

STEP TEN

CALL AND ASK

How can we best train,
inspire and motivate
our callers?



ACTIONS!

Before calling: feed and train

Feed everyone first—they'll be much happier if they're not hungry. But stay away from heavy foods. You don't want sleepy callers, either!

After the volunteer leader welcomes everyone and reminds them why they're here, start your training session. Usually this takes about 30 minutes and includes reviewing the materials and how to use them, and going over the dialogue step by step. Do some role playing, with leaders playing the part of prospects.

Also train your volunteers to handle inaccuracies on their calling cards, too (some are inevitable). Potentially awkward situations—like a divorce or a death—should be managed compassionately and professionally.

And if you'll be handing out awards or prizes (or dessert), give your callers a heads-up. It's fun to know these are coming.

How can we best train, inspire and motivate our callers?

🍀 **During calling—support and encourage**

Cheerleaders and runners are “on” immediately, celebrating successes and keeping the Tally Keeper up to date. Watch for callers who are having a tough time—and have some “sure things” on hand to re-energize them and boost their spirits.

Check in with callers at least every half hour, offering water, coffee and other refreshments.

🟡 **After calling: debrief and reward**

Once the calling is over, quickly tabulate the pledges—and celebrate your success. Even if you did not meet your stated goal, the funds you raised will make a difference to your organization and your callers need to know that.

Also, your phonathon is about more than just fundraising, even though that is the main goal. Wind down together and talk about the experience. Ask volunteers for their feedback and to fill out the “Volunteer Caller Questionnaire.” And by all means, share funny stories and present the awards and prizes.

One final detail: if any information on the pledge or calling cards is illegible or unclear, go over it now, before everyone leaves.





CONSIDER THIS...



SUCCESS STRATEGY:

Friends working together

Every one of you in that room care deeply about the success of your organization and its programs—so play it up. You may come from different backgrounds and live different lifestyles, but you're all here for one cause, which is reason enough to celebrate.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

- ▶ Volunteer Caller Questionnaire

Thank you for participating!

Please take a few minutes to answer the following questions—we'd like to know your thoughts and are always looking for ways to improve our program. If you have any questions or topics you'd like to discuss in person, please do. Including your name is completely up to you.

Please rate the following on a scale of 1 – 5, with 5 being the highest (circle one):

Contact by volunteer leader	1	2	3	4	5
Orientation Packet	1	2	3	4	5
Dialogue Guide	1	2	3	4	5
Pre-call Training	1	2	3	4	5
Food and Refreshments	1	2	3	4	5
Calling Card Functionality	1	2	3	4	5
Pledge Card Functionality	1	2	3	4	5
Support from team while calling	1	2	3	4	5
Effectiveness of incentives	1	2	3	4	5
Atmosphere of calling site	1	2	3	4	5
Overall experience	1	2	3	4	5

Please give us your feedback on the following (continue your answers on the back, if you like):

- What did you like best about your experience?

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- What did you like least?

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- Is the experience what you expected?
If not, what surprised you?

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- Tell us about your best call.

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- Tell us about your worst call.

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- Do you feel you were successful?

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- If you could change anything about the way this
phonathon was conducted, what would it be and why?

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- Would you consider participating in another phonathon?

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- Please add any other comments here—thank you!

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STEP TEN

Overview:

ACTIONS!

- 🔴 Before calling: feed and train
- 🟢 During calling: support and encourage
- 🟡 After calling: debrief and reward

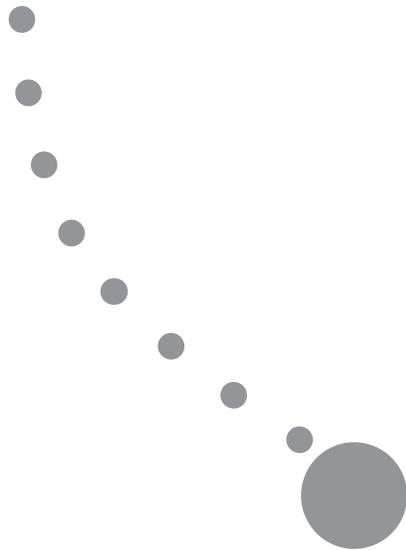
CONSIDER THIS...

- 🔵 SUCCESS STRATEGY:
Friends working together

TOOLS

- ▶ Volunteer Caller Questionnaire

Review the Step



Ready for the
Next Step?

10

STEP TEN