

LeanData

THE ULTIMATE BOOKIT DEEP DIVE

THE FIRST COMPLETE SURVEY OF USER INSIGHTS AND ROI



INTRODUCTION

In today's competitive landscape, orchestrating an efficient Go-To-Market motion is paramount. A critical component of this engine is the ability to connect qualified buyers with the right sales representative instantly. Disconnected systems and manual scheduling processes introduce friction, slow down speed to lead, and ultimately impact revenue.

In a recent survey, we interviewed our customers who use LeanData's meeting scheduling solution, BookIt. Our goal was to uncover the needs that drive teams to look for a scheduling solution and how they evaluate its success.



HERE WE'LL SHARE THE KEY FINDINGS FROM THE SURVEY. WE'LL OUTLINE:



The biggest challenges businesses aim to solve with a scheduling tool



How customers measure the ROI of BookIt



Why they chose BookIt as a scheduling solution



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PART 01

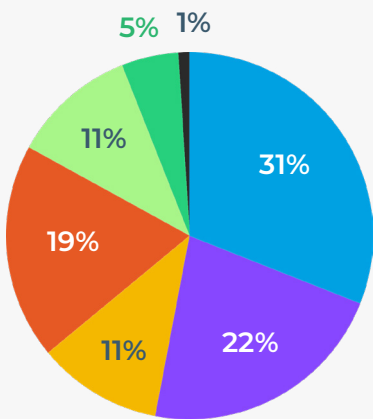
THE REAL PEOPLE BEHIND THE DATA: OUR BOOKIT SURVEY RESPONDENTS

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The survey consisted of LeanData customers who use Orchestration and at least one BookIt Product. Here are some general facts about the people behind the data:

JOBS AND ROLES OF RESPONDENTS

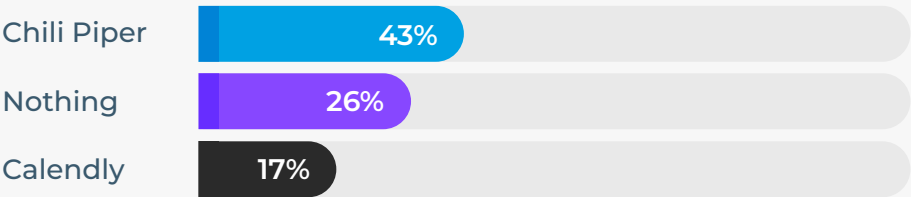
Survey respondents had a variety of job titles and roles. Here's a breakdown of their personas:



EXPERIENCE WITH PREVIOUS SCHEDULING SOLUTIONS

Prior to using BookIt, 74% of respondents were using another scheduling automation solution.

43% of all respondents were previously using Chili Piper for scheduling before switching to BookIt.



PART 02

THE SCHEDULING STRUGGLE IN REAL: WHY TEAMS TURN TO SCHEDULING AUTOMATION

THE SCHEDULING STRUGGLE IS REAL: WHY TEAMS TURN TO SCHEDULING AUTOMATION

When asked about the primary challenges our customers are trying to solve with an automated scheduling solution, survey respondents highlighted three key areas.

SPEED TO LEAD

83%

of businesses want to connect prospects to the right rep as quickly as possible



CUSTOMER EXPERIENCE

48%

want to align with their customers' buying preferences

ACCURATE ASSIGNMENTS

72%

were focused on ensuring every lead or account is assigned to the correct rep



THE SCHEDULING STRUGGLE IS REAL: WHY TEAMS TURN TO SCHEDULING AUTOMATION (CON'T)

Let's take a deeper look at the reasons provided by survey respondents when asked why they looked for a different scheduling solution

Budget-Friendly Alternative

For organizations facing budget constraints, BookIt offers better value than other platforms by streamlining tools and reducing overall costs, all within a single contract.

Consolidation of Tools

LeanData's automated workflows handle task assignments, track progress, and offer support, resulting in faster adoption, better engagement, and increased customer satisfaction.

Challenges of Chili Piper

Customers reported specific pain points with Chili Piper, including a lack of functionality, poor auditability, high costs, and difficulty with operational maintenance. These frustrations led businesses to seek a more flexible, user-friendly alternative.

Improved Functionality & Ease of Use

Businesses needed a solution that provided advanced features and reliable workflows without constant maintenance. BookIt delivered no-code workflows, fewer errors, and enhanced usability, allowing teams to work more efficiently.

"We wanted the consolidation of tools to minimize routing errors and time spent on researching when they do occur."



Katie Bobish

Sales Operations Manager at ChowNow



PART 03

SHOW ME THE VALUE: CALCULATING ROI WITH BOOKIT

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Measuring the ROI of a scheduling solution can be done in a variety of ways. Survey respondents shared multiple ways they measure the ROI of LeanData BookIt. However, the most common metrics used to determine ROI include:



Time Savings

How much time was saved by reducing manual scheduling and automating this process.



Conversion Rates

Analyzing lead-to-meeting, meeting-to-opportunity, and lead-to-closed-won conversion rates.



Number of Meetings Booked

Tracking the quantity of meetings booked and their conversion rates.



Ease of Use & Operational Efficiency

Assessing the reduction in administrative workload and improvements in routing accuracy.



Speed to Lead

Measuring the time it takes to connect prospects with the right rep.



Revenue Impact

Evaluating the impact of scheduling efficiency on overall revenue growth.

“Since implementing BookIt, we’ve seen an improvement of 46.8% in average time for a lead to Qualified First Call.”



Gabriel Ramier
MOps Specialist at Poka

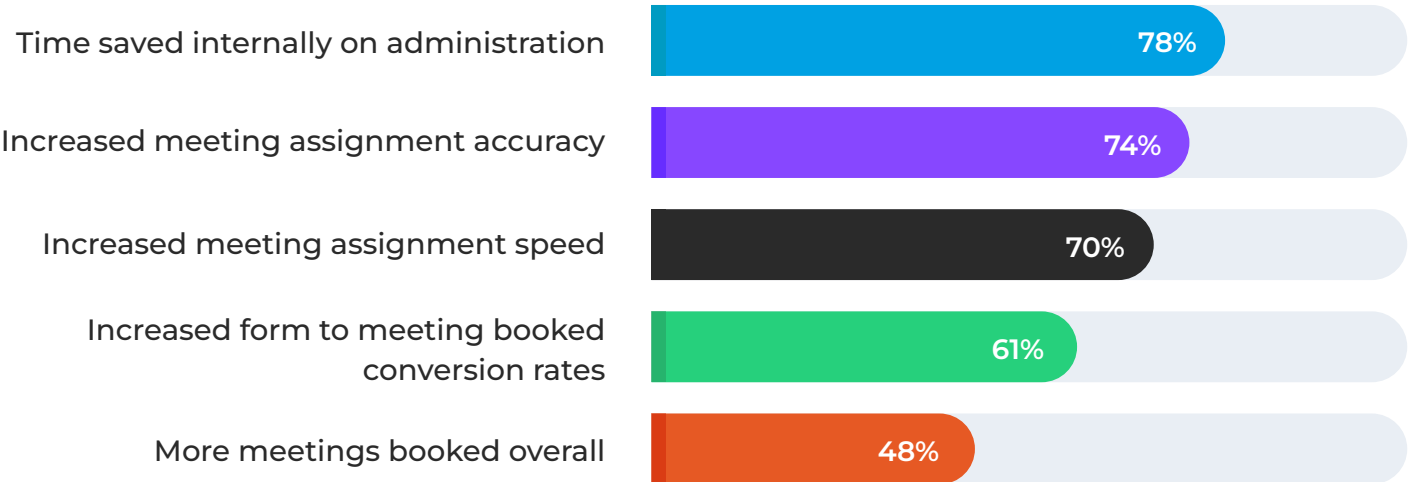
“If it works and I don’t have to think about it - it’s returned the investment!”

Director of SOps & Enablement

SHOW ME THE VALUE: CALCULATING ROI WITH BOOKIT (CON'T)

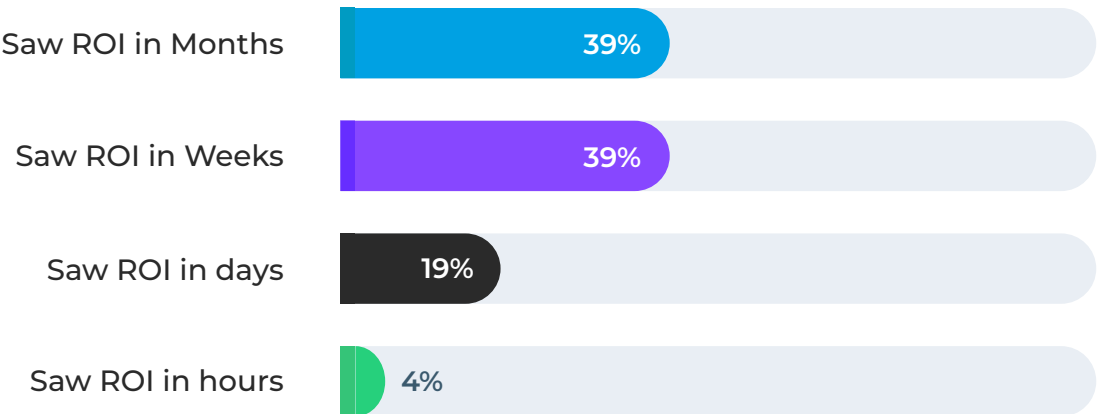
Operational Results

When asked about the operational impact of BookIt, our respondents reported the following metrics:



Time to ROI

The majority of customers saw ROI within a matter of weeks after implementing BookIt:



PART 04

WHY BOOKIT? HEAR IT STRAIGHT FROM OUR USERS

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When asked why they chose BookIt as their scheduling solution, customers reported the following reasons:

1. Already using LeanData
2. Tech stack consolidation
3. Salesforce native
4. Advanced reporting and audit logs
5. Ease of use

“We already had LeanData. We also compared to Chili Piper but **LeanData’s reporting and auditing functionality was significantly more advanced.**”

Director of MOps, 500-1000 employees

“**Transparency in audit logs so we could see where each lead was going and why;** recommended queues [were] a huge win for our SDR team and took manual steps off their plates.”

Salesforce Administrator, 51-200 employees

“Our Marketing Ops team has used LeanData extensively and we felt this add on would help us **improve the routing and response times, which it did.**”

SDR Manager, 500-1000 employees

“I wanted something easier to use, and that can do more with less errors. I also like that Routing and Scheduling are the same platform, so it makes it very easy to manage. Since I was the one managing it, **having a tool native inside of Salesforce was also a huge plus!**”



Nicole Looker

CRM Platform Manager at Rebuy

“The main reason we selected LeanData BookIt was its **advanced automation capabilities combined with seamless integration with our existing Salesforce setup.** This powerful combination enables us to streamline our scheduling processes, reduce manual intervention, and significantly improve the efficiency and accuracy of our sales operations.”



Sarosh Saiyed

RevOps at Affinity.co



WHY BOOKIT? HEAR IT STRAIGHT FROM OUR USERS (CON'T)

"**The graph is easy to build**, especially with us already using LeanData. Also the audit logs are super helpful when troubleshooting."

Director of MOps, 500-1000 employees

"We already used LeanData for lead routing and wanted to consolidate. **We also had a poor experience with Chili Piper.**"

RevOps Manager, 51-200 employees

"We switched [to BookIt] due to **Chili Piper's lack of auditability** and its lack of investment in admin tools."

Sr. Director of RevOps, 51-200 employees

"We already used LeanData and needed an **elegant solution for booking meetings that worked with our existing routing rules.**"



Raheel Alam

Sr. Manager, Applications at Affinity.co

"At first, we did our research to find a scheduling solution like Chili Piper and Calendly. When we came across BookIt, we felt like it was a no-brainer to try it since we were already using LeanData as our lead assignment tool and **it could integrate with our tool stack.**"

MOps Specialist, 51-200 employees

"We were a happy existing LeanData customer and were looking to **further optimize our inbound lead process.**"

Sales Operations, 201-500 employees



WHY BOOKIT? HEAR IT STRAIGHT FROM OUR USERS (CON'T)

Let’s take a deeper look at the main reasons highlighted as a reason for selecting BookIt:

Consolidation of Tools

Customers wanted to consolidate tech stacks by combining their scheduling solution with LeanData, which many were already using for Lead-to-Account Matching and Routing.



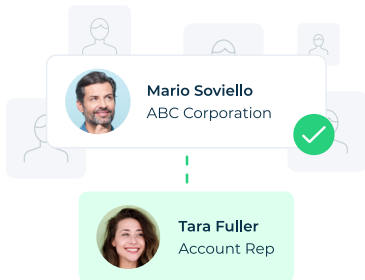
Auditing & Transparency

Customers valued BookIt’s robust audit logs and reporting capabilities, as they needed better transparency and operational insights, particularly for troubleshooting and understanding lead flows.



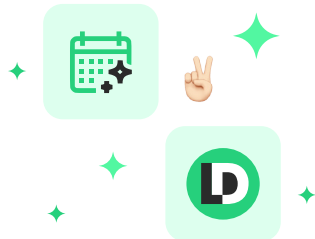
Advanced Routing & Functionality

Customers appreciated that BookIt offered better routing options, duplicate record handling, round robin features, and improved functionality compared to Chili Piper.



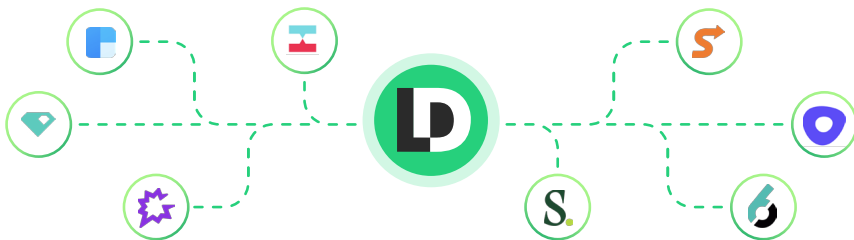
Pricing & Cost Savings

Customers wanted to achieve cost savings by streamlining tools and having both BookIt and LeanData Orchestration under the same contract.



Integration with Routing

Customers valued BookIt’s seamless integration with LeanData Orchestration, which made it easier to manage and provided benefits like better routing accuracy, auditing capabilities, and shared features across both platforms.



PART 05

KEY TAKEAWAYS

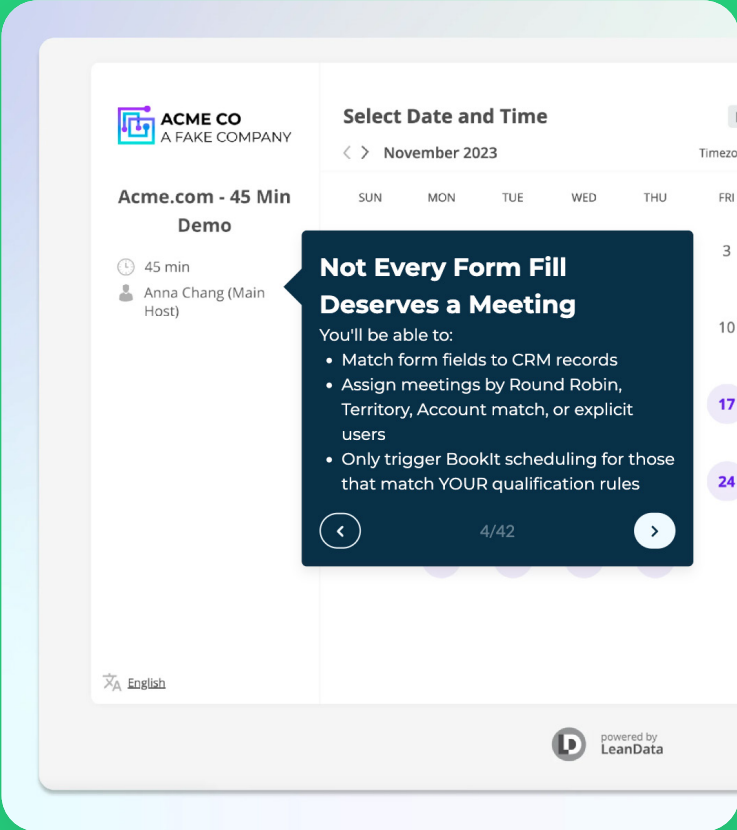
KEY TAKEAWAYS

These insights provide a clear framework for evaluating and implementing a scheduling solution.

- **Automated scheduling is no longer a “nice-to-have”**—it is an essential component of any high-performing GTM strategy focused on improving speed to lead and the buyer experience.
- **Integration is paramount.** A scheduling solution that is native to your CRM and leverages your existing routing logic will save significant administrative time, reduce errors, and ensure assignments are always accurate.
- **ROI is multifaceted, but efficiency is king.** While organizations will measure success differently, the most impactful and immediate return often comes from the administrative time saved, which frees up operations teams to focus on more strategic initiatives.

Thank you so much to all of the LeanData customers who shared their feedback and insights.

If you're interested in learning more about how BookIt can transform your scheduling processes, let's talk.



The screenshot displays the BookIt scheduling interface for 'Acme.com - 45 Min Demo'. It includes a 'Select Date and Time' section with a calendar for November 2023. A callout box titled 'Not Every Form Fill Deserves a Meeting' lists features: matching form fields to CRM records, assigning meetings by Round Robin, Territory, Account match, or explicit users, and triggering BookIt scheduling for those that match qualification rules. The interface is powered by LeanData.

Ready to see BookIt in action?

BOOK A DEMO



CONTINUE YOUR LEARNING

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

The GTM State of Efficiency Report: 2026 Trends & Insights

The State of GTM Efficiency Report: 2026 Edition examines how more than 200 B2B leaders are adapting their go-to-market motions to match the way buyers actually buy.

READ NOW

Rebuy Scales Revenue Operations with the LeanData Platform

See how Rebuy’s transformed their revenue operations, turning cumbersome manual processes into streamlined efficiencies.

READ NOW

GET STARTED TODAY

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