

Turning a Chaotic Dialing Process into a Controlled System for His Team

Michael runs a real estate acquisitions team with multiple callers working large outbound lists (pre-foreclosure, probate, etc.). His challenge wasn't just making calls, it was controlling how his team makes calls at scale.

The Problem

Before Call Boards, Michael and his team were dealing with:

- Complex workflows just to manage call progression
- Inconsistent dialing behavior across team members
- Difficulty keeping reps on the right list and stage
- Losing track of where reps left off in a list
- No clear system for multi-touch follow-up (5+ attempts)

As he put it:

"It's really hard with workflows to keep someone in a cold calling flow... we've created workarounds and it's made it really difficult."

The Bigger Issue: Lack of Control

Michael wasn't just optimizing for efficiency, he is optimizing for discipline.

He needed a system where:

- Reps don't jump around lists
- Calls follow a defined cadence
- Leads don't get skipped or duplicated
- Managers can trust the process

In his words: "I've got to make it simple... otherwise they'll go to the wrong place."

What Stood Out About Call Boards

As he saw the product, a few things immediately clicked:

1. One place to manage everything

Instead of juggling campaigns, workflows, and dialer lists, Call Boards centralizes it into one system.

2. Built-in lead progression

Instead of manually moving leads through:

- 1st call
- 2nd call
- 3rd call

It can be automated based on call attempts.

3. Bulk list control

Michael quickly identified a workflow that fit his operation:

- Upload a list
- Bulk assign it to the board
- Work it systematically

For his use case he said, "I would do the bulk select import option every time... just make sure those leads get contacted."

Key Insight

Call Boards gave him a way to create a "controlled environment" for his agents.

Michael saw immediate value:

- Faster onboarding for new setters
- Less reliance on fragile workflows
- More predictable calling behavior
- Better visibility into call attempts and progress

For teams like Michael's, the problem isn't just making calls — it's managing people, lists, and processes at scale.

Call Boards turns outbound calling from a loosely managed activity into a structured, repeatable, team-wide system. Try Call Boards today.