

From “Operating Blind” to Structured Calling with Call Boards

Rob runs a high-volume outbound insurance sales process built on purchased leads and fast follow-up. While he is a highly experienced closer, his biggest challenge has not been selling — it has been increasing his low connection rates. Call Boards was a way to involve automations in his number and calling strategy, while helping him track who to call, when, and why.

The Existing Workflow Before Call Boards

Rob purchases leads weekly and works them across multiple calling sessions:

- New leads are uploaded in batches (typically 20 per week)
- Calls are made in focused blocks (morning and evening)
- Leads are revisited repeatedly over time
- Follow-ups, callbacks, and no-shows are handled manually

He also works across multiple states and time zones, adjusting who he calls based on time of day. While the system is active and consistent, it lacks structure. As Rob described: “I look down the list and think...I’m almost sure I spoke to this person, but I have no idea.”

The Challenge

Rob’s key pain points were:

- No clear record of who has been called or how many times
- No way to schedule calls
- Time wasted manually reviewing lists before dialing
- Risk of calling the same person repeatedly or missing leads entirely
- No clear distinction between:
 - new leads
 - callbacks
 - follow-ups
 - no-shows
- Manual tracking using memory, paper notes, and guesswork

In his words: “it takes me 20 minutes to go down the first hundred and eliminate the ones I shouldn’t call...I’m operating blind.” Rob’s biggest problem is not effort, it’s a lack of visibility and organization.

Why Call Boards Resonated

Call Boards addressed Rob’s core problem of tracking and clarity. The feature introduced a structured system where:

- Leads are organized into clear stages (New, In Progress, Follow Up, etc.)
- Call outcomes automatically move leads between stages
- Call attempts are tracked visually on each contact
- Scheduled callbacks surface automatically at the right time

This replaced guesswork with a system. Rob even said, “that’s the part that was killing me — the tracking part.”

How Rob Structured His Boards

Rob’s workflow translated into stages like:

- New → never reached
- In Progress → spoke but no appointment
- Follow Up / Appointment → scheduled calls
- Appointment No Show → missed meetings
- Abandoned → no longer worth calling

He also introduced more advanced logic with Call Boards automations:

- Call attempt limits (e.g., move after 12 attempts)
- Different dialing strategies by stage
 - single-line dialing for new leads
 - multi-line dialing for older leads
- Priority handling for inbound voicemails and callbacks

Key Workflow Improvements

1. Clear call tracking

Call Boards show exactly how many times a lead has been contacted. Before, Rob “had no idea how many times we called someone... now I can see it.”

2. Stage-based calling

Instead of one long list, Rob can now:

- call only new leads
- switch to follow-ups
- revisit no-shows
- or work aged leads intentionally

This matches how he actually works.

3. Automatic movement between stages

Leads move based on outcomes (no answer, appointment set, etc.), removing manual tracking.

4. Scheduled call handling

Follow-ups interrupt the dialer at the right time, ensuring nothing is missed.

5. Reduced mental load

Instead of remembering everything, “it tracks everything we need to track.”

Call Boards help turn chaotic calling processes into trackable, repeatable systems.

Try Call Boards today.