

June 27, 2020

To: Joe Biden Field Operations Team

From: Paul Heller, Experience Statewide Field Operations Director from a 2020 US Senate Race

Cell: (770) 289-1916

Email: ProfHeller@gmail.com

RE: Significant Concerns on your Virtual Phone Banking “Process” and “Standard Script”

I am committed to seeing Joe Biden win the presidential election; a must for this nation to get back on track. I have a strong training and communications background having been a management consultant, hotel operator/owner and university professor in Marketing Management, MIS, Digital Marketing, Hospitality and Corporate Finance. I have been extremely involved in Field Operations in four recent campaigns. Attachment II is a summary of my campaign experience including recently being Teresa Tomlinson’s US Senate Statewide Field Operations Director for 6 weeks in Georgia. Attachment III is a resume of mine.

Significant Concerns on Joe Biden Virtual Phone Banking “Process” and “Standard Script”

- 1.. First and foremost, there is no **“onboarding/training”** process. Volunteer is launched right to the site to start phone banking. Volunteers need person to person encouragement, motivation and connection so that they feel part of something. People will be so much more productive with support.
- 2.. There is no compelling/focused message that Joe Biden is communicating. Example only:
[The five most important things Joe Biden wants to accomplish immediately are: 1. Bring truth, integrity, leadership back to the White House. 2. Bring affordable health care to every American
3. Implement imperative new and prior Obama measures to address systemic racism.
4. Economic Priorities .. 5. Fill cabinet and agency appointments with qualified, honest, experienced people.
- 3.. The talking points on racism and the pandemic are way too long. They should be condensed down to 3 or 5 specific action steps. This is ironic as Joe Biden often makes a point of mentioning “three things” in answering questions during interviews and debates.
- 4.. Call for Action to host or attend a virtual community meeting seems too narrow and doesn’t promote other important options to get involved. It is also difficult to understand what these are?
 - Voter outreach through phone banking or texting
 - Group captains for 20+ people to onboard and motivate phone bankers and texters
 - Digital content sharing about Joe Biden over people’s Facebook, Twitter and Instagram. Campaign provides ongoing, updated content.
- 5.. Concisely I do not agree with many of the approaches in this script (I can go into detail at length)
 - “Seeing how the person is feeling/doing” at the outset is very corny and will not be viewed as sincere. You don’t know this person (at all) to be asking them “How are you feeling?”. Empathy can be created from recognizing how difficult of times people are going through.
 - The caller’s time should be respected, and immediately after saying who you are, asked “Is this is a convenient time to chat”. Forcing a message at someone whose is not interested is both a waste of time and creates very uncomfortable situations for the volunteer calling. I’ve tested this approach out on prior campaigns (See attachment I for wording and rationale).
 - There is a much better way to confirm you are speaking with the right person. It’s creepy when person knows right off that you know their name (See Attachment I for wording)
- 6.. Volunteers that are virtual phone banking need the following immediately at their disposal besides personal onboarding/training/motivation:
 - Ability to easily print out training script through an attachment provided (pdf, word) as people want to prepare their words before – making notations, highlighting things. I can confidently state that volunteers do not read off a computer screen, they use some sort of written notes.
 - Printable resource of condense Joe Biden position positions as people will ask about topics important to them. At least a reference on website somewhere, so they can be printed off.

Joe Biden Phone Banking Script – Wisconsin (probably generic) – Page 1 of 2

- Hello, is [supporter name] available? Hi, my name is _____ and I'm a volunteer calling with Joe Biden. We know with all that's going on in the world, it is an uncertain time. We're living through multiple national crises — coronavirus, economic crisis, and the open wound of systemic racism. I wanted to call to thank you for being a supporter but, more importantly, to see how you are doing.

- How are you feeling? (This inquiry into how they are doing is not sincere, no existing relationship)

1-Not Well 2-Somewhat Unwell 3- Neutral 4- Somewhat Good 5-Good

- Thanks for sharing. It certainly is a difficult time for all of us. Joe Biden has talked a lot about how we need to support each other and come together as a community to address these crises, so we wanted to check in and, more importantly, listen.

[IF SUPPORTER CONTINUES CONVERSATION, PROCEED WITH CONVERSATION USING TALKING POINTS BELOW AS A GUIDE]

[ON SYSTEMIC RACISM] - This/these talking points too long

If upset or scared:

Thank you for sharing. I am upset too. It's an incredibly uncertain time. Joe said recently that none of us can turn away. The pain is too immense for any community to bear alone.

I wanted to call today for that reason — to check in and to say we are here with you.

It's unacceptable that the African American community is forced to live with this anxiety and trauma.

This is a national crisis, and we need real leadership, not incendiary tweets, not veiled calls for violence.

This election is a battle for the soul of our nation. Few things make that more clear than the events of the last few weeks.

If asked how VP will handle violence against Black communities and communities of color:

Thank you for asking. As the Vice President has said, it's time to listen, and to respond with real action.

We must come together and fight for the future we want. I know many of you are taking action in your own communities for police reform, to root our economic inequality, and we will follow that lead.

This is a national crisis, and we need real leadership, not incendiary tweets or veiled calls for violence.

Joe Biden will fight for real police reform, that holds all cops to the high standards that so many in fact meet.

He'll expand the DOJ's power to crack down on systemic police and prosecutor misconduct.

He'll make sure that departments train police in de-escalation, and work to heal and improve the relationship between law enforcement and the communities that they're sworn to serve.

And, Joe will bring us to stand together as one nation. The pain is too great for any one community to bear alone; Joe will call every American to conscience, to bridge our divisions, together.

As Joe has said since the start of this campaign - we are in a battle for the soul of the nation. We have to ask ourselves who we want to be as a country, what we want to leave to our kids and grandkids. We've never lived up to our nation's promise - but we've never stopped trying either.

We must come together and fight for the future we want.

[ON THE PANDEMIC]---- This/these talking points too long

If upset by the impact of the virus:

Thank you for sharing. I am upset too. It's an incredibly uncertain and scary time. I wanted to call today for that reason — to check in and to say we are here with you.

Joe knows that the American people have the capacity to meet this moment if we come together as a nation with the same courage that has guided us through past crises.

If asked how VP will fight the spread of the virus:

Protecting the health and safety of the American people is the top job of any president.

Public health professionals must be the ones making public health decisions and communicating directly with the American people.

Joe knows that the American people have the capacity to meet this moment if we:

Harness the ingenuity of our scientists and the resourcefulness of our people.

Lead the world in driving a coordinated global response, not shut ourselves off.

Come together as a nation with the same courage that has guided us through past crises.

Joe Biden Phone Banking Script – Wisconsin (probably generic) – Page 2 of 2

For months, Joe has called on Trump to use his authority under the Defense Production Act to surge the production of key medical supplies and protective gear – and to appoint a Supply Commander to ensure they're distributed fast and in full, today, and ahead of any second wave.

For months, Joe has also called for a massive surge in testing. We still don't have anywhere close to the testing capacity needed to save lives and safely reopen. And now we've learned: Trump is punting this crucial job to states, too – just like he has everything else.

Joe has called for the creation of a Pandemic Testing Board, modeled on FDR's War Production Board, to massively scale the production and distribution of testing equipment and supplies nationwide; and for the creation of a Public Health Jobs Corps, recruiting at least 100,000 Americans to make testing and contact tracing available in every community.

If asked how VP will handle reopening the economy:

To be clear: Everyone wants America to reopen as soon as possible – but protecting the health and safety of the American people is the top job of any president

Joe has laid out a plan to safely reopen the economy – building a bridge through to a vaccine:

First: Get the number of new cases way down, with continued social distancing – and discipline and unity from every American.

Second: Surge accurate, quick testing – to track, trace, and contain this virus.

Third: Get our hospitals the steady supply of staff and equipment needed to be ready for any flare-ups that could come from reopening too fast.

Fourth: Workplaces have to change how they operate and how they're arranged to protect workers.

Fifth: Be ready to produce and distribute effective new treatments for Covid – and ultimately, many millions of doses of a vaccine. That's when we'll know this is over.

At the same time, we need the Senate to immediately pass the HEROES Act, to get economic relief out to states and cities, to keep teachers and other workers on the job. To extend unemployment as long as this crisis lasts. And to make sure that small business funds actually reach deserving mom-and-pop shops.

[IF APPROPRIATE, MOVE TO CAMPAIGN UPDATE] – Virtual community event call to action to narrow; You are losing out on encouraging volunteerism in areas like: phone banking, texting, digital content sharing, being an onboarding captain for these areas, etc.

During these difficult times, we want to empower our supporters to make a difference in their communities.

We're asking supporters to host virtual community meetings with friends and neighbors to discuss how we can strengthen our neighborhoods, show support during this crisis, as well as connect with our campaign. Will you attend a virtual community meeting sometime in the future as it comes up?

[MARK THAT THEY ARE INTERESTED IN ATTENDING A VIRTUAL EVENT]

- Would you be interested in joining a virtual event with members of your community?

1-Yes 2- No 3- Maybe

- [If Yes to Attend] Great! We would be excited to have you at a community meeting and we'll keep you posted as events come up. If you're interested in hosting an event, or getting more immediately involved with the campaign, you can go to joebiden.com/organizenow where there are many actions you can take.

Thanks so much for taking time to speak with me and supporting our community.

[REVIEW NEXT STEPS AND ACTION ITEMS SUPPORTER AGREED TO]

[IN CASE DURING YOUR CALL THE PERSON INDICATES THEY DO NOT SUPPORT JOE, MARK IT HERE]

- Are you planning on supporting Joe Biden in November?

1- Strong Biden 2- Lean Biden 3- Undecided 4- Other 5- Not Voting 6. Trump

Notes

Open Field

I.. Background: Tactics: Old Campaign vs Practical/Psychological Based

1. Showing Respect versus Pushing a Message Without Interest

Old: Pushing/forcing a message at someone who doesn't want to listen:

- is a bad first impression of Teresa Tomlinson
- is aggravating and will leave a bad association of Teresa Tomlinson

New: "Respect the caller" Ask the caller immediately after introductory phrase,

This is Paul (Heller) with the Teresa Tomlinson campaign who is running for US Senate to defeat David Perdue, ... Is this a convenient time to chat?

Answers YES: You now know that you have a "**receptive**" caller; interested in hearing from you. This also reduces the anxiety on the volunteer caller not being forced to deliver a message that is unwelcomed. The more positive a volunteer's experience is, the more time they will be motivated and comfortable phone banking.

Answers NO: This isn't all bad; instead of creating ill-will by continuing; you leave with the caller having a surprisingly and intriguing experience of being respected by the Teresa Tomlinson campaign. You have another opportunity to call back and they might be more responsive.

2. Although You Know the Callers Name, "Don't Risk Freaking Them Out"

Old: Current script and many campaigns start' Hello (caller first name), this is Paul Heller with the Teresa Tomlinson campaign. Not only can this 'spook' someone out, but if you mention a name different than person who answers, they don't feel as important and you may lose opportunity to speak/influence multiple voters in home.

New: After they agree that this is a convenient time: ***Who am I speaking with? (Even though you know the person's name, confirm as could be another person in the home)***

3. Don't rush into asking them who they are supporting. Build more connection in conversation with them with open question.

Old style phone banking and canvassing practices assume that you will have three, separate conversations with voter; (i) Categorize their candidate's voting preference, (ii) Persuasive, and (iii) Get out To Vote.

This is very unrealistic as remember they are getting contacted by your opponents and many down ballot candidates both on the phone and canvassing. Therefore use the first conversation phone banking as more of a Persuasive Conversation and wait until the end to ask them their voting preference (instead of towards the beginning). Use an open-ended question to develop rapport.

Script that will be on Laptop/Ipad of Virtual Phone Banker

Part A

This is (Volunteer's name) with the Teresa Tomlinson campaign who is running for US Senate to defeat David Perdue:

Is this a convenient time to chat?

No: Have a great day and I hope we will be able to reach you when it is more convenient. Visit TeresaTomlinson.com if you have a chance.

Yes: Who am I speaking with; if it is not the same person as system shows, talk to them completely, and at conclusion of call ask if _____ is also available?

At this moment, our country needs extraordinary leadership. Teresa is that leader. As the two-term mayor of Columbus, GA (from 2011-2019) she transformed the city through turbulent economic times. **Crime dropped by 42% and she balanced the budget for the first time in 16 years using no reserve funds. Because of her many accomplishments,** Columbus became one of the 25 Best Run Cities in America. We need her in the US Senate.

How familiar are you with Teresa?

Very familiar/I support her: skip to Part B

Not very: let me give you some more background;

- Teresa has been a strong democrat for 30 years and a real 'fighter'. Because of this she has strong support from Central Ga and the African American voters. She won her first mayoral election by 68% in a city where African American voters are the majority.
- Teresa is strongly pro-choice, and supports universal access to health care, voting rights, and criminal justice reform. As a **litigator** lawyer, Teresa helped families take on some of the most powerful corrupt, corporate interests.
- None of her primary opponents have served elected office.

Part B

Will you support Teresa Tomlinson in the Democratic Primary on May 19?

IF YES] Thank you for your support! Are you voting absentee by mail, early in-person, or on Election Day?

IF YES] **Are you interested in Volunteering/ We will re-contact you**

Participate in a Virtual Meet & Greet any Thursday from 8→9PM. I can email you the link sometime today. Visit TeresaTomlinson.com. Thank you for your time.

III. Existing Teresa Tomlinson Virtual Phone Script

- Hi _____, this is _____ calling from the campaign of Teresa Tomlinson, who is running for U.S. Senate to defeat David Perdue. As two-term Mayor of Columbus, Georgia's second-largest city, Teresa worked to reduce crime by forty-two percent and to dramatically reduce unemployment. Because of her leadership, Columbus was named one of the 25 Best Run Cities In America. I wouldn't be calling you if I didn't believe that Teresa is the one candidate who can bring sanity and respect back to the Senate.
- Will you support Teresa Tomlinson in the Democratic Primary on May 19?
- [IF YES] Thank you for your support! Are you voting absentee by mail, early in-person, or on Election Day?
- [IF UNDECIDED] Teresa is strongly pro-choice, and supports universal access to health care, voting rights, and criminal justice reform. As a lawyer, Teresa helped families take on some of the most powerful corrupt, corporate interests, and now she'll fight for justice by taking on David Perdue, Mitch McConnell, and Donald Trump.

Does that change your answer?

- [IF NO] Thank you for your time.

• Talking Points

-We don't have the luxury to nominate someone who cannot win the General Election.

-It is imperative that we nominate a candidate like Teresa who is ready to lead on day one and can carry a coalition of Democrats beyond the metro Atlanta area.

-Teresa has qualifications that make her uniquely electable against an incumbent, such as she has won hard fought elections and governed well in hard times.

-Because she has been in GA Democratic politics for 30yrs, Teresa has the relationships to solidly carry Atlanta voters and because of her reputation as the successful mayor of Columbus Teresa will be able to go get our Democratic voters in Central GA. Teresa can bring Democratic voters to the polls.

Paul Heller Field Operations Campaign Experience – Att II

Page 1 of 2

I have included the following for your review:

I. Below is a listing of the significant experiences I've had in four campaigns prioritized by most recent.

II. Attachment of my Professional Resume showing education, management consulting experience, hotel owner/hands-on operator experience, and university business school professor 5+ years in Marketing Management, Digital Marketing, Hospitality Operations and MIS.

III. Evaluation/critique of Joe Biden's early-on emailing practices that was based on my research and an extensive consult with one of the nation's leading Bulk Emailing consultants indicated a less than desirable strategy. [I personally know a person within the inner circle of the Biden campaign.]

I. Significant Political Campaign Experience

I have been involved in four major campaigns:

1. [Statewide Field Director for Teresa Tomlinson](#) for 5 weeks from late February, 2020 - March, 2020. I departed the campaign due to incompatibility between Louis Elrod (Young Campaign Manager) and myself. I am more than happy to share what I accomplished and the many attempts I made at trying to get this young consultant to embrace my ideas/strategies and many initiatives that were not being done prior to my arrival. All Teresa would say is what a "G-dsend I was". For each area identified below, I was creatively initiating with technology-driven approaches, **I have provided numerous references that you can directly contact as you will have a hands-on knowledge of my accomplishments and ability to motivate and empower people.**

*A. Virtual Phone Banking: Effective Script strategies and Creating Positive experience for Volunteers (I'm anxious to compare respective script strategies.)

*B. Virtual Town Halls over Zoom including special custom, redirect links to promote attendance with various weekly open and separate focused groups

*C. Recruiting and activating local (primarily) Women's Democratic Groups for Voter Outreach (phone banking, distribution of social media content, post cards)

Reference: Angie Jones: Cell: (770) 855-8069 [Leader in Jones Creek Progressives]

*D. Targeted Black Voter Initiatives: Sororities & Fraternities, Church Groups, Important famous political and sports endorsements for (future) rallies and current print media opportunities

Reference: Henrietta Antonion: Cell: (678) 551-8981 [Key Atlanta Influencer having been Campaign Manager for Andrew Young and Maynard Jackson. Also a close colleague of John Lewis

Reference: Sharon Hill: Cell: (404) 516-7617 [President of Georgia Women's Black Caucus and huge advocate of Absentee Ballot Initiatives]

*E. Recruiting (Obama-like) Statewide Network of Volunteer Team Leaders to recruit, organize and motivate 15-25 local volunteers for voter outreach programs

Reference: Senta Scarborough: Cell: (480) 287-4598: [Highly experienced investigative journalist and Uber experienced campaign volunteer]

Paul Heller Field Operations Campaign Experience – Att II

*F. High School and College Student Initiatives that are structured to motivate virtual phone banking and digital content creation and distribution creating earned position titles that students value for interviewing and their resumes.

Reference: Patrick Chappell: (706) 325-2560 [Most accomplished/longest college intern on campaign; full-time during summer and back from Yale due to Coronavirus]

*G. Attracting and Activating groups statewide: Young Democrats, Policy Driven Groups, and Associations:

Reference: Patrick Chappell: (706) 325-2560

*H. Began Implementing a Down-Ballot State House and Senate Candidate Association Program (not endorsement) to link Statewide Senate Candidate. Program included dual phone-banking, canvassing, photo opportunities, and virtual meetings to provide state campaign strategy suggestions. Reference can be made available as desired.

2. Kevin Abel 2018 6th District US Congressional campaign where he was successful in primary with 4 candidates; however, lost runoff to Lucy McBath 46% - 54%. Top campaign-wide volunteer heading up canvassing (organizing, recruiting, training and motivating) 60+ volunteers. Developed small group training program, canvassing script, assigned mini-van turfs, personally trained new canvassers wanting initial assistance. Personally canvassed over 1,000 doors myself.

Reference: Kevin Abel: Cell: (770) 883-2660

3. Hillary Clinton GA 2016 Presidential Race

Tasked with recruiting a Volunteer Team Leader ("VTL") structure statewide until effort mysteriously shut down? Through both my contacts and database from 2014 Michelle Nunn VTLs listing I re-contacted over 200+ identified contacts through emailing and texting. Within two weeks of around the clock efforts; I had over 60 VTLs excited and ready to be activated with each VTL committing to recruit 15+ volunteers to canvas, phone bank and crowd source events.

4. Michelle Nunn 2014 Senate Race. Assigned one of the targeted key counties to develop the (Obama-like) Volunteer Team Leader networks in that assigned county as well as broadening out to other counties initially not targeted through contacts made readily available. Conceptualized with Michelle Nunn's mother, Colleen Nunn, a statewide rally program through largely black areas with prominent black politicians and celebrities. To Colleen's dismay the Campaign elite didn't support us.

Reference: Colleen Nunn: (404) 242-5741

My background includes (as shown on my resume attached: Senior Management Consultant, Hotel Entrepreneur/Owner, University Adjunct Prof in Digital Marketing, Marketing, Corporate Finance, MIS and Hotel Operations at Georgia Tech, Mercer MBA, Georgia State, Kennesaw State and Oglethorpe.

Paul Heller
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Business Educator ● Business Innovator

Experience

- 2012 to Present **Professional Artist**, Glass Art Illuminations: Founder and Design Director
Fall, 2011 **Instructor**, Social Media Institute of Atlanta
Social Media and Search Engine Marketing, Thirteen Weeks, Engauge Digital
- Summer, 2011 **Professor, PTI**, Oglethorpe University
Social Media and Search Engine Marketing – Evening Program
- Spring, 2011 **Professor, PTI**, Mercer University
Social Media and Search Engine Marketing – MBA Program
- Fall, 2009 **Professor, PTI**, Georgia State University
Corporate Finance (3300), Intro. to Business Finance (1010) – Two Sections
Professor, PTI, Georgia Institute of Technology
Marketing Management (Junior and above course), three sections
- Ongoing **Guest Lecturer**, Emory Goizueta Business School
Real Estate Finance: “*Valuation Approaches In Conjunction with Actual Hotel Transactions*”, and “*Loan Defeasance and Negotiating REO*”
- Spring, 2009 **Professor, PTI**, Georgia State University
Hospitality Quality and Service Management (3800)
- Fall, 2008 **Professor, PTI**, Georgia State University
Hospitality Quality and Service Management (3800)
Introduction to Business and Finance (1010) – Two Sections
- Spring, 2008 & **Professor, PTI**, Kennesaw State University Summer, 2008
Management Information Systems (3100)
- Fall, 2007 **Professor, PTI**, Georgia State University
Introduction to Business and Finance (1010)
- 1991 - 2007 **Hotel Operator and Owner**: Three Atlanta hotels
- 1990 - 1991 **Resolution Trust Corporation** - Senior Contracting Officer
- 1985 – 1990 **Hillmark Corporation** – Vice President of Operations and Marketing,
Bradbury Suite Hotels and RoadStar Inns
- 1980 – 1985 **Touche Ross & Company** – Senior Management Consultant

Education, Certification, and Seminars on Education

GACE (Georgia Assessments for the Certification of Educators); passed the three components necessary for Middle School Mathematics: Professional Pedagogy I & II and Middle School Math

University of Wisconsin – Madison, (1978-1980): M.S. in Finance and Accounting with 3.5 GPA

Rensselaer Polytechnic Institute – Troy, NY (1974-1978): B.S. in Electrical Engineering
with 3.7 / 4.0 GPA, Cum Laude

Certified Public Accountant: State of Illinois on first sitting (all four parts) during 1980

Sales Training: Professional Selling Skills III, Xerox Corporation and
BASE For Sales Excellence, conducted by Zenith Data Systems

Seminars on Education: Alan November: “*Technology in Education*”, Todd Zakrajsek/UNC, “*Creating Excitement and Overcoming Apathy in the Classroom*”, and others.

Personal

Family: Born September 2, 1956. Married, three grown/working children.

Interests: Coaching youth sports, competitive bridge, triathlete, outdoors, photography