

BRING ROUTED SCHEDULING INTO YOUR OUTBOUND MOTION

LeanData BookIt now runs natively inside Outreach. Reps launch routed handoff meetings from a prospect record and insert live availability into the email composer, with LeanData routing and Salesforce attribution intact.

THE CHALLENGE

Reps run their day in Outreach. Scheduling has been living somewhere else.

A rep qualifies a prospect on a cold call and has about ninety seconds to get time on the calendar with the right AE. Instead she opens Salesforce, finds the record, works out who owns the account, and launches the handoff there. By the time she has it, the prospect has moved on.

Async follow up has the same problem in slower motion. Sending availability meant opening a browser extension, generating time slots, and pasting them into the email. Enough friction that reps skip it and fall back to “let me know what works,” which turns one email into four.

Every one of those switches is a place where a meeting quietly does not happen.

THE SOLUTION

The BookIt integration with Outreach brings routed scheduling into the platform your reps already use. It installs from the Outreach Marketplace and builds on the official Outreach SDK, so there is no browser extension to manage and no Salesforce context switch in the rep's path.

Your existing BookIt handoff and routing settings apply automatically once it is on.

WHAT IT DOES

BookIt Handoff, from the prospect record

A rep qualifies a prospect mid call and launches BookIt Handoff directly from the Outreach prospect record. LeanData routes to the right AE using the rules your team already configured, books the meeting, and writes it back to Salesforce with attribution intact. The rep never leaves the call or the tab.

BookIt Invite, in the email composer

A rep writing a follow up inserts suggested meeting times with real availability directly into the Outreach email composer. The prospect picks a time, the meeting routes and books itself, and the thread ends with a calendar invite instead of another round of messages to schedule a meeting.

HOW IT WORKS

1. INSTALL

An admin installs BookIt from the Outreach Marketplace.

2. INHERIT

Existing BookIt handoff, routing, and calendar settings apply automatically. No new configuration required.

3. LAUNCH

Reps see BookIt Handoff on the Outreach prospect record and BookIt Invite in the email composer.

4. ROUTE & BOOK

LeanData applies your routing logic, books with the right owner, and syncs the meeting to Salesforce.

WHAT CHANGES

BEFORE

- Handoff launched only from Salesforce
- Availability required a browser extension and manual copy & paste
- Reps leaving workflows to verify routing, losing booking meetings
- Scheduling outside routing meant broken attribution
- New tool, new rules to configure

AFTER

- Handoff launches from the Outreach prospect record
- Availability inserts directly into the Outreach composer
- Reps stay in one workflow from qualification to booked meeting
- Routing accuracy and Salesforce attribution stay intact
- Existing BookIt settings apply on install

USE CASES

Live handoff on a cold call

"I qualify a prospect mid call and need to route and book time with the right AE without leaving Outreach." The rep launches BookIt Handoff from the prospect record. Routing and Salesforce attribution happen automatically.

Async follow up from email

"I want to send booking availability in my follow up without switching tools." The rep inserts BookIt Invite time slots directly into the Outreach email composer.

Rollout across the team

"I want scheduling live for every rep without rebuilding routing." An admin installs BookIt from the Outreach Marketplace. Existing handoff and routing settings apply automatically.

WHO IT IS FOR

- **SDRs and AEs** running outbound motions in Outreach who need meetings booked at the moment of intent.
- **Sales and RevOps leaders** who want scheduling to follow the same routing rules as everything else.
- **Salesforce admins and business systems teams** who need attribution, logging, and governance to hold up.

GET BOOKIT RUNNING INSIDE OUTREACH

Find LeanData in the [Outreach Marketplace](#), or request a demo at leandata.com/demo

WHY LEANDATA?

LeanData helps organizations accelerate their move to Intelligent GTM Orchestration, serving as the connective tissue across the entire revenue lifecycle. Scheduling is one part of that. LeanData turns buyer intent into booked meetings with the right person, fast, and keeps every handoff precise and auditable at every stage of the buyer journey.

More than 1,000 companies run their GTM orchestration on LeanData, including some of the fastest growing AI companies in the world.