

THE FOUNDATION FOR AGENTIC SCHEDULING

Turn every qualified conversation into a confirmed, correctly-assigned meeting, automatically and at scale.

LeanData's intelligent Scheduling solution streamlines meetings and handoffs across the buyer journey. By connecting prospects to the right rep instantly, Scheduling accelerates speed to lead, orchestrates meaningful interactions, and fuels efficient growth.

With Scheduling's APIs and intelligent routing links, any AI SDR platform—Salesforce Agentforce, Qualified, Drift, or custom-built agents—can plug directly into LeanData's enterprise-grade orchestration layer. Your AI handles qualification. LeanData ensures every qualified conversation ends with the right meeting, assigned to the right rep, with zero manual intervention.

78%

of buyers purchase from the first company to respond

(Lead Connect)

7X

more qualified leads by responding within the first hour

(HBR)

1000+

B2B companies trust LeanData to route & schedule pipeline

7%

Of companies respond in 5 mins, 55% take 5+ days

(Drift)

AI Conversations + Predictable Scheduling = More Booked Revenue

AI SDRs create buyer momentum, but momentum without a deterministic landing pad means meetings get missed, misrouted, or delayed until the buyer goes cold.

LeanData Scheduling is the infrastructure layer that completes the picture. Together, your AI SDR handles the conversation and LeanData ensures every qualified interaction ends with the right meeting, at the right time, with the right rep, with full Salesforce visibility and enterprise-grade routing logic underneath.

"We leaned heavily towards LeanData's BookIt solution. It connects seamlessly with our CRM, ensuring meetings are routed to the correct owner without delays. The results have been incredible."



Nicole Peinado

Revenue Technology Manager, AI Ops
Uber

Key Capabilities

SCHEDULING APIS

REST APIs enable AI SDRs to programmatically fetch availability, retrieve prospect meetings, and book in real-time, no redirect required. Complete booking flows within chat or email with fast response times at enterprise scale.

DYNAMIC ROUTING LINKS

Parameterized URLs carry prospect context (account ID, lead data, custom fields) and trigger enterprise routing logic (L2A matching, territory rules, round robin) before the calendar loads. Embed in any chatbot, email sequence, or AI-generated response.

INTELLIGENT ROUTING & MATCHING

Meetings are routed to the correct rep every time, based on territory, account ownership, round robin pools, and complex GTM rules, with 95%+ L2A matching accuracy.

SLA AUTOMATION & SPEED-TO-LEAD

Automated hold nodes enforce response time SLAs. If a rep doesn't act within a defined window, the lead is instantly re-routed. Missed SLAs trigger rep alerts via email or Slack, manager notifications, and automatic reassignment, ensuring no buyer ever goes cold.

NATIVE SALESFORCE INTEGRATION & ENTERPRISE-GRADE GOVERNANCE

Full CRM context at routing time, account ownership, opportunity stage, territory assignment. Unified audit logs across AI and human touchpoints. Salesforce-native routing logic with enterprise-grade compliance (SOC 2, GDPR, CCPA), giving RevOps control and confidence at every step.

Why LeanData Scheduling?

1. AI SDR ENGAGES THE BUYER

Your AI SDR streamlines the qualification process, efficiently handling objections and creating a seamless meeting-ready moment.

2. MATCH & ROUTE INSTANTLY

The buyer is matched to the right account, opportunity, or territory, and routed to the correct rep with full CRM context.

3. MEETINGS BOOKED IN REAL TIME

A confirmed, correctly-assigned meeting lands on the rep's calendar, automatically, without manual handoff or delay.

4. SLAS ENFORCED, NO LEAKAGE

Hold nodes track response windows. Missed SLAs trigger rep alerts, manager notifications, or automatic reassignment, so revenue never stalls.

5. FULL VISIBILITY IN SALESFORCE

Every booking, routing decision, and SLA outcome is logged natively in Salesforce, giving RevOps a single source of truth.

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 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.