

Building a Flexible Calling System with Call Boards

Sebastian manages a property leads operation inside High Level and wanted a simpler, more organized way for his team to work lead lists. His goal with Call Boards was not just to give reps a place to call from, but to create a clean operational layer where leads could be pulled in, worked by stage, snoozed between attempts, and routed based on call outcomes. Call Boards stood out because it gave Sebastian a more flexible way to organize calling activity without forcing his team to rely on smart lists and manual lead management inside High Level.

The Existing Workflow Before Call Boards

Sebastian's team works property leads inside High Level, where contacts are assigned through round robin workflows. Their reps are primarily focused on calling leads from the earliest stage in the pipeline, then moving contacts based on the result of the conversation.

Their workflow was already structured around:

- inbound or form-generated leads entering a first-step stage
- reps calling leads one at a time
- outcomes like:
 - call scheduled
 - won
 - lost
 - no show
- follow-up actions being handled through High Level automations

The challenge was not that they lacked a system, it was that they wanted a better way to work those lead lists directly without requiring reps to constantly build smart lists, manage filters, or rely fully on High Level views.

The Challenge

Sebastian's key pain points were:

- leads were assigned in High Level, but not always through a clean tagging structure
- they wanted to pull a user's leads into a board and call directly from there
- reps needed a way to avoid re-calling the same contact too soon
- they wanted to work a stage like "step one" directly, without managing separate smart lists
- they needed flexibility around:
 - which contacts were newest
 - which contacts were older
 - how to prioritize who gets called first
- existing stages in High Level did not fully map to how they wanted calling handled day to day

Rather than needing a brand-new process, Sebastian needed a system that could sit on top of their existing one and make execution easier.

Why Call Boards Resonated

Call Boards appealed to Sebastian because it offered a way to make calling more operationally simple while still working alongside High Level.

The value was clear in a few areas:

- leads could be pulled into a board for a specific rep
- reps could call directly from a stage instead of hunting through lists
- outcomes from calls could move contacts to the next appropriate stage
- automations could snooze leads so they were not called again too quickly
- the manager could lock down board settings while still giving reps a clean calling workflow

Instead of forcing the team to manage outreach entirely inside High Level filters and opportunities, Call Boards created a clearer layer for actual call execution.

How Sebastian Structured His Boards

Sebastian's intended setup focused primarily on the earliest lead stage.

His ideal board structure was:

- Import leads into Call Boards via tags
- Step 1 → new inbound leads that need first contact
- Call Scheduled
- Won
- Lost
- No Show / other outcome stages as needed

The main operational goal was simple:

- pull leads from the first stage into the board
- let reps call that list directly
- move contacts to the appropriate outcome stage based on the result of the call
- let High Level continue to handle the rest of the automation and pipeline logic

Rather than using Call Boards for every step of the customer lifecycle, Sebastian wanted to use it most heavily where it added the most value: initial outreach and call execution.

How Call Boards most benefitted Sebastian:

1. A cleaner way to work first-contact leads

Instead of relying on High Level smart lists and stage filtering alone, reps can call directly from a board built around their assigned leads, which simplifies the day-to-day workflow.

2. Built-in snoozing between attempts

One of the most useful improvements was the ability to snooze a lead after a call attempt.

In Sebastian's case, they wanted to make sure a lead was not called again for three days

after a call attempt. That means reps can keep working a list without accidentally re-

touching the same lead too quickly.

3. Outcome-based movement

Call results like:

- scheduled
- won
- lost
- no show

can be used to move contacts to the right stage automatically. This creates a smoother handoff between calling activity and the existing High Level automation structure.

4. Manager control with rep usability

Sebastian wanted his reps to use the board, but not necessarily to manage the board logic themselves. Call Boards supports that well because:

- the manager can configure settings
- lock those settings down
- and still give reps a simple calling experience

This keeps the workflow standardized while reducing setup mistakes.

5. Flexibility in how reps call

Sebastian's team can choose between:

- calling the whole board by priority
- or calling a specific stage directly

That gives them flexibility depending on how they want reps to work leads.

A More Controlled Calling Workflow

Sebastian's is a use case where Call Boards is not replacing the CRM — it is improving how

the team works inside it.

His team still depends on High Level for:

- lead assignment
- pipeline stages in opportunities
- some automations
- downstream follow-up logic

But Call Boards gives them a more practical way to:

- surface the right leads
- call from the right stage
- control when leads are callable again
- and move contacts based on outcomes

That makes it easier for reps to focus on calling instead of list management.

Sebastian's story shows that Call Boards are especially useful for teams that already have

a CRM workflow in place, but need a better system for actually working leads by phone.

For Sebastian, Call Boards help create a more controlled calling process. Call Boards are a

strong fit for teams that want to add structure and usability to outbound calling without rebuilding the rest of their CRM system. Try Call Boards today.