How to Build a Phone Tree

A phone tree is a prearranged system for activating a group of people by telephone. The phone tree system can help you spread a brief message quickly and efficiently to a large number of people. Once your phone tree system is set up, you can use it multiple times to:

- Quickly mobilize members and/or supporters in situations such as when a vote on key legislation is pending and a barrage of calls, e-mails, and letters are needed).
- Notify members of meetings, hearings, actions, and last-minute changes.
- Increase turnout by providing personal invitations to reinforce mailed or e-mailed notices.
- Save printing and postage costs involved with communicating brief notices by mail. (Phone trees are not effective tools for disseminating a high volume of information.)

As coordinator of the phone tree, the only things you need are: **people** to make the calls, anywhere from **five to 30 minutes of time** to make the calls, and **money for long-distance charges where applicable.**

SETTING UP THE PHONE TREE

1) Make a list with current phone numbers of all the people you want the tree to reach. These people could be branch members, past volunteers, potential members, etc. Be sure to include home, cell, office, and other numbers to locate people.
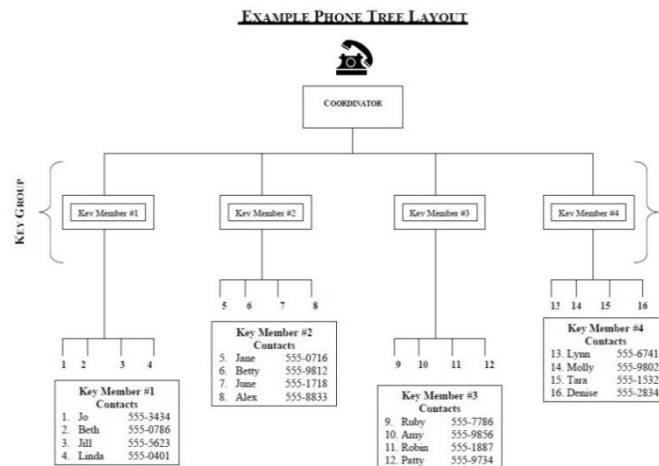
- If you are calling branch members, ask your branch membership chair to keep you informed of changes in branch membership so you can keep your list up to date.

2) From that list, recruit a smaller group of reliable people who will be responsible for calling and activating the other people on the list. This small group will be your "Key Group" that will form the skeleton of your phone tree.

- The Key Group does not need to be big since each person will be responsible for calling several other people on the list.
- Impress upon ALL members of the Key Group the importance of completing all their assigned calls and letting you know the results of those calls. It is critically important that the members of the Key Group are reliable!

3) Divide the people on your list among the members of the Key Group so that each member of the Key Group is responsible for calling three to eight of those people.

4) Keep track of Key Group members and the people you have asked them to call. Distribute that information to the Key Group so that everyone is on the same page. See image at right for a sample way to keep track.

EXAMPLE PHONE TREE LAYOUT

5) Ask members of the Key Group to notify you when they are going out of town or will otherwise be unavailable.

ACTIVATING THE TREE

1) As coordinator, you will start the tree. Write out a brief script complete with the specific action each person needs to accomplish (calling their members of Congress, writing a letter to the editor, coming to the next planning meeting, etc.).

2) Call the members of the Key Group using the script, or activate your phone tree by bringing together the members of the Key Group for a calling party where each person can eat snacks, enjoy the group's company, and make their assigned calls. Make sure that Key Group members understand what they need to do and the time frame in which they should do it. Give them a copy of the script and remind them to report the results to you and to keep trying each person on their list until they make contact.

3) Spot-check the tree's effectiveness by calling a few people down on the list to be sure they have received an accurate and complete message from their assigned person in the Key Group. Or you can prearrange with people down the list to contact you once they have received the message.

4) Once all the calls have been made, make sure to thank the members of your Key Group for a job well done! Keep them excited and motivated for the next time when you need to activate your phone tree.

KEY POINTS
- Have an organization chart for your phone tree.
- Make sure that your Key Group members are reliable and that they understand the importance of making all of their calls within the specified time frame and letting you know the results of those calls.
- Have multiple ways of reaching the people you want to call (home, work, and cell numbers are key).