

CallHub User Guide



Thank you for phone banking for Swing Left!

Whether you are a veteran or have never made a call for the cause, phone banks are a great way for us to engage voters ahead of the 2018 midterm elections. We use a phone bank tool called CallHub, for which you will dial from your own phone to make calls from an online list. **You will need both a phone and a computer/laptop/tablet in order to make calls.**

Creating Your CallHub User Account

To make calls using CallHub, you'll need a CallHub user account, called an "Agent ID."

PRO-TIP: Setting up a CallHub Agent ID is easy, but can take some time. Therefore, we strongly recommend that volunteers set up their CallHub Agent IDs before the phone bank, and bring their Agent ID and password information with them to the event.

1. Go to <https://swingleft.org/phonebank>.

2. Click the “Sign In Using Email” button to log in to your Swing Left account

This is the account you made when you first found our website and signed up. If you don't remember your login information, use your email as your username and reset your password.



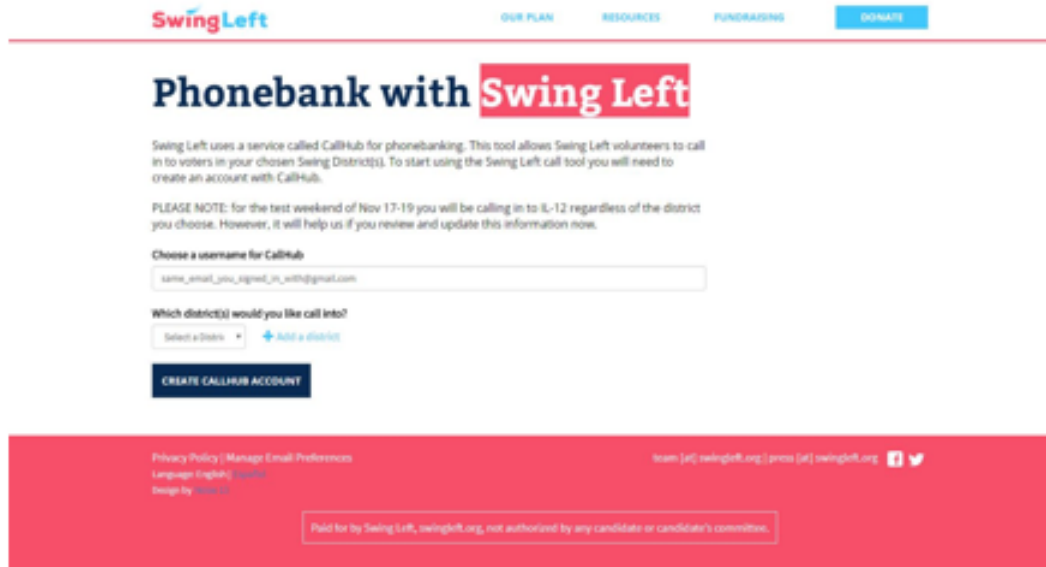
Or, if you don't already have one, **Create a new Swing Left Account :**



PRO-TIP: Be sure to use the email sign-in link: the Google and Facebook sign-in options aren't for use with CallHub.

3. Create your CallHub account

- Enter your email address in the “Choose a username for CallHub” field
PRO-TIP: We strongly recommend using the same email address you use for Swing Left.
- If you’re already a Swing Left member, your chosen districts will appear here.
Choose the district(s) that you want to be associated with for all your future phone banking activity (you will be able to edit this later, if you need to).



Swing Left

OUR PLAN RESOURCES FUNDRAISING DONATE

Phonebank with Swing Left

Swing Left uses a service called CallHub for phonebanking. This tool allows Swing Left volunteers to call in to voters in your chosen Swing District(s). To start using the Swing Left call tool you will need to create an account with CallHub.

PLEASE NOTE: for the test weekend of Nov 17-19 you will be calling in to IL-12 regardless of the district you choose. However, it will help us if you review and update this information now.

Choose a username for CallHub

same_email_you_registered_on_swing@gmail.com

Which district(s) would you like call into?

Select a district + Add a district

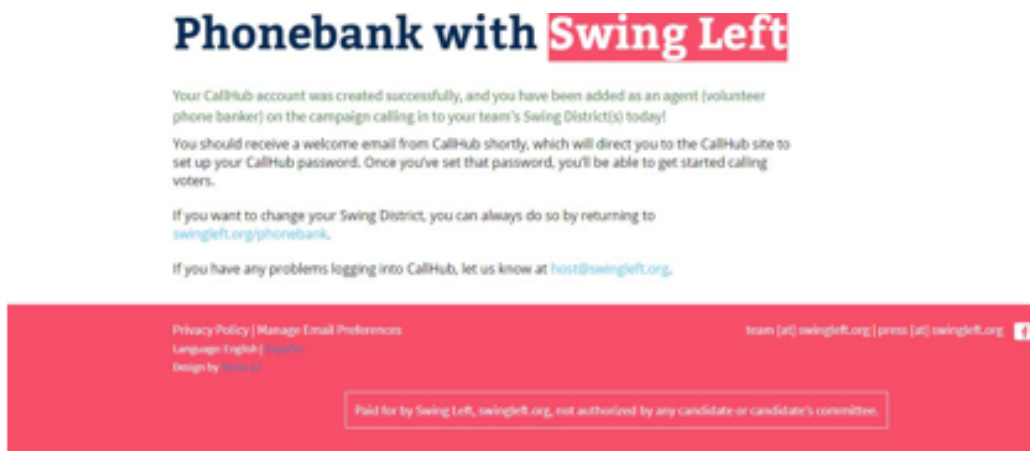
CREATE CALLHUB ACCOUNT

Privacy Policy | Manage Email Preferences
Language: English | Español
Design by 99acres

team [at] swingleft.org | press [at] swingleft.org

Paid for by Swing Left, swingleft.org, not authorized by any candidate or candidate's committee.

4. Once successfully registered with CallHub, you’ll be directed to a confirmation page notifying you that a verification email has been sent to you.



Phonebank with Swing Left

Your CallHub account was created successfully, and you have been added as an agent (volunteer phone banker) on the campaign calling in to your team's Swing District(s) today!

You should receive a welcome email from CallHub shortly, which will direct you to the CallHub site to set up your CallHub password. Once you've set that password, you'll be able to get started calling voters.

If you want to change your Swing District, you can always do so by returning to swingleft.org/phonebank.

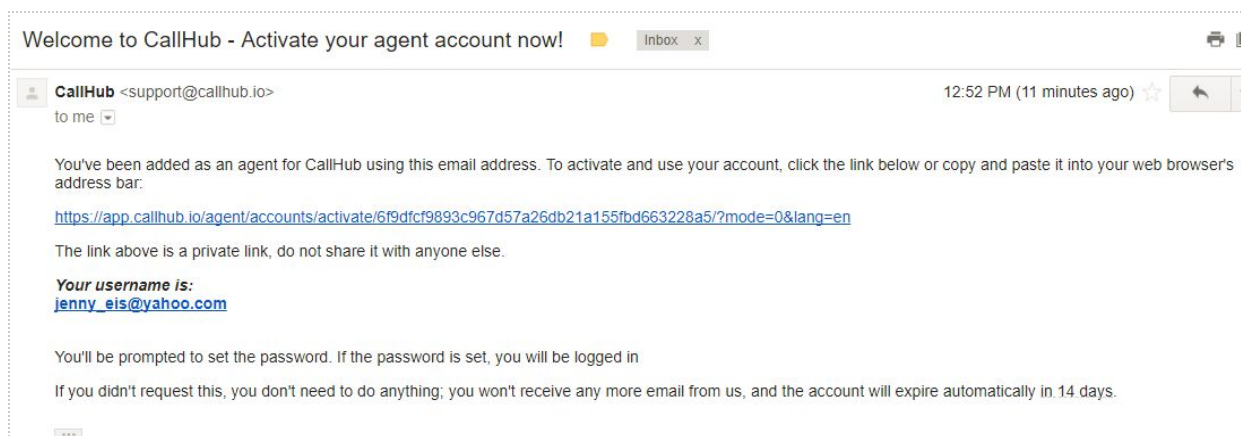
If you have any problems logging into CallHub, let us know at host@swingleft.org.

Privacy Policy | Manage Email Preferences
Language: English | Español
Design by 99acres

team [at] swingleft.org | press [at] swingleft.org

Paid for by Swing Left, swingleft.org, not authorized by any candidate or candidate's committee.

5. Check your email inbox and activate your CallHub agent account.

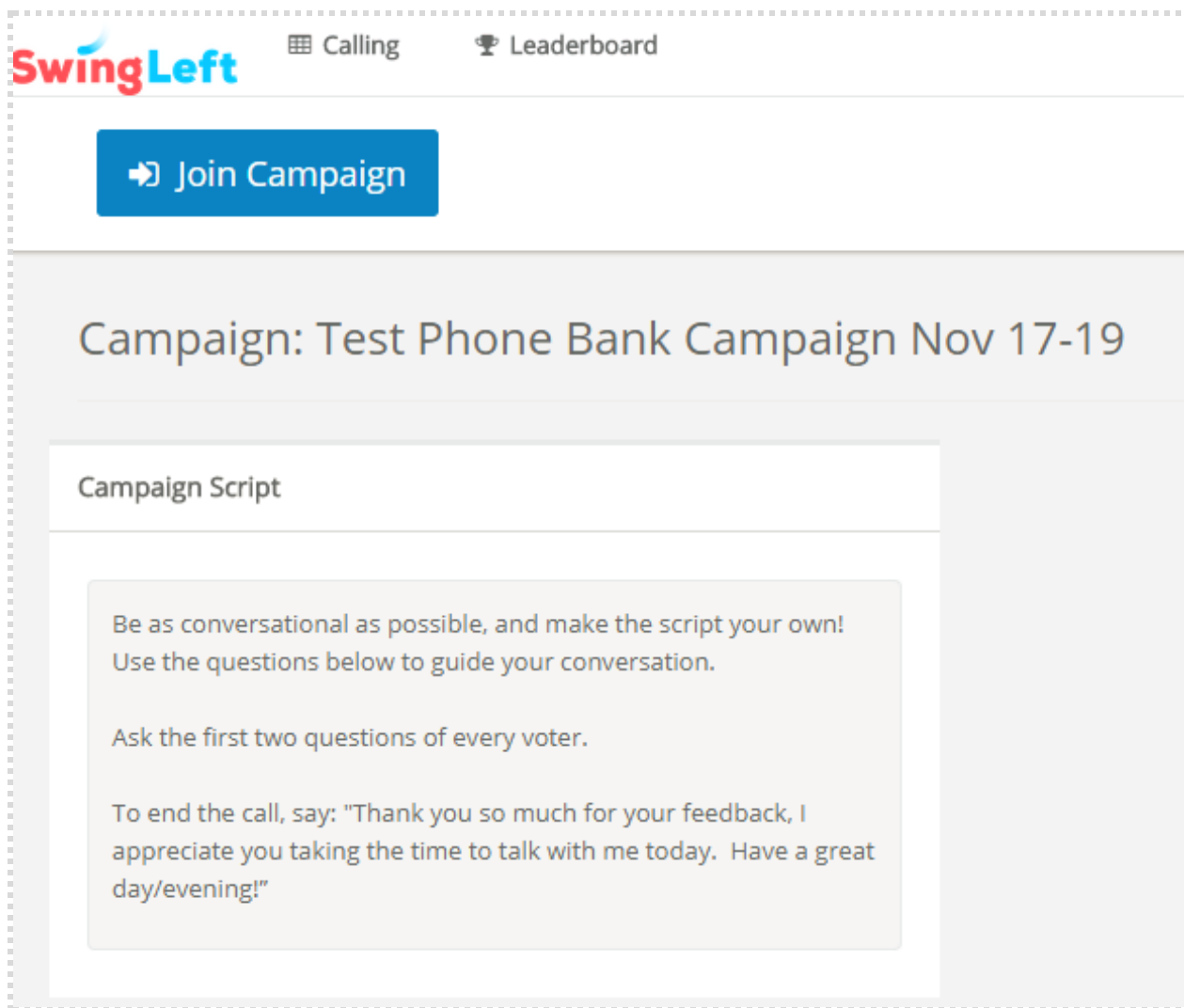


- **Click the link provided in the email.** You will be prompted to create a password.
- **PRO TIP:** *When you sign up for your Agent ID, your confirmation email from might go to your “junk” email folder or your “promotions” tab. If the confirmation email does not appear in your inbox, make sure you check all of your email folders.*
- **Once your account is active, you’ll automatically be assigned to your calling campaign!** In the future, now that you have a CallHub account, you can go straight to the phone bank portal at www.swingleft.org/phonebank.

Using CallHub to Make Calls

Now that you're logged in, you'll see the welcome screen.

Review the instructions, and, when you're ready, **click the "Join Campaign" button to start calling.**



The screenshot displays the CallHub interface. At the top left is the 'SwingLeft' logo. To its right are two menu items: 'Calling' with a grid icon and 'Leaderboard' with a trophy icon. Below the logo is a prominent blue button with a right-pointing arrow and the text 'Join Campaign'. Underneath the button, the main heading reads 'Campaign: Test Phone Bank Campaign Nov 17-19'. Below this heading is a section titled 'Campaign Script'. Inside this section, there is a light gray box containing the following text: 'Be as conversational as possible, and make the script your own! Use the questions below to guide your conversation. Ask the first two questions of every voter. To end the call, say: "Thank you so much for your feedback, I appreciate you taking the time to talk with me today. Have a great day/evening!"'

Once you join the campaign, you will see:

- The name and contact information for the voter you're calling.
- The Campaign Script, as well as the survey questions we are hoping to answer.

The screenshot displays the SwingLeft campaign interface. At the top left is the SwingLeft logo and a 'Leaderboard' link. Below these are two buttons: 'Leave Campaign' and 'Next Contact'. The main heading reads 'Campaign: Test Phone Bank Campaign Nov 17-19'. On the left, a voter profile card for DEOSHANY HARRIS is shown, including her address (218 S WILLIAMS ST, MURPHYSBORO IL US 62966), phone number (+1 618-924-3158), and demographic details (Gender: Female, Age: 22, district: IL-12, Party: Unaffiliated). An 'Edit' button is at the bottom of the card. On the right, the 'Campaign Script' section provides instructions: 'Be as conversational as possible, and make the script your own! Use the questions below to guide your conversation.' and 'Ask the first two questions of every voter.' Below this, a closing statement is provided: 'To end the call, say: "Thank you so much for your feedback, I appreciate you taking the time to talk with me today. Have a great day/evening!"'. The 'Survey Questions' section contains two questions: 'Hi, is [Voter Name] available?' and 'Hi [Voter Name], my name is [First Name] and I'm a volunteer with Swing Left. We're talking to voters like you to get a sense of how they feel about the upcoming elections for Congress in 2018. Did you know that there are midterm elections coming up next November which will decide who will represent you in the next Congress?'.

1. Dial the listed phone number.
2. Move through the script with the caller. For tips on having a great call, check out our [Phone Banking Tips & Tricks](#).

3. Log the answers in the Survey Questions.

Hi, is [Voter Name] available?

Hi [Voter Name], my name is [First Name] and I'm a volunteer with Swing Left.

We're talking to voters like you to get a sense of how they feel about the upcoming elections for Congress in 2018. Did you know that there are midterm elections coming up next November which will decide who will represent you in the next Congress?

QUESTION 1. Generally, on a scale of 1 to 5 (1 being "not at all satisfied" and 5 being "completely satisfied"), how do you feel about the job President Trump and the Republicans in Congress are currently doing?"

QUESTION 2: If elections for Congress were held tomorrow would you vote for the Democratic candidate or the Republican candidate for Congress?

(If 4 or 5, end call, otherwise move on to Question 3)

4. If you speak to someone who answers “yes” to Question 4, “would you like to volunteer”, please verify their email, and type it into the box below the prompt.

QUESTION 3. Can I count on you to join me and other Democrats in your community to vote in the next elections for Congress in 2018? (If Yes, move to Question 4. If No or Unsure, end the call)

QUESTION 4. We at Swing Left are working to take back the House because we believe it's the most effective way to put a check on Trump's agenda. In order to be able to do that, it's crucial that we start right now. Would you be interested in volunteering with Swing Left to ensure we can take back the House next fall?

(If "yes" to volunteering)
Great! Can I confirm your email really quickly? (Type email below)

5. When you finish your conversation, click the Next Contact button.

Logging out of the CallHub Campaign

1. Once you've completed your last call, and logged its results, **DO NOT** click either the “Leave Campaign” or “Next Contact” buttons at the bottom-right side of the page. **Instead, click on “SAVE” button.**
2. **Once you have saved**, the page will refresh, but still display the last call you made.
3. After the page has refreshed, **select “Leave Campaign”** and you'll have successfully logged out.

Thank you for helping to take back the House!