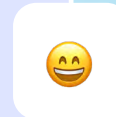




The Ultimate BookIt Deep Dive

The First Complete Survey of User Insights and ROI



Introduction

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

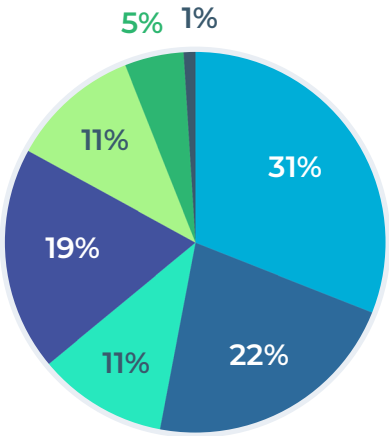
The Real People Behind the Data: Our BookIt Survey Respondents

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:

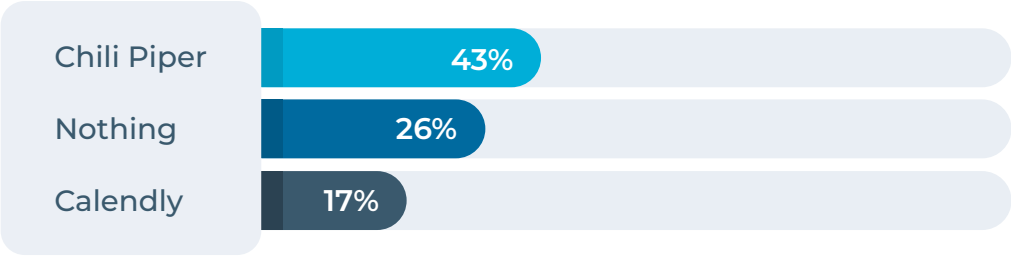
- RevOps
- SF Admin/Systems
- Other
- MOps
- Marketing/Demand Gen
- SOps
- Sales Leadership



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 is 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



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



"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

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

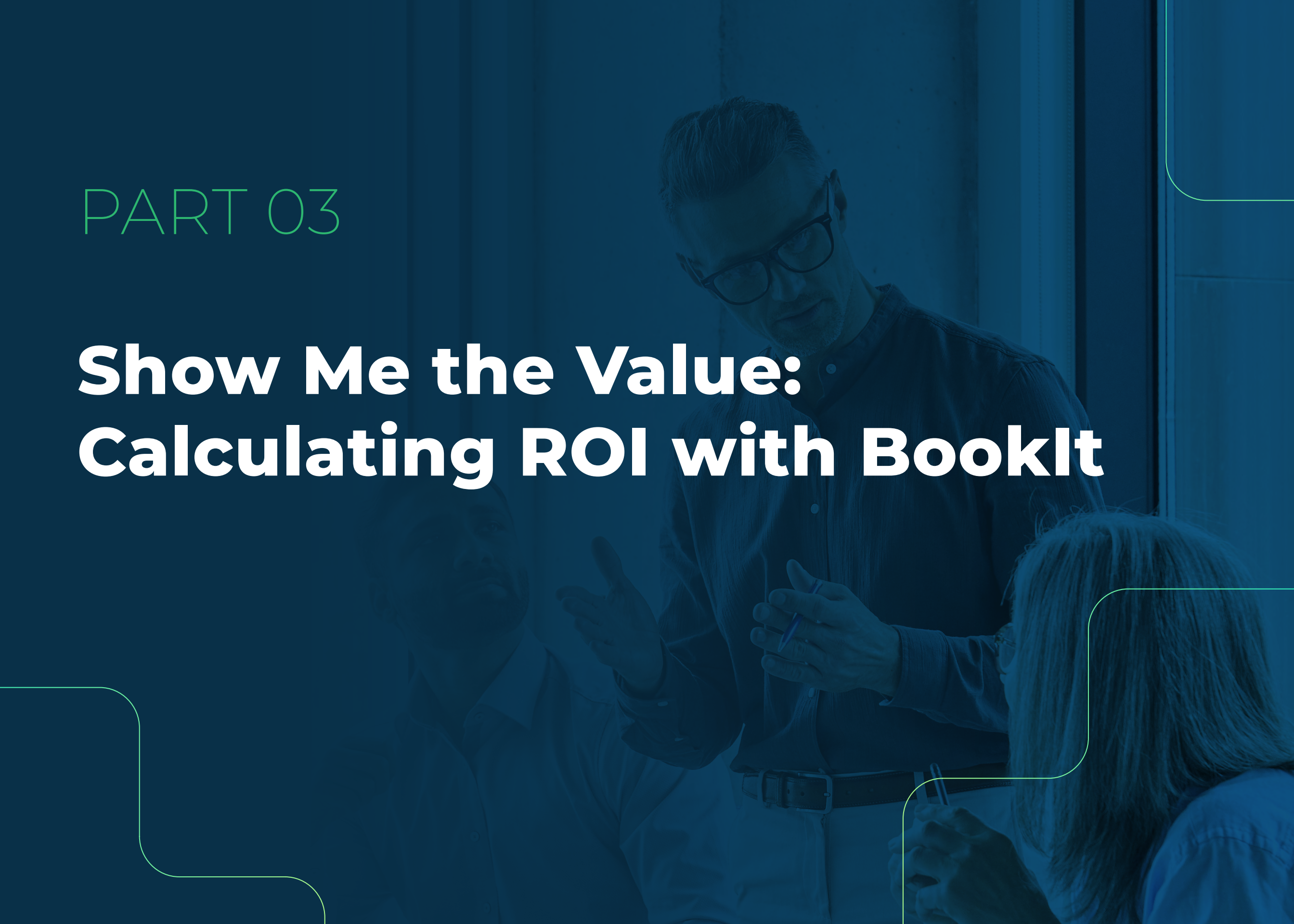
Customers reported specific pain points with Chili Piper, including a lack of functionality, poor auditability, high costs, and difficulty with operational maintenance. These frustrations led businesses to seek a more flexible, user-friendly alternative.

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.

PART 03

Show Me the Value: Calculating ROI with BookIt



Show Me the Value: Calculating ROI with BookIt

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.



Number of Meetings Booked

Tracking the quantity of meetings booked and their conversion rates.



Speed to Lead

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



Conversion Rates

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



Ease of Use & Operational Efficiency

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



Revenue Impact

Evaluating the impact of scheduling efficiency on overall revenue growth.

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



Director of SOps & Enablement



Gabriel Ramier MOps Specialist at Poka

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

Operational Results

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

Time saved internally on administration



Increased meeting assignment accuracy



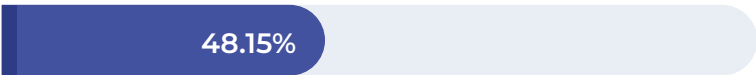
Increased meeting assignment speed



Increased form to meeting booked conversion rates



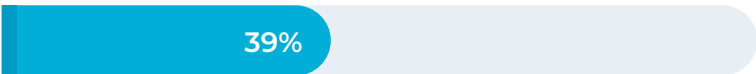
More meetings booked overall



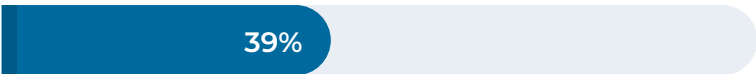
Time to ROI

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

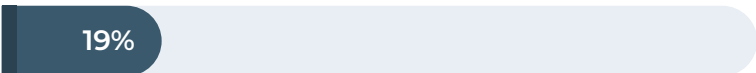
Saw ROI in Months



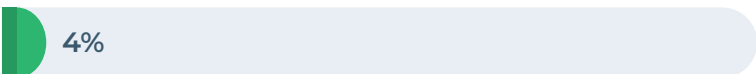
Saw ROI in Weeks



Saw ROI in days



Saw ROI in hours



PART 04

Why BookIt? Hear It Straight from Our Users



Why BookIt?

Hear It Straight from Our Users

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

“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

“**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

“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

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



Director of MOps, 500-1000 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

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



MOps Manager, 500-1000 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

“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

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



Sales Operations, 201-500 employees

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

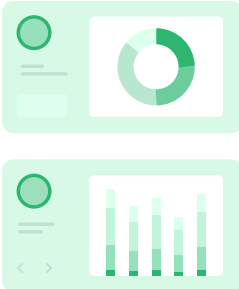
Consolidation of Tools

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.



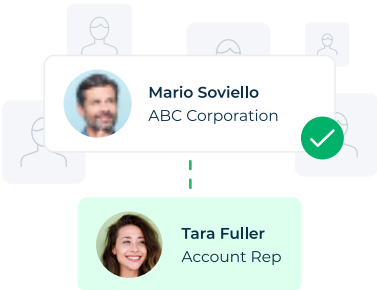
Auditing & Transparency

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.



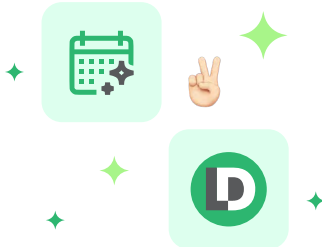
Advanced Routing & Functionality

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



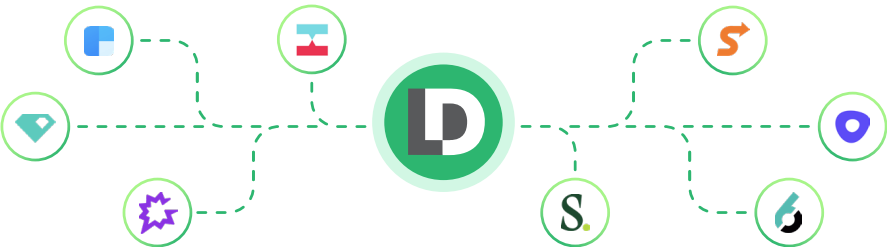
Pricing & Cost Savings

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

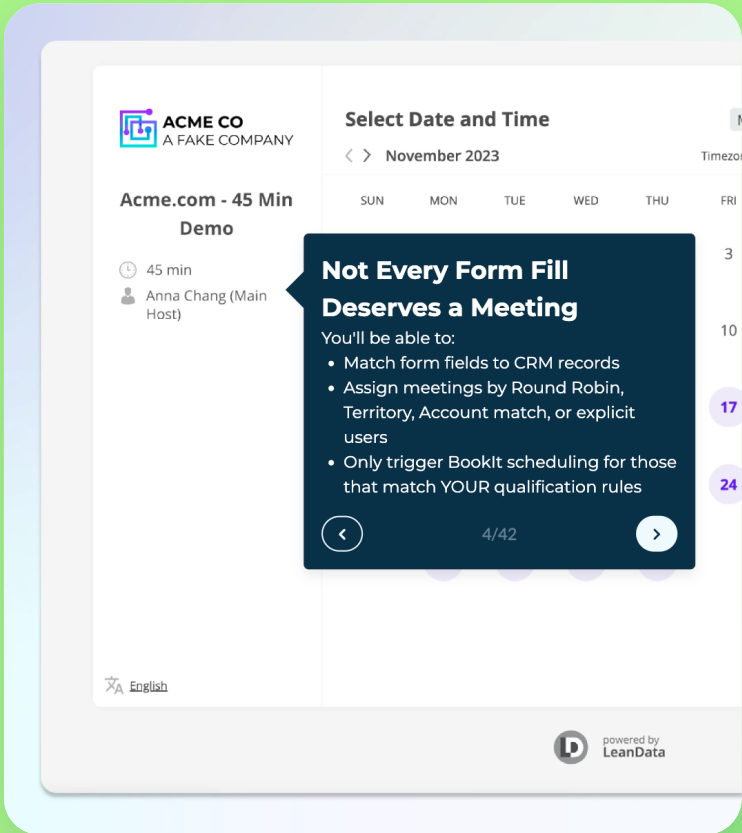
Automated meeting scheduling is a must-have in your tech stack to improve speed to lead.

A solution that integrates into Salesforce and uses your existing lead routing rules will save administrative time and ensure accurate assignments.

How your organization measures ROI will depend on your needs. However, many BookIt users find what matters most is administrative time savings.

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, take our interactive tour today.



Not Every Form Fill Deserves a Meeting

You'll be able to:

- Match form fields to CRM records
- Assign meetings by Round Robin, Territory, Account match, or explicit users
- Only trigger BookIt scheduling for those that match YOUR qualification rules

Ready to see BookIt in action?

Start Interactive Tour

About LeanData

WEBINAR

How to Book More Qualified Sales Meetings in 2024



Zachary Dammann
SENIOR REVOPS ANALYST,
LATTICE



Vishnu Premasankar
GROUP PRODUCT MANAGER,
LEANDATA

VIDEO

Lattice Increases Speed to Lead by 50% by Leveraging the Full LeanData Platform



Dan Thomas
Account Owner
Product A

VIDEO

BookIt Handoff in 90 Seconds



CUSTOMER STORY

Rebuy Scales Revenue Operations with the LeanData Platform

Get Started Today

Visit **LeanData.com** to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing 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!