LeanData

BookIt Handoff

The most efficient automated scheduling solution for intelligent buyer handoffs

The Problem

A critical step in any sales process is the successful handoff of buyers from one rep to another, such as from a Sales Development Representative (SDR) to an Account Executive (AE), or an AE to a Customer Success Manager (CSM).

Unfortunately, that process frequently results in a litany of emails or time spent manually checking calendars and spreadsheets just to schedule a meeting with the right team members. This not only depletes productivity, but also damages the customer experience.

It takes
7.5 emails on average
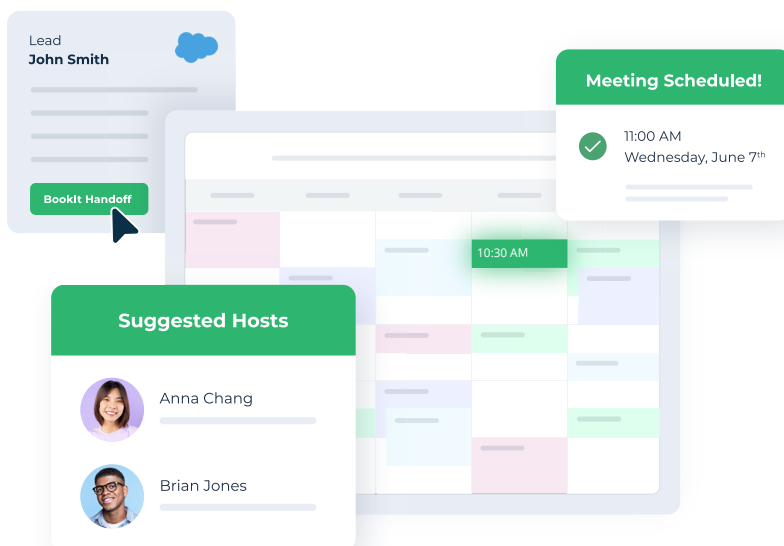to schedule a meeting

(Calendly)

65%
of a rep's day is spent on
non-selling activities

(Forbes)

The Solution

BookIt Handoff empowers reps to instantly schedule next-step meetings between buyers and the right team member, in seconds.
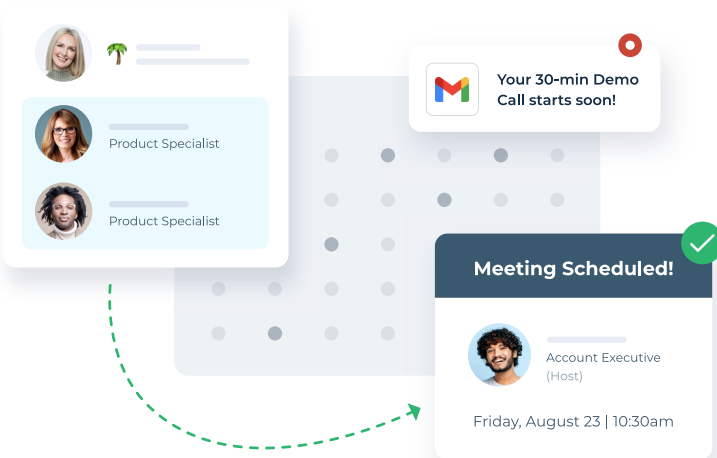
With BookIt Handoff's automated scheduling suggestions and direct integration with Salesforce, revenue teams can efficiently book meetings directly from within Lead, Contact, Account, Opportunity, and Case records, improving productivity, conversion rates, and the buyer experience!

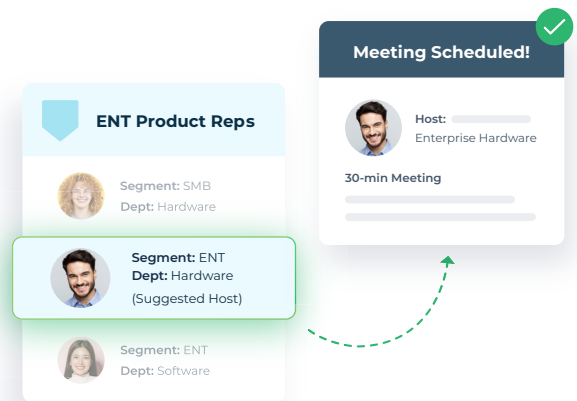# Coordinate friction-free handoffs with unrivaled precision and speed

Boost Efficiency & Eliminate Guesswork

Automatically suggest the correct AE, round robin, territory, or other specialists a rep should schedule a meeting with based on your unique business logic.

ENT Product Reps

Segment: SMB
Dept: Hardware

Segment: ENT
Dept: Hardware
(Suggested Host)

Segment: ENT
Dept: Software

Meeting Scheduled!

Host:
Enterprise Hardware

30-min Meeting

Product Specialist

Product Specialist

Your 30-min Demo Call starts soon!

Meeting Scheduled!

Account Executive
(Host)

Friday, August 23 | 10:30am

Improve Conversion Rates

Instantly schedule meetings with the right team members directly from within Salesforce, easily see who's on vacation, and send automated reminders to decrease no-shows.

Build & Adjust Handoff Logic With Ease

Enable seamless handoffs with no-code, drag-and-drop workflow automation, customizable meeting types, and transparent reporting for every scheduling outcome.

Audit Logs

Meeting Type

Lead Activity

Get Started Today:

Visit LeanData.com to learn more about LeanData's go-to-market operations solutions for Matching, Routing, Scheduling and Buying Groups, or visit us on **AppExchange.**

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 plays, people and processes needed to transform buying 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. Join the movement!