will be prompted to dial a phone number to connect your phone to the dialer. Once you’ve connected your phone, don’t hang up using your phone. You will navigate through your calls on the dialer via your computer/tablet.

### **Step 5: Awaiting a call**

You’ll know you’re on the dialer and awaiting your first call when you hear a chime and a voice says, “connected!” Depending on how many people are using the dialer, it may take a few minutes for your first call to come through.

### **Step 6: Answering a call**

You will hear a “clink” noise when a live person has answered your call. You can assume they’ve already said hello while the dialer was connecting them with you. Go ahead and start talking as soon as you hear the noise!

### **Step 7: Coding your calls**

You’ll need to click the voter’s responses on your page to move to the next section of your script. Try to log the preference as accurately as possible—this will determine how we follow up with the voter next! More coding guidance is located [here](#).



## Step 8: Completing a call

After you finish your call, click the red **“end call”** button in the top-right corner of your screen to hang up, or wait for the constituent to hang up first. Then click **“end survey”** and **“continue calling”** to keep going!

## Step 9: Wrapping up

When you’re finished dialing, make sure to log the responses for your final call. Then, depending on which calling option you chose, you can close your browser window or hang up your phone and close your browser window to end your dialer session.

**Looking for more information?** Check out Scale to Win’s [complete user guide and video](#).

## Dialer FAQs

### What if the person hangs up before I say anything?

If the voter hangs up before you get a chance to speak, mark them as **“Call Back Later.”** If they identify themselves, hear who you are and why you’re calling, and then hang up, mark them as **“Refused.”**

### What if I talk to a different person than the name in the script?

That’s totally fine! If you speak with a friend or family member and the voter named in the script is not available, mark the result as **“Call Back Later.”** If you speak with a friend or family member and the constituent named in the script is not reachable at this number anymore—for example, if they are away at college—mark the result as **“Wrong Number.”**

Also, If you speak with someone who has no affiliation with the constituent named in the script, if they are interested in listening and participating with the goal of the phone bank, feel free to engage, but you should also mark the result as **“Wrong Number.”**

### I got their new number from a family member. Can I add that info to the dialer?

Please share the contact’s first name, last name, and updated number with your team lead, who will pass this information on to MoveOn staff. We will attempt to update their



MoveOn record to reflect their new number, so it can be added to the dialer for next time.

### **Can I edit a call that is already finished?**

Yes! Once you complete your call, you will see a summary of the survey responses you selected. You can click “edit survey responses” at the top-left corner of your screen to go back and change any answers you need to. Once you click “continue calling,” you will not be able to go back to edit a previous call.

## **FAQs**

### **Who/what is MoveOn?**

MoveOn is an organization where millions mobilize for a better society—one where everyone can thrive. Whether it’s supporting a candidate, passing legislation, or changing our culture, MoveOn members are committed to an inclusive and progressive future. We envision a world marked by equality, sustainability, justice, and love. And we mobilize together to achieve it. Under the current presidential administration, MoveOn is committed to fostering a safe space for like-minded individuals to stand up against the Trump-Elon billionaire takeover. You can visit [moveon.org/about](https://moveon.org/about) for more.

## **Quick Troubleshooting Tips**

### **What if it’s taking too long to connect me to the next call?**

The dialer is attempting to reach constituents while you wait. If it takes more than 5 minutes, it may be because too few people are on the dialer. Try to recruit a friend or family member to make calls alongside you! If you’ve been waiting for longer than 5 minutes, you can also try restarting your internet browser and returning to the dialer website.

### **I can hear the member, but the member can’t hear me!**

This happens sometimes. Ensure you have chosen the “**leave computer audio**” option in Zoom. If you muted the microphone instead, no sound can leave your device, which prevents constituents from hearing you. You can also check that your browser has access to your microphone.



If you are joining the dialer from a tablet or a smartphone, you may need to exit Zoom completely in order for the dialer to function properly.

If you've followed the above steps and the call still isn't connecting properly, please rejoin computer audio, return to Zoom, and join a "Tech Support" breakout room.

### **Can I look at the script before I start making calls?**

Yes! Connect to the dialer at [MoveOn.org/Call](https://MoveOn.org/Call) and click "Script Preview."

## **Persuasion Tips**

### **Smile while you dial!**

It really comes through in your voice on the phone and keeps you motivated as we dial to protect our freedoms and democracy.

### **Be conversational, not confrontational.**

People tend to shut down or stop listening when told they are wrong.

### **Don't rely on facts alone.**

Your story, the values we share, the future we want to build together, and the threats we face will be more convincing than any talking points.

## **Coding Your Results**

- Answering Machine or No Answer: No one on the line to speak with.
- Refused: The person hung up mid-conversation or was rude, and we shouldn't call them back.
- Call Back Later: The person hangs up before you begin speaking, says they are busy, or says the person you want to speak with isn't home.
- Wrong Number: The person named in your script can't be reached at this number.
- Language Barrier—Spanish or Other: The person doesn't speak English. If you can detect the person speaking Spanish, choose that option.
- Deceased: The voter has passed away.



- Moved: Relocated