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 the weeks right before elections, when we switch to shorter shifts)
- Commit to respond to calls within 2-3 hours close to an election
- Commit to work with each contact until issue/question resolved
- Commit to maintain contact's confidentiality
- Escalate calls to Level 2 agents ("experts") when needed

When to Escalate Calls to Level 2

- Question beyond your knowledge or outside your experience
- 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 - Susan Fulks, Barbara Feeney, 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.

Access Freshdesk at https://voteridwisconsin.freshdesk.com
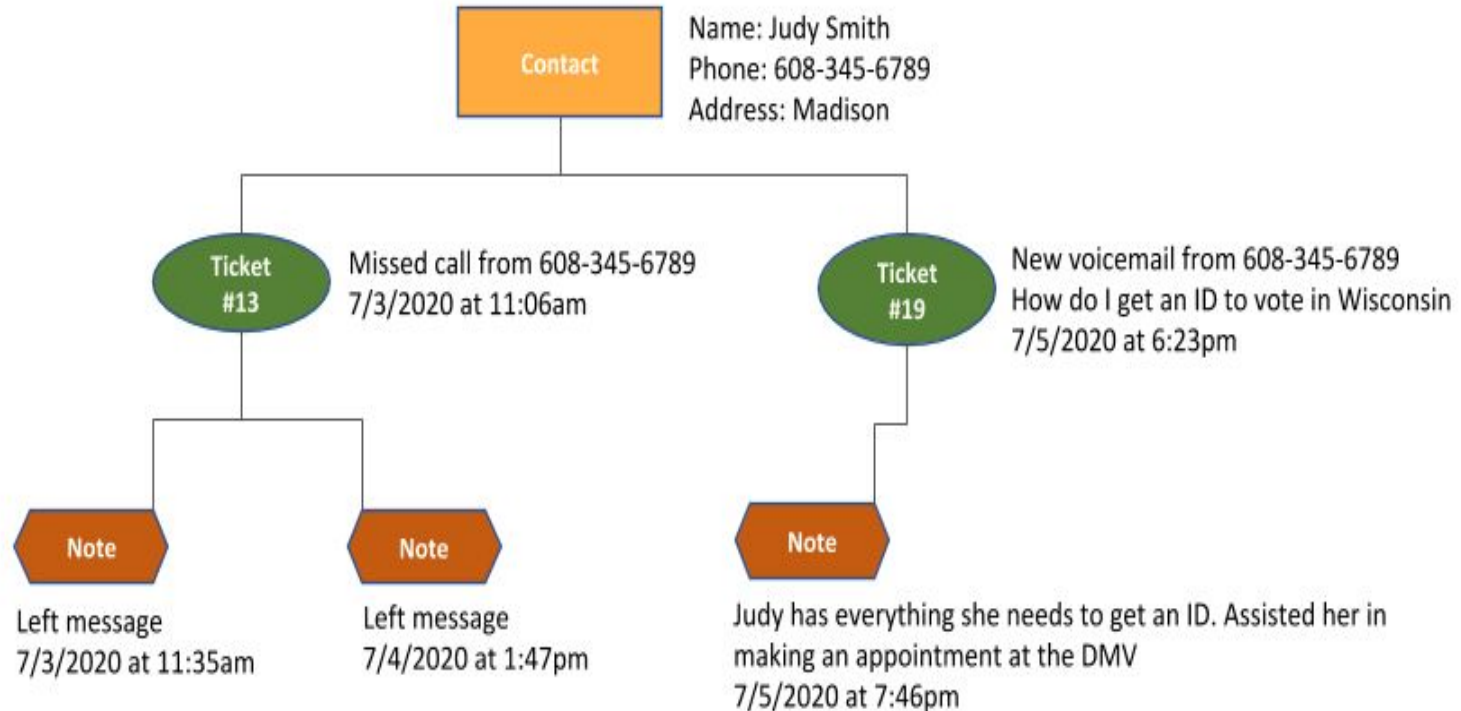
Login to the support portal

Enter the details below

> Your e-mail address

> Password

☑ Remember me on this computer

Forgot your password?

LOGIN

🎧 **Are you an agent?** **Login here**

⇐ You should log in here

...or login using

G GOOGLE

f FACEBOOK

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
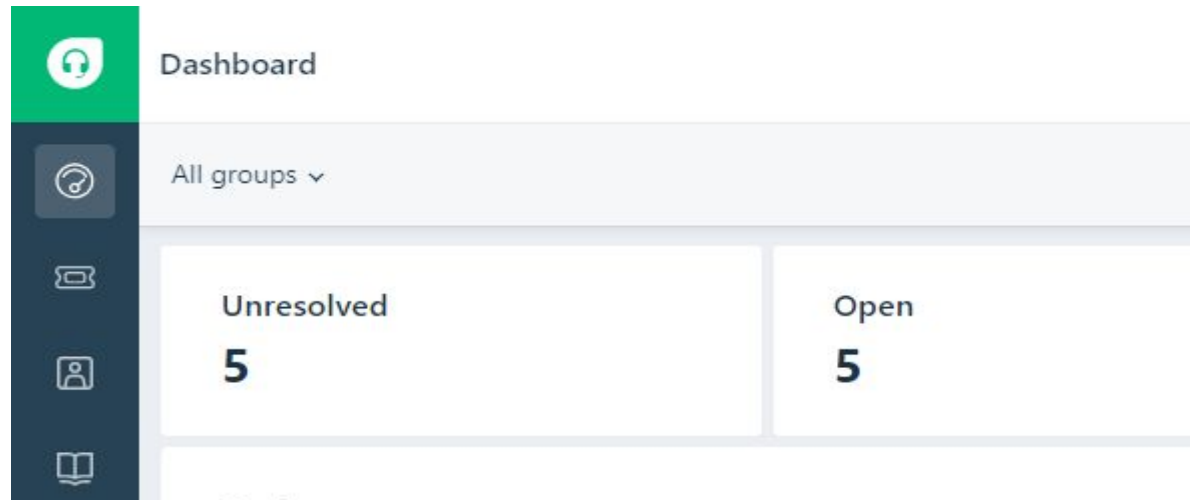
Freshdesk Navigation Icons

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

Contacts - Updating details

The "contact name" will often show only a phone number. Click on the Contact Name field.

Contacts - Updating details

Next click **Edit**

Contacts - Updating details

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

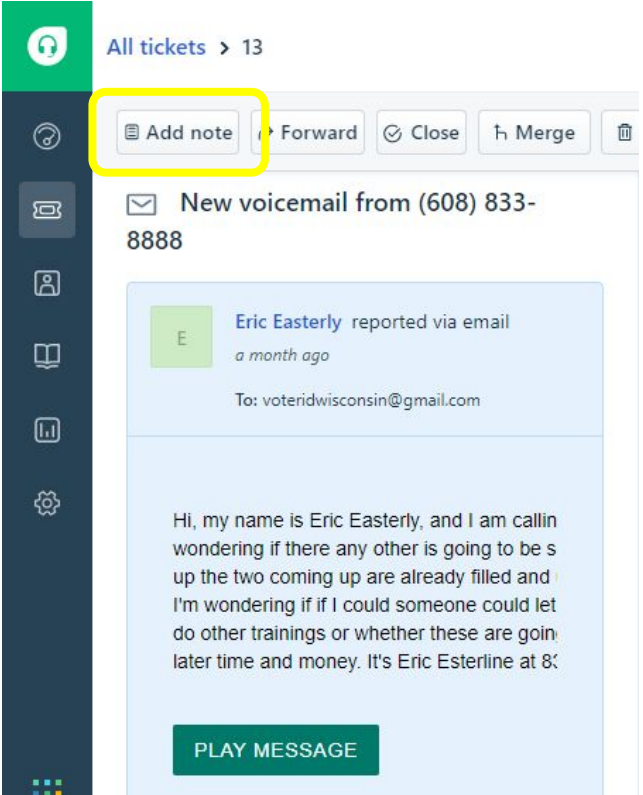If they want a ballot witnessed, we will need a full address.

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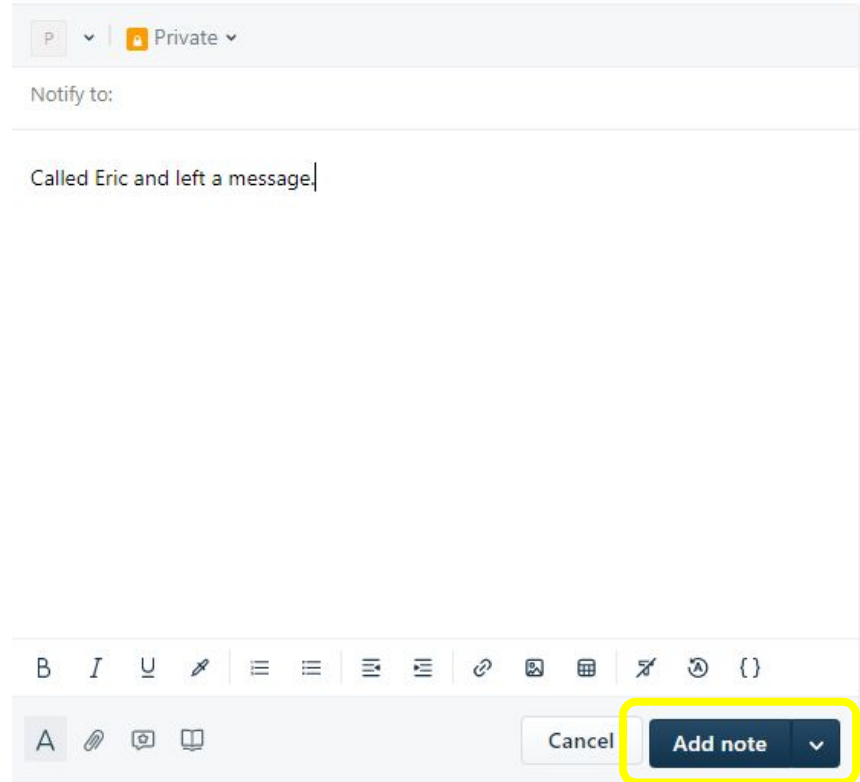
If the ticket needs to be handed off to another volunteer, this will provide great background information for that next volunteer.

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!