

LeanData



5 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So rather than forcing buyers, customers, or your employees to conform to an outdated scheduling process (because they won't), offer an automated meeting solution that's a win-win for everyone.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 five powerful business use cases revenue teams are using today to improve the scheduling experience and accelerate buying decisions.

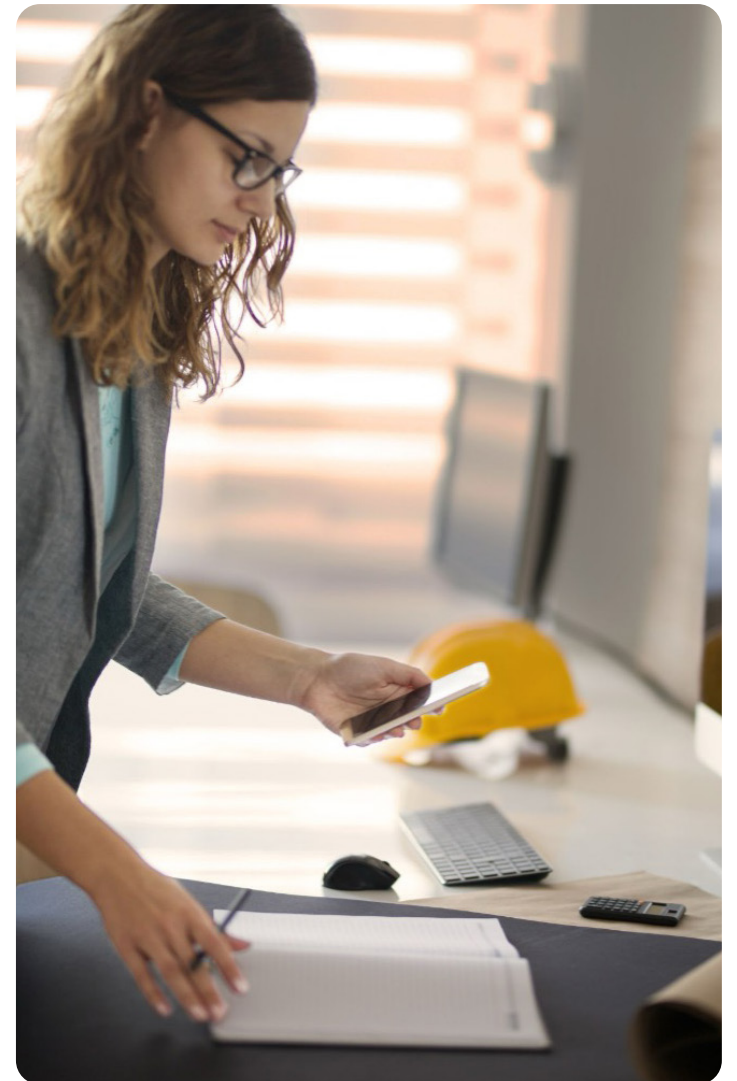


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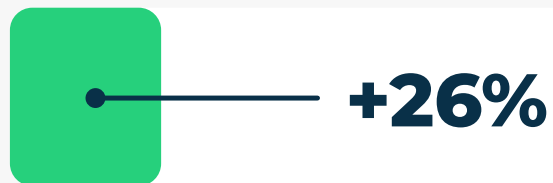
WHAT IS SCHEDULING SOFTWARE?

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 intelligent go-to-market (GTM) orchestration features like account matching, de-duplication, round robin assignment, lead qualification, group booking, and more, so scheduling becomes part of a coordinated, signal-driven buyer journey.



Online scheduling leads to 26% more new customers.



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



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

Source: [Financesonline.com](https://www.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

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

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

-  Prospect/customer fills in a webform.
-  Based on form field details, scheduling software matches that person to the right account.
-  The right calendar based on your unique business logic is shown.
-  Buyer/Customer selects a preferred time.
-  Meeting is booked and reminders are sent!



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.



MEET LEANDATA AT 6SENSE BREAKTHROUGH — BOOTH #G3

Join us to see how LeanData + 6sense turn buyer signals into revenue through intelligent GTM orchestration.

Here's why you need to stop by the LeanData booth:

Check out a live demo of what's new with LeanData: Discover how to unify data, automate routing, and engage every buying group member in real time.

Grab some fun swag: Pick up a fun otter plushie or water bottle.

FIND US AT BREAKTHROUGH

Location
Booth #G3 FontaineBleau Hotel, Las Vegas

Date
November 11 – 14

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.

- » **Instant:** Immediately pass buyers to the next best rep
- » **Precise:** Pass qualified leads to the right rep, every time, based on your unique business logic that eliminates guesswork and scheduling chokepoints.
- » **Adaptable:** Easily tailor meeting types and adjust handoff logic



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)*



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 instantly qualifies and prioritizes leads using your business logic and the signals already present in your CRM, ensuring only high-value buyers see a calendar.

This reduces spam meeting occurrences.

IF THIS ACTION IS TAKEN		SCHEDULING SOFTWARE WILL TRIGGER THIS NEXT ACTION
A hot, qualified lead completes a demo request.	➤	Immediately display the right sales rep's calendar at the moment of a form fill, chatbot submission or link click.
An unqualified lead completes a demo request.	➤	Round robin the lead to a pool of sales reps for further qualification.
A prospect downloads a piece of priority content.	➤	Implement a 48-hour SLA for sales reps to reach out if relevant.

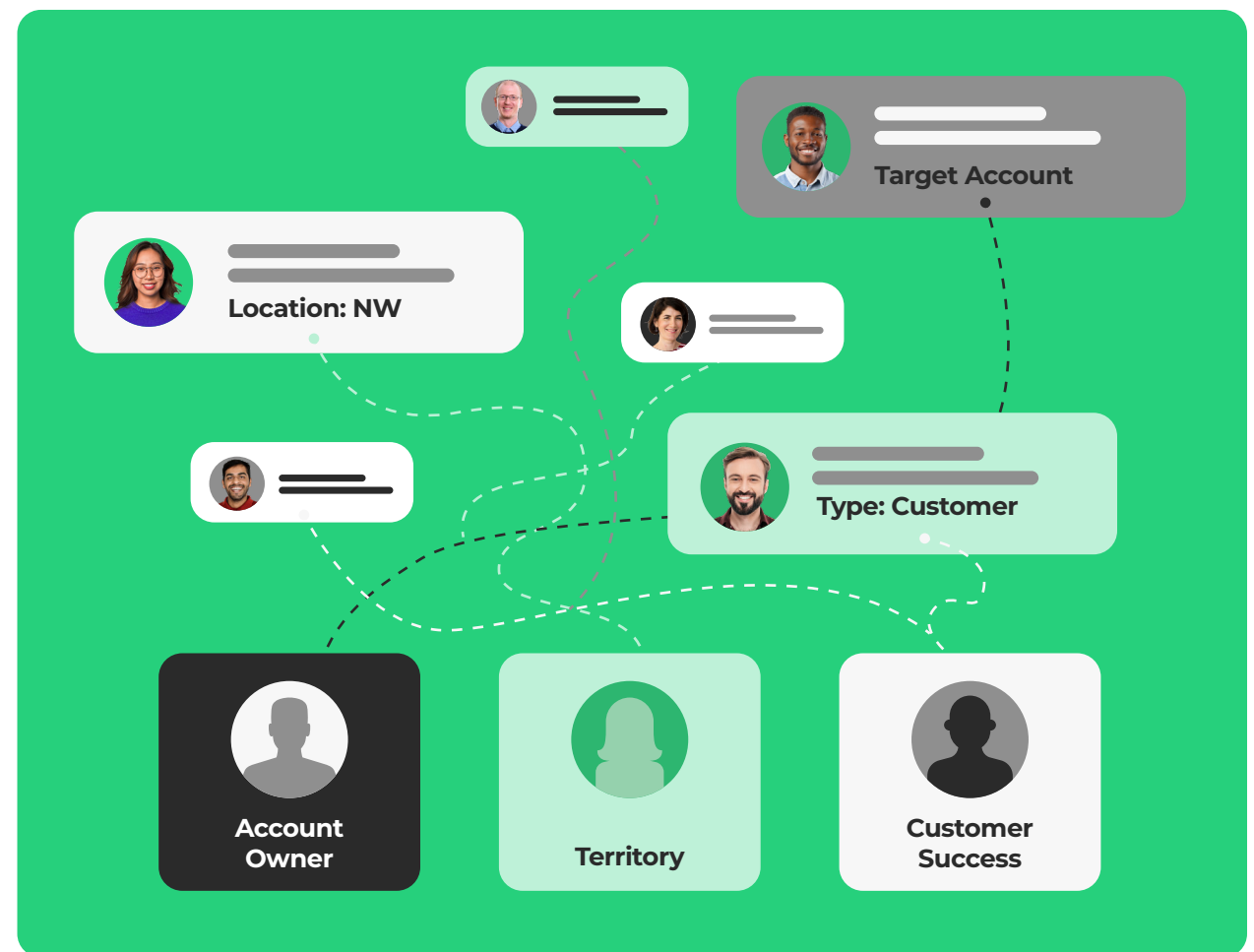


USE CASE #5 ENTERPRISE SCHEDULING

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 using LeanData’s AI-enhanced matching, which improves accuracy and reduces manual configuration.

ASSIGNMENT

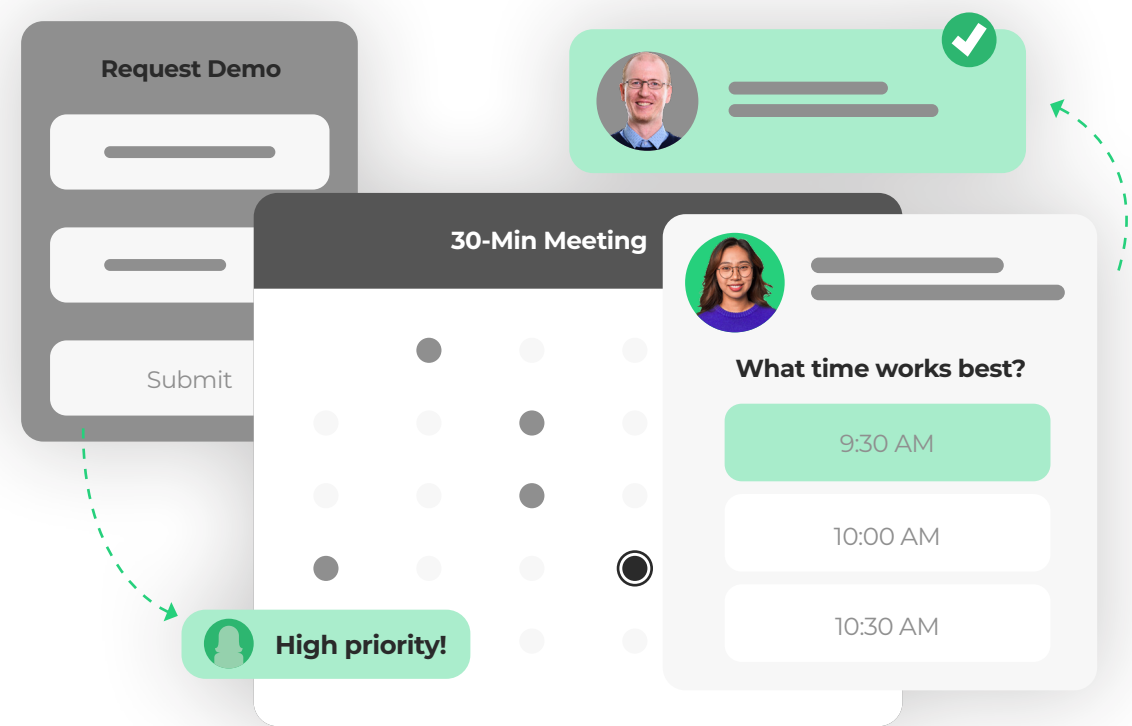
Assign records according to any distribution model, including round robin, territory, account-based, overlays, capacity, and explicit users.

SCHEDULING

Deliver a branded, frictionless experience that instantly shows the best available meeting times while honoring rep pauses, vacations, and booking rules.

REPORTING

View, troubleshoot, and optimize end-to-end scheduling flows with enhanced dashboards, meeting logs, and AI-assisted visibility into every automated match, decision, action, and outcome.



“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 Bains
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

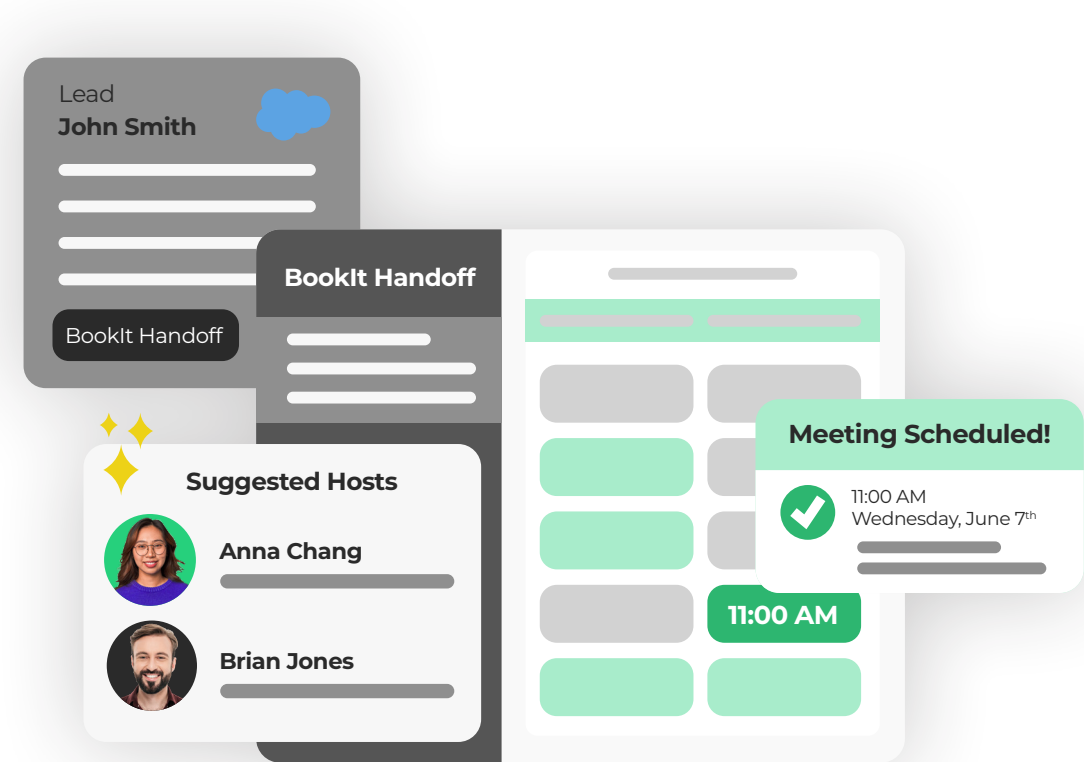
Round robin meetings or book with the first available pool member, backed by automatic calibration for new reps and fair distribution.

GROUP BOOKING

Easily schedule group calls without any hassle of manual meeting coordination

SMART REP SUGGESTIONS

Automatically suggest the right seller using your business logic and signal-driven context from Salesforce.




“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.



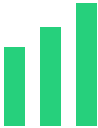
INDIVIDUAL BOOKING LINKS:

Schedule meetings without the back and forth.




GROUP BOOKING LINKS:

Improve team selling.



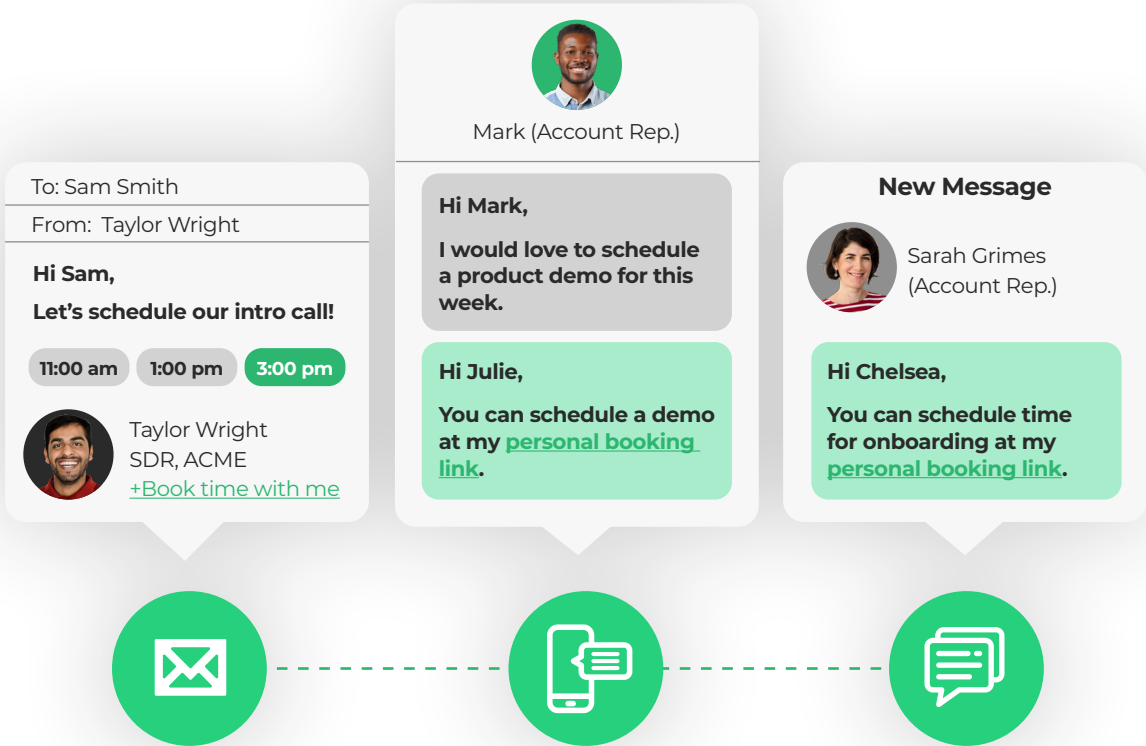
MEETING METRICS DASHBOARD:

Visualize key scheduling metrics and quickly optimize.



INVITE & CHROME EXTENSION

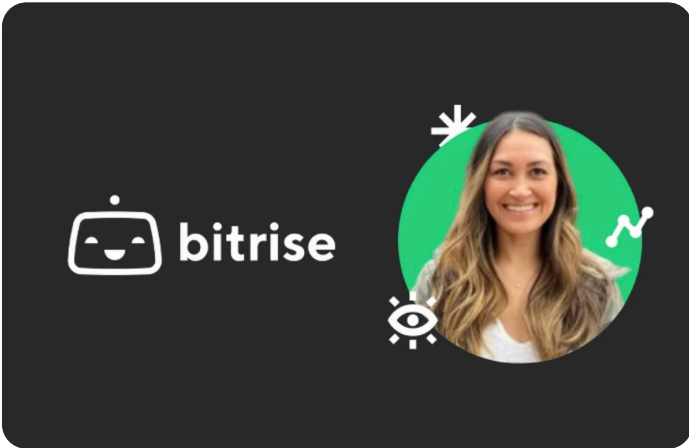
Embed preferred meeting times directly within email, giving buyers one-click booking at the ideal time.



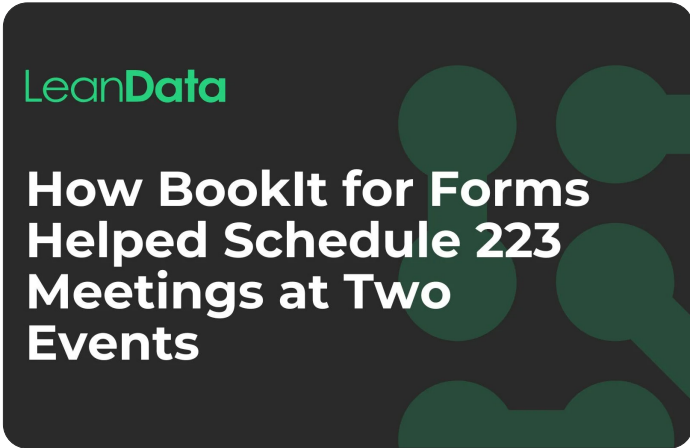
RECOMMENDED RESOURCES



INTERACTIVE TOUR
[BookIt Suite](#)



CUSTOMER STORY
[Bitrise Revs Up Lead Routing and Meeting Scheduling with LeanData](#)



BLOG
[How BookIt for Forms Helped Schedule 223 Meetings at Two Events](#)

GET STARTED TODAY

Visit [LeanData.com](#) to learn more about LeanData’s Intelligent GTM Orchestration solutions for Automated Scheduling, Matching, Routing, Engagement and Buying Groups, or visit us on [AppExchange](#).

REQUEST A DEMO

Why LeanData?

LeanData helps B2B enterprises fuel efficient growth by aligning marketing, sales, and customer service execution with the buyer journey. Our Intelligent GTM Orchestration platform acts as the connective tissue across the revenue lifecycle, integrating and normalizing buyer data, automating signal-driven workflows, and delivering AI-powered insights. The result is faster, cleaner execution and the ability to adapt GTM motions with agility without coding. More than 1,000 leading companies and a community of 5,000+ OpsStars rely on LeanData to achieve speed to lead, higher conversions, accelerated pipeline, and predictable growth by turning buyer signals into coordinated action.