

“I’m trying to set it up so my only job is: get leads in, call them, and everything else is automated.”

Thomas had already built a highly customized outbound system using HighLevel — with workflows, tags, counters, and automations all working together. His goal was to engineer the perfect system where leads flow automatically, calls are prioritized correctly, and follow-up happens without manual effort.

The Existing System

Before Call Boards, Thomas had built:

- Workflow-driven automation for every call outcome
- Tag-based triggers to move leads through pipelines
- Call attempt counters to control follow-up logic
- Smart lists designed to determine the “next best call”

As he described it, “I had to be like a master mapper... take those dispositions and create tags that fire off automations.”

The Challenge

Even though the system worked, it came with tradeoffs:

- Heavy setup and maintenance
- Multiple workflows needing to stay perfectly aligned
- Complexity across tools (dialer + CRM + automations)
- Risk of duplication or breaking logic
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At its core, Thomas was trying to solve one thing: “I’m trying to set it up so my only job is to get leads in and call them, and everything else is automated.”

Why Call Boards Stood Out

Call Boards introduced a simpler way to achieve the same outcome, without stitching together multiple systems.

Instead of:

- Workflows → tags → pipelines → dialing logic

It becomes:

- One board → priority stack → built-in automations

What immediately clicked for Thomas was the Call Boards concept of “always prioritize the best person to call next.”

Key Improvements

1. “Next Best Call” built in

Instead of building smart lists, Call Boards dynamically surfaces the highest-priority lead.

2. Fewer moving parts

No need to coordinate multiple workflows across systems.

3. Centralized automation

All logic can live inside one board instead of scattered across tools.

4. Real-time lead prioritization

New leads automatically jump to the top of the queue.

5. Flexible integration

Still works with existing CRM workflows when needed.

Call Boards offered a way to achieve the same outcome he had engineered manually, but with far less overhead.

As he put it:

“I’m just trying to figure out — is this a simpler way to do what I’m already doing?”

Call Boards replace fragile, multi-step automation setups with a single system. Try Call Boards today.