



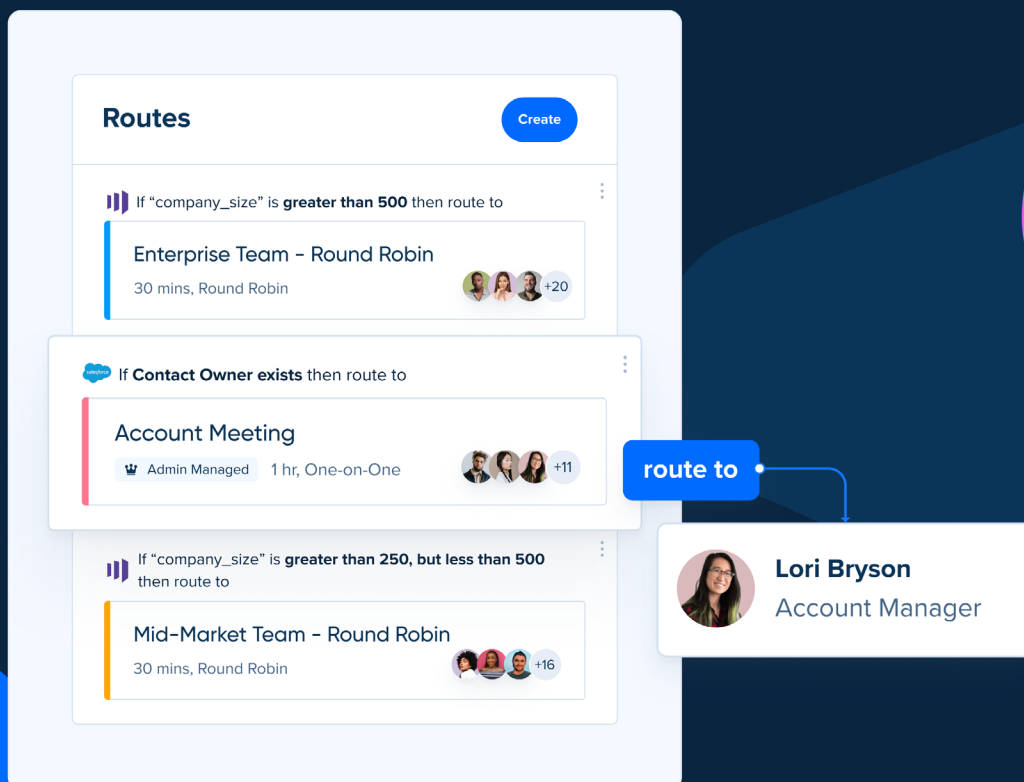
Qualify, Route, and Book Sales Meetings Instantly

Fill your MQL pipeline faster and drive more revenue with scheduling automation

Two important factors make or break the start of your sales cycle:

- 01 How quickly you connect with interested prospects**
- 02 A scalable marketing-to-sales handoff that works for everyone, including prospects**

In this guide, we'll walk through how scheduling automation helps you improve both of those factors, so you can convert high-quality prospects faster, speed up pipeline, and ultimately increase revenue.



01 Connect with leads faster via automation

Once a prospect shows interest in your solution, your team needs to make contact as soon as possible. Any delay gives the prospect time to find a solution elsewhere.

We've all heard the lore about how best practice is to respond within five minutes, because prospects are more likely to buy from the vendor who responds first. (Depending on which studies you look at, that number can be anywhere from 30% to 78%. Point is, getting there first matters – a lot.)

Yet look at the process many organizations use today for inbound demand generation:

A prospect indicates they want to talk to sales, submits a form ... and is left waiting to hear back from your team! Then more time and friction build up as the prospect and your salesperson email back and forth to find a time for that first call.



Modern demand gen and revenue operations teams have found a better way:

[Add scheduling to your website](#), so that once a qualified prospect hits that "contact sales" CTA, they can immediately book a meeting at a time that works for them.

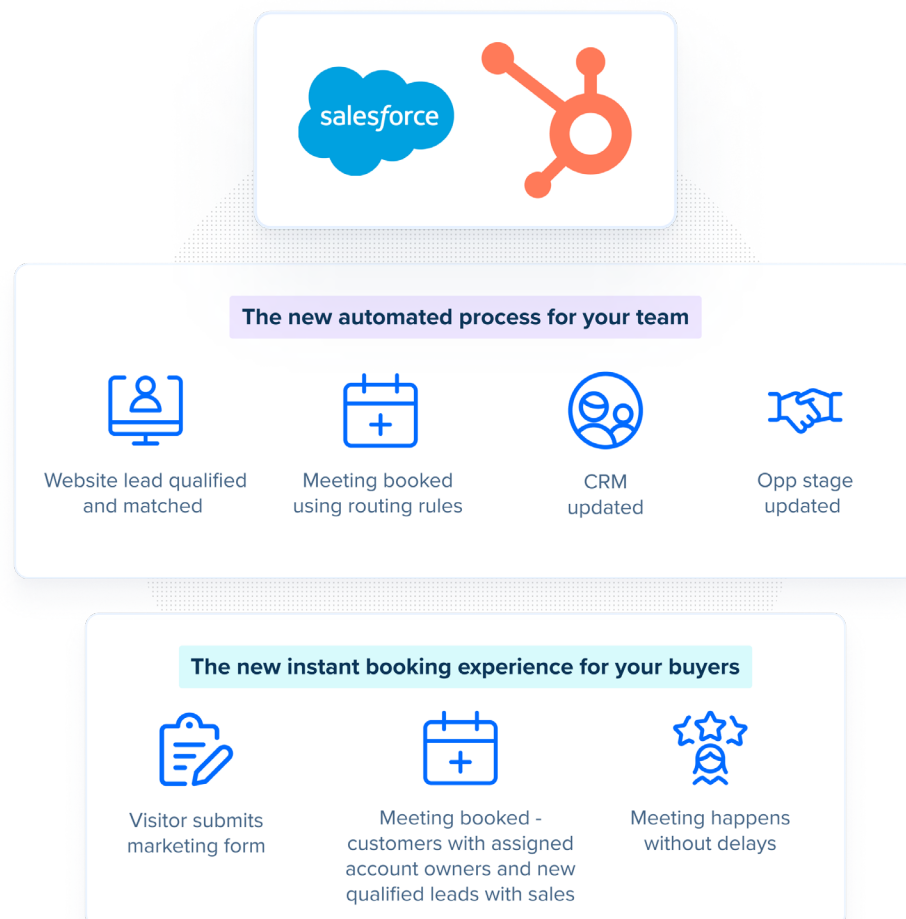
They don't have to wait to hear back from a sales rep, and your team can stop spending valuable time manually following up with inbound leads. No more leads [languishing in Salesforce, HubSpot, or your preferred CRM!](#)

Ready to set this up? Get in touch with us!

Connect with the Calendly sales team

Some scheduling tools, like Calendly, can also:

- **Support initial discovery:** Ask questions while the prospect is completing their booking so your reps know what to focus on in that first meeting.
- **Automate lead distribution:** Connect with leads even faster by choosing a scheduling platform with [round robin distribution](#). Automate which salesperson is chosen for a meeting based on their availability, equal team distribution, or other custom priorities.
- **Qualify and book leads from your marketing forms:** When you add [Calendly Routing](#) to your marketing forms, you can show scheduling pages only to leads who meet your qualifications, like prospects from specific industries or companies of a certain size. That way, your busy team can spend their valuable time on high-quality leads.
- **Instantly schedule known leads with their active account owners:** When a known lead or customer submits a form, automatically route them to the booking page for their assigned account owner using a [real-time Salesforce lookup](#) or [HubSpot lookup](#).





Our HubSpot form conversion rates have skyrocketed with Calendly Routing. We're now seeing 70% of qualified leads booking demos directly from our website. Our entire team is thrilled."



Max Friedman
CEO, Givebutter

02 Effortless sales handoffs

With scheduling automation, feel confident that your demand gen team is sending your sales team high-quality leads – and stop worrying about prospects falling through the cracks. Fewer qualified leads drop out of the sales funnel, so you know your demand gen campaigns are driving conversions and ROI.

Here are six ways a scheduling automation platform can help your team fill pipeline and generate revenue opportunities so your sales team can hit their goals:

- 01 Add routing to your marketing forms:** When you integrate your [HubSpot](#), [Marketo](#), or [Pardot](#) forms with Calendly, you can schedule high-value leads right from your marketing forms. Increase website conversions and keep leads moving through the funnel without changing any of your existing tools and workflows.
- 02 Integrate with the marketing and sales tools your team uses every day:** A scheduling platform that integrates with your teams' existing tech stack lets you boost productivity without having to reinvent the wheel. For example, [Calendly's CRM integrations](#) automatically create a new lead, contact, or opportunity when a lead books a meeting. If the lead already exists in your CRM, the event is added to their record. Keep everyone on the same page and spend less time manually copying data between platforms.
- 03 Let prospects book sales calls right from their inbox:** Let interested leads book a sales call without a lengthy email exchange – and immediately put leads in your funnel – by adding sales reps' scheduling links to your nurture campaign CTAs and automated sales cadences.

- 04 Set up routing at live events to instantly book meetings for your sales team:** Instead of following up with hot leads after the event, prompt them to schedule a meeting before they leave your booth.
- 05 Uncover trends to book more meetings with less effort:** Access [meeting insights](#) to identify key metrics, benchmarks, and trends – like popular meeting times, top performers, and in-demand meeting types – and make improvements where needed. Plus you can examine routing analytics to track meeting conversion rates and see how your forms perform.
- 06 Use workflows to automate communications:** Set up [pre- and post-meeting automations](#) to send email or text reminders, share sales enablement content, send thank-you notes, and request follow-up meetings. Reduce no-shows and keep prospects engaged between meetings without having to send emails manually.

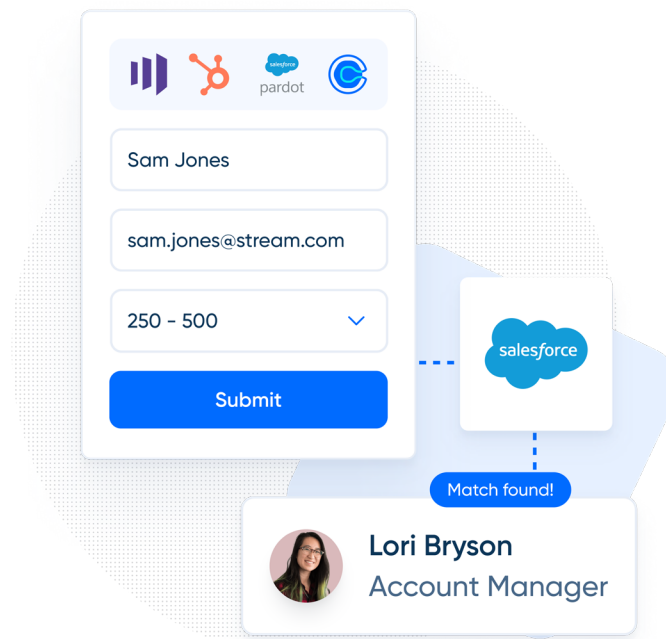


Calendly Routing is a game changer for our sales team. They no longer spend 5+ hours a month reassigning website demos. Customers automatically book with the right person thanks to the Salesforce lookup."



Abbie Deaver

Director of Marketing, RCReports



Here's how Calendly helps revenue teams hit their numbers

Bitly saw a **40%**
increase in sales-qualified
opportunities through their website

Katalon shaved
a week
off their sales cycle

Smith.ai converted
34% of MQLs
into demos

CallRail
doubled
their sales conversion rate

“

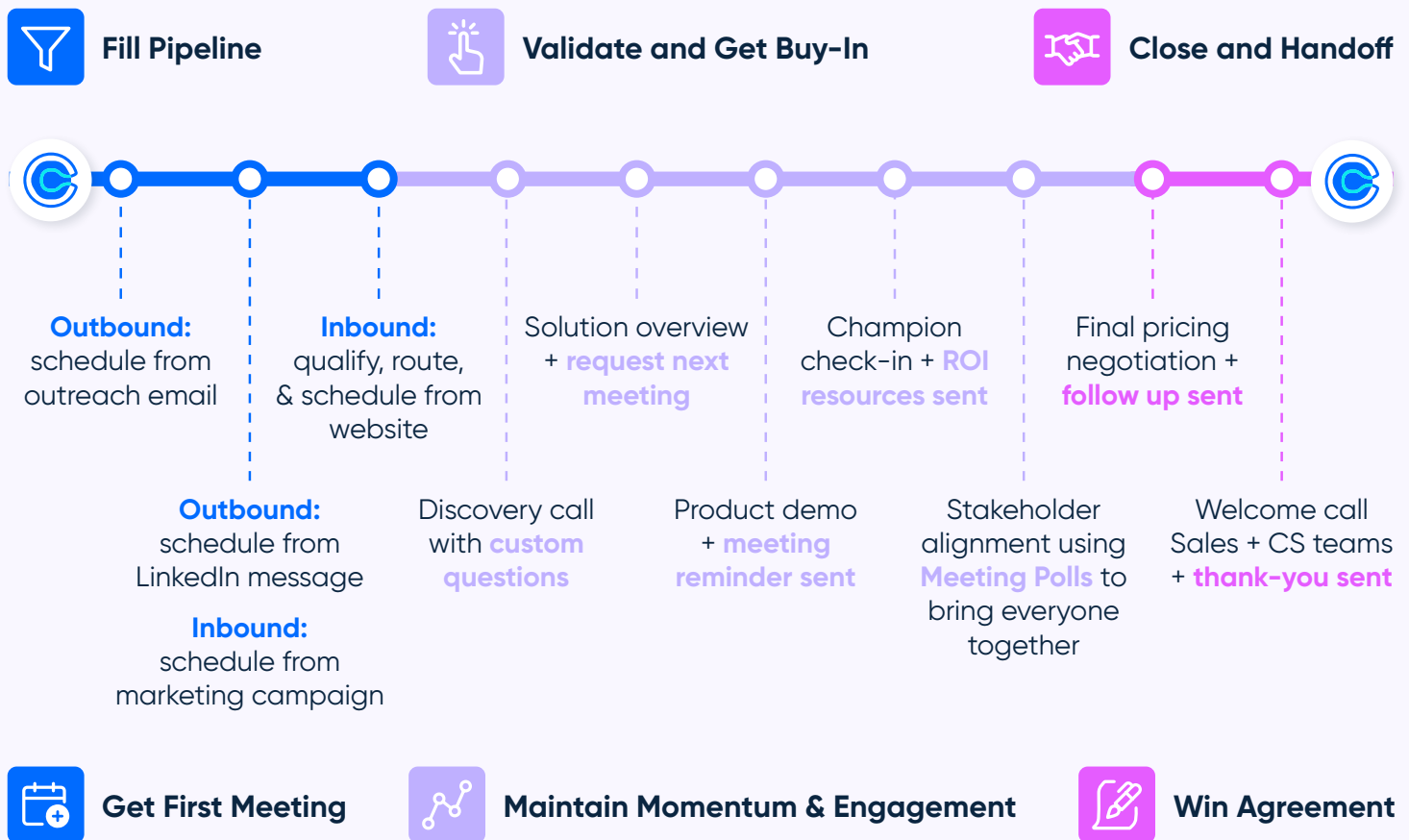
Before adding Calendly Routing Forms, 60% of people who started to book a meeting on our website did not complete the booking. Now, we're automatically sending demos to specific reps. We're winning more business with less work.”



Kenneth Burke

Vice President of Marketing, Text Request

Elevate every point in your sales cycle to drive more revenue



Here's a peek at how Calendly's Marketing and RevOps teams use Calendly Routing and our results

Adding routing to our website forms

20% increase in meetings booked with high-value leads

Using routing at events

79% ROI

Achieved from a single event

80 sales meetings

Booked from a single event

Ready to hit your pipeline goals?

See why teams rely on Calendly to close deals, build relationships, and grow their business.

[Connect with the Calendly sales team](#)