Voter ID Coalition
Voter Helpline
Agent Training
Training Overview

- Responsibilities of an agent
- Best practices
- How to use Freshdesk
- Freshdesk resources
- Scheduling & logistics
Responsibilities of Helpline Agents

LEVEL 1

● Use Freshdesk site to retrieve and document calls, texts & emails
● Sign-up on schedule to answer calls (week long shifts until election season, then we switch to 1 day shifts)
● Commit to respond to calls within 24 hours
● Commit to work with each contact until issue/question resolved
● Commit to maintain contact’s confidentiality
● If comfortable, provide direct assistance to help get an ID
● Escalate calls to Level 2 agents (“experts”) when needed
When to Escalate Calls to Level 2

- Question beyond your knowledge or outside your experience
- Request for direct assistance at the DMV
  - You are not comfortable doing this
- Contact needs help in a different language
- Contact needs help from a local expert outside of Dane County
- Request for absentee ballot witness
- Press request for information
- Contact wants to volunteer for voter outreach
Responsibilities of Helpline Agents

LEVEL 2

- Same as Level 1
- Consult with bilingual agents
- Refer to local experts outside of Dane County
- Assign to absentee ballot witnesses
- Provide information to contacts who want to volunteer
- Provide direct assistance at DMV (if comfortable)
Responsibilities of Helpline Agents

LEVEL 2

Refer to others

- Arrange for cab ride - Barbara Feeney, Susan Fulks, Gail Bliss
- Hospitalized voters - contact Gail Bliss
- Press request - contact Paul Lindquist or Kathy Fullin
- Assistance for voters experiencing homelessness - Gail Bliss
Special Reminders

● If you are "on duty" and are expecting emails from Freshdesk but they are not arriving, check your spam folder.
● Request from Level 1 agent for assistance from Level 2 agent
  ○ only “on duty” agent responds
  ○ respond within 24 hours
  ○ close to the election, respond within a couple of hours
● Monitor your “Pending” tickets
  ○ be sure notes are complete
  ○ refer tickets to Level 2 agents if needed
  ○ update status to “Resolved” or “Closed”
● Press requests go to Paul Lindquist or Kathy Fullin
Best Practices

- Stay positive
- Seek help and research as needed
- Stay non-partisan
- Peer review - tickets double-checked for completeness and status
QUESTIONS?
Freshdesk Helpline Overview

1. **Voter** calls helpline - leaves a voice message or hangs up

2. A **ticket** is automatically opened in Freshdesk with phone number, and if the caller left a voice mail, with a voice mail transcript.

3. The new ticket is automatically assigned to the **Level 1** group and an email is sent to notify the “on duty” Level 1 agent(s).

4. An available Level 1 **Agent** assigns the new ticket to themselves, and contacts the voter to gather more information, answer questions and provide needed support. Notes are added to the ticket each time any action is taken by the Agent.

5. The ticket status should be updated, recording the progress through the four stages:
   - **Open** - initial status of a new ticket
   - **Pending** - awaiting action by the voter. We can't make progress until that action is completed
   - **Resolved** - successfully resolved the voter's initial challenge(s)
   - **Closed** - voter is ready to vote and knows when/where/how to vote !!!
This sample depicts a voter calling two times over a three day period. Eventually she got the assistance she needed.

- **Ticket #13**: Missed call from 608-345-6789
  - 7/3/2020 at 11:06am
  - Note: Left message 7/3/2020 at 11:35am

- **Ticket #19**: New voicemail from 608-345-6789
  - How do I get an ID to vote in Wisconsin
  - 7/5/2020 at 6:23pm
  - Note: Judy has everything she needs to get an ID. Assisted her in making an appointment at the DMV
  - 7/5/2020 at 7:46pm

**Contact**
- Name: Judy Smith
- Phone: 608-345-6789
- Address: Madison
Getting started in Freshdesk

1. Launch Freshdesk by navigating to voteridwisconsin.freshdesk.com

2. After entering your email address and password, you will see the Dashboard page
These icons allow you to navigate to key areas within Freshdesk.

**Dashboard**: an overview of the ticket counts

**Tickets**: list of new tickets and tickets you are assigned to resolve

**Contacts**: list of every voter who has called

**Knowledge Base**: answers to questions about helpline procedures and about voter registration, voter ID, and voting
Tickets

- Click a ticket **Subject** (bold text) to view that ticket’s Details page
Claiming a Ticket

If a new ticket is unclaimed, review the transcript. (Ignore the Play Message button.)

First, claim the ticket so no other Agent grabs it:

- clear the Group dropdown by choosing the “--” choice
- choose your name in the Agent dropdown (bottom center of the page),
- then click Update

*** don’t forget to click Update ***
Ticket Properties

As you communicate with the voter and learn more about their questions and/or issues, choose the appropriate dropdown values and then click Update

- **Tags** - enter one or more tag values to classify what issues the voter needs assistance with
- **Type** - optionally, choose the type of ticket (Question, Press Inquiry, New volunteer etc)
- **Status** - update the tickets status as you progress towards resolution and closure (Open, Pending, Resolved, Closed)
- **Group** - re-assign the ticket to Level 2 if it involves complex issues needing the attention of our more experienced volunteers
The “contact name” will often show only a phone number. Click on the Contact Name field.
Contacts - Updating details

Next click **Edit**
Try to enter at least a first name and city. Make sure their phone number is entered in the Work phone field.

If they want a ballot witnessed, we will need a full address.

Enter any other information you’ve gathered.

Click **Save**
Adding Ticket Notes

As you work on each ticket and learn more about the challenges that voter is facing, click **Add note** to document the steps you’ve taken and information you provided the voter.

If the ticket needs to be handed off to another volunteer, this will provide great background information for that next volunteer.
Adding Ticket Notes

After entering your notes, click **Add note**
Escalating a Ticket to Level 2

If a ticket involves complex issues needing the attention of our more experienced volunteers, you can escalate it to Level 2.

To escalate the ticket, choose **Level 2** in the **Group** dropdown (bottom center of the page), then click **Update**.

Level 2 volunteers (on duty that day) will be notified a ticket needs their attention.

*** don’t forget to click **Update** ***
QUESTIONS?
Freshdesk Solutions-Knowledge Base

- **Call Scripts** - sample interactions with contacts
- **Helpline Procedures** - step-by-step directions for using Freshdesk and responding to contacts
- **Resources** - background information not specific to voting procedures
- **FAQs** - background information specific to voting procedures; accessible by volunteers and the general public
- **Freshdesk Updates - Library** - most recent Freshdesk update emails for agents
Activity

- Review articles
  - Last name A-G - Review Helpline Procedures (start from top)
  - Last name H-P - Review Helpline Procedures (start from bottom)
  - Last name Q-Z - Review Resources

- Report out on the following:
  - Learned something new
  - Needs further clarification
  - Of particular interest
QUESTIONS?
Helpline Scheduling and Logistics

● 2 agents per day - commit to specific period which varies depending on closeness to election
● Busy time - swarm, first come basis
● For help
  ○ Freshdesk - Paul paullindquist@lwvdanecounty.org
  ○ General questions - Kathy kathyfullin@gmail.com
  ○ Sign up for shifts on SignUp Genius
    ■ Link to Helpline Signup on Coalition webpage (https://www.voteridwisconsin.org)
● Email updates available online

Thank you for volunteering!