



# Delivering World-Class Buying Experiences With LeanData's BookIt Scheduling Software

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# What is Automated Appointment Scheduling Software & LeanData's BookIt?

Scheduling software — like LeanData's [BookIt](#) — allows individuals and groups of users to determine the best time to schedule a meeting together. Additionally, scheduling software automates other scheduling processes such as work schedule management, employee communication and time tracking.

Either cloud-based or as a local application, appointment scheduling software shares users' calendar availability, and generates a booking form or link that can be shared with other users who then select their preferred time to meet. The end result is that scheduling software helps users operate more quickly and more efficiently.

The best scheduling software allows prospective buyers and customers to better control their own buying journeys. Prospective customers are empowered to instantly select meeting dates and times that best fit their needs, accelerating their

own buying journeys at their desired pace.

It's important to note automated **appointment scheduling software is not calendaring software**, the most commonly used of which include Google Calendar, Office Calendar and Apple Calendar (previously known as iCal). Rather, scheduling software enhances the value of existing calendaring software.

**“Meetings could take 24 hours or more to schedule before. BookIt reduces that time so the SDR doesn't even have to reach out, the prospect just books a meeting instantly.”**

 Alation



# What are the Benefits of Appointment Scheduling Software?

Appointment scheduling software like BookIt allows prospective and existing customers to conveniently select a preferred meeting time, with no need for back-and-forth emails or phone calls to determine availability or confirm a date and time. It eliminates the time-consuming and error-prone manual processes that cause so much frustration.

Scheduling software also reduces the likelihood of forgotten meetings and no-shows, placing key appointments front and center on both parties' calendars, and sending automated reminders and notifications.

Finally, the value of placing the control of creating appointments into the hands of your customers, prospective customers and website visitors cannot be overstated. Speed and convenience are key in both buying journeys and in customer experiences. If lead response time (aka, [speed to lead](#)) is important in your market, empowering

your customers to instantly book meetings with the proper representative in the organization demonstrates responsiveness at an entirely new level.

With scheduling software automation delivering benefits to both businesses and their customers, the category has become a relative necessity in the modern revenue tech stack.

On the following pages, you'll find four of the most common use cases for LeanData's BookIt scheduling solution.

**“For our prospects, BookIt reduces the friction between point of interest and connecting with the person who is going to help them.”**

**Amplify.**





# Common BookIt Use Cases



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# Focus on the Leads That Matter: Qualifying Inbound Leads Before a Meeting Gets Scheduled

## Common Challenge

Appointment scheduling software allows an interested party to immediately book a meeting on a representative's calendar. As such, it's tremendously customer-centric. However, giving outside parties unfettered access to book appointments isn't always the best solution for the organization.

Not every party qualifies for an immediate booking of a meeting with a representative — think analysts, media, students, educators, competitors, etc.

## Desired Outcome

Immediately qualify all inbound web form submissions and only present the meeting availability of the best rep for high-value and high-priority customers.

## The BookIt Advantage

Use the full functionality of BookIt to build a decision path that qualifies each record and provides meeting times with the most appropriate company representative.

With LeanData's BookIt, all inbound web form submissions instantly go through your custom lead qualification process. Those that are qualified for meetings are then served up the correct representative's calendar and availability so that they can book their own meetings.



# Create Optimal Experiences for High Priority Accounts: Scheduling Priority Leads With AEs

## Common Challenge

High-priority leads and prospective customers are forced to go through a “one size fits all” go-to-market process. Not only does it waste precious time, it delivers a less-than-ideal customer experience.

## Desired Outcome

Prospective customers who meet very specific criteria (e.g., high-priority contacts matched to target accounts with annual revenue greater than \$500 million) are immediately empowered to book meetings with an Account Executive rather than going through an initial Sales Development Representative qualification call.

## The BookIt Advantage

Use the full functionality of BookIt to build a decision path that evaluates each record and



accelerates engagement with priority leads and customers by providing meeting times with the most appropriate Account Executive.

Remember, with LeanData’s BookIt, *all inbound web form submissions* — each and every one of them — instantly go through your custom lead qualification process. Those identified as high-priority leads are then presented with the correct Account Executive’s calendar and availability so that they can book their own meetings.





# Book the Next Meeting Before the First One Ends: Scheduling Outbound

## Common Challenge

While on a call with a representative, it's determined that the prospective customer should meet with another representative at the company to further the discussion. However, too often the choices for booking such a meeting involve either traditional back-and-forth emails and voicemails, or a return to the initial web form. Neither delivers a world-class customer experience.

## Desired Outcome

A prospective customer can immediately book a follow-up meeting while on a phone call with a representative, rather than having to go to the website again.

## The BookIt Advantage

Using BookIt functionality, create an internal use-only webpage with a web form. Have your representatives access this page and fill out the

form on behalf of their prospective customer, while they are still on the call. Send all form submissions through a BookIt flow to have it assigned according to your pre-determined logic.

Book the next meeting with your customer already on the phone, leaving no time for the lead to grow cold or stale.

**“BookIt removes the manual step of coordinating schedules, saving our teams’ time. And from a customer perspective, if they really are interested, they want to talk to the right person quickly, so it’s just much more efficient and a win/win for everyone.”**





# BookIt & Routing: Assigning Meetings & Engaging Users

## Common Challenge

In the time between a meeting being booked and conducted, the organization is disengaged with the prospective customer, resulting in a warm lead growing cold or, even worse, beginning to explore alternative solutions with competitors.

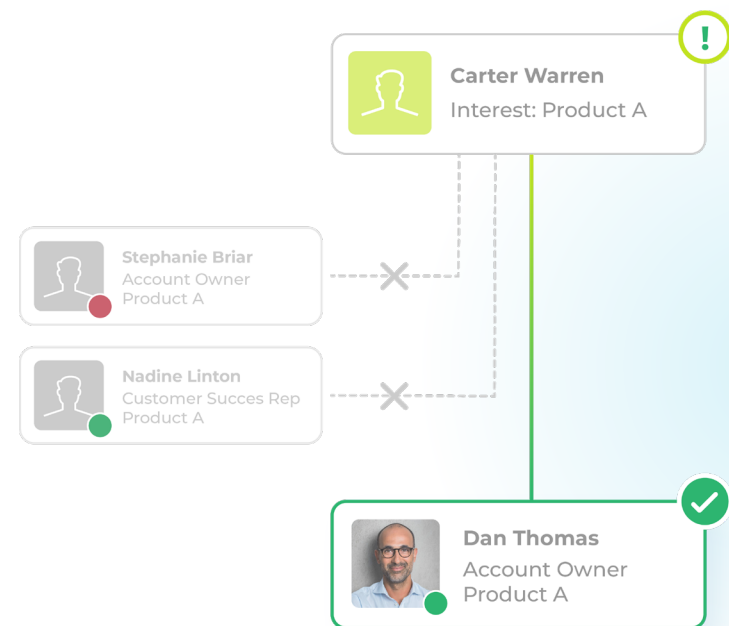
## Desired Outcome

Understand the context behind each requested meeting and keep prospective customers engaged with content and personalized communications leading up to the appointment.

## The BookIt Advantage

Use BookIt for the initial assignment and meeting scheduling, automatically creating custom events in Salesforce for each meeting. Complement BookIt with the [LeanData Revenue Orchestration Platform](#) to identify which new leads booked meetings through BookIt and now need to

be added to a sales engagement cadence or sequence. Use the complete context available in your CRM and the meeting request to engage with personalization.



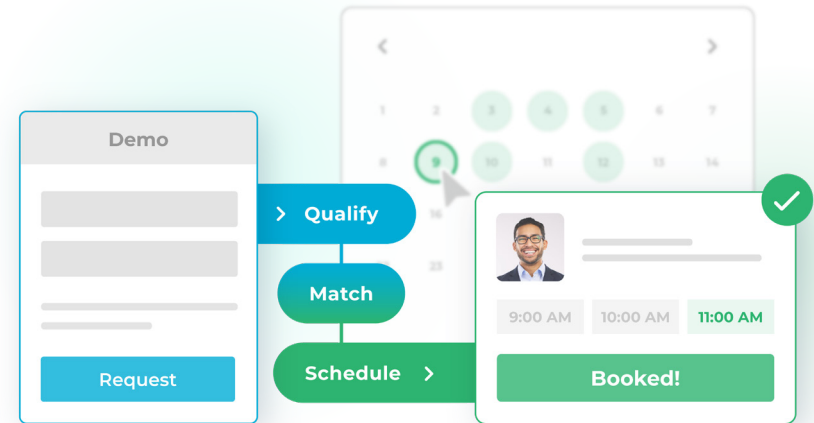
# A Meeting is More Than Just a Meeting

Appointment scheduling software eliminates the tiresome back-and-forth of emails, phone calls and voicemails in trying to book a meeting. That's great news for your customers and your revenue team.

However, it's important to ensure a meeting is booked not just for the sake of booking a meeting. The key considerations in effectively facilitating the customer's buying journey take place before, during and after meeting scheduling occurs.

LeanData's BookIt determines if a meeting is the next best step for a prospective customer. If a lead qualifies for a meeting, then it's critical she is matched to the correct representative. However, if a meeting is not the next best step for your prospect, she should be routed to that best next step, like, for instance a marketing nurture stream.

Once a prospect is qualified for a meeting and the



calendar of the correct representative is presented, BookIt still has tasks to accomplish.

When the meeting is set, BookIt sends confirmations to both participants. Additionally, integrations with Slack and Microsoft Teams can be triggered to notify your representatives so that they can prepare for their meetings accordingly.



# A Meeting is More Than Just a Meeting (cont.)

Finally, a meeting is a significant milestone in the buying journey, and BookIt therefore creates an event in your organization's Salesforce instance. With an event established, your RevOps team can then track, measure and, in aggregate, look for ways to continually improve to positively impact your delivered customer experience.

Pairing BookIt with a robust Revenue Orchestration platform empowers your team to execute on data from new prospective customers, routing Salesforce records and delivering personalized content in coordination with sales engagement platforms.

[Request Demo](#)

## Get Started Today:

Visit [LeanData.com](https://leandata.com) to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Engagement, or visit us on [AppExchange](#).

## 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 revenue tech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the people, processes and plays needed to transform buyer 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.



# Recommended Readings

**BLOG**



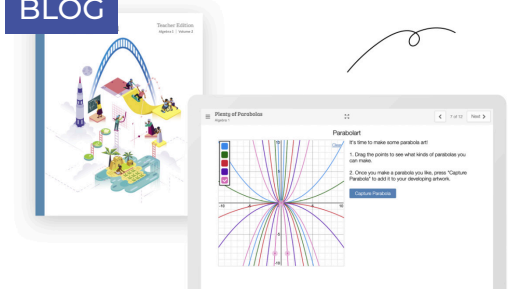
**BookIt: Automated Scheduling Software for the Win/Win**

**LeanData**

**BookIt: Automated Scheduling Software for the Win/Win**

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**BLOG**



**Amplify Improves the Buyer Experience with BookIt**

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**DATA SHEET**



**Automated Scheduling Software Buying Guide & Checklist**

**Appointment Scheduling Software Buying Guide & Checklist**

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