Our Shared Future
"Remote Relational Canvassing" Database Training

October 2020

Relational Remote Canvassing: Overview

Combine…

- text messages,
- phone calls,
- voice messages, and
- postcards

…from the same volunteer or volunteer team to educate the voter and build a relationship grounded in trust and connection.

Relational Remote Canvassing

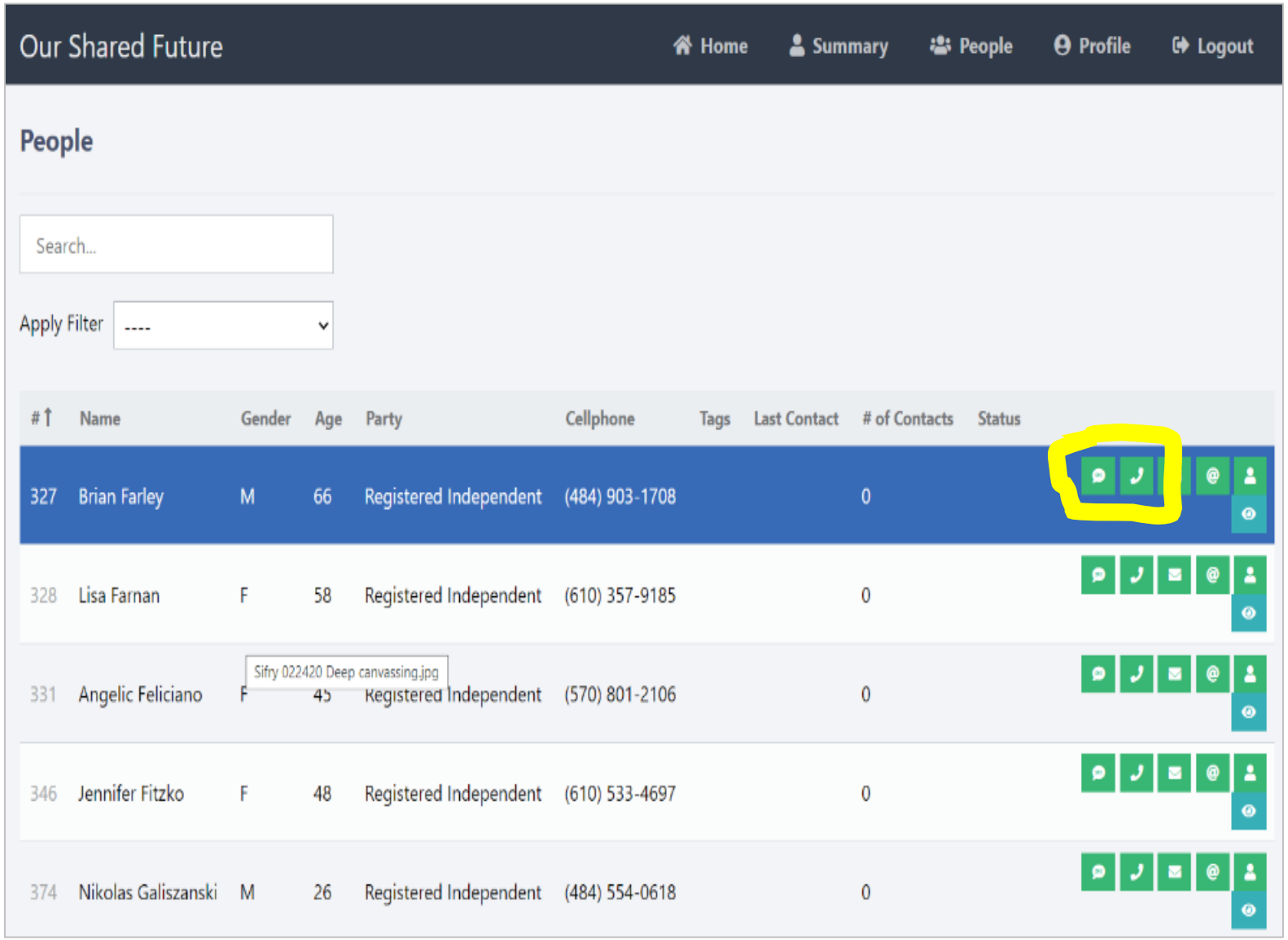
- If we know the undecided voter's cell phone number (and a voter list can be limited to those with cell phones), we **start by sending a text message** letting voter know that will be calling them in a few minutes.
- Try to call. If you don't reach the person, **leave a voice message**.
- **Follow-up**: If you do reach the person, try to get their email so you can follow up or, alternatively, follow up by text message or mailed note.
- **Look for opportunities to interact again: This is how we show we are trustworthy and want to build a relationship.** If they have questions you can't answer, no problem. Do your best to find the answer and get back to them. Are there other small ways that you can be of service?
- IF you can't reach a person by phone, text, or email and they don't reply to your voicemail, **send a (partially) hand-written letter or postcard.**
- **Repeat** sending 1 or 2 more rounds of text messages and phone calls again.
- **If there's time in the campaign, can you be of service?** Think creatively about how you or others in your network or the campaign can help: Look up registration status, how to mail in a ballot or vote early… It's a great way to help AND to build a relationship

Three Technology Building Blocks

1:

Our Shared Future Database:

People/Voters

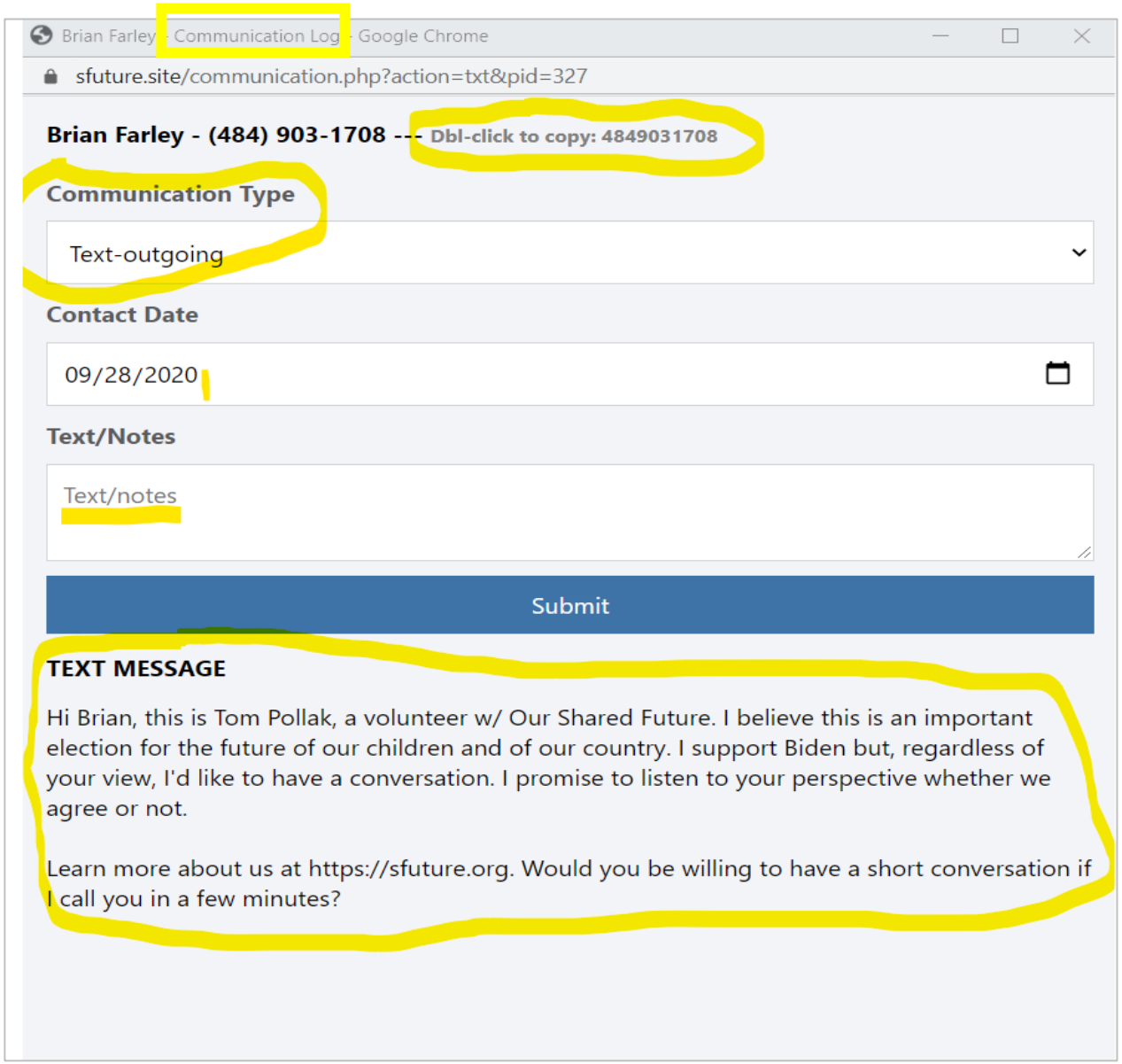


Three Technology Building Blocks

2.

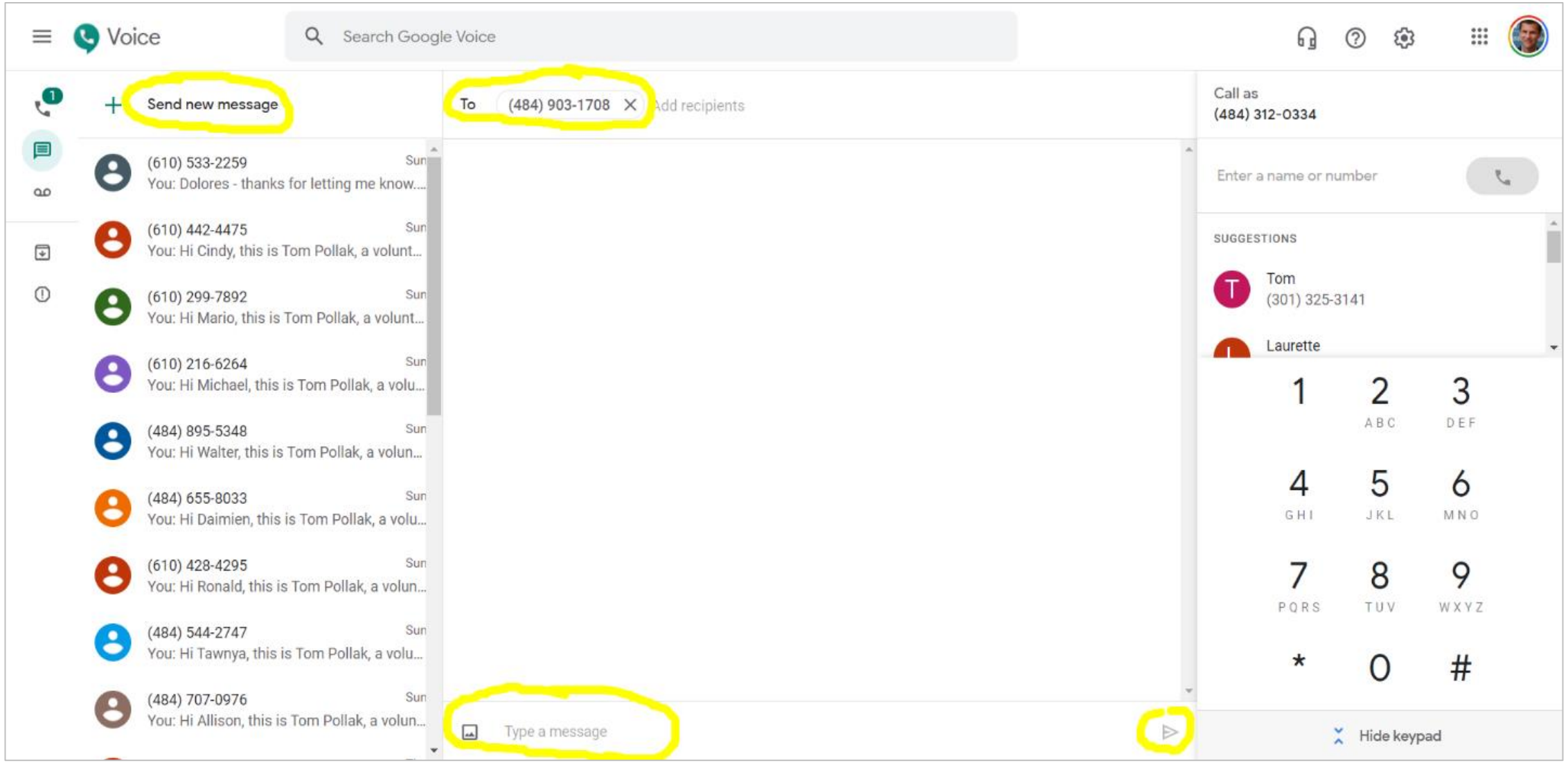
Our Shared Future Database:

Communications Log

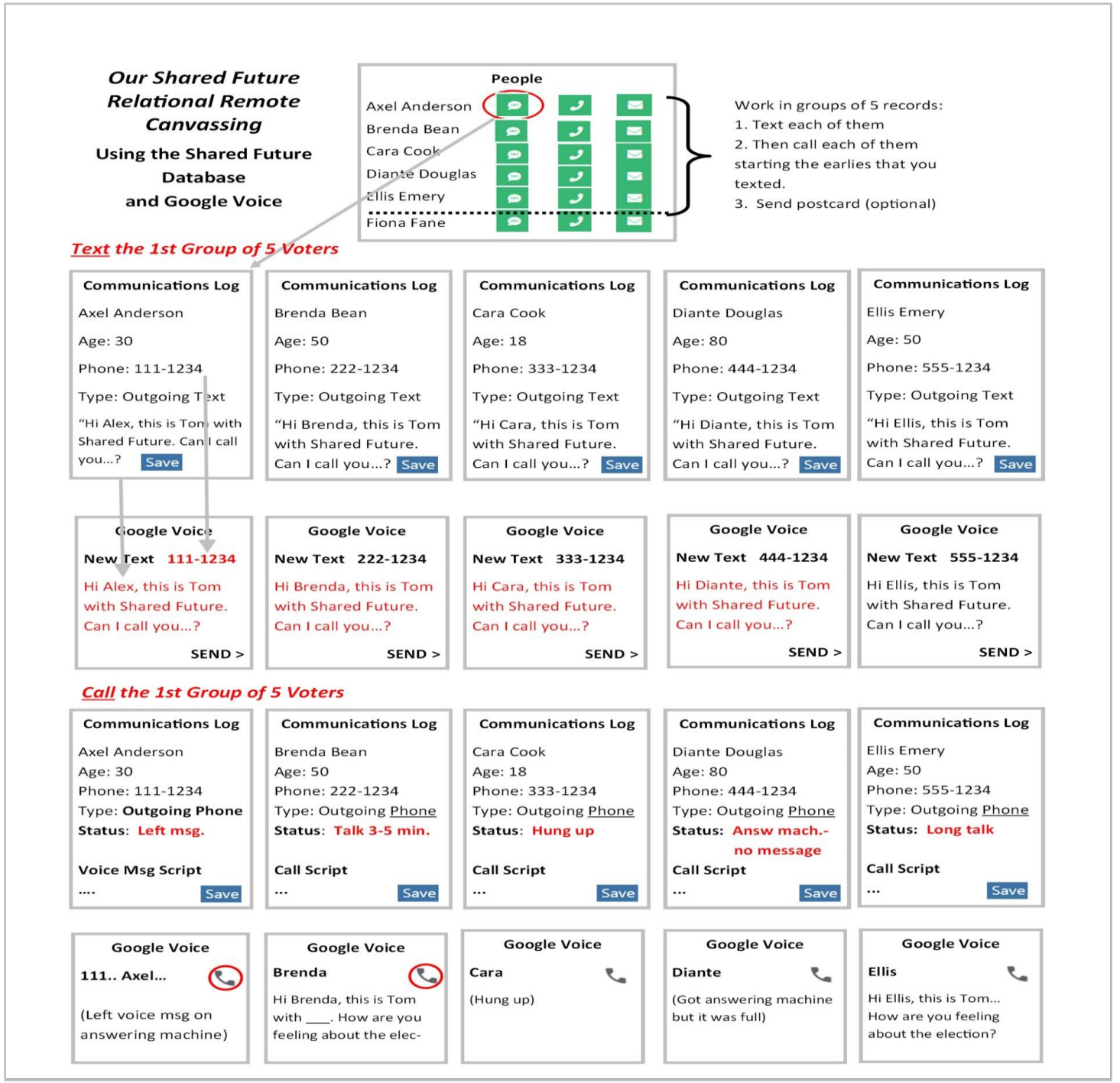


Three Technology Building Blocks

3. Google Voice: For Texting AND Calling

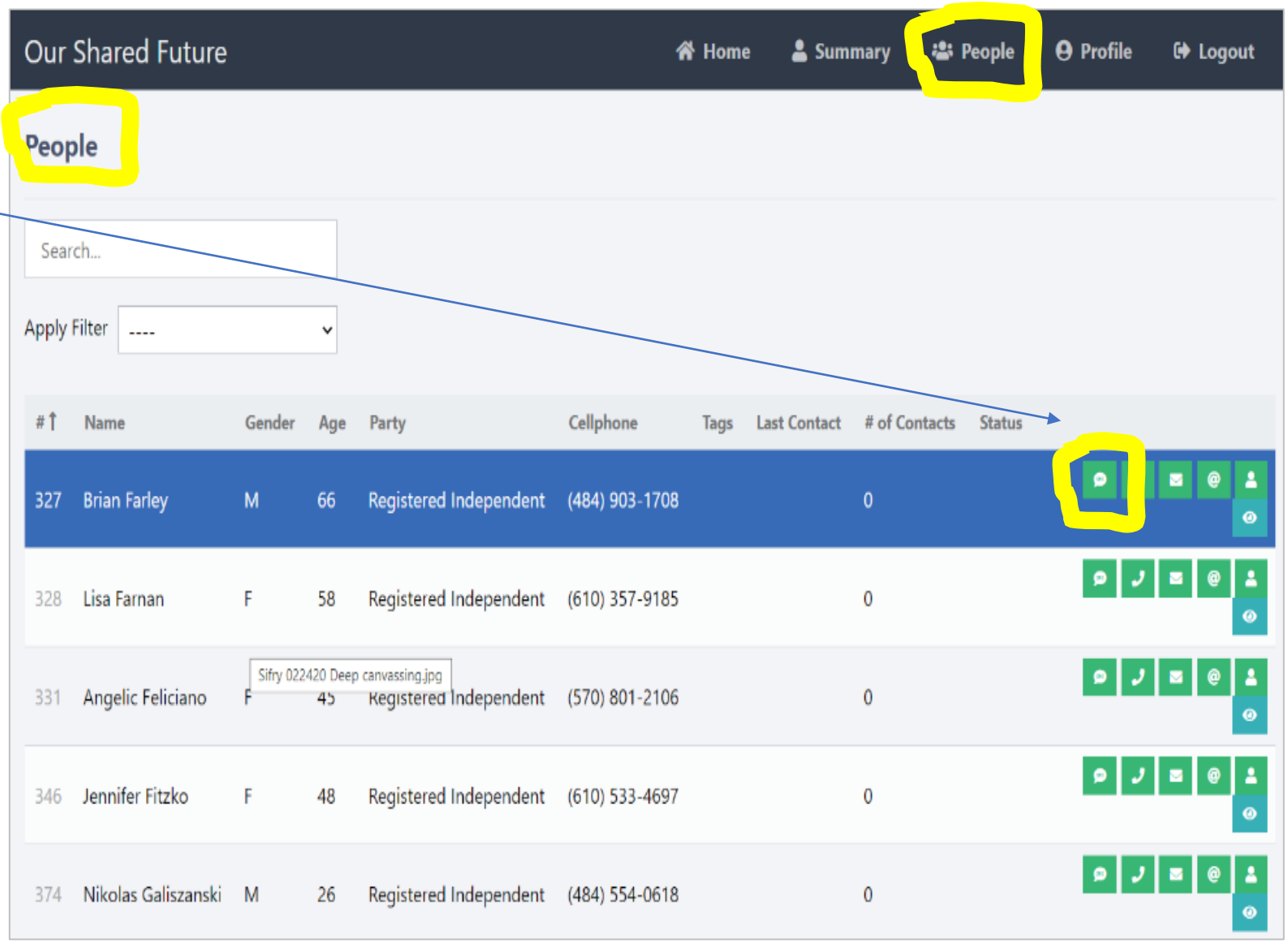


Overview of the Workflow



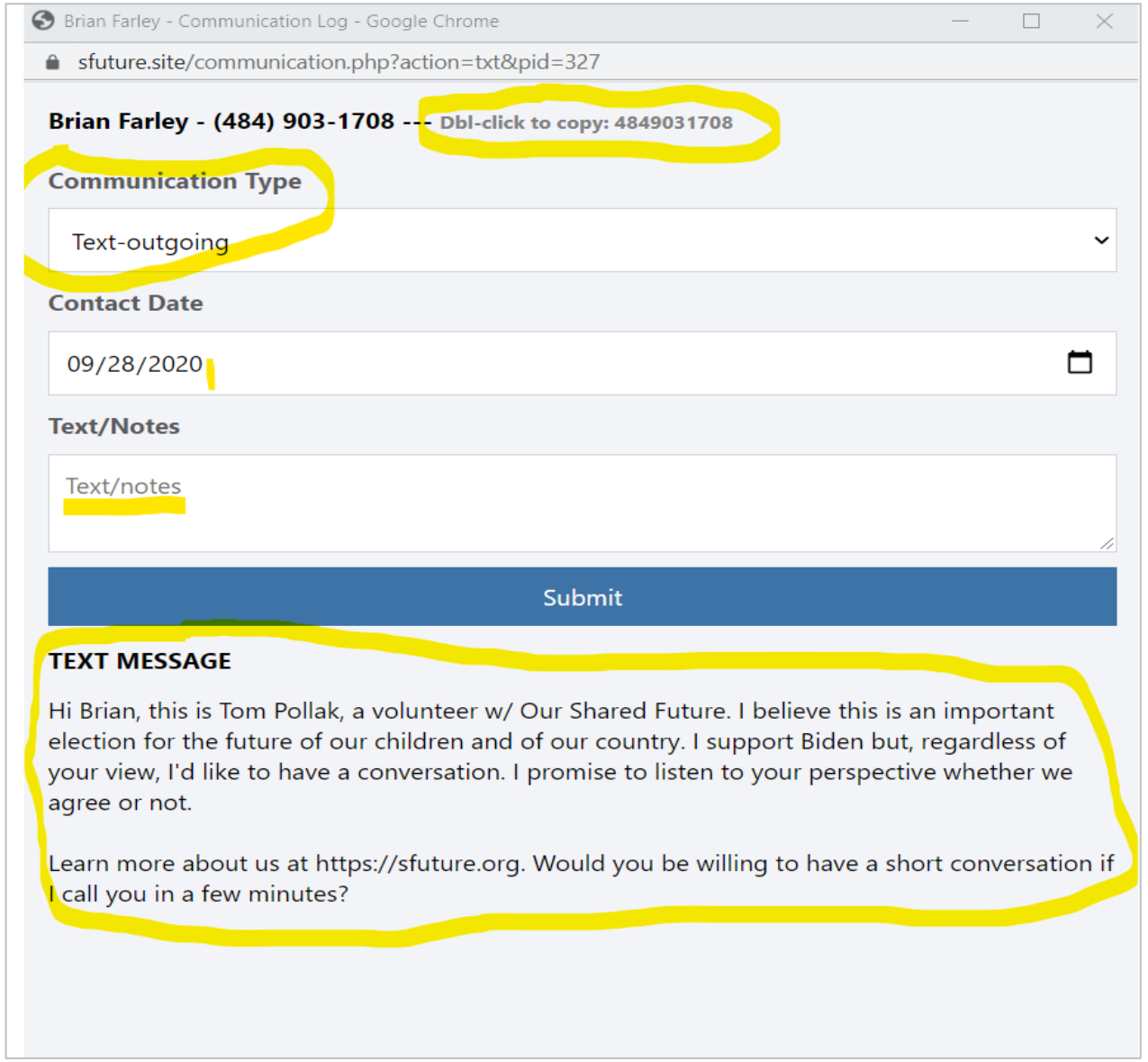
The Process in Detail

- Click on the "Text" symbol



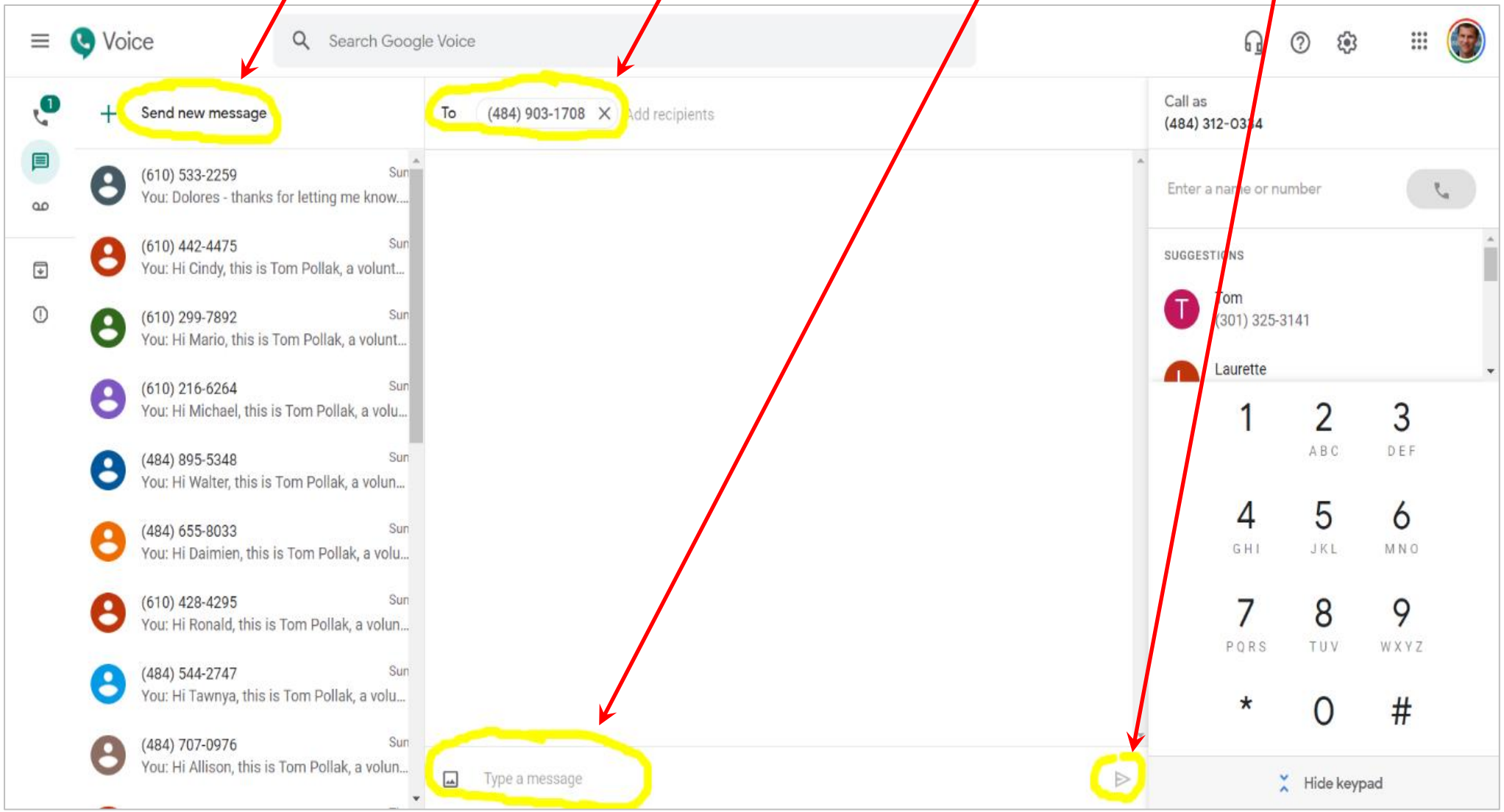
The Process in Detail: Sending a Text Message

- All the default settings should be ok for Texting.
- You will need to copy both the phone # and the TEXT MESSAGE from here to Google Voice



Google Voice: For Texting

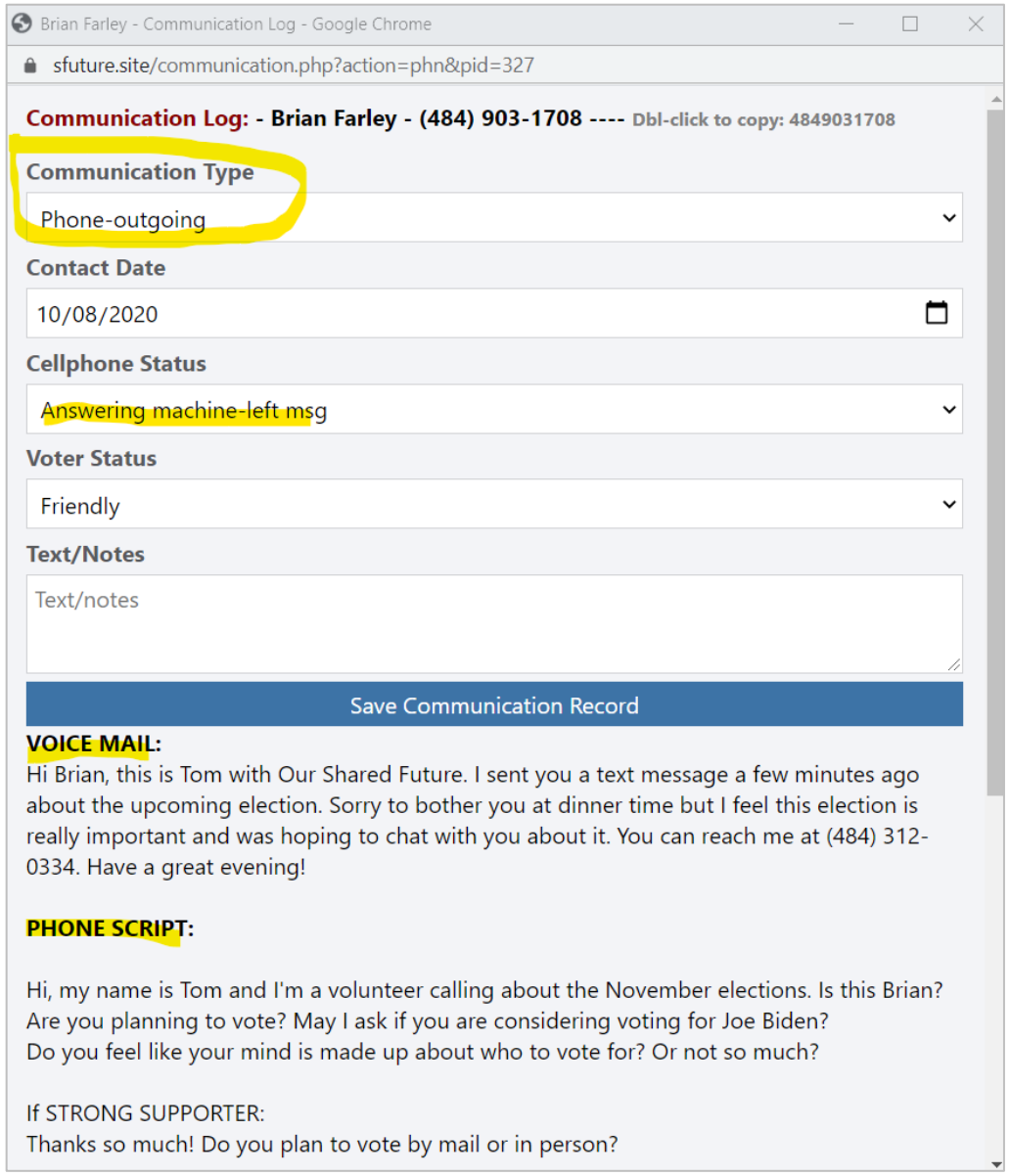
4 Steps: 1. "Send new message" - 2. Paste in Phone# -- 3. Paste in message – 4. Click Send button



The Process in Detail: Making Phone Calls

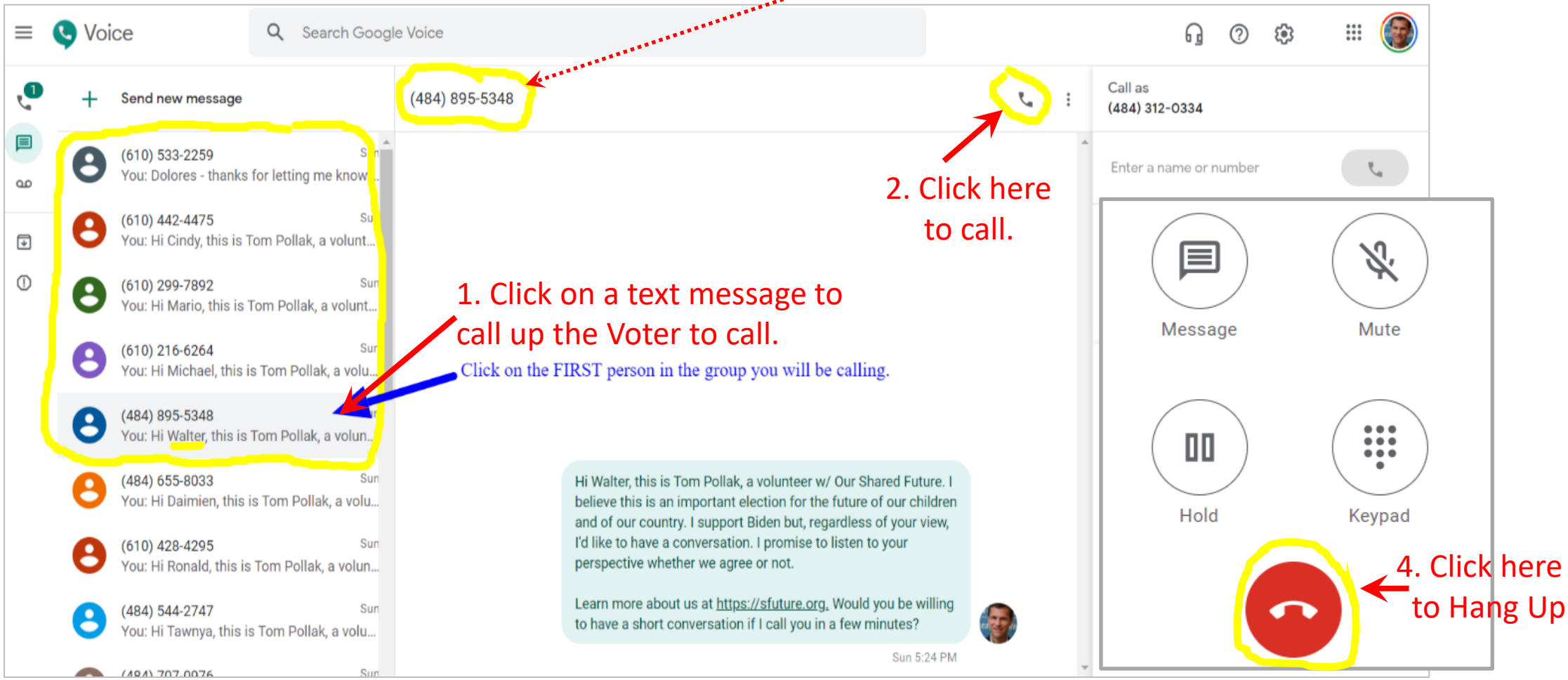
Call up the Phone Communications Log BEFORE YOU CALL so you can read the Voice Mail or Phone Script.

You don't need to DO anything on this screen until AFTER you've made your call: Choose the "Cellphone Status" and "Supporter Code", then "Submit."



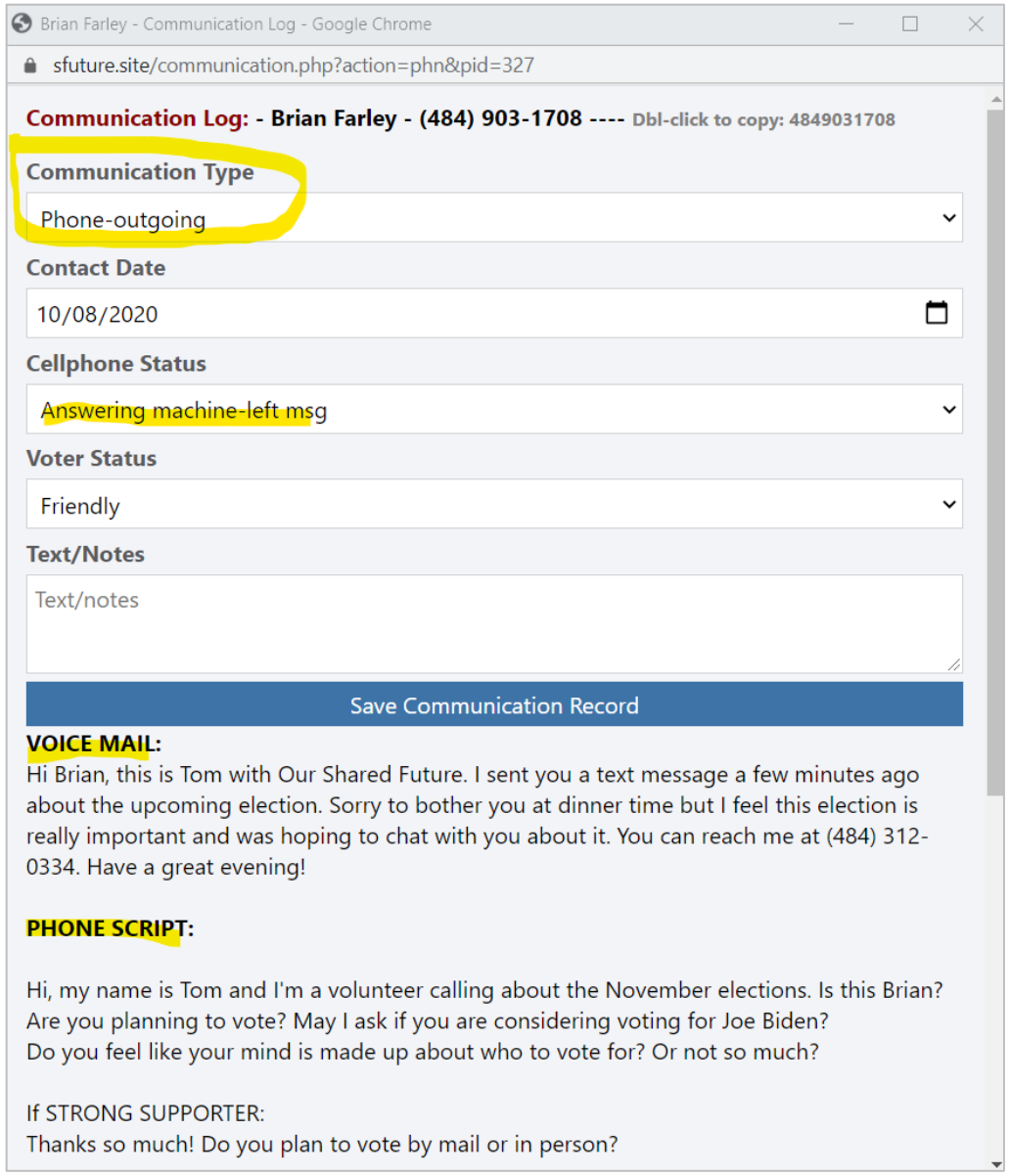
Google Voice: For Phone Calls

4 Steps: 1. Click on the first # in the left column that you want to call. (Number will pop into the box.)
2. Click on the Phone symbol to make the call.
3. Switch back to your Phone Communications Log to be ready to read the script.
4. Click the hang-up button back on this screen when done.



The Process in Detail: Making Phone Calls

Now that the call is completed, choose the appropriate “Cellphone Status” and “Voter Status” options, add any comments and Click “Save” to close this record.



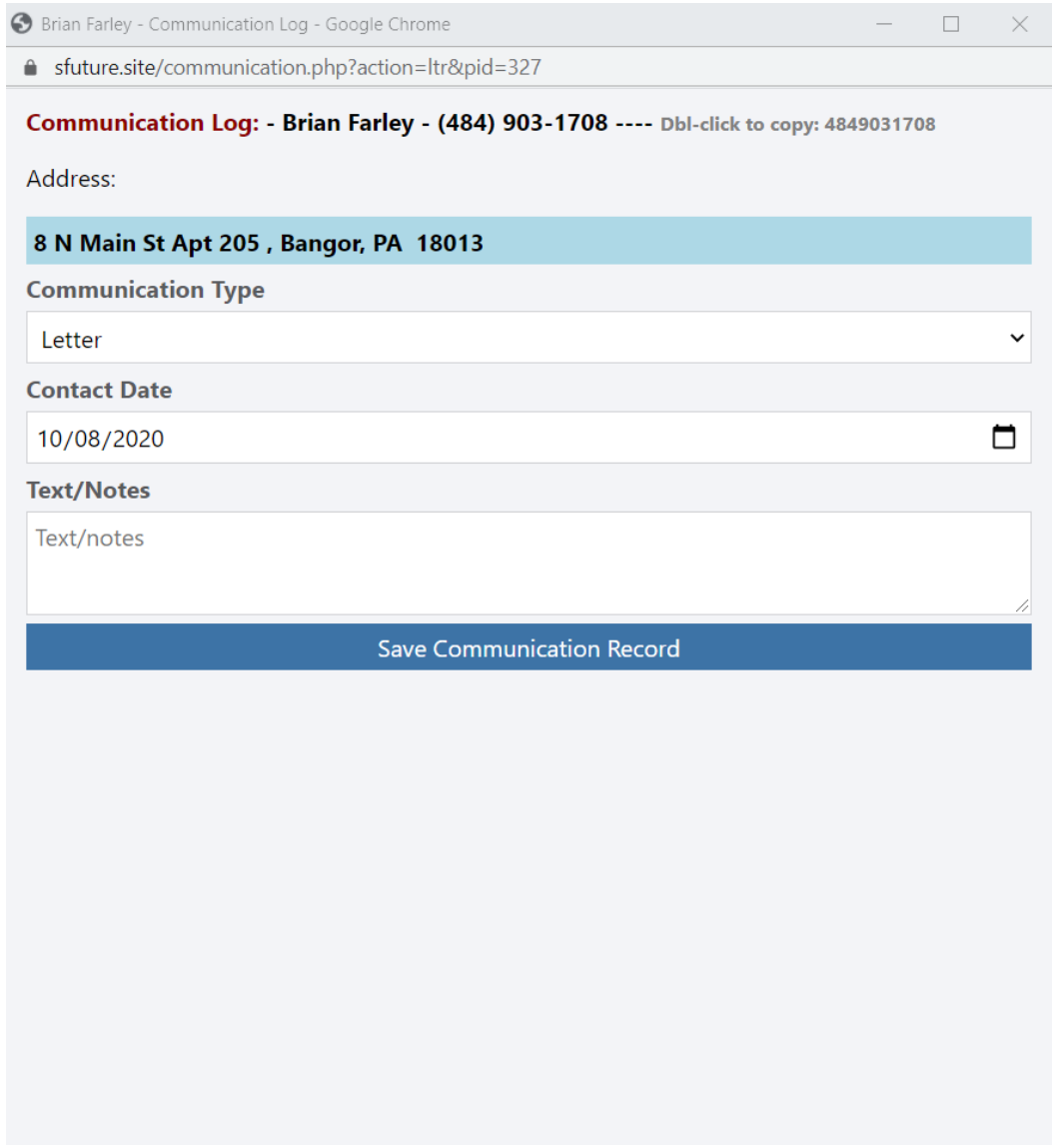
The Process in Detail: Sending Postcards

Sending Postcards or Letters is even simpler:

Just click on the green button in the People screen with the Letter symbol to call up the Communications Log.

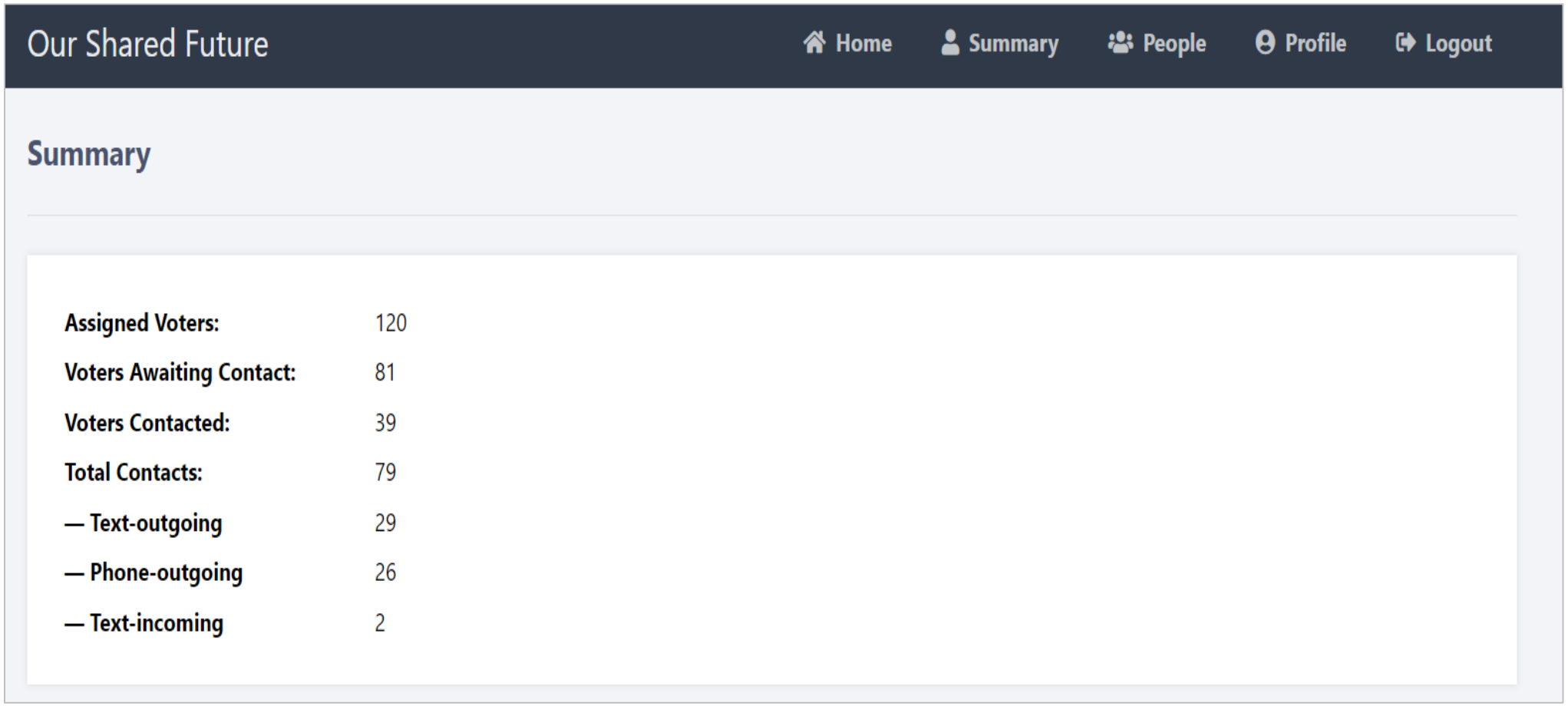
You'll see the person's address on a light blue background at the top, which you can write onto the postcard or letter.

Click "Save" when done to record your achievement!



Check Out Your Achievements!

Check out your progress by clicking on “Summary” on the main menu bar.

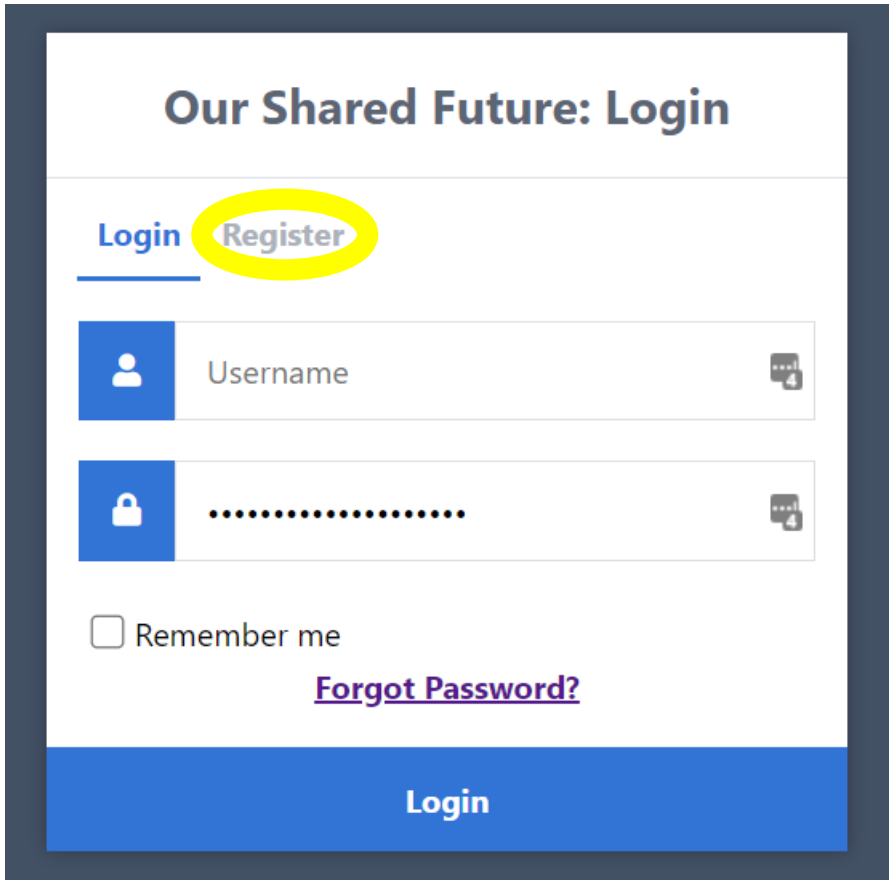
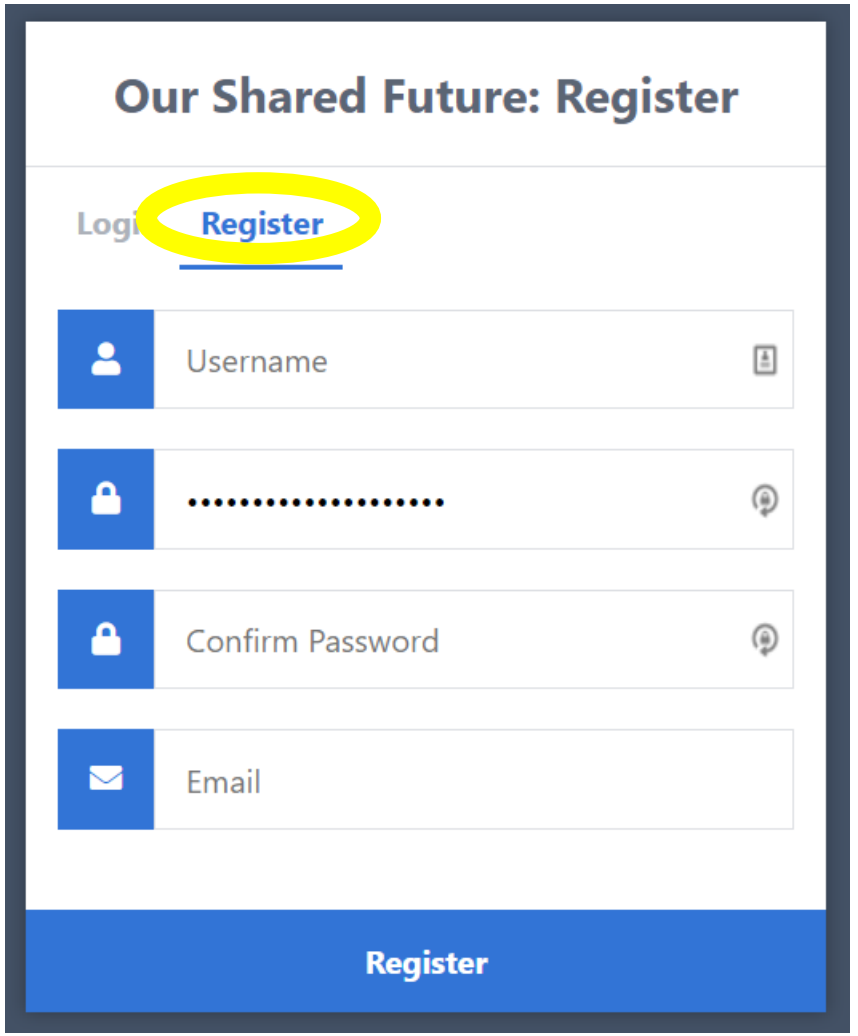


Four Easy Steps to Set Up Our Database and Google Voice

1. **Register on Our Shared Future's easy-to-use database** system at **https://sfuture.site**
   Be sure to “authenticate” your email: The system will automatically send you an email after you register to make your sure that your email is correct. If you don’t see an email from sfuture.site within a minute, please check your Spam folder!
2. **Get a Google Voice account (optional) -** Please choose an area code that is in the state or smaller region where you will be calling - **https://voice.google.com**.
   We recommend headphones to improve call quality.
3. **Get heavy paper for postcards** from Staples or Office Depot, etc. -- 80-100 pound weight -- that can be cut into 4 postcards on each page.
4. **Download** the Microsoft Word **postcard template** and customize it for your use: **https://drive.google.com/file/d/1N6ZjnNVk67ck7Hc-PSJCZDyx-DZsDx82/view?usp=sharing** (A Google Docs version will be available shortly.)

Do I Need to Use Google Voice? You don’t have to use Google Voice but I’ve found it to me very efficient for quickly sending texts and calls without fear of mistyping a phone number. If you don’t want to use Google Voice, using your own phone number working from an iPad or other tablet is relatively easy, or you can use a range of other text messaging and phone call add-ins if you prefer them for efficiency and for masking your personal information.

Setup: Our Shared Future Database

https://SFuture.site

From the "Login" screen, click on the "Register" link and enter the required information.