Fundraising Phone Bank Work Flow

Introduction

Phone Banks are set up and operated via the Survey section of the Campaign menu of PowerBase.

The basic work flow of Phone Bank is this:

1. **Configuration**
    a. Determine if this will be collecting Donation or Membership payments and configure the button.
    b. Determine which fields should appear in the pop up when you mouse over a record in the survey
2. **Set up the Survey type of Phone Bank**
    a. Add questions as custom data or reuse prior custom fields
    b. Put them on a profile or reuse a prior profile.
    c. Add them to the Phone Bank Survey
    d. Determine a "Result Set" and add it to the Phone Bank Survey
3. **Create Group(s) to be interviewed**
4. **Prepare for volunteers**
    a. Add survey to a menu
    b. Create volunteer logs in and assign them to a special permission group of PowerBase Phone Bank
    c. Train the volunteers and staff that will be calling
5. **Start Calling**
    a. Using your new Survey, reserve contacts from the Group for each caller
    b. Caller logs in, makes calls and enters responses, including credit card payments
    c. Automatically release any reserved contacts after a day so they can be assigned again tomorrow.
6. **Monitoring**
    a. Use Activity and/or Survey reports to track who has not been called.
    b. Use Contribution Reports to check on receipts
7. **Evaluating**
    a. Contribution Reports for dollars
    b. Membership Reports for member renewals
    c. Activity and Survey reports for number of calls made