

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

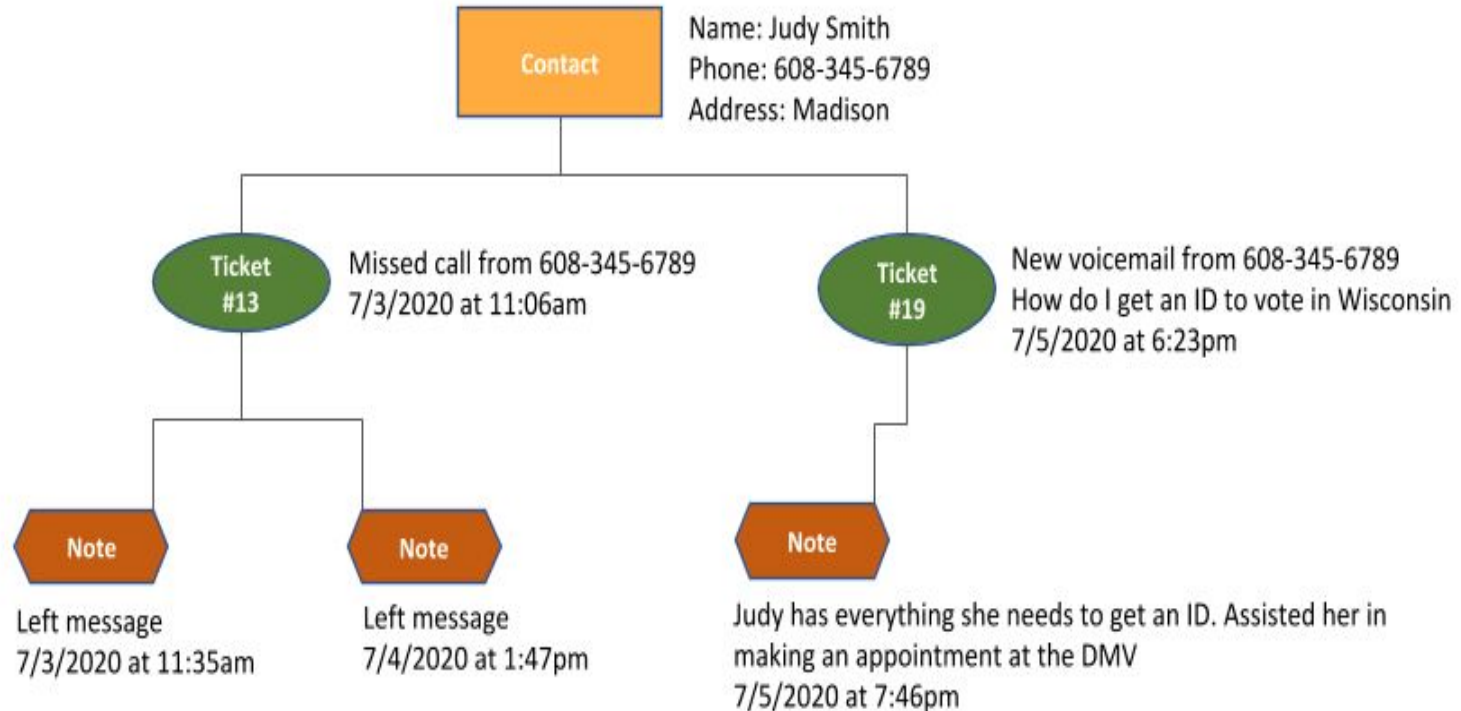
- Stay positive
- Seek help and research as needed
- Stay non-partisan
- Peer review - tickets double-checked for completeness and status

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**

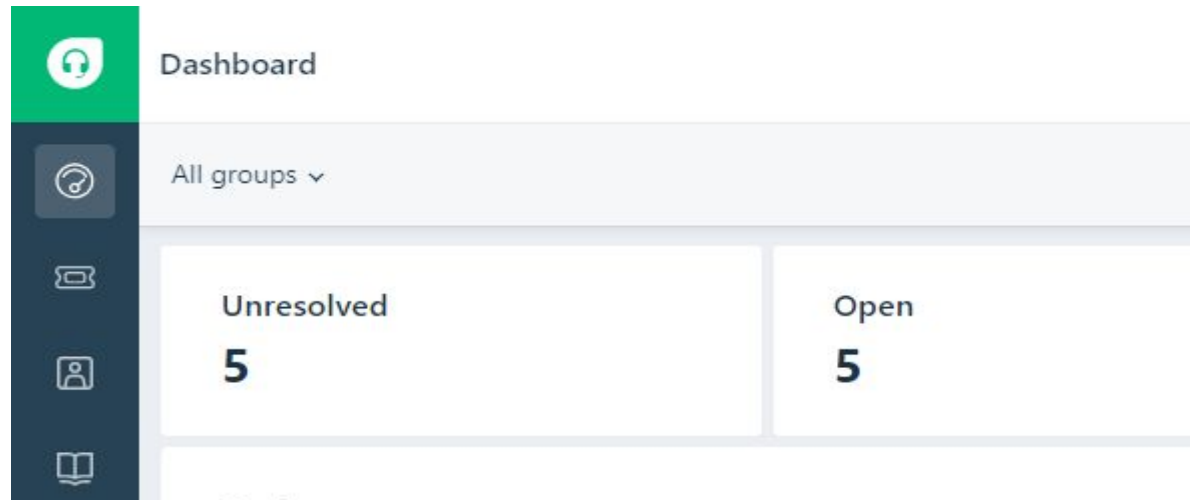


Are you an agent? [Login here](#)

← You should log in here

Getting started in Freshdesk

1. 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

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 filter section with "Sort by: Date created" and a "Layout: Card view" dropdown. The main area displays two tickets in a list view. The first ticket has a purple icon 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, it says "Unkown • Created 20 days ago". To the right of the subject, there are three items: a green square with "Low", a person icon with "Level 1 - ... / --", and a flag icon with "Open". The second ticket has a green icon with the letter 'E' and a subject line "New voicemail from (608) 833-8888 #13". Above the subject is a "Volunteer" tag. Below the subject, it says "Eric Easterly • Created 23 days ago". To the right of the subject, there are three items: a green square with "Low", a person icon with "Level 1 - ... / --", and a flag icon with "Open".

☰ New and my open tickets Explore your plan

☐ Sort by: Date created Layout: Card view

☐		New missed call from (708) 890-9999. #14 ✉ Unkown • Created 20 days ago	 Low 👤 Level 1 - ... / -- 🚩 Open
☐		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:

- 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 *****

The screenshot displays a ticket management interface. At the top, there are action buttons: Add note, Forward, Close, Merge, Delete, and a menu icon. To the right, there are 'Show activities' and navigation arrows. The main content area shows a voicemail message from (608) 833-8888. The message content includes a contact card for Eric Easterly, a 'Voice' logo, and the text: '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:'. Below the message is a 'PLAY MESSAGE' button. To the right of the message is a 'PROPERTIES' section with fields for Tags (Volunteer), Type (Question), Status (Open), Priority (Low), and Group (Level 1). At the bottom of this section is an 'Agent' dropdown menu with '--' selected, which is highlighted with a yellow box. Below the dropdown is an 'Update' button. On the far right, there is a 'CONTACT DETAILS' sidebar for Eric Easterly, showing work phone 608-833-8888 and a timeline entry for the voicemail message. At the bottom of the sidebar is a 'TO-DO' section.

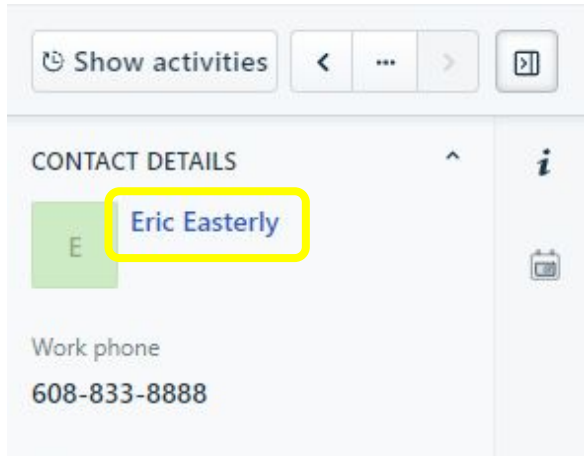
Ticket Properties

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 screenshot shows a web interface for managing tickets. At the top, there are buttons for 'Merge', 'Delete', and a menu icon. Below these, the ticket status is 'Open'. The main section is titled 'PROPERTIES' and contains several dropdown menus: 'Tags' (with 'Volunteer' selected), 'Type' (with 'Question' selected), 'Status' (with 'Open' selected), 'Priority' (with 'Low' selected), 'Group' (with 'Level 1' selected), and 'Agent' (with '--' selected). A large 'Update' button is at the bottom of the form. To the right of the form, there is a 'CONTACT' section with a green 'E' button, a 'Work phone' number '608-83...', and a 'Timeline' section with a list of items. On the left side, there is a vertical sidebar with some text partially visible.

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**

The screenshot shows a user interface for managing contacts. At the top, there is a navigation bar with a green header containing a person icon and the text "Contacts > Eric Easterly". To the right of this are buttons for "Explore your plan", "New" (with a dropdown arrow), and a search box labeled "Search". Below the navigation bar is a toolbar with three buttons: "Edit" (with a pencil icon), "Delete" (with a trash icon), and "Merge" (with a merge icon). The "Edit" button is highlighted with a yellow border. Below the toolbar is the contact's profile card for "Eric Easterly", which includes a green square placeholder with the letter "E" and the text "UNVERIFIED". To the right of the name are buttons for "+ New ticket" and "Call". On the far right, a "DETAILS" sidebar shows "Tags", "Add tags", and "Work Phone 608-833-8888". A dark sidebar on the left contains icons for home, messages, contacts, and a book.

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.

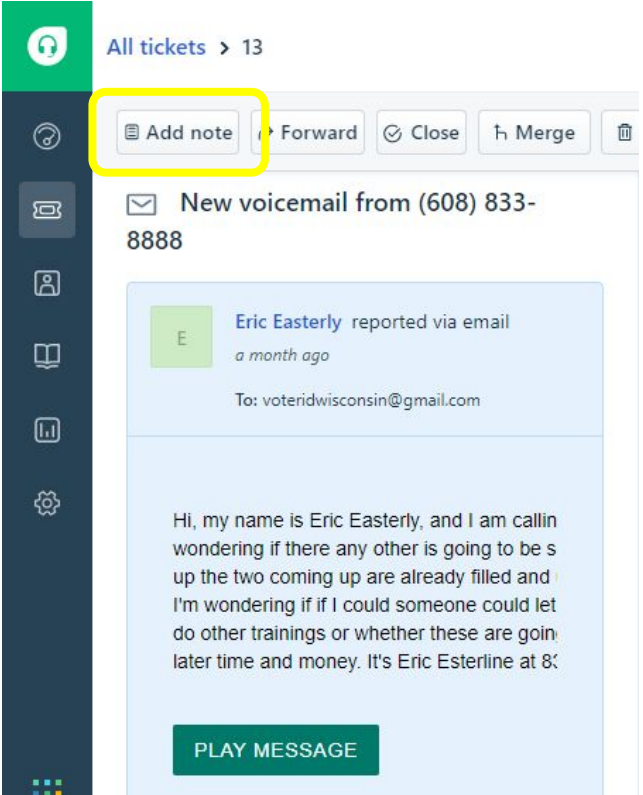
Enter any other information you've gathered.

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.

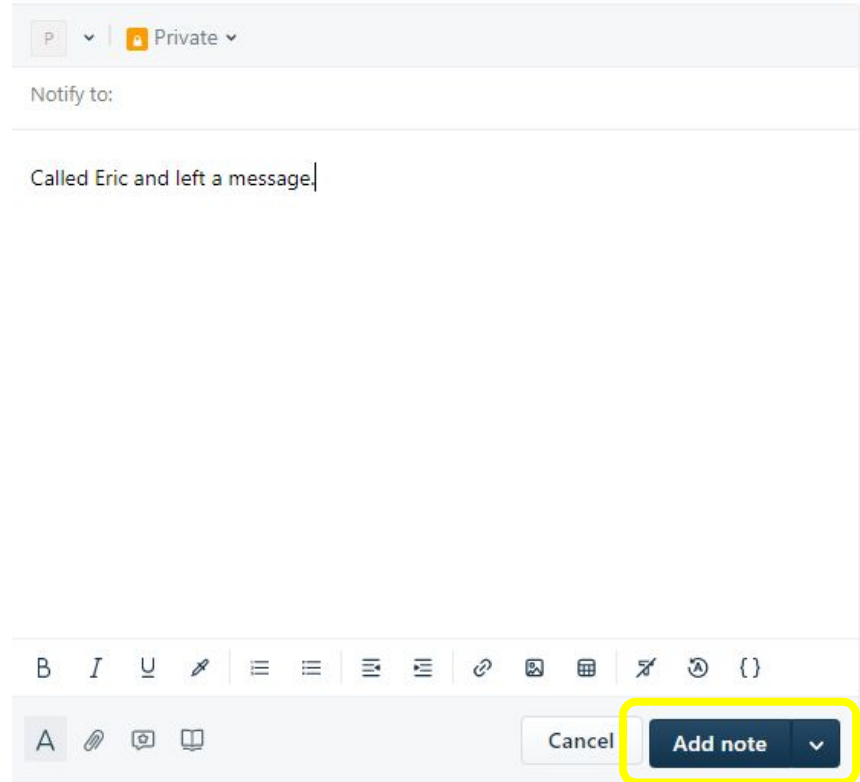
If the ticket needs to be handed off to another volunteer, this will provide great background information for that next volunteer.



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 several 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,' with a cursor at the end. A rich text editor toolbar is visible below the text area, containing icons for bold (B), italic (I), underline (U), link, list, and other formatting options. At the bottom, there is a 'Cancel' button and an '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 **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 *****

The screenshot displays a ticket management interface. The 'PROPERTIES' section includes the following fields:

- Tags:
- Type:
- Status:
- Priority:
- Group: (highlighted with a yellow box)
- Agent: (highlighted with a yellow box)

An 'Update' button is located at the bottom of the form. On the right side, a 'CONTACT' sidebar is partially visible, showing a user profile icon with the letter 'U', a phone number '708-8...', and a 'TO-DO' section.

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!