



**BEST PRACTICES  
FOR POLITICAL CAMPAIGNS  
USING CALLFIRE**

WHITE PAPER

# OVERVIEW

*This best practice guide is intended for individuals who work in for political campaigns. This paper does presume some cursory knowledge about how each CallFire product works; for a review, please visit the CallFire website, [www.callfire.com](http://www.callfire.com).*

Political campaigns are constantly looking to find a winning edge. Culled from our users' stories, this white paper is designed to provide best practices on how to effectively leverage CallFire's solutions for candidate and issue campaigns.

Given the time crunch of a campaign cycle, the various components of a campaign must work in unison. This paper will focus on how CallFire will help your field, communications, and finance departments optimize their time and be more effective.

## SMS FOR FIELD ORGANIZING

Text messaging, or SMS, has become an essential communications tool for political campaigns. Current research suggests that SMS is the preferred means of communication among young people and indeed, mobile users in general. In addition, text can be a great way to propagate information. Here are some ways you can utilize text messaging as an effective organizing tool:

- **Text surveys**, which are less intrusive than voice surveys because they can be responded to at any time. For example, you can poll constituents as to whether they have registered to vote yet.
- **Registration reminders**, customized by state, letting constituents know when deadlines are.
- **Absentee ballot information**, customized by state, reminding constituents to request absentee ballots if needed, and when they must be submitted.
- **Event invitations** to any local campaign events—personalized by area code.
- **Important announcements** to communicate with your supporters. In 2008, for example, the Obama presidential campaign used SMS to announce its vice presidential choice.
- **Fun messages and photos** to communicate with your constituents on a personal level.
- **Down-ballot promotions** to encourage constituents to vote for other candidates you support.
- **GOTV reminders**. SMS can be a critical organizing tool in getting out the vote, ensuring supporters show up at the correct polling location.



# VOICE BROADCAST FOR ORGANIZING AND FINANCE

CallFire's Voice Broadcast allows your pre-recorded message to reach thousands of people quickly. All you have to do is upload your phone list, schedule a time and date for your calls to go out, and CallFire will broadcast your recorded message. With a press-1 transfer option, your audience can connect directly to your campaign office.

- **Candidate introduction.** Have candidates or campaign surrogates introduce themselves to voters. But remember, you have a limited timespan to communicate with voters. Be concise and keep your message under thirty seconds.
- **Field event reminder calls.** Notify your supporters when there is a campaign event. If the supporter is interested in learning more about the event, they can press 1, have their call transferred, and your office can give them more information or collect RSVPs.
- **Donation solicitations.** Many campaigns use voice broadcasting for candidate donation solicitation. The candidate or a surrogate can make a donation request and ask the supporter to press 1 to speak to a representative and process a payment. Of course, making a live request is preferable; however, when you have a lot of calls, using voice broadcast makes reaching out to donors more manageable. Save your campaign staff time and use CallFire Voice Broadcast and Hosted IVR to automate the process.



*CallFire made it possible for us to produce and deploy an effective advocacy campaign—quickly, and on budget. With CallFire's simple, flexible XML environment, we were able to connect with thousands of Wisconsin voters... and offer them the opportunity to connect directly with their elected officials.*

- Michael Snook, Progressive Change Campaign Committee



# HOSTED IVR FOR ORGANIZING AND VOTER EDUCATION

With limited resources and manpower, it makes sense for campaigns to automate as many processes as possible. The CallFire IVR Designer enables you to create custom phone trees as simple or as advanced as your campaign needs. Just record your messages (or choose the text-to-speech option) and use our drag-and-drop interface to build anything from get-out-the-vote learning menus, to automated inbound or outbound polls and surveys.

## CUSTOMIZED MESSAGES, SURVEYS, AND AUTO ATTENDANTS

- **Customized GOTV reminders.** Using CallFire's Hosted IVR, you can provide voters with specific voting location information based on their inputted ZIP code and ask if supporters need a ride to the polls. Once a key is pressed, you can either route the request to the field team or register the request for a ride.
- **Navigable candidate introductions.** Set up a dynamic call where a constituent can hear a candidate's stance on various issues. With an automated IVR, the voter can choose from a number of options and learn more about the candidate's stance on issues important to them.
- **Polls.** Both professional consulting firms and campaigns use CallFire IVRs to generate outbound polls to gather information on voter preferences.



*It has been a big challenge for us to figure out how to track the efforts of our members around the country. When we have 10,000 volunteers who need to report in on the same day, CallFire's IVR system is a breakthrough solution for us. It just works, and we can concentrate on other things.*  
- Adam Ruben, MoveOn.org



# CLOUD CALL CENTER FOR VOTER OUTREACH AND FINANCE

With so little time and so many voters to contact, everyone from field staff to volunteers can use the speed of CallFire's Cloud Call Center to make voter contact, finance calls, and volunteer recruitment much more efficient. Here are some ways our political clients have used the Cloud Call Center to get a winning edge:

- **Call from home.** Volunteers often don't have the time or are unable to make it to the campaign office to pick up call sheets or make phone calls. With the Cloud Call Center, you can make volunteering more convenient. Provide a link to CallFire's agent login screen on your candidate's website so that volunteers can easily make calls remotely, wherever they are. In doing so, you'll be able to recruit more volunteers to work more shifts, and thus contact more voters.
- **Voter and constituent contact.** The Cloud Call Center eliminates manual calling and data entry. Simply upload a list and start making persuasion and GOTV calls. Provide a script and customize disposition questions to identify voter preferences. The data collected will be stored automatically and will make follow-up calls easier and more efficient.
- **Volunteer recruitment.** Have your field organizers load their recruitment lists into the CallFire site and make their calls through the Cloud Call Center. They'll spend less time recruiting and more time organizing and tending to direct voter contact efforts.
- **Donation solicitation.** In the same way you utilize the Cloud Call Center to do all your field calls, your candidate can use the Cloud Call Center to make finance calls. Not only will you have a happier candidate more eager to make donor calls, but you'll have a more productive team overall.

*These best practice tips are designed to help you formulate a winning strategy. Please feel free to contact us with any questions. We look forward to helping you work towards victory.*





# ABOUT CALLFIRE

*CallFire, an Inc. 500 company, provides a reliable, enterprise-grade VoIP platform that powers voice broadcasts, call centers, call tracking, and text messaging campaigns. CallFire has over 37,000 customers including political groups, non-profits, insurance agents, small business owners, and marketers. Headquartered in Santa Monica, CA, CallFire is dedicated to providing high-availability systems, intuitive user interfaces, furious developer support, and unparalleled customer care in order to transform how companies do business.*

*Learn more at [www.callfire.com](http://www.callfire.com).*