

Simplifying a Complex Real Estate Calling Workflow with Call Boards

Wilson runs a real estate company with a team of six, with two users actively handling outbound marketing. His team does a high volume of cold calling and uses Call Boards to organize leads based on call attempts. While his process is relatively straightforward, the real value of Call Boards came from replacing a much more complicated workflow that had previously been built inside High Level. For Wilson, Call Boards stood out because it made an otherwise bulky and overly complex system much simpler to manage.

The Existing Workflow Before Call Boards

Wilson's team brings in leads and moves them through a structured call cadence based on how many times each lead has been contacted. Their board setup is simple and consistent:

- CC1
- CC2
- CC3
- CC4
- CC5

Each stage represents a new call attempt, with leads moving automatically from one stage to the next based on call count.

The Challenge

Before Call Boards, Wilson had built this process inside High Level opportunities, but the workflow was much more complicated than it needed to be. Wilson explained, “as you can imagine, the workflow [in High Level] was super complicated and bulky. So this made everything a lot simpler.”

Why Call Boards Resonated

Call Boards worked well for Wilson because it mirrored the team's existing outreach structure without requiring the complexity of a full High Level opportunities workflow. The biggest value was that it gave the team a simpler way to execute a clear call-attempt-based process:

- Leads move through stages based on call count
- Dispositions can still trigger tags and High Level workflows
- The team can keep their automation logic intact while making the calling workflow easier to manage

Wilson described the setup as straightforward and intuitive enough that even after a new UI update, he “didn't notice any substantial changes that weren't super intuitive.”

How Wilson Structured His Boards

Wilson's call board process is intentionally simple:

- CC1 → first call attempt
- CC2 → second call attempt
- CC3 → third call attempt
- CC4 → fourth call attempt
- CC5 → fifth call attempt

Leads move through these stages automatically based on call count, not manual dragging. On the disposition side, Wilson's team also uses automations that apply tags and trigger workflows such as:

- follow-up campaigns
- remove from marketing
- add to appointment set workflows in High Level

This means Call Boards is not replacing their automation ecosystem — it is acting as the operational layer that makes their calling process easier to manage.

Takeaway

Wilson's story shows that Call Boards are valuable not only for teams trying to create structure, but also for teams that already have structure and want to simplify execution. For Wilson, Call Boards helps turn a bulky outbound system into a cleaner operational workflow by:

- simplifying call-attempt tracking
- preserving existing automations
- making the process easier for his team to run day to day

This makes Call Boards especially compelling for teams that already have sophisticated workflows, but need a simpler way to manage calling activity at scale.

Try Call Boards today.