

CHISM Strategies

Named "America's Best Direct Voter Contact Firm"

*by the American Association
of Political Consultants.*

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Introduction

Phone banks:

Oftentimes, it's the last major expenditure decision in a campaign. And with phone banks there are no direct mail portfolios or TV ad reels to use in comparing consulting firms.

Because the decision often occurs amid the chaos of a campaign in full swing, one tendency is to focus solely on price.

But with the explosion in cell phone usage and the greater mobility of voters, campaigns would do well to select a phone firm that understands the new realities and is skilled at reaching and mobilizing your targeted voters. This e-book explains how quality phone firms add value and maximize the benefit to your campaign.

Live Calling Programs

How Callers are Paid

Generally, political phone firms use one of two different business models. Some companies maintain their own call centers, while most contract with call centers that also handle commercial work. Either way, it's important for you to know how callers will be paid.

Most phone firms pay callers by the hour. The callers have no financial incentive to hurry through calls or to code a call as having been completed if it wasn't. Some firms, however, pay their callers based on the number of calls they complete.

!! Be cautious of phone firms that pay their callers on a per-contact basis. This model creates an incentive for unscrupulous operators to inaccurately code phone call results to increase their paychecks.

How Quality is Assured

Depending on the size of your project, your phone firm will be handling hundreds, thousands or even millions of calls per day. It's important for you to know how your phone firm will assure that each and every interaction is of the highest quality.

Top phone firms maintain a specific supervisor-to-caller ratio for each calling program. A more complicated script may require a lower ratio than a simple message. In addition, each supervisor should coordinate a program training session to go over the script, highlighting important background information and every possible mispronunciation.

Your phone firm should give callers everything they need to succeed. Every script should include phonetic spellings within the message to ensure that all city and candidate names are pronounced correctly. The phone firm should also attach background documents to the script for easy access.

?? Background information for each call should include the goals of your calling program and how you intend to use the data collected. At a minimum, your phone firm should provide callers with the election type (primary, runoff, or general), election date, candidate's party, and contact information, like the candidate's website and phone numbers.

How Calls are Monitored

You should choose a firm that assigns a project manager to monitor your calls daily. Your phone firm should also allow and encourage you to participate in call monitoring.

Following the first day of calling, your phone firm should be capable of providing the initial call reports and sharing the experiences they had while monitoring the first wave. You should be able to work with your phone firm to decide if script edits should occur prior to the next wave of calls.

In addition, your phone firm should be able to respond quickly if conditions change. For example, calling program background documents may need revisions if your candidate has unveiled new TV commercials or happens to be faced with an unfolding scandal.

How Problems are Addressed

No matter how many quality assurance controls a phone firm has in place, calling programs are invasive and may sometimes prompt complaints. When callers are pushing messages and asking questions about political issues, they are likely to annoy some of the intended audience.

Quality phone firms distinguish themselves when a problem arises. Your phone firm should provide after-hours phone numbers for immediate troubleshooting. When you receive a complaint, your phone firm should have the ability to analyze caller records to determine if an individual caller is miscoding data. Additionally, your phone firm should be able to quickly trace back a problem call to a specific operator when you provide them with the recipient's phone number.

Sometimes the problems are more subtle; for instance, ID call results defy common sense or refusal rates are abnormally high. Your phone firm should be able to use tabulations by vote history, age, race, gender and geography to break down the initial numbers, analyze the issue and suggest a solution.

How Results are Presented

Many campaigns need daily progress reports on their calling programs. Your phone firm should provide timely call reports that include summary information on the number of call attempts, the number of billable contacts, and the disposition of each of these records, as well as the percentage of voters on the call list that were contacted. Make sure your daily reports also include financials on the previous night's calling, including what percentage of the budget was exhausted and a projection on final costs of the program.

!! Most live calling reports will include tabulations by age, race, gender, vote history and, when appropriate, geography. If your campaign will need cross tabs (for example, age x vote history), make sure you specify that need before the calling program starts.

How Pricing is Determined

Because live calling programs never reach the entire target audience, the definition of a “billable contact” is very important. Phone firms generally charge for conversations that include a refusal by a targeted voter to disclose her candidate preference, an instruction by the voter not to call back, and even a statement that the voter does not plan to participate in the election. While this data is not immediately useful in building a mailing universe, it has value for your campaign and should be included in billings.

- !!** Be wary of phone firms that do not charge for “refusals” – never has a phone program had 100% participation. If your refusal rate is near zero it could be that the operators are coding these voter responses in the “undecided” category, skewing the actual results of the calls.
- !!** No matter how busy you are, always insist on a written contract. Any agreement should specify payment due dates, refund policies and dispute resolution procedures.
- ??** A written contract can save you trouble in the long run. Many problems arise only after the first call report is issued, when you discover the phone firm misunderstood your expectations for the program.

Live Calling Programs Checklist

Does the firm you’re considering...

- pay callers on a per-hour basis?
- maintain a low supervisor-to-caller ratio?
- conduct caller training routines for each program?
- include proper pronunciations throughout the script?
- attach full background information to the script?
- monitor calls nightly?
- allow and encourage you to monitor calls?
- help you decide whether to revise your scripts as events unfold?
- have protocols in place to properly handle complaints and issues?
- provide after-hours telephone numbers in case an issue arises?
- provide timely call reports?
- have the capability to provide cross tabs, like age x vote history?
- charge for “refusals” to reduce incentives for caller miscoding?
- provide a written contract that clearly spells out program goals and important terms?



Recorded Calling Programs

How Robocalls are Valued

Some vendors only sell “dials” on a recorded call system. In such a “bare-bones” system, you simply provide a recording, a list of phone numbers and a desired time for calls. The vendor then loads the program without any further interaction or instruction from you.

The best phone firms offer a series of value added services that usually increase the price of calls by a penny or more. This small cost is an important investment that can save you time and money later. Value added services include review of other targeted messaging and scriptwriting that reinforces important themes. Quality firms will also provide advice on the timing and length of the calls.

Your phone firm should provide you with toll-free numbers for use in recording messages and be able to accept audio files from you. Additionally, top firms have the software to edit recordings and append disclaimers as appropriate.

!! Quality phone firms will monitor call penetration rates and will often launch subsequent rounds of calls for no additional charge to maximize your message’s reach. Keep these additional rounds of calls in mind when considering price comparisons.

Avoiding Costly Errors

Your phone firm should have safety features in place to avoid a legal and public relations nightmare for your campaign. A mistimed call is one of the most costly mistakes that a campaign can make. Sending out calls at 3 a.m. instead of 3 p.m. will anger and annoy voters, prompting negative media coverage.

!! Make sure your phone firm has “trigger locks” that prevent calls from being launched at the wrong time. Top firms also run each calling program on a separate platform to ensure that the calls go to the correct phone list.

?? Recorded calls are governed not only by federal law, but also by laws that vary from state to state. It’s wise to make sure your phone firm understands the laws that apply to your calls.

How Consistency is Ensured

Your phone firm should maintain sufficient capacity to make sure that your phone calls are actually placed. Imagine discovering after a close election that your calls were never actually launched!

?? Top phone firms have multiple, specially-designed backup systems located in “secure phone vaults” in different cities, should unforeseen circumstances knock out the primary trunk lines.

Your phone firm should also have diagnostic tools that can track recorded calls in real time and can report with accuracy when calls were launched, when they were concluded, and the number of dials per wave of calling.

How Results are Presented

After your calls are completed, your phone firm should provide timely reports that distinguish between live answers, calls handled by answering machines, and unreached numbers. The unreached numbers list should include data on nonworking phone numbers. A good call report will also include information on the cumulative number of dials.

?? Your phone firm may be able to help you improve a list that suffers from a high unreachable rate. Phone matches and other database work can help you get in contact with more of your targeted audience.

How Pricing is Determined

Recorded call pricing is usually calculated either on a cost-per-record basis or a cost-per-connect basis. You will probably prefer the cost-per-connect basis in most cases. Because recorded call connect rates can range from as low as 40% of the list for low-income, transient voters to as high as 85% for some senior audiences, a cost-per-connect pricing structure gives your phone firm an incentive to redial and maximize the number of voters they reach.










?? Few phone firms charge for a cost-per-complete call. No reliable technology accurately measures whether a recipient listens to the entire message.

!! No matter how busy you are, always insist on a written contract. Any agreement should specify payment due dates, refund policies and dispute resolution procedures.

?? A written contract can save you trouble in the long run. Many problems arise only after the first call report is issued, when you discover the phone firm misunderstood your expectations for the program.

Recorded Calling Programs Checklist

Does the firm you're considering...

- provide included services like scriptwriting and messaging advice? 
- maintain a toll-free number for recording messages and have the ability to accept audio files? 
- monitor call penetration rates and launch additional rounds of calls if necessary? 
- have safety features to prevent calls from being launched at the wrong time or to the wrong list? 
- understand regulatory and compliance issues? 
- have sufficient capacity to guarantee your calls are actually launched? 
- maintain backup systems to safeguard against unforeseen problems? 
- provide timely and complete call reports? 
- offer cost-per-connect rates and a complete, written contract? 

Examples Available for Review

Email or call us and we will send you examples of these important documents

Sample contract with confidentiality and performance safeguards and the necessary legal boilerplate

- Live Call Sample Report
- Recorded call Sample Report
- Troubleshooting Standard Operating Procedures (SOPs)
- Call Background/Briefing Sample

We also have available for you case studies on award winning calling programs for

- Persuasion ID Programs
- Interactive GOTV Calling Programs
- Vote-by-mail elections
- Mail chase calling programs
- IVR Surveys
- Telephone town halls

Final Thoughts

Phone banks can produce the margin of victory in a close election. reinforcing your TV, radio, direct mail and digital campaign themes and strengthening your field effort to increase targeted voter turnout.

Chism Strategies is America's premier telephone voter contact firm for Democrats and progressive causes all across the United States. We've worked in more than 2,500 campaigns in every state, providing both live and automated calling programs in federal, state and local government campaigns.

Each year, the American Association of Political Consultants recognizes the best campaign work around the country with its Pollie Awards. Independent panels of judges review thousands of submissions of work from candidate and ballot measure campaigns, public affairs and grassroots advocacy project. Each of the last three years Chism Strategies has earned more awards than any other phone firm. The professionals in political consulting industry have consistently named Chism Strategies as the best in the business.

For clients lists or other information
please visit www.chismstrategies.com
or call us 601.982.0231.

We would love to be a part of your election effort.


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