

How Call Boards Fits a Real Outbound Workflow

Gregg runs a structured outbound sales process built around fast follow-up and repeated call attempts. New leads enter his CRM automatically and he works them through a series of call stages based on how many times they've been contacted. While the system works, Gregg currently manages progression manually through tags and smart lists. Call Boards stood out because it matched the way he already thinks about lead follow-up — with the potential to save significant time by reducing manual tracking.

Gregg's Existing Process Before Call Boards

Gregg's workflow begins when a new lead is automatically added to his CRM and tagged as New Lead. From there, he follows a call-attempt-based progression:

- New Lead
- Calls 4–6
- Calls 7–9
- Calls 10–12
- Aged Lead

He typically calls leads 2–3 times per day over 2–3 days, moving them through the funnel until they reach around 12 call attempts, at which point they are considered an aged lead.

Unlike a traditional pipeline that uses broad statuses, Gregg tracks progression using specific call-count ranges. This gives him a disciplined system for follow-up, but also creates a lot of manual work.

The Challenge

Gregg's current process depends on manually adding and removing tags to keep leads in the right smart lists and columns. As new leads continue to enter while older leads are still being worked, he has to keep track of which leads are on call 1, 2, or 3, then manually move them into the next stage. That manual upkeep becomes especially painful in a high-frequency outbound workflow where speed and consistency matter.

In his words, "My process is a little bit manual. I have to essentially add tags and remove tags." With Call Boards, "being able to just click and dial and not having to manually add and remove tags any longer is the most beneficial part for me."

Why It Matters

Call Boards stood out to Gregg because it reflects the exact structure he already uses. He created boards using the same categories he manages today, such as Calls 4–6, Calls 7–9, and Calls 10–12. He was able to import leads by tag, create a board quickly, launch calls, and begin tracking call counts inside the board using automations. This way, when a lead has been called 6 times, they are automatically moved to the next stage for calls 7-9. The experience felt intuitive from the start. Gregg described it as "self explanatory" and said the product worked in a way that aligned naturally with how he thinks.

Gregg is not asking for a new workflow, he already has a disciplined outbound motion, but he has to manage lead progression manually. What he wants is a simpler way to run it and to save time with easy to understand automations. Call Boards serve this purpose.

Try Call Boards today.