



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

Our Shared Future									
People									
<div>Search...</div> <div>Apply Filter ---- ▾</div>									
# ↑	Name	Gender	Age	Party	Cellphone	Tags	Last Contact	# of Contacts	Status
327	Brian Farley	M	66	Registered Independent	(484) 903-1708			0	<div><div></div></div>
328	Lisa Farnan	F	58	Registered Independent	(610) 357-9185			0	<div><div></div></div>
331	Angelic Feliciano	F	45	Registered Independent	(570) 801-2106			0	<div><div></div></div>
346	Jennifer Fitzko	F	48	Registered Independent	(610) 533-4697			0	<div><div></div></div>
374	Nikolas Galiszanski	M	26	Registered Independent	(484) 554-0618			0	<div><div></div></div>

Three Technology Building Blocks

2.

Our Shared Future Database: Communications Log

Brian Farley - (484) 903-1708 --- Dbl-click to copy: 4849031708

Communication Type

Text-outgoing

Contact Date

09/28/2020

Text/Notes

Text/notes

Submit

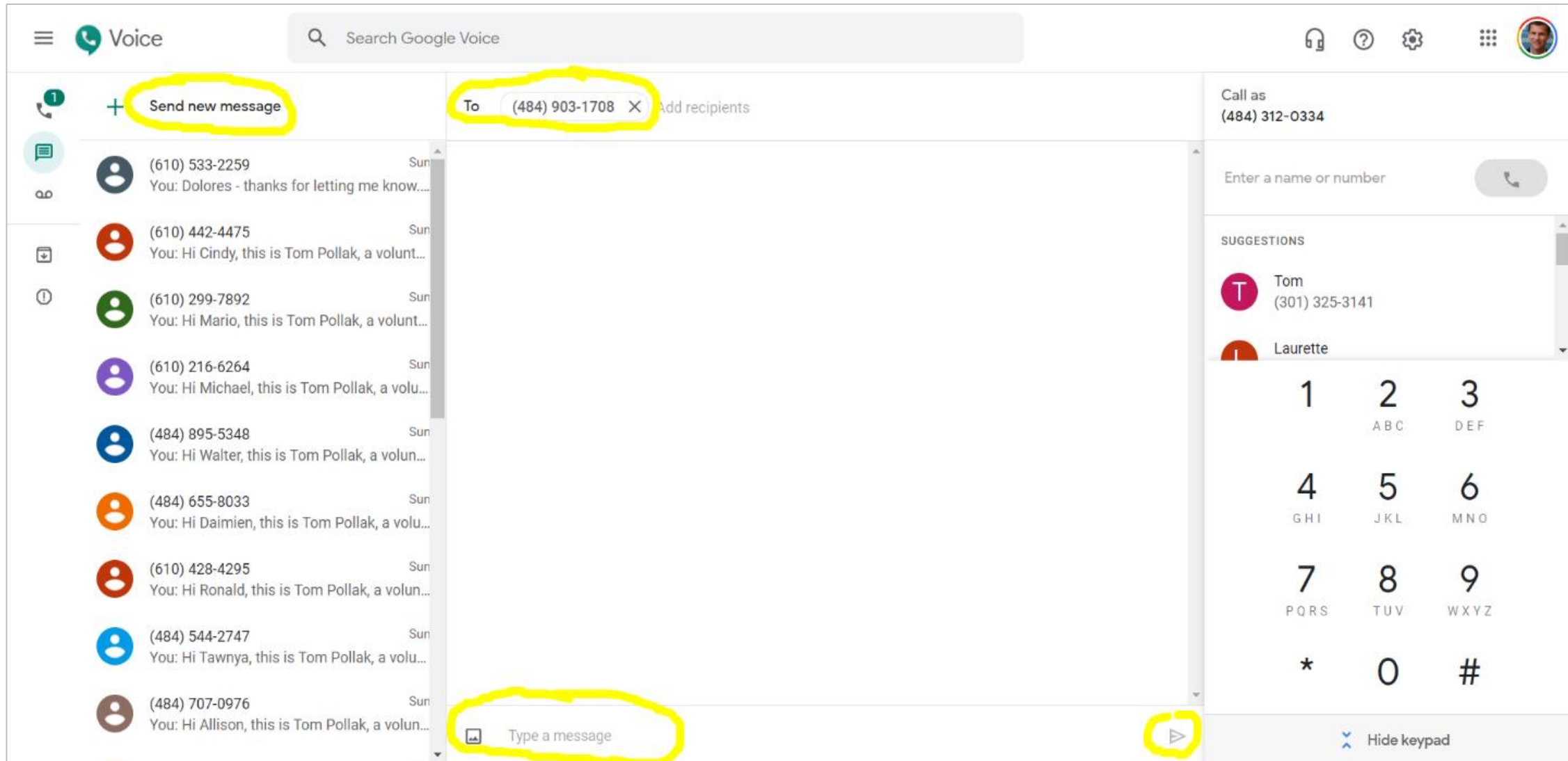
TEXT MESSAGE

Hi Brian, this is Tom Pollak, a volunteer w/ Our Shared Future. I believe this is an important election for the future of our children and of our country. I support Biden but, regardless of your view, I'd like to have a conversation. I promise to listen to your perspective whether we agree or not.

Learn more about us at <https://sfuture.org>. Would you be willing to have a short conversation if I call you in a few minutes?

Three Technology Building Blocks

3. Google Voice: For Texting AND Calling



Overview of the Workflow

Our Shared Future Relational Remote Canvassing

Using the Shared Future
Database
and Google Voice

People			
Axel Anderson			
Brenda Bean			
Cara Cook			
Diante Douglas			
Ellis Emery			
Fiona Fane			

- Work in groups of 5 records:
1. Text each of them
 2. Then call each of them starting the earliest that you texted.
 3. Send postcard (optional)

Text the 1st Group of 5 Voters

Communications Log Axel Anderson Age: 30 Phone: 111-1234 Type: Outgoing Text "Hi Alex, this is Tom with Shared Future. Can I call you...?" Save	Communications Log Brenda Bean Age: 50 Phone: 222-1234 Type: Outgoing Text "Hi Brenda, this is Tom with Shared Future. Can I call you...?" Save	Communications Log Cara Cook Age: 18 Phone: 333-1234 Type: Outgoing Text "Hi Cara, this is Tom with Shared Future. Can I call you...?" Save	Communications Log Diante Douglas Age: 80 Phone: 444-1234 Type: Outgoing Text "Hi Diante, this is Tom with Shared Future. Can I call you...?" Save	Communications Log Ellis Emery Age: 50 Phone: 555-1234 Type: Outgoing Text "Hi Ellis, this is Tom with Shared Future. Can I call you...?" Save
Google Voice New Text 111-1234 Hi Alex, this is Tom with Shared Future. Can I call you...? SEND >	Google Voice New Text 222-1234 Hi Brenda, this is Tom with Shared Future. Can I call you...? SEND >	Google Voice New Text 333-1234 Hi Cara, this is Tom with Shared Future. Can I call you...? SEND >	Google Voice New Text 444-1234 Hi Diante, this is Tom with Shared Future. Can I call you...? SEND >	Google Voice New Text 555-1234 Hi Ellis, this is Tom with Shared Future. Can I call you...? SEND >

Call the 1st Group of 5 Voters

Communications Log Axel Anderson Age: 30 Phone: 111-1234 Type: Outgoing Phone Status: Left msg. Voice Msg Script Save	Communications Log Brenda Bean Age: 50 Phone: 222-1234 Type: Outgoing Phone Status: Talk 3-5 min. Call Script ... Save	Communications Log Cara Cook Age: 18 Phone: 333-1234 Type: Outgoing Phone Status: Hung up Call Script ... Save	Communications Log Diante Douglas Age: 80 Phone: 444-1234 Type: Outgoing Phone Status: Answ mach.- no message Call Script ... Save	Communications Log Ellis Emery Age: 50 Phone: 555-1234 Type: Outgoing Phone Status: Long talk Call Script ... Save
Google Voice 111.. Axel... (Left voice msg on answering machine)	Google Voice Brenda Hi Brenda, this is Tom with _____. How are you feeling about the elec-	Google Voice Cara (Hung up)	Google Voice Diante (Got answering machine but it was full)	Google Voice Ellis Hi Ellis, this is Tom... How are you feeling about the election?

The Process in Detail

- Click on the “Text” symbol





















Our Shared Future

Home Summary **People** Profile Logout

People

Search...

Apply Filter ----

# ↑	Name	Gender	Age	Party	Cellphone	Tags	Last Contact	# of Contacts	Status
327	Brian Farley	M	66	Registered Independent	(484) 903-1708			0	   
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346	Jennifer Fitzko	F	48	Registered Independent	(610) 533-4697			0	   
374	Nikolas Galiszanski	M	26	Registered Independent	(484) 554-0618			0	   

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

Brian Farley - Communication Log - Google Chrome

sfuture.site/communication.php?action=txt&pid=327

Brian Farley - (484) 903-1708 --- Dbl-click to copy: 4849031708

Communication Type

Text-outgoing

Contact Date

09/28/2020

Text/Notes

Text/notes

Submit

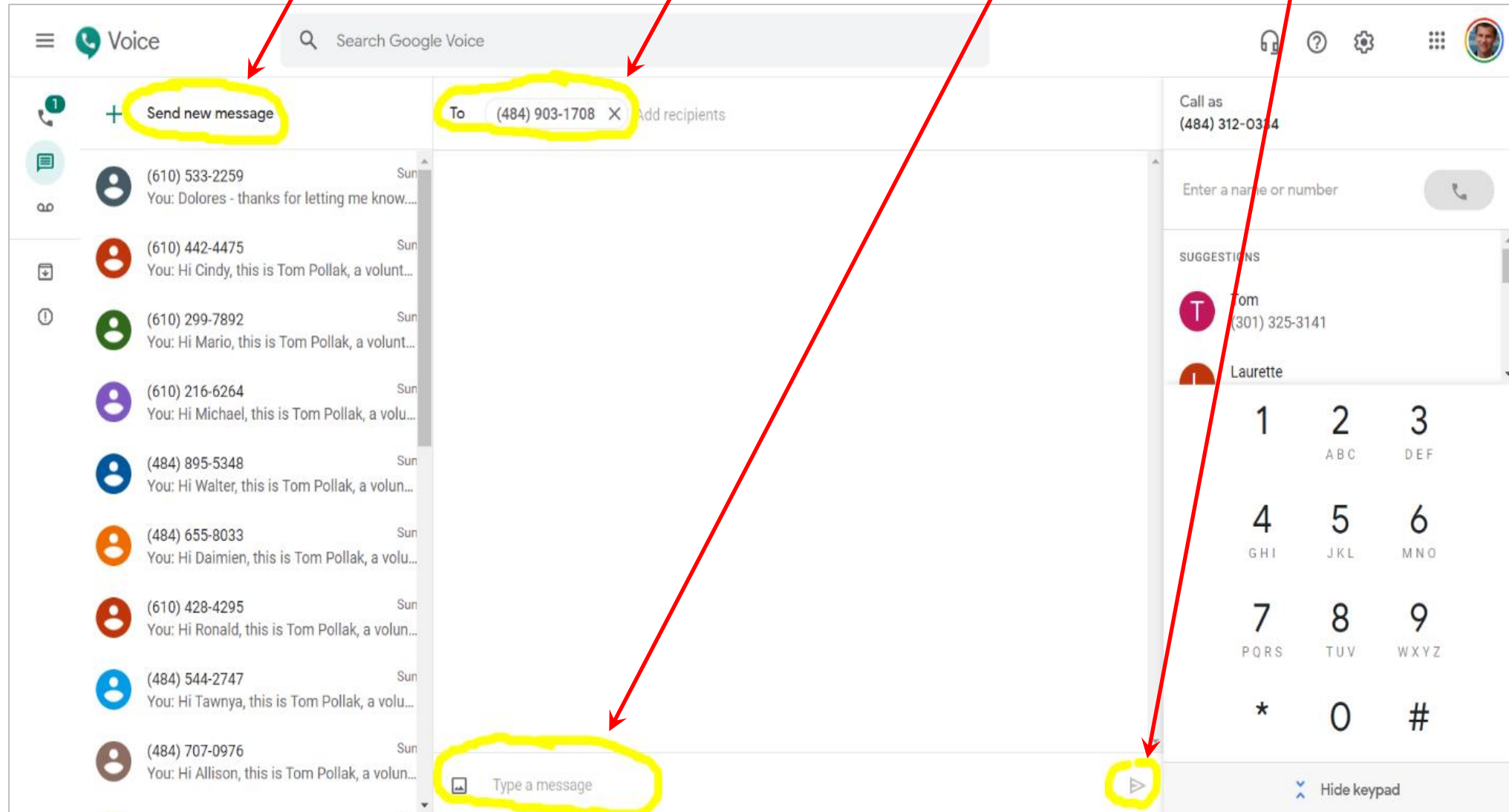
TEXT MESSAGE

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Learn more about us at <https://sfuture.org>. Would you be willing to have a short conversation if I call you in a few minutes?

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."

Brian Farley - Communication Log - Google Chrome

sfuture.site/communication.php?action=phn&pid=327

Communication Log: - Brian Farley - (484) 903-1708 ---- Dbl-click to copy: 4849031708

Communication Type
Phone-outgoing

Contact Date
10/08/2020

Cellphone Status
Answering machine-left msg

Voter Status
Friendly

Text/Notes
Text/notes

Save Communication Record

VOICE MAIL:
Hi Brian, this is Tom with Our Shared Future. I sent you a text message a few minutes ago about the upcoming election. Sorry to bother you at dinner time but I feel this election is really important and was hoping to chat with you about it. You can reach me at (484) 312-0334. Have a great evening!

PHONE SCRIPT:
Hi, my name is Tom and I'm a volunteer calling about the November elections. Is this Brian? Are you planning to vote? May I ask if you are considering voting for Joe Biden? Do you feel like your mind is made up about who to vote for? Or not so much?

If STRONG SUPPORTER:
Thanks so much! Do you plan to vote by mail or in person?

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 screenshot shows the Google Voice web interface. On the left, a list of text messages is displayed, each with a contact's name and phone number. A yellow box highlights the first message in the list, which is from (484) 895-5348. A red arrow points from the first step of the instructions to this message. A blue arrow points from the second step of the instructions to the phone icon in the top right corner of the interface. The phone icon is also highlighted with a yellow box. The right side of the interface shows a call control panel with buttons for Message, Mute, Hold, and Keypad. A red arrow points from the fourth step of the instructions to the red hang-up button at the bottom of the call control panel, which is also highlighted with a yellow box. The bottom of the screen shows a script for a phone call, starting with "Hi Walter, this is Tom Pollak, a volunteer w/ Our Shared Future. I believe this is an important election for the future of our children and of our country. I support Biden but, regardless of your view, I'd like to have a conversation. I promise to listen to your perspective whether we agree or not."

1. Click on a text message to call up the Voter to call.
Click on the FIRST person in the group you will be calling.

2. Click here to call.

4. Click here to Hang Up

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.

Brian Farley - Communication Log - Google Chrome

sfuture.site/communication.php?action=phn&pid=327

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Phone-outgoing

Contact Date
10/08/2020

Cellphone Status
Answering machine-left msg

Voter Status
Friendly

Text/Notes
Text/notes

Save Communication Record

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Thanks so much! Do you plan to vote by mail or in person?

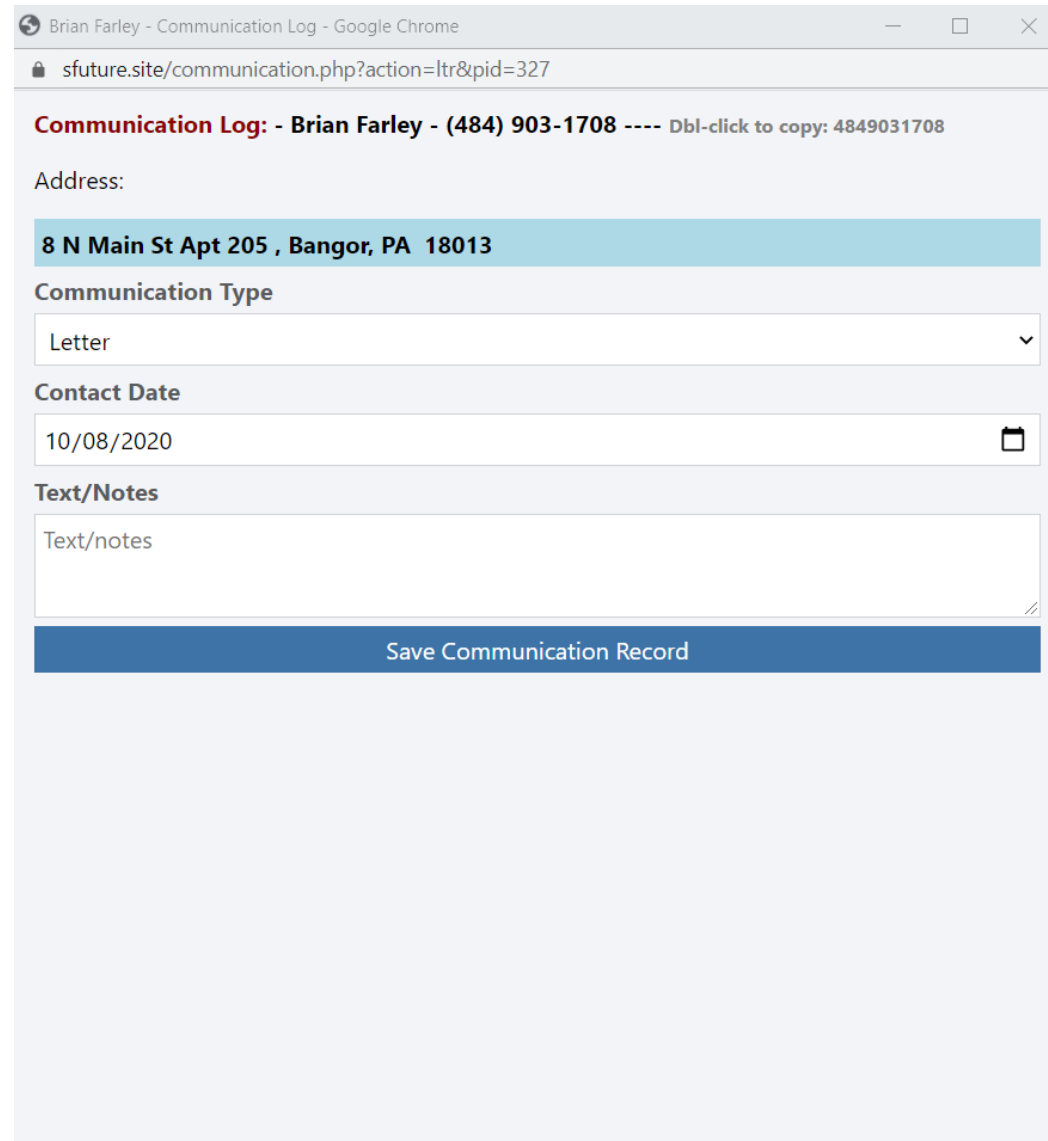
The Process in Detail: Sending Postcards

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!








The screenshot shows a web browser window titled "Brian Farley - Communication Log - Google Chrome". The address bar shows the URL "sfuture.site/communication.php?action=ltr&pid=327". The page content includes a header "Communication Log: - Brian Farley - (484) 903-1708 ---- Dbl-click to copy: 4849031708". Below this is a section labeled "Address:" with a light blue background containing the text "8 N Main St Apt 205 , Bangor, PA 18013". This is followed by a "Communication Type" dropdown menu set to "Letter". Below that is a "Contact Date" field with the date "10/08/2020" and a calendar icon. The next section is "Text/Notes" with a text area containing the placeholder "Text/notes". At the bottom of the form is a blue button labeled "Save Communication Record".

Check Out Your Achievements!

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

Our Shared Future

 Home  Summary  People  Profile  Logout

Summary

Assigned Voters:	120
Voters Awaiting Contact:	81
Voters Contacted:	39
Total Contacts:	79
— Text-outgoing	29
— Phone-outgoing	26
— Text-incoming	2

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.

Our Shared Future: Login

[Login](#) [Register](#)

 Username




☐ Remember me


[Forgot Password?](#)


Login


Our Shared Future: Register

[Login](#) [Register](#)

 Username



 Confirm Password

 Email

Register