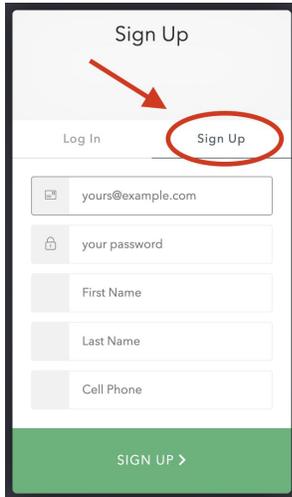


# Scale to Win— Step by Step Guide

## NextGen Policy

### Step 1:

**Creating your volunteer account** – Please create an account by following this link: <https://bit.ly/2PWB0KF> and select "Sign Up" then enter your information.



A screenshot of a web form titled "Sign Up". At the top, there are two buttons: "Log In" and "Sign Up". The "Sign Up" button is circled in red, and a red arrow points to it from the top left. Below the buttons are several input fields: "Email" (with the placeholder "yours@example.com"), "Password" (with the placeholder "your password"), "First Name", "Last Name", and "Cell Phone". At the bottom of the form is a green button labeled "SIGN UP >".

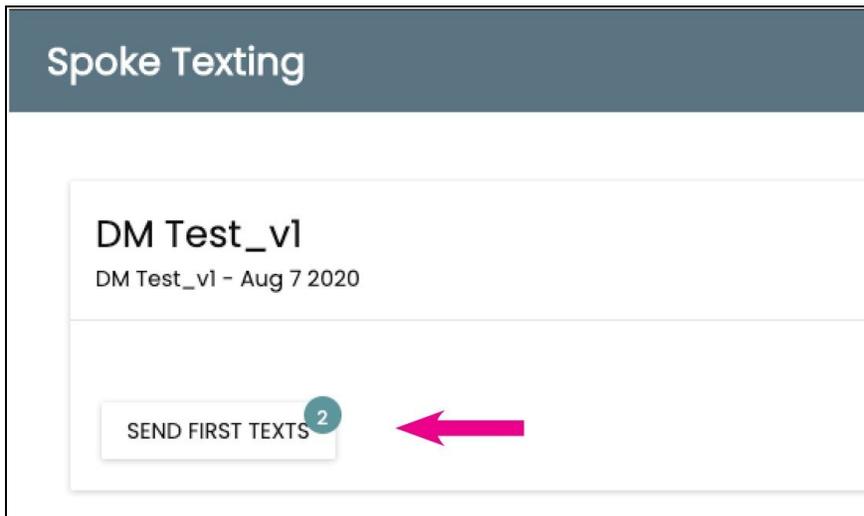
**Wait for a campaign assignment link** that will be sent by email from the admin in the days leading up to your assignment. Once you receive the link (in an email) click it and it will take you to your first texts.

**Logging in going forward:** Whenever you want to log on after you've created your account, use the direct link <https://nextgenpolicy.spoketowin.com>

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### Step 2:

The first screen you see will be this; All of your initial text messages are pre-loaded and ready to send. Click 'Send First Texts,' to take you to your initial texts.

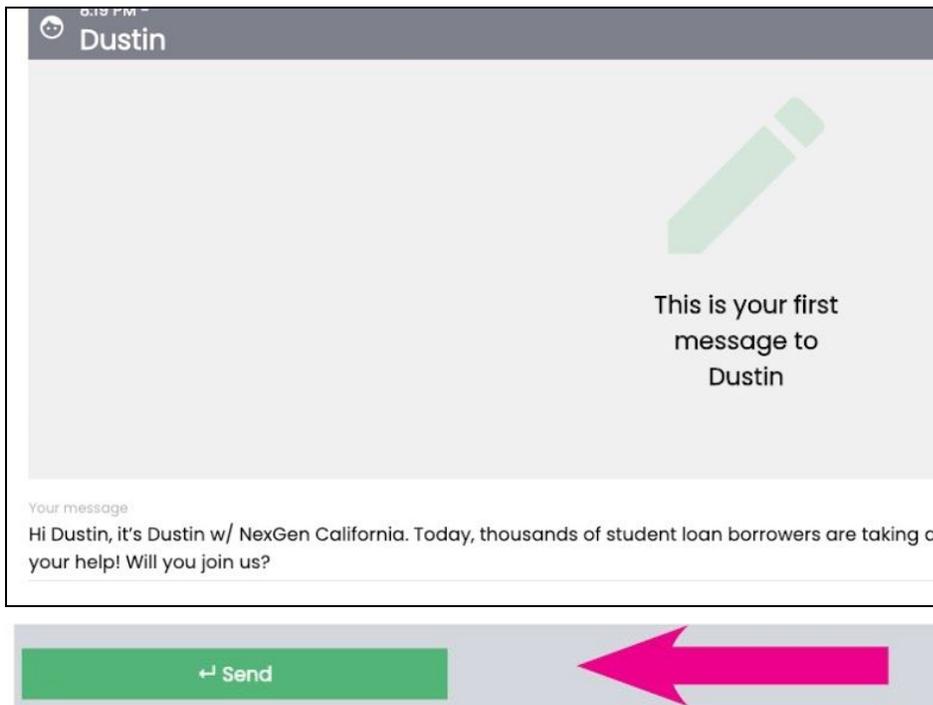


A screenshot of a web interface titled "Spoke Texting". The main content area shows a card for "DM Test\_v1" with the subtitle "DM Test\_v1 - Aug 7 2020". At the bottom of the card is a button labeled "SEND FIRST TEXTS" with a small green circle containing the number "2" next to it. A pink arrow points to the "SEND FIRST TEXTS" button from the right.

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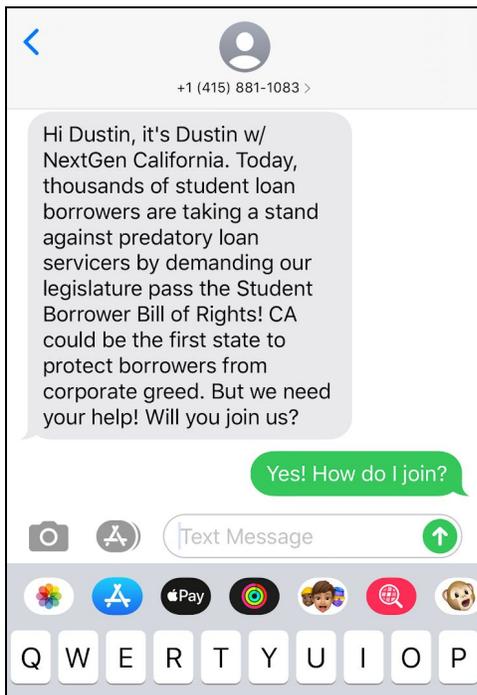
### Step 3:

The initial message for each of your assigned contacts will auto-populate for you. Just click 'Send,' until you get through all of your initial messages.



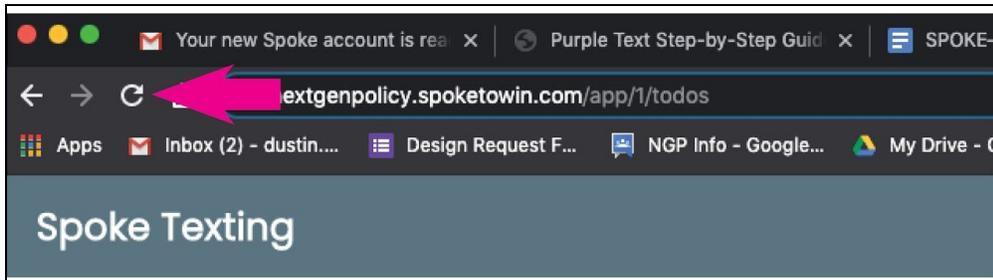
#### Step 4:

The text audience will receive a text on their phone that looks like this.



## Step 5:

Press the 'Refresh Browser' icon at the top of your browser to see replied responses.



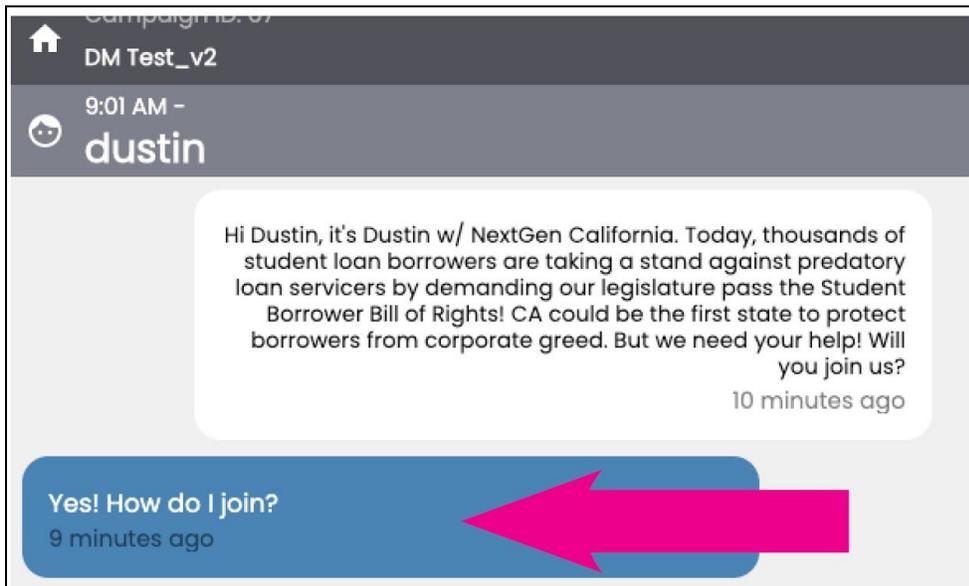
## Step 6:

An orange circle with a # inside of it indicates how many responses are waiting for you to answer. Click 'Respond'.



## Step 7:

You can read the reply in the grey box. Depending on how they answer will determine how you respond.



A typical conversation between Dustin and Chelsea could go something like this...

*"Hi Person, this is Dustin from NextGen. Will you join us in taking action today?"*

Our next steps is determined around the question Dustin is asking:

*"Will you join us in taking action today?"*

An example of a 'YES' response from the person may look like this...

*"Yes Dustin, How can I join?"*

An example of a 'No' response could be....

*"Unfortunately I am uninterested..."*

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### Step 8: **\*\*VERY IMPORTANT\*\***

If they answer the text that indicates a 'YES,' then mark 'YES'. If it is a 'NO' then mark 'NO'.



Will you join us in taking action?: YES

YES  NO

All Responses ▾ Opt-out

Skip

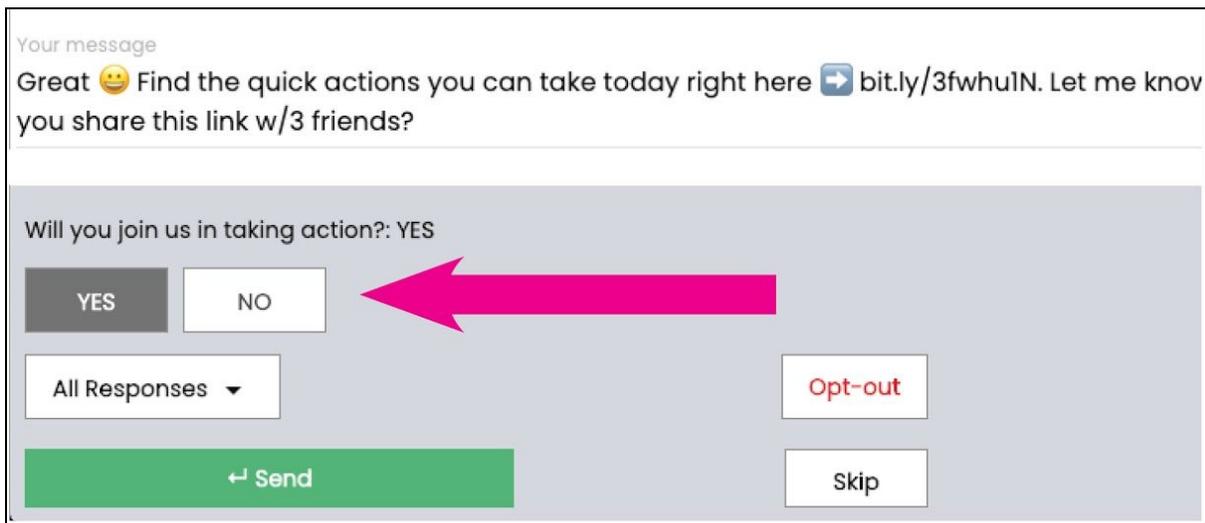
A pink arrow points from the right towards the YES and NO radio buttons.

*\*\*By doing this we can run a report and track analytics.*

---

### Step 9:

A message will auto-populate with a 'YES or NO' indication.



Your message

Great 😊 Find the quick actions you can take today right here [bit.ly/3fwhu1N](https://bit.ly/3fwhu1N). Let me know you share this link w/3 friends?

---

Will you join us in taking action?: YES

YES  NO

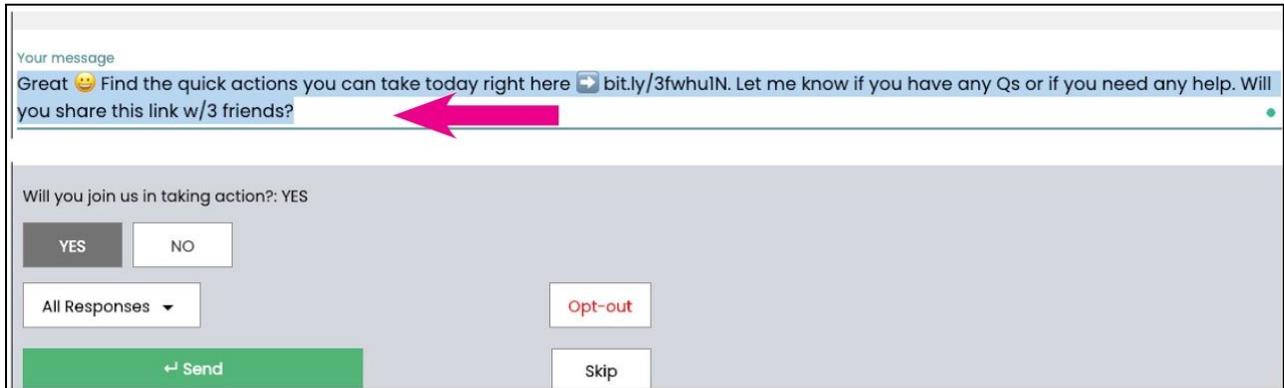
All Responses ▾ Opt-out

Skip

A pink arrow points from the right towards the YES and NO radio buttons.

- OR -

You have the ability to change any message and make it your own. As a matter of fact it is encouraged! Simply highlight the text in the text box field and tweak the message that will resonate with the individual.



Your message

Great 😊 Find the quick actions you can take today right here [bit.ly/3fwhu1N](https://bit.ly/3fwhu1N). Let me know if you have any Qs or if you need any help. Will you share this link w/3 friends?

Will you join us in taking action?: YES

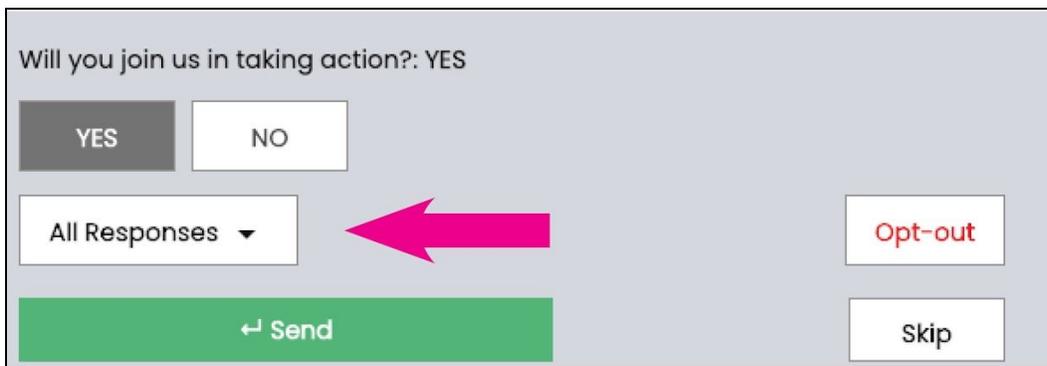
YES NO

All Responses ▾ Opt-out

↩ Send Skip

## Step 10:

Your campaign manager should have 'Canned Responses' for you ready to go. A 'Canned Response' is an auto-generated response that allows you to answer anticipated questions more efficiently.

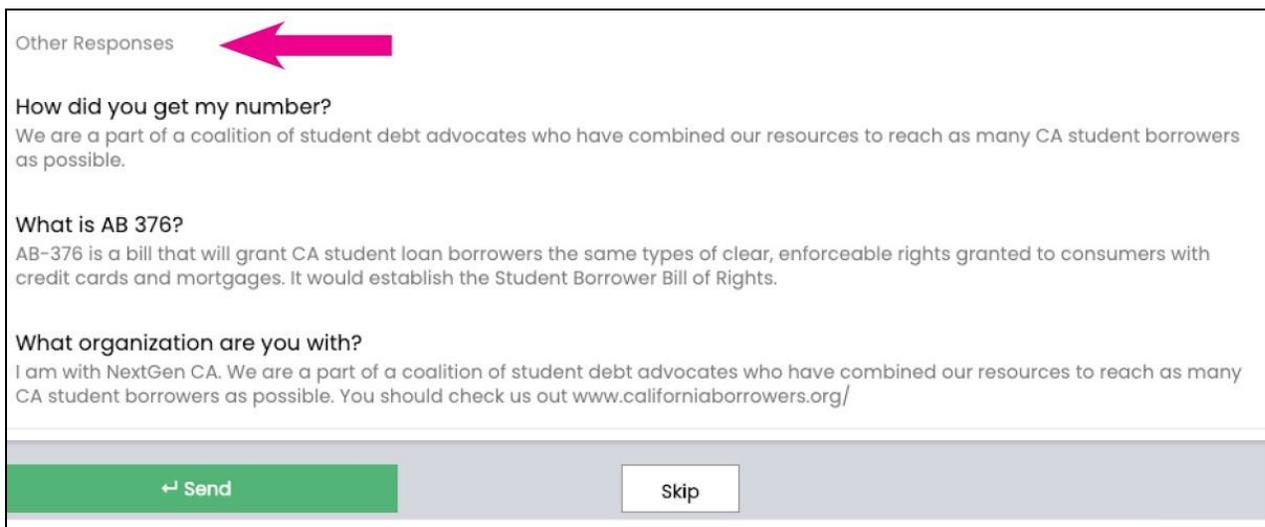


Will you join us in taking action?: YES

YES NO

All Responses ▾ Opt-out

↩ Send Skip



Other Responses

How did you get my number?  
We are a part of a coalition of student debt advocates who have combined our resources to reach as many CA student borrowers as possible.

What is AB 376?  
AB-376 is a bill that will grant CA student loan borrowers the same types of clear, enforceable rights granted to consumers with credit cards and mortgages. It would establish the Student Borrower Bill of Rights.

What organization are you with?  
I am with NextGen CA. We are a part of a coalition of student debt advocates who have combined our resources to reach as many CA student borrowers as possible. You should check us out [www.californiaborrowers.org/](http://www.californiaborrowers.org/)

↩ Send Skip

### Step 11:

When you are ready to respond click 'Send'.



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### Step 12:

Once you reply to an individual, the next individual who has responded will automatically populate on screen. Filter through your messages until all have been answered.

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### Step 13:

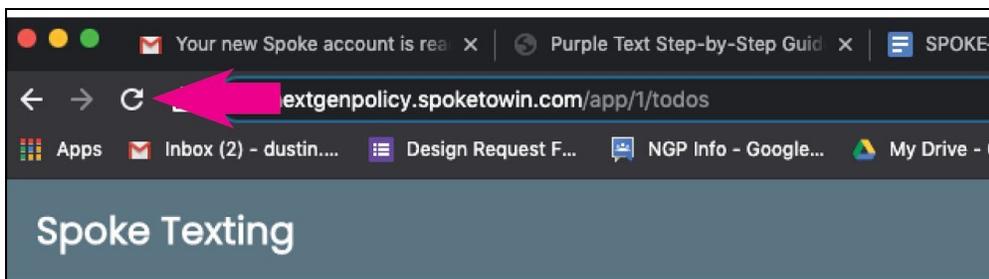
Quick note: if you have skipped a response or would like to review a previous conversation, use the toggle arrows in the upper right hand corner of the screen to go back and forth.



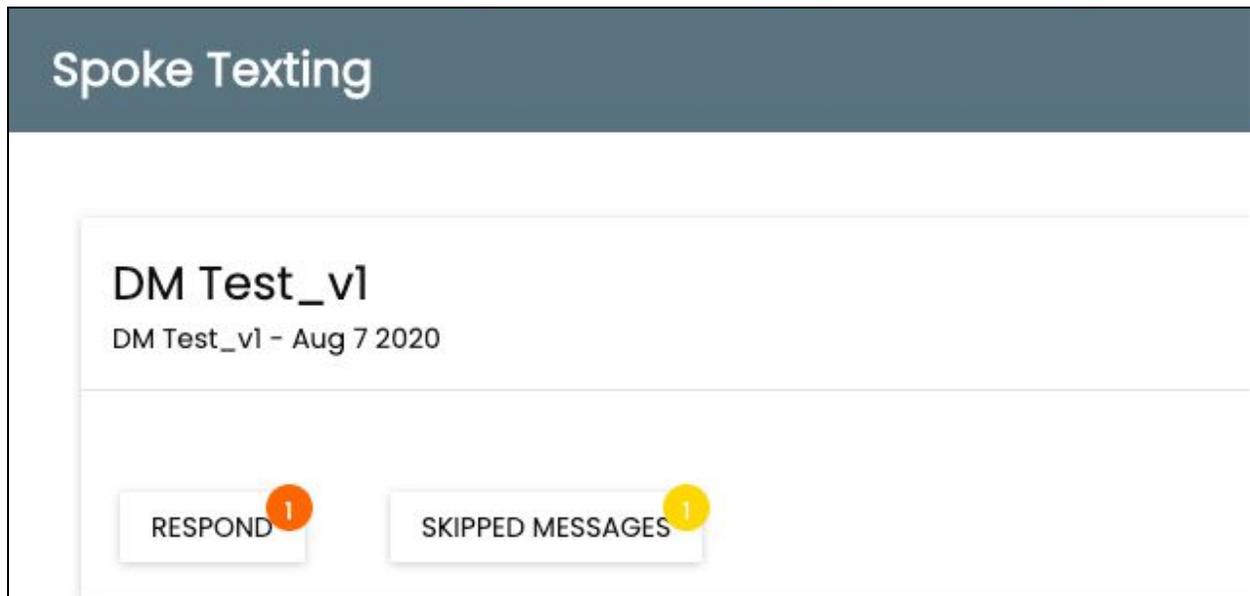
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### Step 14:

Press the 'Refresh Browser' icon at the top of your screen if you need to refresh or see current replies.

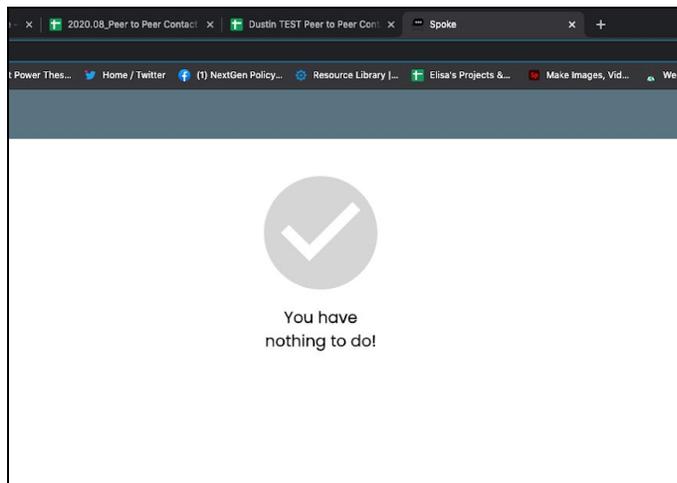


## Spoke Texting



### Step 15:

Once you see this screen that indicates you are caught up and have no responses at the time. Hit the refresh button often to check if you have any response you need to answer.



## Guidelines on when and when not to use the “opt-out” button.

1. A texter **should use their best judgment** on the intent of the text recipient’s response. We do not want to opt-out people unless that is the intent of their request. We also do not want to text people who wanted to be removed from P2P texting lists.

2. A texter **should** select the “opt-out” response option when the text recipient provides a response at any point in the exchange that **clearly expresses a desire to opt-out** from future texts. Examples include:
    - Opt-out
    - STOP (note: it is not case sensitive)
    - Remove me from your list
    - Do not text me again
    - Iterations of the examples above
  
  3. A texter **should NOT click the “opt-out” response option** if the text recipient’s intent is unclear or they reply with the following:
    - No
    - I do not want to participate/join (or any iteration of this response)
    - Wrong number
    - I do not work/live at XXXXX anymore
- 

## Texter FAQs

**Q: When can I text?**

**A:** *Between 9 am pacific and 9 pm pacific. (5-6 pm best practice)*

**Q: I don’t remember how to use Scale to Win.**

**A:** *Read steps #1 – #16 for a quick refresher*

**Q: What if it’s a wrong number?**

**A:** *Select “Wrong Number” from your ‘Canned Responses’ and reference the recommended reply*

**Q: What if someone is being rude or obnoxious?**

**A:** *Our motto on the texting team is: when they go low, we go high. Never engage with someone who is being rude or obnoxious. Simply archive the conversation, or opt them out and continue engaging with supporters.*

**Q: How can I remove someone from our contact list?**

**A:** *Click the opt-out button, but only if that is a clear ask. See the Opt-out guide above.*