

“This is really cool” – Turning Scrappy Calling Into a System

Andrew sells life and health insurance using outbound calling across mixed lead sources. He’s actively dialing every day: testing, adjusting, and figuring things out on the fly.

The Problem

Andrew wasn’t lacking effort — he was lacking structure.

- Leads came from everywhere (manual uploads, ads, lists)
- CRM rules created confusion and duplication
- No clean way to organize or prioritize calls
- Constant manual work just to keep things straight

He was making it work... but it wasn’t smooth.

The Shift

1. Simple organization (without the mess)

Instead of guessing, he can add a tag, drop leads into a board, and start calling.

2. Control over dialing behavior

You can set up different strategies for different leads based on the stage they are in.

About this, Andrew said, “...this helps a lot...these little things make a huge difference.”

Within minutes of understanding it, Andrew was already thinking:

- How to organize his lists
- How to prioritize leads
- How to customize dialing strategy
- How to move faster day-to-day

Call Boards turned his process from scrappy and reactive to structured and intuitive. Try Call Boards today.