

FOLLOW UP TOOL GUIDELINES

(Updated 5/18/22)

login to conventionofstates.com

click on profile icon in upper right hand corner to bring up drop down menu

select Dashboard

Go to the tools section of the icons on the far left side of the page

Select Follow up tool

in the dark gray column headings find the heading for Lower
(this represents your house district)

in the light gray section where it says filter type in your house district number ie. 28 or 45 etc.- the number of your district only

Then hit the blue circle button in the upper right corner of the page to apply the filter

(the white circle button cancels all applied filters)

What you are now seeing should be any new petition signers in your house district. You will notice that the created at date column has dates showing in green, yellow and red. The created at date refers to the date the petition was entered into our system. The colors are a visual representation of how long they've been in the system.

Newer entries will be in green, ones that have been there a few days - yellow and ones that are at least a week old in red. Our goal is to have every new petition signer contacted by someone from their district within a few days or in green. Once an entry has turned to red our state followup team will try to reach out to them.

Goal for contacting each new signer is to send them a welcome information email and to try to connect with them via a text message and a phone call.

Next click on the person's name and that will bring up their profile.

Under their profile name you will see a series of data points with either checkmarks or X's if they apply. Most everyone should have a checkmark for petition signed. Take note if they have checked that they are interested in volunteering. These will be people we want to give a little special attention to contacting.

To the right of the profile information is an email tool. Click on the template drop down menu and select the option TX-TX Universal Thank You. This will populate in the body of the email. You will need to manually type in a subject. Type in the persons name - Welcome to the Convention of States Team.

At the bottom of the email tool hit the blue **SEND** box.

Under the person's profile info copy their phone number and use it to send a text message.

Here are examples of text messages that could be sent depending on weather the petition signer has indicated they want to volunteer or not

Sample FUT TEXTS

Hi _____ - My name is (Your name) and I'm a volunteer with Convention of States Action. Thank you for your support and if you are interested in more information or volunteering please contact me and check out conventionofstates.com/stand

IF VOL IS CHECKED

Hi _____ - My name is (Your name) and I'm a volunteer with Convention of States Action. Thank you for your support and I'd love to talk to you about

volunteering with our organization. Let me know when would be a good time for you. In the meantime help us spread the word about COS by sharing this video with your friends and family. conventionofstates.com/stand

Next attempt to reach petition signer with a phone call. The purpose of this call is to personally thank the person for their support of the convention of states project and determine if they have any interest in more information or volunteer opportunities. If so direct them to the conventionofstates.com website and the Resources tab for more info and the Take Action tab for volunteer opportunities and the Introductory Webinar registration.

Sample CALL or Voicemail

Hello _____

My name is (Your Name), and I'm a volunteer with Convention of States Action here in Texas.

I'd like to thank you for your support and for signing our petition. Are you potentially interested in more information or perhaps being part of our volunteer team?

If YES-

Great, let me direct you to our website. conventionofstates.com There is a **resources tab** with a lot more information about our organization and our progress. And there is a **take action tab** that would allow you apply for a volunteer role and register for our introductory webinar that will provide you with a great overview of our mission and our organization.

Do you have any questions that I may answer?
Thank you again - Good Bye

IF NO-

I understand

If you ever change your mind be sure and check out our website
conventionofstates.com

Thanks again for taking the time to sign our petition.

Good -bye.

If they have check VOL-

Hi _____ This is (Your Name) and I am a volunteer with Convention of States Action. I'd like to thank you for your support and for signing our petition. I see that you are interested in Volunteering and that's great!

(At this point you may want to find out a little bit about them, how they found out about COS)

Let me direct you to our website conventionofstates.com There is a **resources tab** with a lot more information about our organization and our progress. And there is a **take action tab** that would allow you apply for a volunteer role and register for our introductory webinar that will provide you with a great overview of our mission and organization. I look forward to working with you and having you on our team. Good bye!

VOICEMAIL-

Hi _____ This is (Your Name) and I am a volunteer with Convention of States Action. I just wanted to personally thank you for your support and for signing our petition. If you'd like more information please contact me or visit our website conventionofstates.com. Thanks again.

If they have checked VOL-

Hi _____ this is (Your Name) and I am a volunteer with Convention of States Action and I just wanted to personally thank you for your support and for signing our petition. I also see that you are interested in volunteering and I'd love to chat with you about that when its convenient so please let me know. In the meantime check out our website conventionofstates.com and click on the Take Action tab for volunteer opportunities. I look forward to talking with you. Have a great day!

Once you have sent the text message and tried to call (even if you just left a message) hit the **COMPLETE** button at the bottom of the profile page in the follow up tool.

The FUT is a welcome clearing house for the District Dashboard which contains all data for our petition signers. We would like people processed through the follow up tool as quickly as possible.

Notice that if you begin the process with a petition signer but do not fully complete it that person will move from "new followup" to "in progress" which are category headings at the top of your Follow Up Tool page. Once you have completed the process it will move the person to your "Archive" All your completed followups will be found in the archive. It's important that you complete the process in a timely manner!

If you actually connect with a petition signer that wants more info or to volunteer be watching for a volunteer application to come into the Leaders Management Tool (LMT) and you can onboard them to our team from there.