

Bringing Structure to a High-Velocity Insurance Calling Workflow with Call Boards

Rich works high-volume insurance leads and needed a better way to manage call timing, prioritize fresh opportunities, and keep older leads organized without getting buried in his CRM. His challenge was not lead flow — it was building a system that matched how he actually works: respond quickly to new leads, make repeated double-dial attempts, then move leads into different buckets as they age and require a different approach. Call Boards gave Rich a structured way to manage that cadence while still supporting the fast, practical workflow he already uses.

The Existing Workflow Before Call Boards

Rich's outreach process is built around speed-to-lead and repeated contact attempts. His typical workflow looked like this:

- new leads come in and need to be called first
- he manually double-dials leads
- he wants multiple call attempts per lead per day, but not too close together
- after enough attempts, leads should move into a different working bucket
- after more attempts, those leads become stale and require a different message

He already had a clear mental model for how leads should be worked. The problem was that most of that logic lived in his head. He knew which leads were fresh, which were older, which needed another attempt, and which needed a follow-up — but the system was not yet doing that work for him.

The Challenge

Rich's biggest pain points were around call cadence, lead progression, and workflow clarity.

- he needed a way to double-dial leads without overcalling them
- new leads needed to stay at the top, even while he worked older leads
- older leads needed to be handled differently than fresh inbound leads
- he wanted leads to move automatically based on call count
- he needed a separate place for leads that required a real follow-up action
- he was still working through how Call Boards and the CRM should complement each other

At the center of it all, Rich needed a system that matched his real behavior:

- fast first contact on new leads
- spacing between attempts
- automatic movement from new to working to stale
- room for special cases like callbacks, follow-ups, or “call me later” conversations

Why Call Boards Resonated

Call Boards matched the way he already thinks about leads: by freshness, number of attempts, and next step.

The biggest value was that Call Boards could:

- keep the newest leads at the top
- automatically move leads after a set number of attempts
- snooze leads between call rounds
- separate true follow-up work from general calling
- help Rich see where every lead belongs instead of tracking it manually

As Rich worked through the setup, he was clearly translating his real-world process into the board:

- six attempts in New
- eight more in Working On
- then move to Stale Leads
- any meaningful next step goes to Follow Up, Appointment Set, Won, or Lost

That gave him a system that reflected how he already works, but with much less mental overhead.

How Wilson Structured His Boards

Rich's board evolved into a simple, intentional progression:

- New
- Working On
- Stale Leads
- Follow Up
- Appointment Set
- Won
- Lost

His intended cadence was clear and he structured this in his Call Boards settings and automations:

New

- manually double-dial leads
- keep them in the New stage until 6 call attempts
- after every 2 call attempts, snooze the lead for 3 hours
- this prevents overcalling while still allowing multiple rounds in the same day

Working On

- once a lead has had 6 attempts, move it to Working On
- keep it there for 8 additional call attempts
- then move it to Stale Leads

Stale Leads

- older leads that now require a different script or tone
- these are no longer treated like fresh opportunities

Follow Up

- for leads where Rich has spoken with the person and there is a real next action
- examples include:
 - “call me back later”
 - “I'll call you back”
 - “follow up”
 - “try me next month”

This created a clean distinction between routine outreach and true follow-up work.

Key Improvements for Rich

1. Automatic movement based on call count

One of the biggest improvements was building the workflow around call attempts, not guesswork.

Rich's lead progression became:

- New → 6 attempts
- Working On → 8 more attempts
- Stale Leads → aged leads that need a different approach

This removed the need to manually remember where a lead belongs.

2. Better spacing between attempts

Rich did not just want repeated attempts, he wanted them spaced in a way that made sense. With Call Boards, he could set a rule so that after 2 call attempts, a lead is snoozed for 3 hours before it becomes callable again. This preserved his double-dial strategy while protecting against overcalling.

3. New leads stay prioritized

Rich recognized that speed-to-lead matters, and Call Boards supports that by always surfacing the hottest leads first. New leads stay at the top, while older leads are worked after. This means his daily workflow now aligns more closely with how he already prioritizes opportunities.

4. A dedicated place for real follow-up work

Rich needed a meaningful difference between:

- leads he is still trying to reach
- and leads he has spoken with and needs to revisit intentionally

The Follow Up stage gave him a home for those second category leads — ones that require personal action, not just another routine attempt.

5. Clearer separation between call workflow and CRM

One of Rich's biggest questions during implementation was simple but important:

What is the board for, and what is the CRM for?

The distinction became clearer during setup:

- Call Boards = daily calling workflow and lead movement
- CRM = notes, broader contact history, and deeper record management

That made the overall system easier to understand and use.

A Workflow That Matches How He Thinks

Call Boards helped Rich create a system that fits how he naturally works.

He wanted something that reflected his actual process:

- fresh leads first
- repeated attempts with spacing
- older leads treated differently
- true follow-up separated from the main queue

By the end of creating his Cal Board, Rich said the structure “fits psychologically” with how he thinks. Call Boards are especially valuable for users working high-velocity lead queues who need more than just a static contact list. Try Call Boards today.