



# **Canvassers Training Manual**

iOS Version

## Downloading the app to your phone/device

Mobile Ecanvasser is available to download from both the Apple App Store and Google Playstore.

The app is a free to download. Mobile Ecanvasser is compatible with IOS 7 and upwards.



## Can I log in from multiple devices?

You can log in to the app from a different device as long as it is downloaded to that device. When you are logged in on one device you will automatically be logged out of any other device.

## Syncing your app for the first time

When you sign in for the first time you will be syncing all the campaign data to your device which may take a while to load so we would recommend you do this with your battery charged and while connected to Wi-Fi. Once this initial sync has taken place you will load just the data you need in your turf or group in any subsequent opening of the apps to increase speed and usability.

## Syncing your data

Syncing of your data takes place automatically while you are out on canvass if you are connected to the internet. If you are not connected or are out of coverage you can still operate offline and wait until you have finished and are back in coverage to sync. There is a manual sync button on the settings page of the app which is good practice to hit once all your canvassing has been done.

## Permission settings

As a canvasser there are two Permission settings you can be granted:

**Lead Canvasser** who has access to the mobile app and can read reports of houses that have previously been canvassed.

**Canvasser** has access to the mobile app and can be assigned canvasses to complete but cannot access canvass histories for houses.

# Using the Ecanvasser IOS App

When you first open up the Ecanvasser app on your phone, you will be presented with the list view.

Navigating the IOS app is done through the **Canvass view, Map view, Talking points or Settings** buttons at the bottom of the screen.

As you can see from the canvass icon being marked in blue, we are currently looking at things through **Canvass view**.

## Canvass view

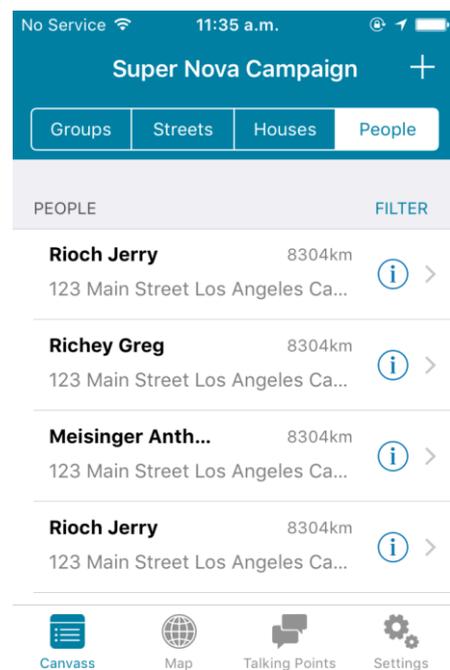
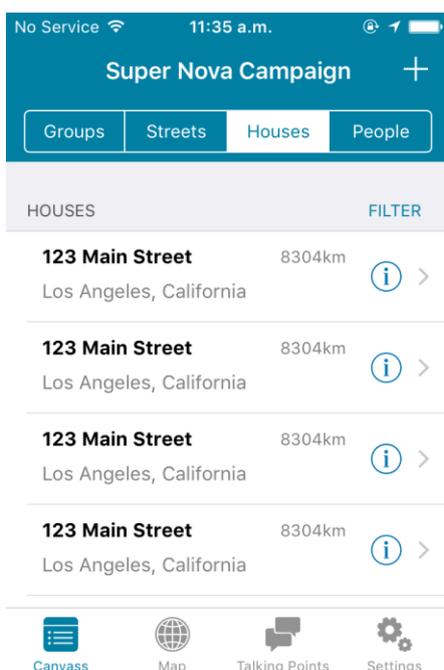
In canvass view you have four different ways to view the canvass you have been assigned, by **Groups, Streets, Houses or People**. This navigation is towards the top of the screen and the highlight in white (in this case Houses) indicates which view you are on.

**Groups** display a certain segment of the voter file which has been assigned for you to canvass.

In **Street** view, you can see the various streets that your houses are located on.

In **House** view, a canvasser can see all the houses they have been assigned to canvass.

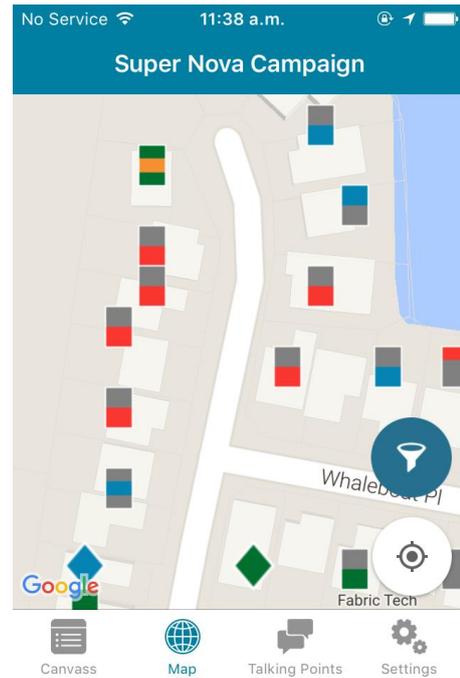
In **People** view, you have a list of all voters you have been assigned. When you click on a voter who has been canvassed, you will be shown their name, voter reception, and the date they were canvassed. It may also show an issue the person had or if they answered a survey.



## Map View

The **Map** view on the app provides the canvasser with a clear view of who has been interacted with. The **Grey** houses are yet to be canvassed. **Yellow** is a house we are currently clicked on and **Green** have been canvassed. **Blue** have been contacted but need to be revisited and **Red** are not interested.

If you click on a house, it will show you what voter occupies that house according to your voter file. Street view will also be enabled and you are ready to canvass.



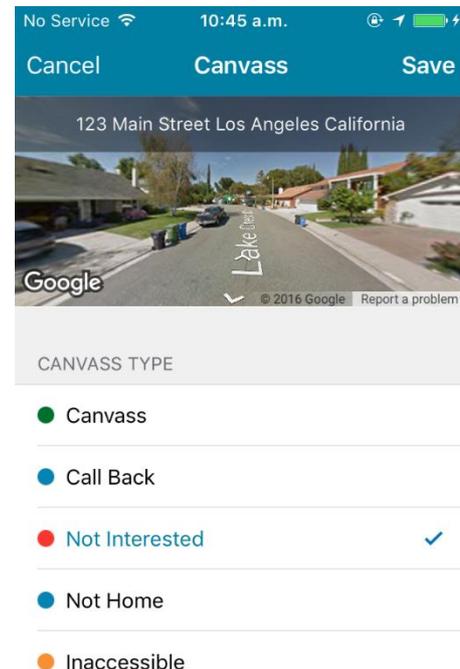
## Doing a canvass

Canvassing an individual couldn't be easier. You enter a canvass from either the House or People view in Canvass or by clicking on a house pin in the Map view. You confirm the name. Enter all data including any Custom Fields which are required. Add issues and complete a survey if necessary. Then finish by entering the **5-star reception** and don't forget to click **Save**.

**NB\*** - To update a person's information, simply click on the icon next to the name.

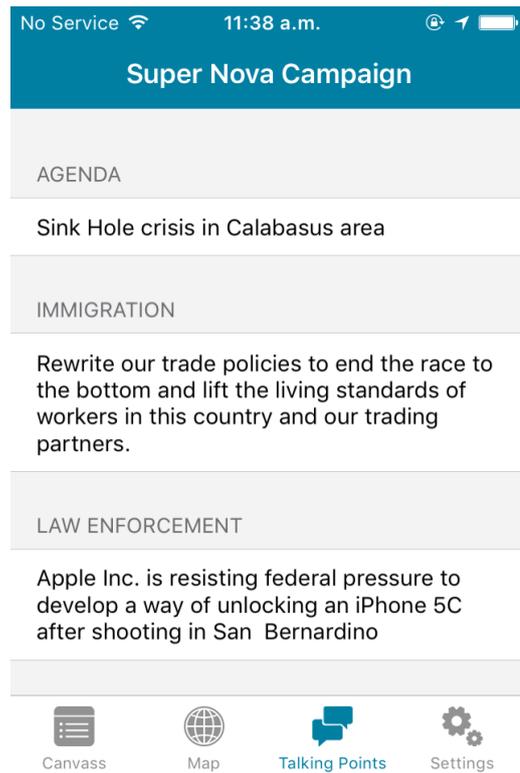
The Filter button is also very important as it can save you time when looking for a specific person. You can search by name/ surname or even those you have successfully canvassed.

When a house has been visited it will then have one of the colors attached to it. For example, if the house was Inaccessible it will have an orange circle next to it subsequently or if it has been successfully canvassed it will have a green circle.



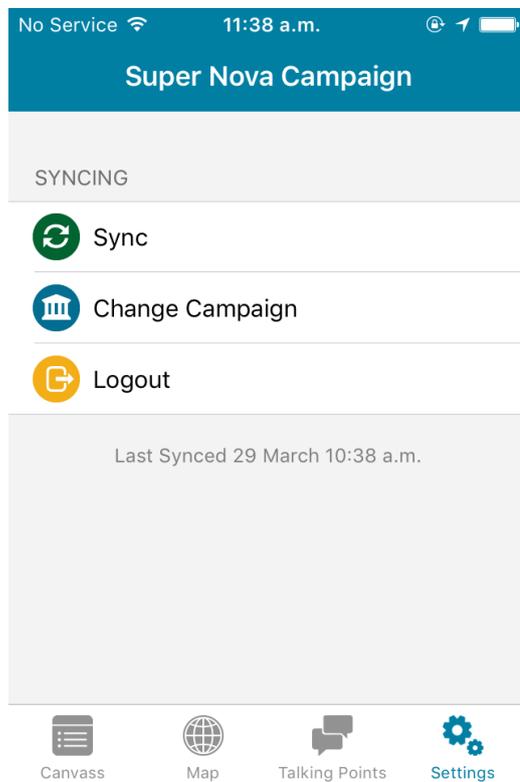
# Talking points

**Talking points** are crucial from a campaign managers point of view as they help your canvassers engage the voter. They offer helpful conversation topics when at the doorstep and provide the public with a good understanding of what your candidate stands for.



# Settings

The **Settings** page gives a very clear and simple overview of your campaign. Here you can sync your app if you have not be connected to the internet. This automatically transfers updates from your app across to the dashboard and vice versa.



# Best practice when canvassing

There are a couple of best practice tips that we suggest to all canvassers:

- Try to charge your device fully before going out on canvass
- Make sure you have synced all the voter data before you go out for the first time.
- Work with a partner, it is much easier for one person to input and the other person to lead the canva
- Use the voice to text function that is inbuilt on nearly all device keyboards now. This will help you when inputting a specific voter request or filling out surveys that are not multiple choice answers.

## Top Tips for Canvassers

There is nothing more effective than getting face-to-face with potential supporters and this is why canvassing and door-to-door campaigning is used universally during elections. No matter how deeply society becomes embedded in the virtual world, nothing beats the knock--knock effect. Being prepared is half the battle, so check out our top 10 tips for easy canvassing

### **1. Training**

As part of the canvass training process, ensure that all canvassers take some time to think about why they are helping the political campaign.

Also practice out loud what you should be saying before starting the door-to-door canvass.

### **2. Know your route**

The last thing you want to happen is to get lost. Get the logistics correct, make sure to map out the houses you are visiting and also how you plan on getting around to them.

### **3. Know your candidate's policy points**

All the training in the world and if you don't know what your candidate stands for, it's game over. Be aware of the key points of his/her policy and you can relay these to potential voters.

### **4. Make eye contact and be engaging with the public**

Always make eye contact with whoever you're talking to. It's not only a sign of respect but it also shows you are engaged and interested in what is being discussed.

### **5. Have a good handshake**

This really is crucial when trying to gain support from strangers. A strong handshake can convey confidence before you have even opened your mouth.

#### **6. If you are using a handheld device make sure it is charged**

Most campaigns are now operating off handheld devices to store and collect data about potential voters. If you are using a smartphone or tablet, ensure they are fully charged.

#### **7. Always carry pen and paper**

And just in case you didn't listen to No.6 and now your portable device is dead, always have a back-up. Pen and paper can be just as effective.

#### **8. Don't argue with the public**

Not everybody is going to be receptive to your candidate's message but remember, avoid engaging in any kind of negative debate or argument. You are representing the candidate and party first.

#### **9. Don't forget to ask for the vote**

Another obvious one but you'd be surprised at the amount of canvassers who forget to ask for the vote. If you don't ask, then you won't receive.

#### **10. Thank them for listening to you**

Make sure the person at the door remembers you for the right reasons. Always be gracious when leaving.