

From Overwhelmed by Workflows to a Clear, Simple Calling System

Adam runs his business on a white-labeled HighLevel setup, managing lead flow, pipelines, and automations. His focus is to keep things organized, move leads through stages efficiently, and avoid overcomplicated systems.

The Challenge

Adam was already using automations but they were becoming a burden.

- Workflows were complex and hard to manage
- Lead progression didn't always reflect reality
- Systems required constant mental overhead
- He avoided diving in deeper because of the complexity

As he puts it, "I have a bad habit of looking at things too hard... I didn't want to overburden myself." He needed a simpler way to run calling without adding complexity.

The Shift

Within minutes of first seeing Call Boards, Adam's reaction was, "I was expecting it to be a little more complicated... it looks pretty straightforward."

Call Boards:

1. Simplifies what CRM workflows complicate

Instead of building endless workflows:

"Some of the automations... are so complicated that they're not easy."

Call Boards gave him a way to manage calls without adding more logic layers.

2. Flexible enough to match real operations

Adam immediately started thinking in terms of:

- Lead age vs call attempts
- Stage-based progression
- Real-world cadence (not just automation logic)

This showed the system could adapt to how he already runs things.

3. Low cognitive load

The biggest win wasn't features — it was usability.

Call Boards doesn't replace his system, it makes it usable again. Try Call Boards today.