How to Build a Phone Tree

A phone tree is a prearranged, pyramid-shaped system for activating a group of people by telephone. Using the phone tree system can spread a brief message quickly and efficiently to a large number of people.

RESOURCES NEEDED

People. A coordinator and a network of reliable people form the skeleton of the phone tree.

Time. The coordinator will spend time organizing the tree. (This process should be done prior to serious activation of the tree.) Once it's set up, the tree can do dozens or even hundreds of hours of work with only five to 50 minutes of involvement by each member, depending on the frequency and number of calls each member is assigned.

ACTION CHECKLIST

1) Make a list with current phone numbers of all the persons you want the tree to reach.

2) From that list, recruit a smaller group of people who will be responsible for calling and activating other members. This small group is referred to as the Key Group .

   a. Keep the Key Group as small as possible, since each group may be responsible for reaching people who in turn are responsible for reaching out, and so on. It is critically important that the members of the Key Group are reliable!

   b. Impress upon ALL participants the importance of completing all their assigned calls.

3) Divide the people on your list among the members of the Key Group.

   a. Consider assigning responsibilities geographically to reduce any phone charges.

   b. Try to limit calls to three to eight per participant so the phone tree won't become too burdensome.

4) Make a chart of Key Group members and their assignments and distribute it to the Key Group. Be sure to include cell numbers and emails to locate them.

OPERATING THE TREE

1) As coordinator, you will start the tree. Write out a brief script your Key Group can use during their phone calls.

2) Call the members of the Key Group using the script. Make sure that Key Group members understand what they need to do and the time frame in which they should do it.

3) Spot-check the tree's effectiveness by calling a few people down on the list to be sure they have been contacted and have received the complete message you want to share (contained in your script).

4) Train the folks in your Key Group to keep trying each person on their list until they make contact. If a member of the phone tree cannot be reached, have the caller notify you as the coordinator so you can fill in or delegate the responsibility to another member.

KEY POINTS

- Have an organization chart for your phone tree.
- Be sure that your Key Group members are reliable.
- Have multiple ways of reaching members (home and cell numbers, as well as email).