

From Fragmented Pipelines to a Unified Calling System

Pamela runs an agency with multiple team members handling inbound and outbound leads across different stages. Her biggest challenge wasn't generating leads, it was managing them across multiple pipelines, tools, and workflows without things breaking. Call Boards stood out as a way to consolidate her team's calling activity into a single, streamlined system.

The Existing Workflow Before Call Boards

Pamela's team was operating across multiple pipelines inside the CRM. They used separate dialing workflows and relied on automations and tags in the CRM to move leads along. Leads would enter one pipeline, move based on time or activity, and get assigned when a rep engaged. All of it required constant manual oversight. As Pamela described, the system would often break, "even with the pipeline and the dialer... sometimes it gets broken."

The Challenge

Pamela's key pain points were:

- Managing multiple pipelines for different use cases (new, quoted, etc.)
- Reps needing to switch between systems constantly
- Leads getting stuck or not moving correctly
- High operational complexity from overlapping automations
- Difficulty coordinating multiple reps without overlap

She said her goal was: "I don't want them to have to keep moving back and forth between different pipelines."

Why Call Boards Resonated

Call Boards introduced a simpler model:

- One centralized place for calling
- Stage-based workflow instead of multiple pipelines
- Filtering and assignment to prevent reps from overlapping
- Ability to prioritize and call the entire board

As Pamela put it, "to be able to keep it all in one place... this is gonna be amazing." Pamela identified several high-impact changes she could make with Call Boards:

1. Centralized calling workflow: instead of jumping between pipelines, reps can operate from a single board.
2. Team coordination without overlap: rep assignment + filtering ensures reps only work their leads.
3. The flexible stage design allows for custom stages like "Quoted", which mirrors CRM workflows.
4. Bulk lead management: leads can be imported and worked as a batch instead of one-by-one.
5. Reduced system complexity: fewer moving parts compared to layered CRM automations.

Call Boards isn't just about dialing faster — it's about simplifying complex sales operations into one system the team can actually follow. As she put it, "I just want it to all be more seamless for everyone."

Try Call Boards today.