



Connecting with Consumers through Phone-a-Thons

Whether you call it a phone-a-thon, a phone bank, or a telethon, inviting consumers to pick up the phone and dial in can be an effective way to turn outreach on its head and bring consumers to you. This fact sheet is designed to help you understand how to plan a phone-a-thon to help connect consumers to health insurance.

Six Reasons Why Phone-a-Thons Are an Effective Outreach Strategy

- 1** The free publicity that you get from the TV or radio station you're partnering with allows you to reach thousands of consumers—or maybe even an entire state—all at once.
- 2** Phone-a-thons are an extremely convenient way for consumers to get the information or assistance they need. They don't even have to leave their homes!
- 3** A phone-a-thon is an effective way to promote current enrollment events, connect consumers to enrollment assisters, and educate consumers about how to prepare for an appointment with an enrollment assister.
- 4** Doing a phone-a-thon can take less time and be more cost-effective than other methods of outreach. Often, as part of the phone-a-thon, TV and radio stations will do live interviews, which give you another opportunity to get your message out to thousands of consumers.

- 5** A phone-a-thon gives you, your staff, and volunteers the opportunity to talk directly with consumers who have questions and need information about health coverage. This is also a chance to educate consumers about the financial assistance that is available and motivate them to sign up for coverage.
- 6** Staff and volunteers are energized during the phone-a-thon: It is exciting to be at the TV or radio station and be able to talk to lots of consumers.



How do I organize a phone-a-thon?

Establish a Relationship with a Local Media Outlet

Phone-a-thons are usually conducted in partnership with a local or state-wide TV station, or, less often, with a radio station. The role of the media outlet is twofold: The station must have a space set up with telephones, and it must take a leadership role in promoting the phone-a-thon. Investigate the media outlets in your region and/or state, and approach the ones you think could be a good fit.

TIP

Try to partner with a station that has done phone-a-thons before—this can make the whole process go more smoothly.

How do I approach a media outlet?

- **Schedule an in-person meeting with the TV or radio station.** Ask to meet with a reporter you have worked with in the past, if possible. If you do not have a contact person, ask for the producer, station manager, or the station's community relations manager.
- **Ask if the station has done a phone-a-thon before.**
- **Offer a clear explanation of what the station would need to provide.** The station should provide the following:
 - A call center or phone hub with phone lines.
 - A specific phone number for incoming calls that can be used during the phone-a-thon.
 - A phone routing system that allows calls to be shared among staff and volunteers.

- A room with tables, chairs, and one phone per person. Having space between the chairs is a good idea so each person who is taking calls has a little bit of private space, especially since it can be hard for staff or volunteers to hear people on the other end of the phone when everyone is talking at the same time.
- A way to broadcast or advertise the phone-a-thon and the phone number in advance during the news or any other designated time, and/or during a specific television or radio program. It is important to promote the phone-a-thon before it actually takes place.
- **Ask how the station's phone system (routing system) works.** It is important to know in advance how the calls will be received and sorted among the people who are answering the phone so you can better prepare your staff and volunteers.

Sample Script for Approaching a Media Outlet

We are working to inform consumers in [insert state/region] about the new health insurance options that are available to them. To get the word out to more people, we would like to partner with you and do a phone-a-thon. Some of the people in your audience may be uninsured, and the phone-a-thon will help connect them with experts who can help with the enrollment process so your [audience/listeners] can get the coverage and care they need.

The deadline for applying for health coverage is [insert deadline, for example, March 31], and many people who apply will qualify for financial assistance to get help paying for their health insurance.

This phone-a-thon will be a great opportunity for your station to support a good cause and dedicate a specific day and time when consumers can call and get their questions answered.

- **Explain what the station will gain.** Some stations may want to charge money to do a phone-a-thon, but many stations will be open to holding a phone-a-thon for free as a public service. Many broadcast networks are required to dedicate a certain amount of air time to public service, and your phone-a-thon could help them meet that goal. Remind them that your phone-a-thon provides a service to their audience and the community.

See the sample script on page 2 that you can adapt for your own use.

Determine the Goal of Your Phone-a-Thon

You can operate the phone-a-thon as an educational event and use it to provide information to consumers who have questions. Or you can use the phone-a-thon as an opportunity to connect consumers to assisters and start the enrollment process.

Once you define the goal, you will be able to decide what kinds of materials the staff and volunteers will need.

Using a Phone-a-Thon as an Educational and Messaging Tool

Phone-a-thons have proven to be excellent educational and messaging tools. Your phone-a-thon can be a great opportunity to educate consumers about upcoming enrollment events and deadlines and about where they can get in-person assistance to help them sign up for health insurance. During the phone-a-thon, the TV or radio station can make several announcements about the message you want to convey.

With this kind of phone-a-thon, the role of staff and volunteers is to answer questions consumers may have about the new coverage options and tell consumers where they can get help signing up for health insurance.

TIP

Schedule your phone-a-thon before an upcoming enrollment event. This will give you the opportunity to direct consumers to the enrollment event and to potentially schedule appointments for consumers to meet with enrollment assisters at the event.

Using a Phone-a-Thon as an Enrollment Tool

In addition to answering consumers' questions, you can take the extra step and bring consumers into the enrollment process. For example, you can use the phone-a-thon as an opportunity to have consumers book appointments with assisters. However, you must put in place a more specific system for this strategy to be successful. Here are two options to consider:

1. **Trained staff and volunteers can schedule appointments with enrollment assisters** (navigators, in-person assisters, certified application counselors, etc.) during the call.

In order for this to work effectively, you need to provide staff and volunteers with appointment sheets with the times that each enrollment assister is available.

Note: You'll need to put a system in place to avoid double booking. For example, have computers with Internet connections available to all staff or volunteers, and use a Google Doc¹ that shows in real time which appointments are being booked.

2. Enrollment assisters should be ready to follow up with callers during the phone-a-thon.

Trained staff and volunteers who are at the phone-a-thon will talk to the consumers, answer their questions, and ask if they would like to be connected to an enrollment assister to schedule an appointment. If the answer is yes, the staff and volunteers will tell consumers that a trained assister will call them right back (if the consumer gives verbal permission to do so). The staff person or volunteer will identify an enrollment assister who is available to call the consumer back.

The staff person or volunteer will need to get the consumer's phone number and address or zip code to identify a nearby assister, and he or she will need to confirm with the consumer the best time for an assister to call back.

TIP

Consider conducting the phone-a-thon in the language of the audience you are trying to reach, and partner with the appropriate media outlet. Make sure you have staff and volunteers who speak the same language as your audience.

Getting the Word Out about the Phone-a-thon

The station you are partnering with should be responsible for promoting your phone-a-thon and should promote it on the day of the event.

In addition to promoting it during the news and other shows, you can ask the station staff to promote it on their Facebook and Twitter pages. As the station tweets, you and your

staff can retweet the message, which will propel information about the phone-a-thon even further.

If you have a budget available, using paid advertising on the station a few days in advance of the phone-a-thon can help boost the number of callers.

Of course, it is important that you engage your existing partners, families, and friends in helping promote the phone-a-thon too.

Finally, to maximize participation, ask the TV station you're working with to run a message and the phone number at the bottom of the screen throughout the phone-a-thon.

TIP

Reach out to your existing partners and coalition members, and ask for help with planning and conducting the phone-a-thon.

Staffing the Phone-a-thon

Once you have a media outlet that agrees to conduct the phone-a-thon, you need to figure out who is going to answer the phones. Staff? Volunteers and staff?

When recruiting staff and volunteers, make sure that several time slots are available (according to the number of phones you have at the station), and make sure that you have enough people working during the same shifts. Schedule shifts for 90 minutes maximum per person per shift, and allow staff and volunteers to take breaks during this time.

Having staff and volunteers at the phone-a-thon who are trained enrollment assisters has proven to be one of the most effective ways to make a phone-a-thon successful. The better-trained staff and volunteers are, the better they will be able to answer consumers' questions.

Training Staff and Volunteers

Doing a basic training with your team before you have the phone-a-thon is essential to making it effective. The training should include the following steps:

- **Develop a script**, and walk through the script with everyone who will be taking calls.
- Give everyone an opportunity to get comfortable with the script by **role playing with a partner**. Emphasize that people should try their best to put the script in their own words. After all, it is a conversation they will be having with consumers, not a scripted dialogue.
- **Walk through the materials** you will have available.
- **Explain how the phone system will work and train them accordingly**. Here are two examples of phone routing systems that the station may have:
 - **Calls may be routed on a priority system**. The challenge here is that the staff person or volunteer who is “first” in line in the priority system will always be the one to take the next call that comes in. Consider rotating your staff or volunteers so you do not have one person answering the majority of calls.
 - **Calls may be routed based on a randomized system**. This can work better because it allows the calls to be more evenly spread across the staff and volunteers.
- **Train volunteers and staff to collect contact information from callers** so you can follow up with consumers to make sure they get enrolled.
 - Obtain proper consent from callers to collect this information.
 - Write down the information (including name, phone number, mailing address, and email address).
 - Take the caller’s question.

Emphasize the importance of recording accurate and complete information for each caller.

What kind of materials should be available for staff and volunteers?

The most important part of organizing a phone-a-thon is putting together a resource packet that staff and volunteers can refer to when speaking with consumers.

Materials for the packet may include:

- **An opening script** for answering the phone (for example, “Thank you for calling about your health insurance options, how may I help you?”).
- **Contact information for enrollment assisters** and local enrollment sites. A list of all the assisters grouped by county can be helpful.
- **An intake form for logging consumers’ contact information** and tracking the number of calls received. *See the Sample Phone-a-Thon Intake Form on page 7, which you can adapt for your own use.*
- **General talking points or FAQs** on the Affordable Care Act, the health insurance marketplace, Medicaid, and CHIP.
- **A handout with income eligibility levels for several family sizes** to help staff and volunteers assess the type of health coverage people may qualify for.
- **More specific tips on ways to get covered for certain groups** (for example, people under 30, people with disabilities, etc.).
- **Protocol for dealing with “difficult” callers**. Coach people to not engage in any kind of discussion that could become a debate—try to end the call as quickly and politely as possible. For example: “Thank you for your comments, but I need to move on to the next caller. We are here today to talk to people who are looking for help with health insurance. Thank you for your call.”

✓ TIP

Keep in mind what kind of equipment staff and volunteers may need. In addition to phones, you may need headsets. Laptops can also be useful to assess whether a person may be eligible for financial assistance. Staff and volunteers can use a laptop to access the “[Get Covered Calculator](http://www.getcoveredamerica.org/calculator/)” at www.getcoveredamerica.org/calculator/, which is a consumer-friendly tool that provides individuals and families with realistic cost estimates for new coverage using basic information. Laptops can also help you schedule appointments with enrollment assisters, if that is your goal. Some stations may be able to supply computers, but others may not. You should always ask!

Lessons Learned from Organizations that Have Conducted Phone-a-Thons

- ✓ Some organizations have successfully partnered with the public affairs staff from their regional Centers for Medicare and Medicaid Services (CMS) office. Regional offices are located in Atlanta, Boston, Chicago, Dallas, Denver, Kansas City, New York, Philadelphia, San Francisco, and Seattle.
- ✓ Coordinate your phone-a-thon with other organizations to maximize your efforts. This can be a great way to recruit navigators and certified application counselors to staff the phone-a-thon.

- ✓ The station will most likely set the hours the phone-a-thon takes place (for example, around early morning and evening news broadcasts). The phone lines will be programmed to turn on and off during times set by the station.
- **Have the phone lines open beyond the local news hours.** The longer the phone lines are open, the more consumers will be able to call and get their questions answered.
- **It is crucial for the media outlet to promote a way for viewers or listeners to get help after the phone-a-thon has ended.** Ask the TV or radio station to provide a phone number or post a phone number on its website that callers can use to connect with you after the phone-a-thon is over.

- ✓ Have a way for volunteers and staff to quickly refer to what they need. It is important that they have information at their fingertips.

- ✓ If you already have a relationship with a media outlet, and they have the infrastructure to conduct the phone-a-thon, it can be fairly easy to put it together. Some organizations have put together a phone-a-thon in a week. You can do it too!

Here is a sample timeline for planning a phone-a-thon if you do not already have an established relationship with a media outlet:

| WEEK 1 | WEEK 2 | WEEK 3 | WEEK 4 |
|---|---|---|--|
| Research and reach out to media outlets | Media outlet confirms it can conduct the phone-a-thon | Promote the event with your partners, friends, and families | Media outlet promotes phone-a-thon, phone-a-thon happens |

Sample Phone-a-Thon Intake Form

Staff/Volunteer: _____ Time of Call: _____

Thank you for calling the [insert name] phone-a-thon. We are talking to uninsured people about the new health insurance marketplace and want to find out if you would like help with enrolling in new coverage or getting answers to your health insurance questions.

First, can I get some information from you?

| | | | |
|-----------------------|--|------------------|-----------|
| Name | | | |
| Phone | | | |
| Address | | | |
| Email | | | |
| Income | | Insured? | Yes No |
| # in Household | | Medicaid? | Yes No |

| Household Size | Annual Medicaid Income Limit | Household Size | Annual Medicaid Income Limit |
|----------------|------------------------------|----------------|------------------------------|
| 1 | \$15,856 | 3 | \$26,951 |
| 2 | \$21,403 | 4 | \$32,499 |

If eligible for Medicaid: Would you like to have a certified enrollment assister call you right back to help you apply for Medicaid over the phone? Yes No

If not eligible for Medicaid: Would you like to make an appointment to meet with a certified enrollment assister to apply for coverage through the health insurance marketplace? Yes No

Appointment Date: _____ Time: _____ Location: _____

If not interested in receiving further assistance: Thank you for calling the [insert name] phone-a-thon. Good luck finding health coverage that works for you and your family.

Write notes and questions below.

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Endnote

¹ Google Docs is an application that lets you create different kinds of online documents, work on them in real time with other people, and store them in your Google Drive online—all for free. More information is available online at <https://support.google.com/drive/answer/49008?hl=en>.

