

6 Powerful Use Cases for Scheduling Software

Accelerating Pipeline With LeanData BookIt



Make Scheduling a Win-Win for Buyers and Sellers

Today's B2B buyers don't want to make appointments via email exchanges and definitely not over the phone. People want the experience of booking a meeting when it's convenient for them.

Likewise, your Sales team, Account Managers, Professional Services, and others have better revenue-generating tasks to do than participate in the back-and-forth ping pong of meeting scheduling.

So rather than forcing buyers, customers, or your employees to conform to an outdated scheduling process (because they won't), offer an automated meeting solution that's a win-win for everyone.

This ebook details six powerful business use cases revenue teams are using today to improve the scheduling experience and accelerate buying decisions.

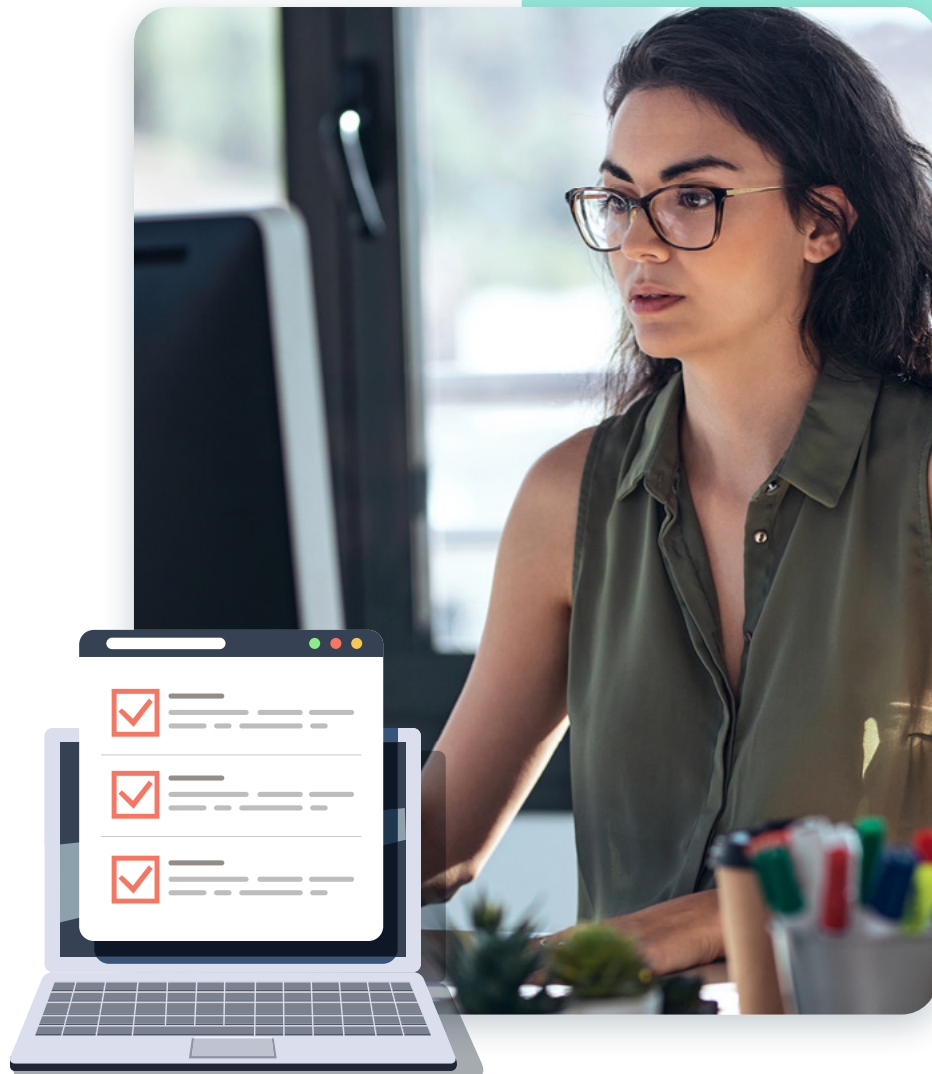


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What is Scheduling Software?

Scheduling software allows prospects and customers to book, reschedule, and cancel appointments through an online interface without the need for human contact.

It streamlines the process of managing appointments by eliminating the common back-and-forth scheduling hassle. As a result, **appointment scheduling software has become a staple in the modern RevTech stack.**

However, automated appointment scheduling software, like LeanData's BookIt suite of solutions, is **so much more than a calendaring tool.**

Best-in-class scheduling software includes revenue orchestration features like account matching, de-duping, Round Robin assignment, lead qualification, group booking, and many other functionalities.



+26%

Online scheduling leads to 26% more new customers.



+17%

Self-scheduling decreases the no-show percentage by 17%.



60%

60% of consumers typically schedule their appointments with businesses online.

Source: Financesonline.com



Benefits of Scheduling Software

Automated appointment scheduling software far exceeds traditional scheduling tools, providing powerful benefits to pipeline generation:



Compelling Buyer Experiences:

Providing instant scheduling to a prospect creates a compelling buyer experience, improving conversion rates.



Increased Productivity:

Scheduling software reduces the time spent to secure a meeting, improving sales productivity.



Decreased No Shows:

Scheduling software includes automated reminders, decreasing the number of meeting no shows.



Seamless Handoffs:

Scheduling software allows SDR teams to pass buyers to the right Sales rep and instantly schedule the next steps meeting.



Speed To Lead:

Scheduling software can qualify, prioritize, and assign Leads quickly and with precision, ensuring the fastest response possible.



Reduced Marketing-To-Sales Friction:

Eliminates the time Marketing teams spend passing high-intent Leads to Sales teams, while also reducing the friction caused by manually coordinating meetings using misaligned data.

Scheduling Solutions Maturity Curve

Is your company ready for scheduling software?

Consider how meeting scheduling fits into your overall go-to-market (GTM) strategy. For example, how will interested buyers find their way to the right calendar for the right person at your organization?

Automated meeting scheduling software is essential when an organization experiences certain indicators of business maturity and operational needs.



Use this checklist as guide:

- ☐ The **volume and complexity** of your meetings has increased. Basic scheduling systems often fall short, leading to inefficiencies and errors.
- ☐ Your organization needs **advanced features** such as lead qualification, appointment prioritization, and automatic handoffs between departments.
- ☐ Your organization needs **visibility into data analytics** like appointment trends or buyer behavior for decision-making
- ☐ Your organization needs a **seamless integration** for meeting scheduling with marketing automation tools or your CRM.
- ☐ Your organization needs a scheduling system that can **scale with your growth**, adapting as meeting volume increases without lowering the quality of customer experience.
- ☐ Your organization wants to **improve the buyer experience** with more personalization.

Ultimately, your readiness for appointment scheduling software will be a combination of these three things:

- 1 The scale of your operations
- 2 The complexity of your scheduling needs
- 3 The strategic priorities of your organization



Use Cases for Scheduling Software

Use Case #1

Webforms to Meetings

Prospective buyers want quick, friction-free buying journeys on their own timelines. When they're ready to engage with a company, they expect an instant response.

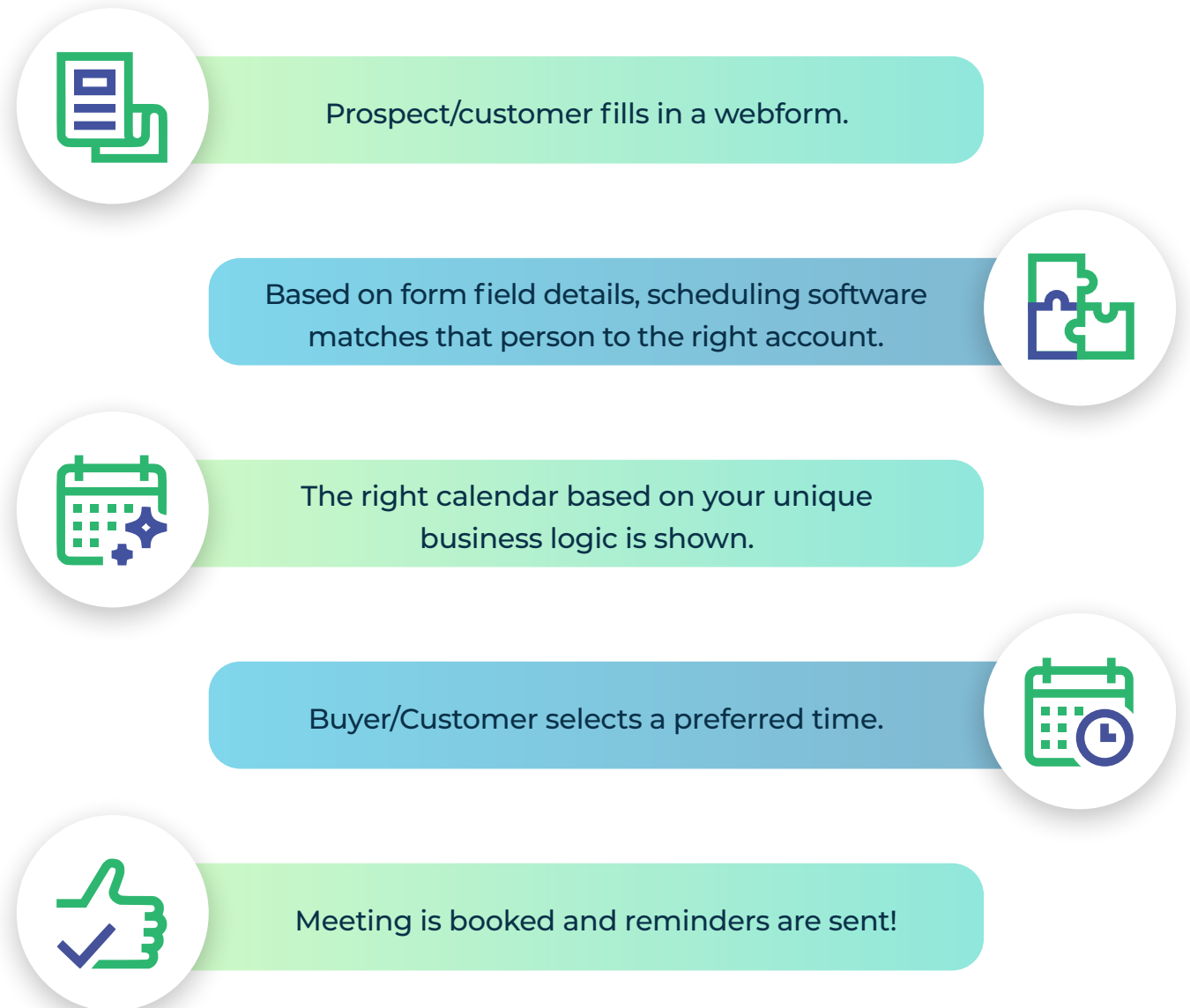
To ensure speed to lead, marketing automation must pass inbound leads from webforms and chatbots to the Sales team.

As part of this process, Leads must be qualified, prioritized and assigned quickly and accurately to ensure the buyer gets the **fastest response possible**.



78% of customers buy from the company that responds to their inquiry first

Here's how scheduling software instantly turns webform submissions into meetings:



Use Case #2

Events

Marketers often struggle to prove event ROI and justify expenses or sponsorship levels. However, if you book meetings, the event becomes more measurable. Meetings can be tied to pipeline and revenue.

Meetings Eliminate Event Ambiguity

Automatically secure meetings with your top prospects and customers at any event.

Meetings Provide Visible Event ROI

Meetings are visible and tracked in your CRM, making attribution and post-event reporting a breeze.

EVENT

Forrester B2B Summit 2024

Meet with us at Forrester B2B Summit, we'll be there from May 5-8!

Discover how LeanData can enhance and speed up your achievements. Meet our team for tailored solutions and expert guidance.

Case Study Session:

NVIDIA, AI, Data Science, & the Buying Group Revolution on Monday, May 6th at 3:05 PM with Aristomenis Capogeannis, Senior Director, Enterprise Revenue Marketing, NVIDIA

Let's Chat at Forrester

Email*
prospect@anycompany.com

First Name*
Any

Last Name*
Prospect

Job title*

Company Name*
LeanData

Submit

Create a landing page for each event and include your booking form on that page. This will be used pre-event to book in-person meetings.

Then, during the event, sales reps can use the landing page again to book follow-up meetings.

Use scheduling software to support event-related meetings with prospects:

- 1 Prospect fills in a webform.
- 2 Scheduling software shows available times based on event date, staff availability and webform information.
- 3 User selects a preferred time.
- 4 Meeting is booked and customized reminders are sent.

Use scheduling software to support a dedicated swag pickup with your customers:

- 1 Outreach emails are automated to customer attendees.
- 2 Customers fill in a webform
- 3 Meeting times are displayed based on Account Manager availability and event schedule.
- 4 Meeting is booked and customized reminders are sent.

Use Case #3

Team Handoffs

Revenue teams like SDRs and BDRs need an efficient way to pass buyers to the right rep and schedule meetings with speed and accuracy.

Not to mention, Sales teams need to provide customers with a seamless buying experience that will **(1) accelerate buying decisions, and (2) increase opportunity close rates.**

Scheduling software will expertly pass every buyer to the right team member, eliminating scheduling breakdowns that derail vital selling activities.



It takes **7.5 emails** on average to schedule a meeting. (Calendly)

65%

of a rep's day is spent on non-selling activities (Forbes)



Instant:

Immediately pass buyers to the next best rep



Precise:

Pass qualified leads to the right rep, based on your unique business logic that eliminates guesswork and scheduling chokepoints.



Adaptable:

Easily tailor your meeting types and adjust handoff logic



Use Case #4

Lead Prioritization

Not every lead deserves the same follow-up. So when a prospect completes a demo form, Sellers need a way to disqualify Leads and not show a meeting calendar. Manually prioritizing Leads is a waste of valuable time.

Scheduling software has the power to instantly qualify and prioritize Leads based on your unique business logic.

That way, the right calendar will be shown only allowing Leads and Accounts that meet specific criteria to book meetings. **This reduces spam meeting occurrences.**

IF THIS ACTION IS TAKEN

A hot, qualified Lead completes a demo request.

An unqualified Lead completes a demo request.

A prospect downloads a piece of priority content.



SCHEDULING SOFTWARE WILL TRIGGER THIS NEXT ACTION

Immediately display the right sales rep's calendar at the moment of a form fill, chatbot submission or link click.

Round Robin the Lead to a pool of sales reps for further qualification.

Implement a 48-hour SLA for sales reps to reach out if relevant.

Use Case #5

Enterprise Scheduling

Large enterprise organizations have a broader scope of scheduling needs. They may have global teams working across many time zones or require meeting coordination across multiple departments.

Automated appointment scheduling software can manage complex enterprise use cases such as:

- ✓ **Group bookings**
- ✓ **Multiple time zones**
- ✓ **Integrations with enterprise systems**
- ✓ **Data hygiene**
- ✓ **Custom Round Robin pools with weighting and capping**
- ✓ **Complex meeting routing based on named accounts and territories**





BookIt Suite of Solutions

BookIt for Forms

LeanData's BookIt for Forms activates inbound plays with no-code, drag-and-drop scheduling automation.



Matching:
Match form fills to other CRM records with 95% accuracy across 6 fields, without any required configuration.



Assignment:
Assign records according to any distribution model, including Round Robin, Territory, Account-based, overlays, and explicit users.



Scheduling:
Deliver a compelling experience that matches your brand, instantly showing options for available meeting times.



Reporting:
View, troubleshoot, and optimize orchestration with dashboards, reports, and detailed logs about every automated match, decision, action, and end result.

The screenshot displays a user interface for scheduling a demo. On the left, a 'Request Demo' form has input fields and a 'Submit' button. In the center, a '30-Min Meeting' calendar shows a grid of days with a blue dot indicating a selected time slot. On the right, a 'What time works best?' modal shows three time options: 9:30 AM, 10:00 AM, and 10:30 AM. A 'High priority!' notification with a person icon is shown at the bottom. Dashed green arrows indicate the flow of information between the form, the calendar, and the time selection modal.

The flow of information is overall way better with LeanData and BookIt. I do not have to convert nearly as many leads to accounts as I did in the past, the Demo form works SIGNIFICANTLY better and we have fewer misbookings.”



Cole Baines
Business Development Lead



BookIt Handoff

LeanData's BookIt Handoff is the most efficient way to pass buyers to the right team member.



Instantly Schedule Meetings:

on behalf of other team members, directly from Lead and Contact records.



Prioritize Prospect Availability:

Round robin meetings or quickly book with the first available pool member.



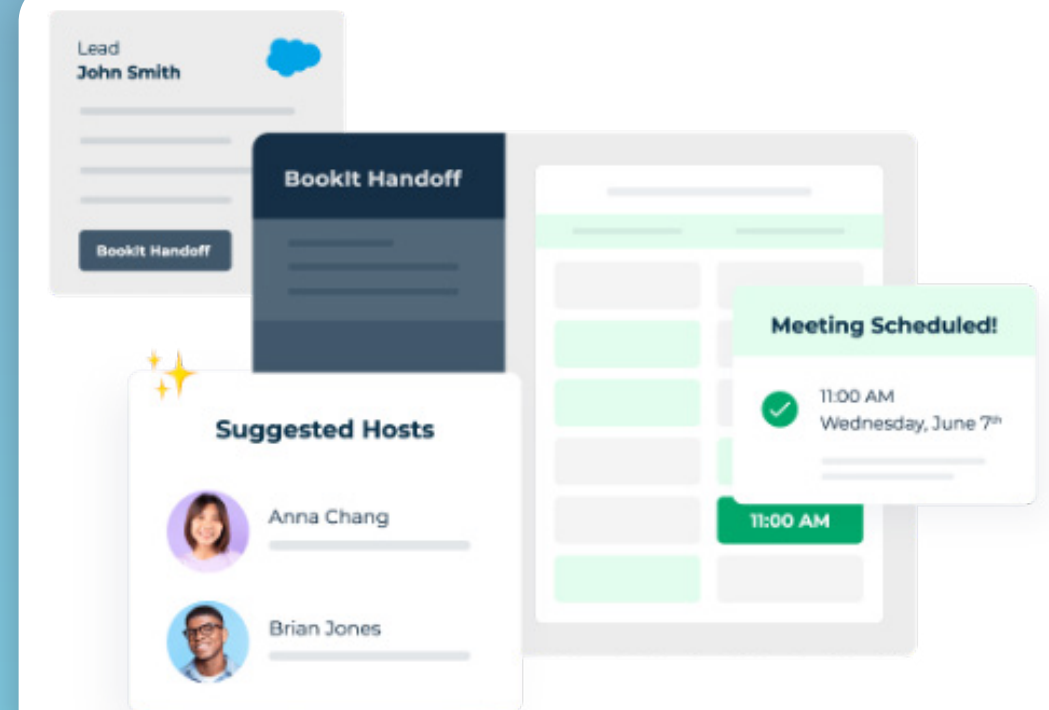
Group Booking:

Easily schedule group calls without any hassle of manual meeting coordination.



Smart Rep Suggestions:

Automatically suggest the right user a rep should book with based on any business logic.



“I’m super excited as we dive deeper into BookIt Handoff’s functionalities. We now have visibility with reports and dashboards. It’s truly synchronized across all of our platforms, which reduces the additional steps that the SDRs have to do in order to accomplish their sales motion.”



Frank Quartararo
Global Manager of Inbound Sales Development
Remote



BookIt Links & Chrome Extension

LeanData's BookIt Links provides personalized scheduling links for every revenue moment.



Individual Booking Links:

Schedule meetings without the back and forth.



Group Booking Links:

Improve team selling.



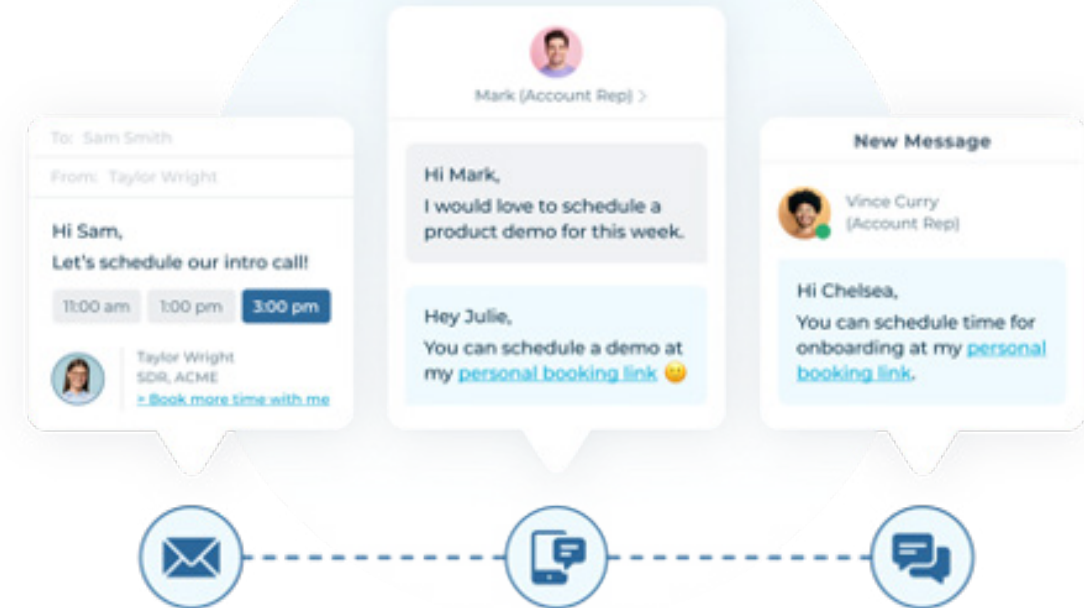
Meeting Metrics Dashboard:

Visualize key scheduling metrics and quickly optimize.



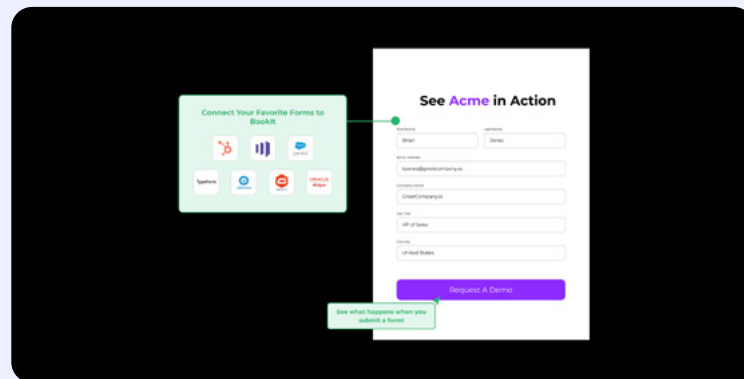
Invite & Chrome Extension:

Embed preferred meeting times directly within email to empower invitees to book at the perfect time.

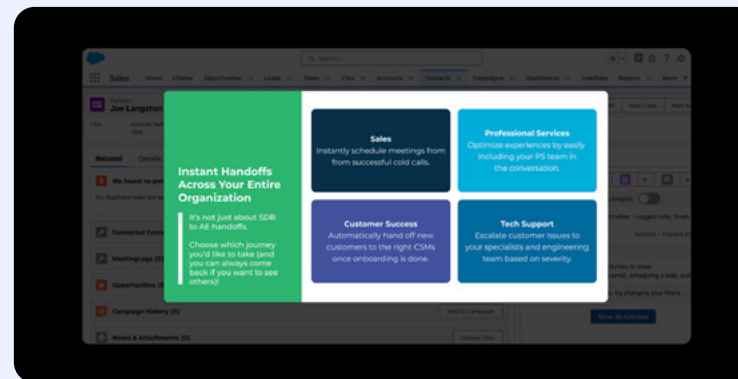


Recommended Resources

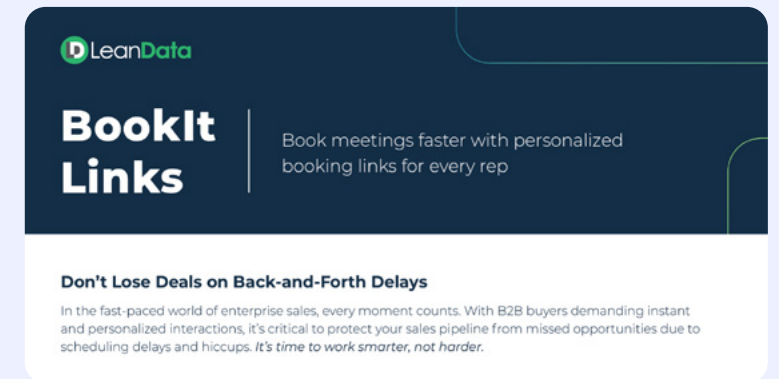
Check out these resources for even more practical insights for getting the most out of LeanData.



Interactive Tour: BookIt for Forms



Interactive Tour: BookIt Handoff



Solution Brief: BookIt Links

Get Started Today:

Visit [LeanData.com](https://leandata.com) to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Engagement, or visit us on [AppExchange](https://appexchange.com/apps/1525200000000000000/leandata).

Request Demo

Why LeanData?

Today's growth leaders power their B2B selling with LeanData, the gold standard in modern revenue orchestration and an essential element of the modern RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the people, processes and plays needed to transform buyer signals into buying decisions. LeanData is inspiring a global movement among its 1,000+ customers and community of 5,000+ OpsStars worldwide, empowering them with revenue operations excellence that translates into compelling buyer experiences and competitive advantage.

