

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

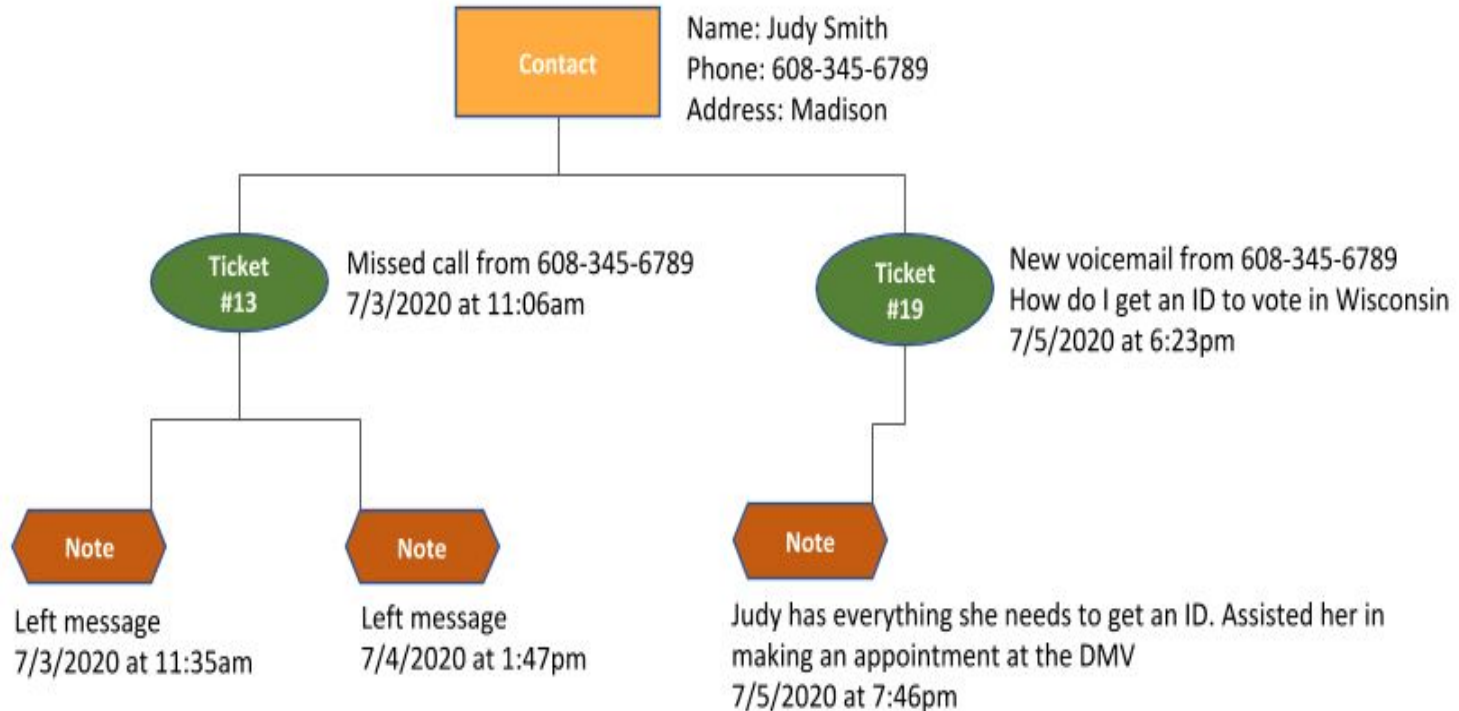
- Stay positive
- Seek help and research as needed
- Stay non-partisan
- Peer review - tickets double-checked for completeness and status

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

Remember me on this computer

[Forgot your password?](#)

LOGIN

...or login using

 **GOOGLE**

 **FACEBOOK**

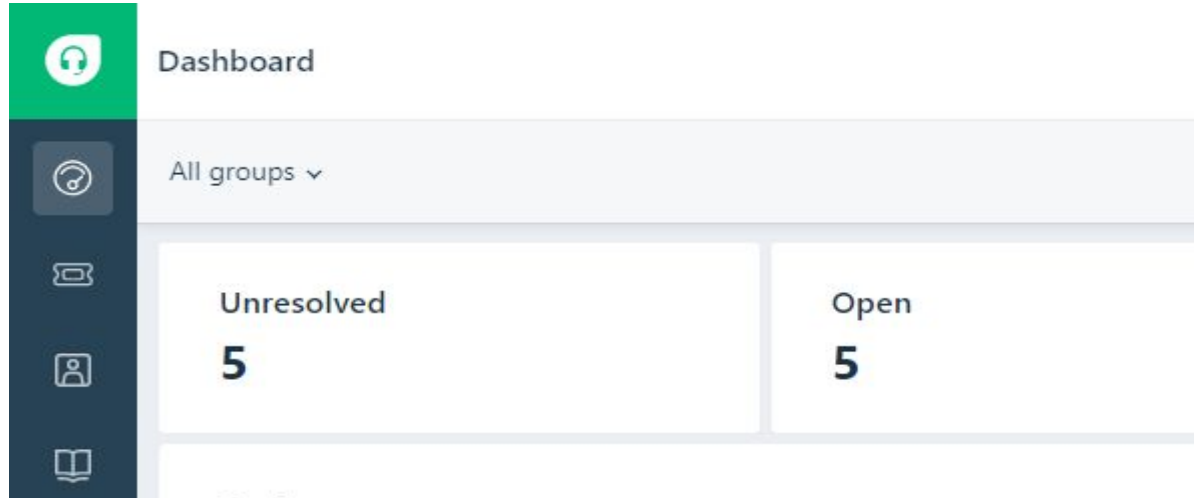


Are you an agent? [Login here](#)

← You should log in here

Getting started in Freshdesk

1. You will start on 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

The screenshot shows a ticket management interface. At the top left, there is a hamburger menu icon and the text "New and my open tickets". At the top right, there is a button labeled "Explore your plan". Below this, there is a header bar with "Sort by: Date created" and a dropdown arrow, and "Layout: Card view" with a dropdown arrow. The main area contains two ticket cards. The first card has a checkbox, a purple square with the letter 'U', and a subject line "New missed call from (708) 890-9999. #14" which is highlighted with a yellow box. Below the subject is "Unkown • Created 20 days ago". To the right are "Low", "Level 1 - ... / --", and "Open" with dropdown arrows. The second card has a checkbox, a green square with the letter 'E', a "Volunteer" tag, and a subject line "New voicemail from (608) 833-8888 #13". Below the subject is "Eric Easterly • Created 23 days ago". To the right are "Low", "Level 1 - ... / --", and "Open" with dropdown arrows.

☰ New and my open tickets Explore your plan

☐ Sort by: Date created ▾ Layout: Card view ▾

☐	U	New missed call from (708) 890-9999. #14 ✉ Unkown • Created 20 days ago	Low ▾ Level 1 - ... / -- ▾ Open ▾
☐	E	Volunteer New voicemail from (608) 833-8888 #13 ✉ Eric Easterly • Created 23 days ago	Low ▾ Level 1 - ... / -- ▾ Open ▾

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:

- choose your name in the **Agent** dropdown (bottom center of the page),
- then click **Update**

***** don't forget to click Update *****

v and my open tickets > 1420

New Search ?

Add note Forward Merge Delete

Show activities

New voicemail from (608) 219-7701

Eric reported via email 4 years ago

To: voteridwisconsin@gmail.com

Voice

Hi, my name is Eric pelagic. My phone number is 608-219-7701. I live Georgia. Zipcode is 53704. I was just calling to see about what I would need to put into a room rej an idea that has been incorrect address on it. Yes. I'm looking forward Thank you.

PLAY MESSAGE

YOUR ACCOUNT HELP CENTER HELP FORUM

This email was sent to you because you indicated that you'd like to receive email notifications for voicemail in the future, please update your email notification settings.

Google

Google LLC
1600 Amphitheatre Pkwy

Pending
on Nov 5, 2020 10:34 AM

PROPERTIES

Tags

Type
Question

Status *
Pending

Group
No groups found

CONTACT DETAILS

Eric

Work phone
608-219-7701
View more info

TO-DO

Agent
--

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)
- **Agent** - re-assign the ticket to Level 2 if it involves complex issues needing the attention of our more experienced volunteers

The screenshot shows a ticket management interface. At the top, the ticket status is 'Pending' and the timestamp is 'on Nov 5, 2020 10:34 AM'. Below this is the 'PROPERTIES' section, which is highlighted with a yellow border. It contains the following fields:

- Tags:** An empty text input field.
- Type:** A dropdown menu with 'Question' selected.
- Status *:** A dropdown menu with 'Pending' selected.
- Group:** A dropdown menu with 'No gro' selected.
- Agent:** A dropdown menu with '--' selected.

At the bottom of the highlighted section is a dark blue button labeled 'Update'. To the right of the form, there is a sidebar with various icons and text, including 'Work p 608-2' and 'View'.

Contacts - Updating details

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

The screenshot displays a contact record in a web interface. At the top, there is a toolbar with buttons for Reply, Add note, Forward, Close, Merge, Delete, and a menu icon. On the right side of the toolbar, there are buttons for Show activities and navigation arrows. The main content area is divided into three sections. The left section shows an email icon followed by the subject "Fwd: New voicemail from (608) 770-9598". Below this is a contact card with a pink circle containing the letter 'C', the name "Caller+608-770-9598", and the text "reported via email" and "5 days ago". Underneath is an email icon and the address "To: support@voteridwisconsin.freshdesk.com". A green phone icon with the word "Voice" is positioned below the email address. The bottom of this section contains the text "Judy gotch 608-770-9598. I live at 2021 Wheeler Road Madison, Wisc". The middle section shows the status "Resolved on time" and "5 days ago", followed by a "PROPERTIES" section with a "Tags" field containing "Rides_To_Polls" and a "Type" dropdown menu set to "Question". The right section is titled "CONTACT DETAILS" and features a pink circle with 'C' and the name "Caller+608-770-9598" highlighted with a yellow box. Below this is the email address "caller+608-770-9598@voteridwisconsin.org" and a "View more info" link.

← Reply Add note → Forward ⌂ Close ↗ Merge 🗑 Delete ⋮

Show activities < ... >

✉ **Fwd: New voicemail from (608) 770-9598**

C Caller+608-770-9598 reported via email
5 days ago

✉ To: support@voteridwisconsin.freshdesk.com

Voice

Judy gotch 608-770-9598. I live at 2021 Wheeler Road Madison, Wisc

Resolved on time
5 days ago

PROPERTIES

Tags
Rides_To_Polls x

Type
Question

i CONTACT DETAILS ^

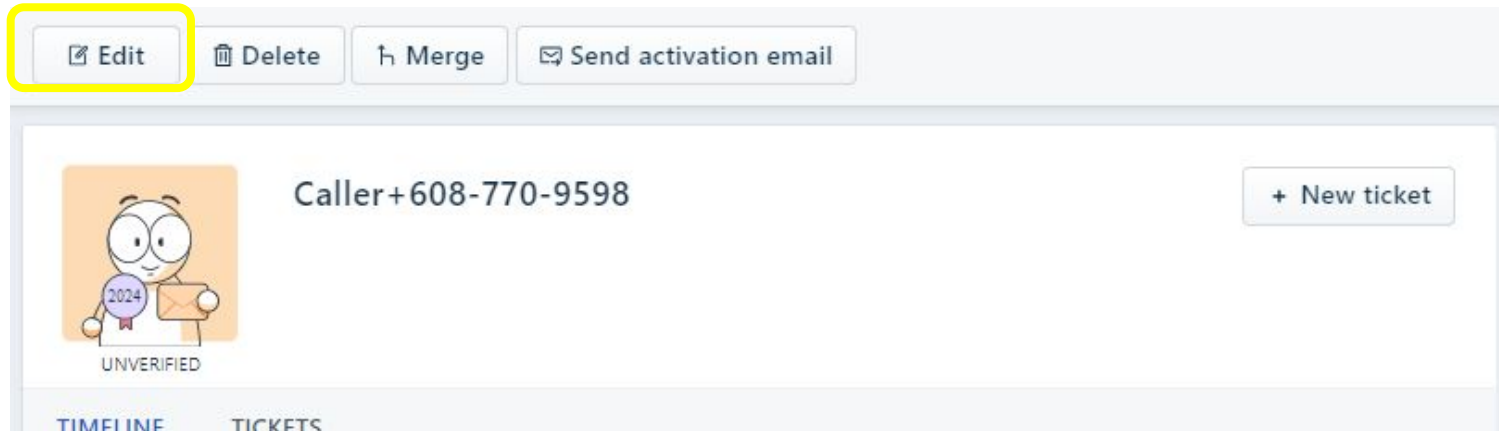
C Caller+608-770-9598

Email
caller+608-770-9598@voteridwisconsin.org

[View more info](#)

Contacts - Updating details

Next click **Edit**



The screenshot displays a contact management interface. At the top, there is a horizontal toolbar with four buttons: 'Edit' (highlighted with a yellow border), 'Delete', 'Merge', and 'Send activation email'. Below the toolbar, the contact details for 'Caller+608-770-9598' are shown. On the left is a cartoon character icon holding a '2024' badge and an envelope, with the word 'UNVERIFIED' underneath. On the right is a '+ New ticket' button. At the bottom, there are two tabs: 'TIMELINE' and 'TICKETS'.

Contacts - Updating details

 Edit contact

 Upload photo
An image of the person, it's best if it has the same length and height

Full name *

Eric Easterly

Enter a title

Atleast one of these fields is mandatory *

Email

Enter an email address

Work phone

608-833-8888

Mobile phone

Enter a phone number

Twitter

Enter a Twitter ID

Company

Address

Enter the address of this person

Cancel

Save

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.

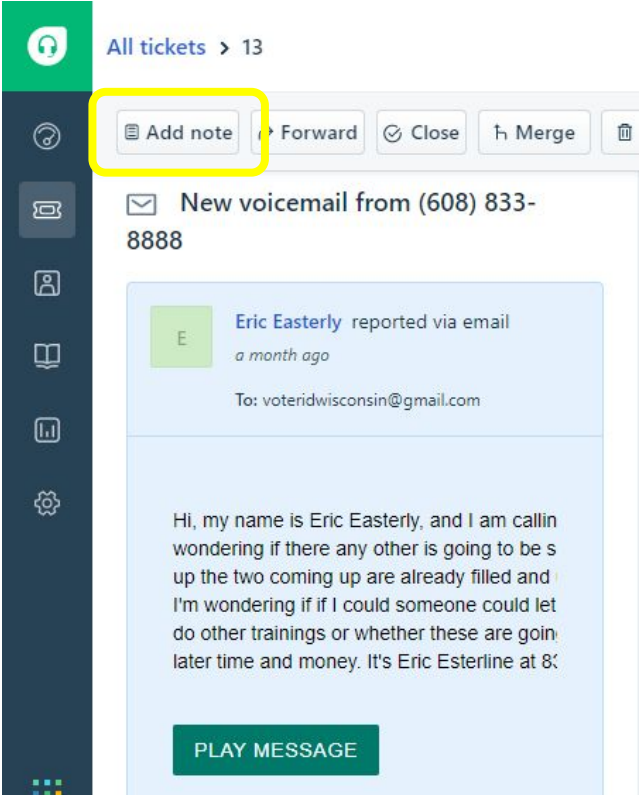
Enter any other information you've gathered.

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.

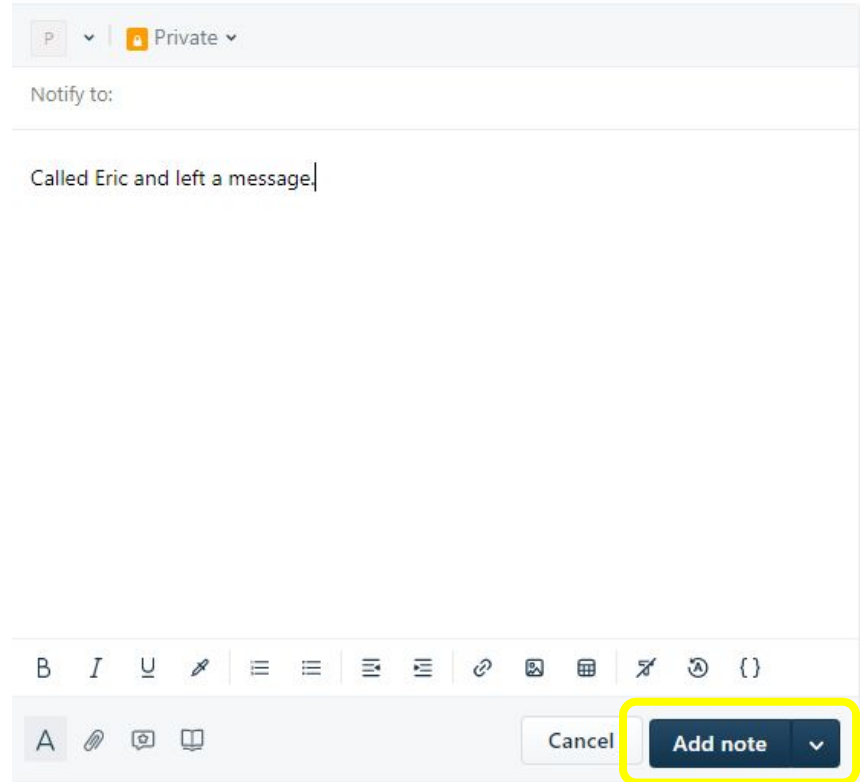
If the ticket needs to be handed off to another volunteer, this will provide great background information for that next volunteer.



The screenshot displays a ticket management interface. At the top, there is a green header with a headset icon and the text "All tickets > 13". Below this, a row of action buttons is visible: "Add note" (highlighted with a yellow box), "Forward", "Close", "Merge", and a trash icon. The main content area shows a "New voicemail from (608) 833-8888". Below the voicemail header, there is a message card from "Eric Easterly" reported via email "a month ago". The message content reads: "Hi, my name is Eric Easterly, and I am callin wondering if there any other is going to be s up the two coming up are already filled and I'm wondering if if I could someone could let do other trainings or whether these are goin later time and money. It's Eric Esterline at 8". At the bottom of the message card, there is a green button labeled "PLAY MESSAGE". A dark sidebar on the left contains various icons for navigation.

Adding Ticket Notes

After entering your notes, click **Add note**



The screenshot shows a user interface for adding a note to a ticket. At the top, there are two dropdown menus: one with the letter 'P' and another labeled 'Private'. Below these is a 'Notify to:' field. The main text area contains the note 'Called Eric and left a message,'. At the bottom, there is a rich text editor toolbar with icons for bold (B), italic (I), underline (U), link, list, and other formatting options. Below the toolbar is a row of icons for text color (A), attachments, and other features. On the right side of this row, there is a 'Cancel' button and a dark blue 'Add note' button with a dropdown arrow, which is highlighted with a yellow border.

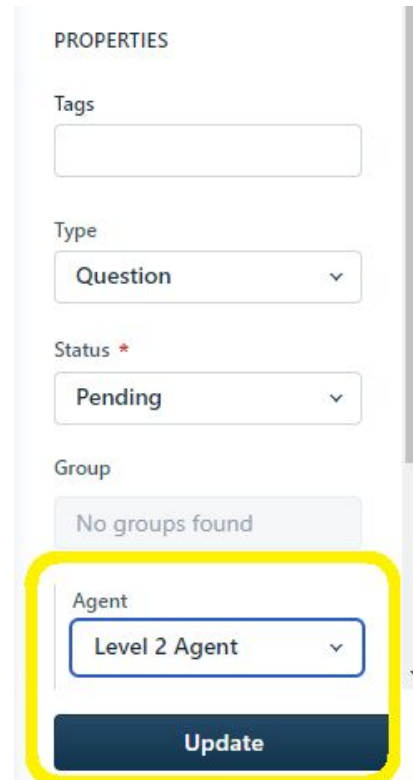
Escalating a Ticket to Level 2

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 **Agent** 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 *****



PROPERTIES

Tags

Type

Question

Status *

Pending

Group

No groups found

Agent

Level 2 Agent

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!