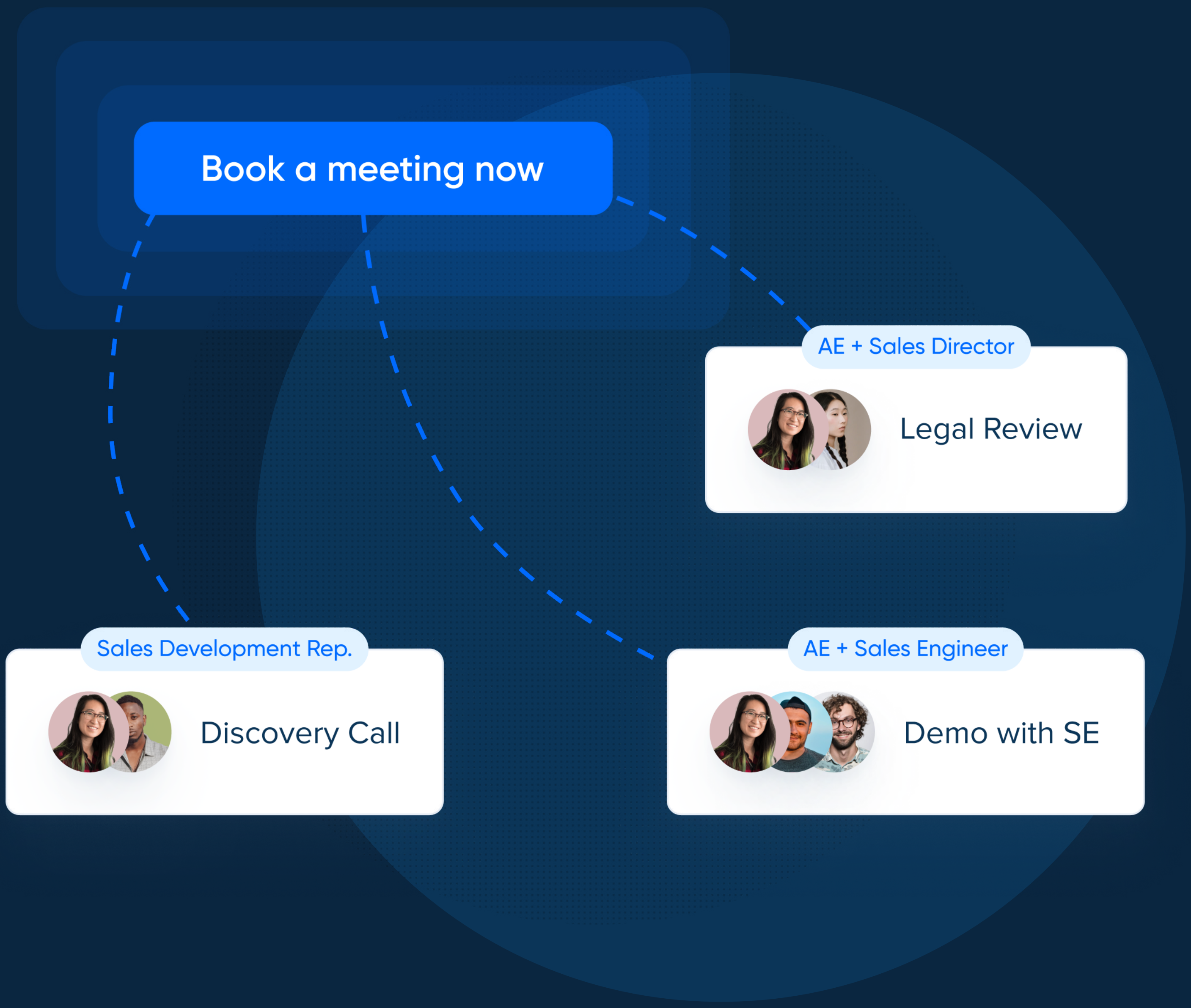
Calendly

Scheduling automation for sales, marketing, and customer success teams



Meetings with customers — and the activities surrounding scheduling — are the lifeblood of revenue teams.

When we say "revenue teams," we're talking about sales, marketing and customer success departments who attract sales leads, turn those leads into meetings with prospective customers, and then close and retain those customers.

And like every other task used to increase revenue, the scheduling of those meetings deserves automation.

Everything else is automated — why not scheduling?

Today, nearly everything in a revenue team's day-to-day work is automated. Enriching a customer relationship management (CRM) database with contacts, looking up phone numbers for cold outreach, emailing prospects, and more — all automated. Except for scheduling the meetings where customer relationships are solidified. The meeting lifecycle still suffers from too much manual effort.

Revenue-generating activities happen before and after a salesperson meets with a prospect: to move a deal along, to close, and to onboard with customer success. And your scheduling automation platform needs to automate and support those activities.

Why *now* is the time to automate your meeting lifecycle

Automating meeting scheduling has become crucial for revenue teams to enable faster connections and cut the time between meeting milestones in half.

Let's stop and think about the revenue lifecycle.

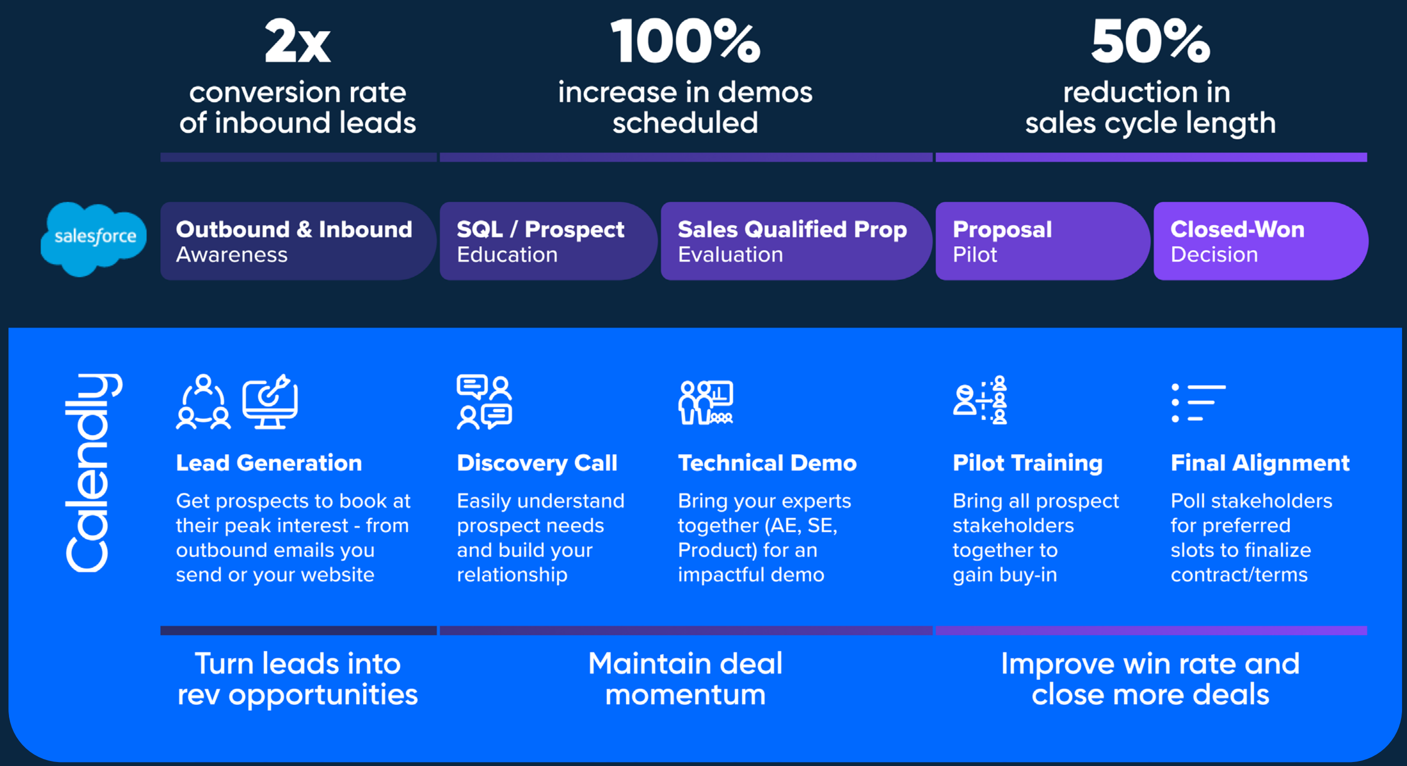
The first step occurs when a prospect fills out a form — often deployed by a marketing department's demand generation team — or responds to an email and is routed to a sales development representative (SDR) for a discovery call.

Then, often, the SDR sends the lead to the account executive to schedule a demo.

The third meeting sometimes includes additional stakeholders and influencers.

The fourth may include the client's IT team to ensure the product fits within their enterprise software stack.

Subsequent calls may involve procurement and legal until the contract is signed.



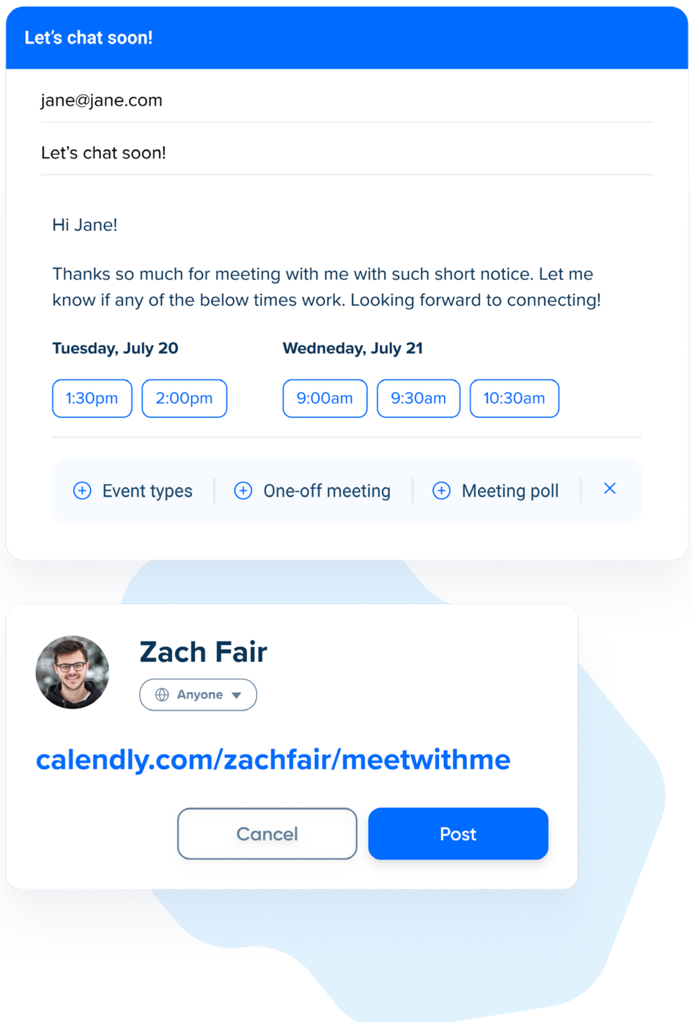
Once a deal is closed, the salesperson schedules a kick-off between their colleague in customer success and the customer. Then, customer success leads the customer through the implementation process and schedules quarterly touchpoints with both the customer success manager (CSM) and account executive (AE) for expansion opportunities.

Throughout the revenue lifecycle, meeting reminders, follow-ups, and emails are exchanged.

Without scheduling automation, a manual process would severely affect team productivity, the customer experience, and ultimately revenue generation.

So why has it taken so long to automate such an important aspect of the revenue meeting lifecycle?

The focus on outbound



Prior to 2010, revenue teams wasted their time on the back and forth: "Does 2 p.m. work? No, what about 4:30 p.m.?"

After 2010, sharing a scheduling link that showed your available times became the de facto process for prospects and customers to schedule meetings with revenue teams.

Today, with more than 10 million users and 50,000 corporate customers, Calendly is the undisputed category leader when it comes to outbound scheduling. When people less familiar with Calendly think of its core usage, outbound activity is where their mind often goes. After all, 93% of sales teams who report using Calendly for outbound achieve faster sales cycles, averaging a 2x increase in demos scheduled.

But outbound-only scheduling automation won't get you to your best pipeline performance.

Savvy revenue teams use Calendly for inbound scheduling too. Calendly lets teams instantly qualify leads and schedule with prospects and customers — without the revenue professional having to lift another finger.

Two types of sales motions

Outbound Sales

“Hi, Susan. Would love to show you how our product can help meet your business needs. Feel free to share times you’re available, or find a time that works for you here.”

Inbound Sales

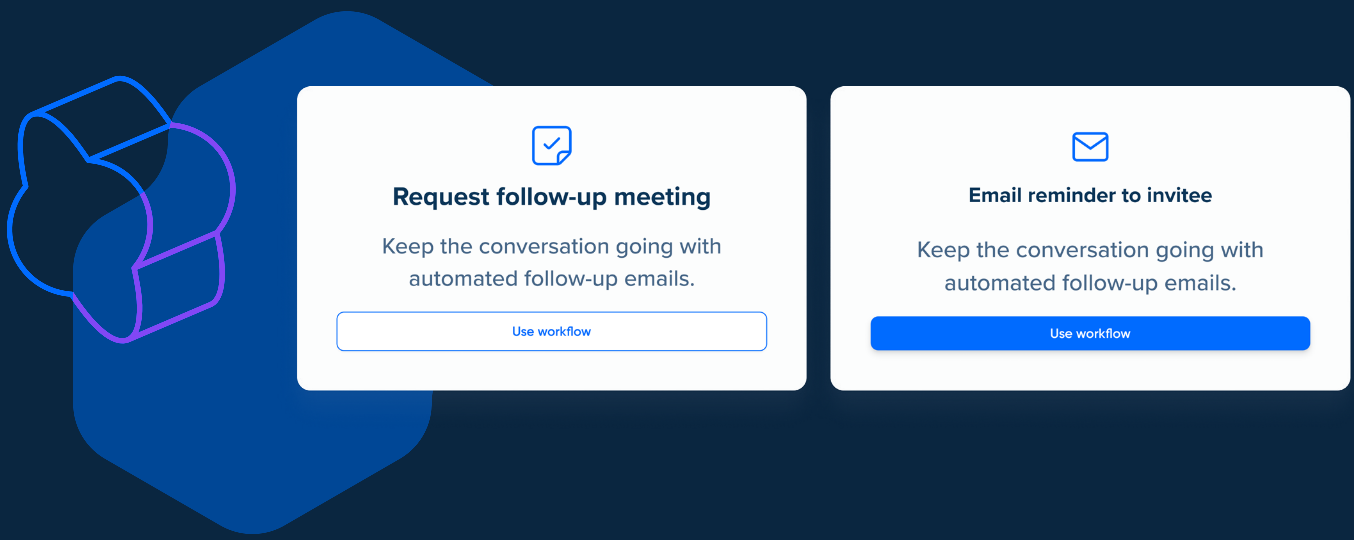
“Learn how our product can help your business. Schedule a free 30-minute demo by filling out this form.”

The best revenue teams automate both outbound and inbound scheduling. The way to meet revenue goals, beat competitors, and reach more opportunities is speed to connection.

For example: Prospects can click “Book a Demo” on your website, fill out a form, and immediately schedule a call with an SDR. Automating demo scheduling lets you respond to prospects first, giving you a competitive edge.

How sales and demand gen teams can automate the revenue lifecycle to drive more pipeline and revenue

Now that you've learned how both inbound and outbound scheduling play key roles in successful revenue generation, let's dive deeper into how scheduling automation platforms play in both revenue motions to help 89% of sales teams close more deals.



Outbound sales

Thousands of salespeople in companies of all sizes share scheduling links via email, social media, and more.

Via email

Salespeople often include their scheduling links when they email prospects.

The pros take it to the next level by:

- Inserting their scheduling link into their email signature — "Book Time With Me"
- Adding their scheduling link to their automated email "drip" sequences in Outreach, Salesloft, and more
- Adding meeting times to their email when responding to prospects in Gmail or Outlook (via Calendly for Chrome, Firefox, or Outlook)

By adopting Calendly, Bitly's outbound SDRs saw a 100% increase in the number of demos scheduled.

> **"Our outbound SDRs use Calendly scheduling links in their prospecting emails. Not only do the SDRs come in with a whole calendar of prospects to speak with but they have more prospects show up to their meetings."**
>
> **Dave Rotholz**, head of Bitly's East coast sales team

And it's not just Bitly; 88% of Calendly users say meeting no-shows have decreased.

Via social media

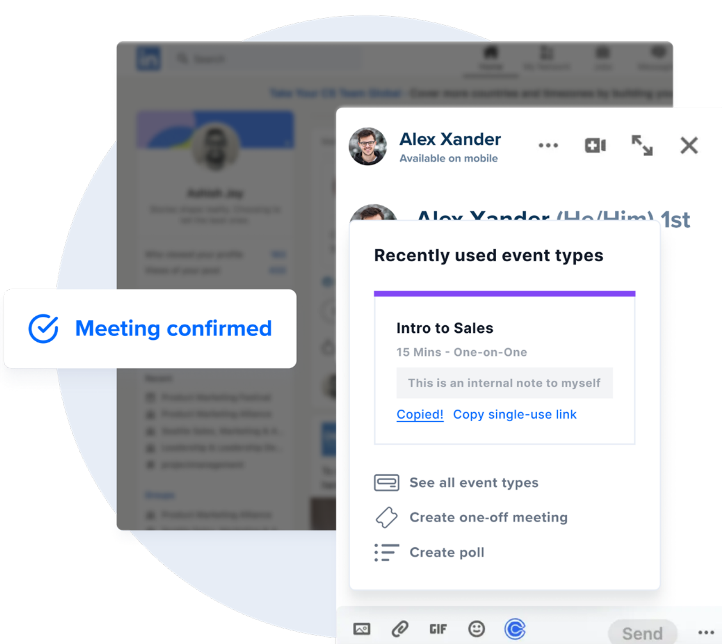
Another popular place to share your scheduling link as a salesperson is via social media, such as LinkedIn and Twitter.

The pro move here:

- Use the [Calendly browser extension for LinkedIn Messaging] to easily add your scheduling link to any LinkedIn message

By adopting Calendly, Bitly's outbound SDRs saw a 100% increase in the number of demos scheduled.

> **"The LinkedIn Integration with Calendly helps you save even more time when booking appointments. The handy little extension allows you to share your availability with ease and book meetings much faster, hand-pick times for VIP conversations with one-offs, and find time that works for the group you're messaging with meeting polls."**
>
> **Craig Dean**, demand generation consultant



Inbound sales

What if your sales team could book meetings while they sleep?

In other words, imagine allowing prospects to come to you via inbound sales — or demand generation — versus solely relying on outbound sales.

Calendly customer Signpost used inbound scheduling to achieve a 50% increase in the time they have to focus on sales funnel engagement.

> **“A good tool is one that’s so simple, we can basically forget about it and let the meetings roll in. That’s what happened when we implemented Calendly.”**
>
> **Julia Pan**, Sales Enablement, SignPost

Team scheduling pages

Setting up a team scheduling page is the easiest way to dip your sales team’s toes in inbound scheduling.

Now, a prospect can select from several options to meet with your team. And you can easily support meetings with several members of your team because Calendly creates a “Venn diagram of availability” and only shows times when all required people are available.

For example, the prospect can book a:

- 30-minute meeting with Mary (the account executive handling discovery)
- 40-minute meeting with Mary and Brian (the sales engineer leading the demo)
- 20-minute follow-up meeting with Brian to ask technical questions

Add scheduling automation to your website

Many tech-forward sales teams work with their marketing teams — specifically demand gen — to embed Calendly in their company websites.

For teams who want to take scheduling on their website to the next level, Calendly Routing lets them instantly qualify and schedule leads right from their marketing forms.

By adding Calendly Routing to their website forms, Givebutter now sees 70% of qualified leads book demos directly from their website.

> **“Our HubSpot form conversion rates have skyrocketed with Calendly Routing. Our entire team is thrilled.”**
>
> **Max Friedman**, Givebutter CEO

Crawl → Walk → Run

If the above sounds intimidating, never fear: You can crawl, walk, and run your way to inbound sales with scheduling automation.

CRAWL Work with your demand gen team to simply add scheduling automation to your website and allow anyone to book time with one salesperson.

WALK Set up team scheduling event types such as collective events (e.g., an AE can join a sales engineer with a prospect) or Round Robin events (Calendly will automate which salesperson is chosen for a meeting based on their availability, equal distribution, or priorities you set).

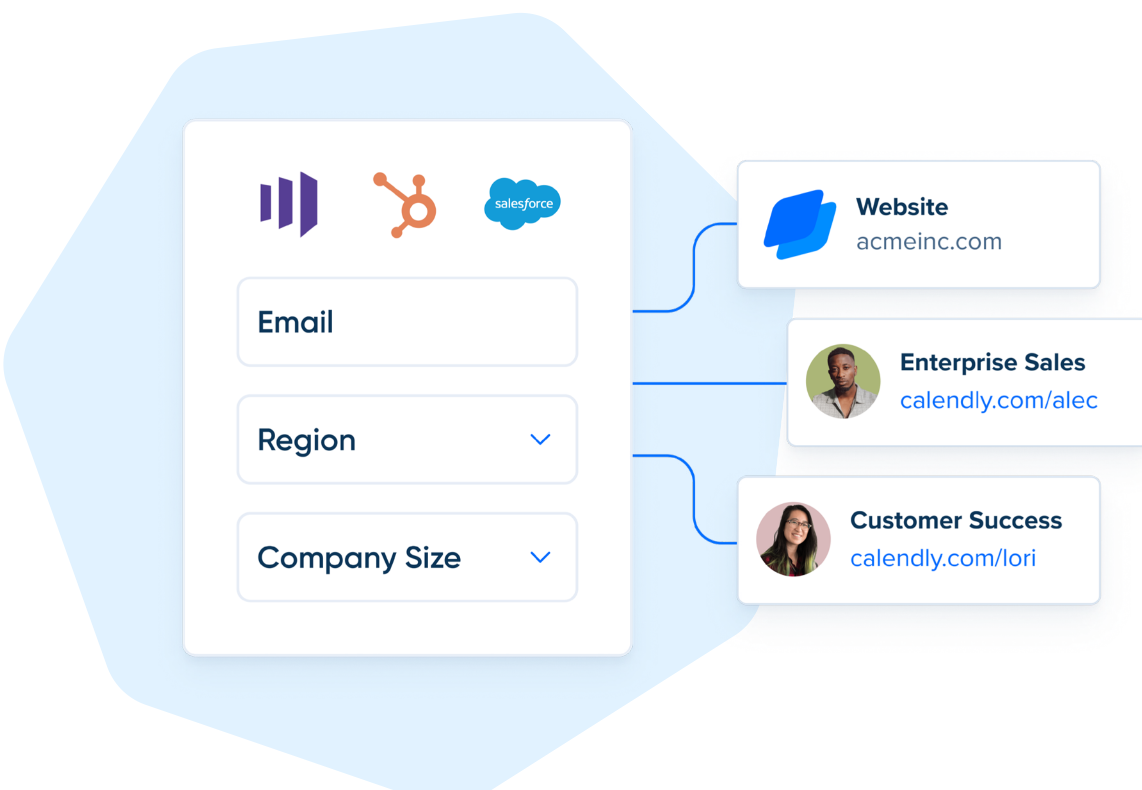
RUN

What if you don't want to let everyone who comes to your website book a meeting?

With [Calendly Routing], show scheduling pages only to leads who meet your qualifications, like prospects from specific industries or companies of a certain size. That way, busy sales teams can focus on the deals that matter most.

Qualify leads through marketing forms in Marketo or HubSpot, or build new forms in Calendly. Once visitors fill out the form, automatically route them to the right booking page based on their responses, so they can schedule immediately. (For leads who don't book, existing routing rules and engines kick in as usual.)

If you [integrate with Salesforce], Calendly can match known leads or customers directly to their account owner's booking page. A behind-the-scenes Salesforce ownership lookup means no one spends valuable time manually reassigning leads.



How customer experience teams can quickly connect with customers for better onboarding, retention, support, and growth

Just as meetings help move a sales deal along, meetings between customer experience (CX) teams and customers help onboard new users, upsell new products, and renew subscriptions.

Calendly automates the scheduling of customer meetings to free up CX pros to focus on product education and retention.

By using Calendly, AgriWebb saw a 75% reduction in wait time to schedule customer calls.

> “**Calendly has been a key driver in a lot of our growth. It’s really helped us drive our internal efficiency as a company, but also in a customer-facing sense from the first touchpoint all the way through their journey.”**
>
> **David O’Brien,** Head of Success, AgriWebb

When scheduling becomes easier, every aspect of customer experience, success, and support is improved.

Team scheduling pages

One of the most impactful ways to empower your customer is to allow them to book a meeting when they need help, want to learn something new, or, ultimately, learn how you can help them reach their goals. Setting up a team scheduling page makes it easy

Like the customer success team at Vonage did, organizations can save 85 hours per month — time they'd been wasting on meeting scheduling — and instead focus on customer impacts, such as meeting prep and closing more support tickets.

> **"The time to book meetings is non-existent now. But the biggest benefit for our customers is having the CSMs be more prepared, more ready to give answers there and then."**
>
> **Chris Williams,** Head of Customer Success UK/EMEA, Vonage

Now, your customer can select from several meeting options that fit their needs at that specific moment. For example:

- Immediate tech assistance from Customer Support
- Best practice discussions with Customer Success
- Renewal questions with Account Management
- Training with Product

Add scheduling automation to your website

Customer success and customer support teams gain numerous benefits from adding scheduling automation right to their website — especially on web pages dedicated to current customers or support hubs.

This is why Ancestry.com sends 40% fewer scheduling emails to launch projects with clients.

> **“Calendly has transformed the way we interact with clients and deliver on projects. In our case, everyone wins.”**
>
> **A.C. Ivory**, Senior Manager, Ancestry.com

Crawl → Walk → Run

Just as sales and marketing teams can take an incremental approach to use Calendly, so can CX teams:

CRAWL Simply add scheduling automation to your website and allow customers to book time with a customer success manager or support rep.

WALK Set up group scheduling event types such as collective (e.g., a CSM and product expert join a call to help a customer set up a new feature/integration) or Round Robin (Calendly automates which support rep is chosen to help with an incoming help request based on their availability, equal distribution of incoming requests, or priorities you set).

RUN What if you could improve your customer health and net promoter scores by getting customers to the right CX team member as fast as possible?

Calendly Routing lets you ask qualifying questions — “what do you need help with?” or “what are your language preferences?” — so your customer doesn’t get frustrated trying to connect with the right person.

Based on a customer’s answers, send them to a specific team member’s booking page. For example, Justin is the expert for technical onboarding and speaks Korean, so he receives a customer who indicated they have a setup issue and prefer to speak in Korean.

Sales, marketing, or customer experience: Everyone can benefit from pre- and post-meeting automation

Whether you've booked a meeting via an outbound email, you've accepted a meeting via your website, or a customer booked a meeting from your scheduling page, you still need to communicate before and after a meeting.

Calendly offers Workflows — automation that triggers messages throughout the meeting lifecycle — from the time a meeting is scheduled all the way through your follow-up with attendees.

Reduce no-shows and other mistakes

Calendly helps eliminate human errors that detract from your buyer and customer experience so meetings aren't missed, canceled, or forgotten.

- Ensure everyone from your team shows up with an email or text message when a meeting is scheduled, canceled, changed, or upcoming.
- Never forget to add important meeting details such as a Zoom link or business address, and don't worry about time zone math.

- Gather information ahead of time by having attendees answer questions as they book the meeting so you know what they need.
- Remind your attendee(s) about the meeting with automated email or text reminders that you can send days, hours, or minutes beforehand.
- Enable easy rescheduling so your attendees can find a new time, versus letting the meeting fall off their calendar.

Nurture the prospect/customer before the meeting

Engaging and impactful meetings with customers require more than just showing up. With Calendly Workflows, you can make the best first impression for any meeting to help build your relationship.

- Automatically share customized notes with the meeting agenda and goals to ensure everyone is on the same page.
- Automatically send event reminders so no one has to scramble last minute to join the meeting.
- Automatically send informative content so your prospects or customers feel prepared and ready to engage and ask questions at the upcoming meeting.

Keep the prospect or customer warm post-meeting

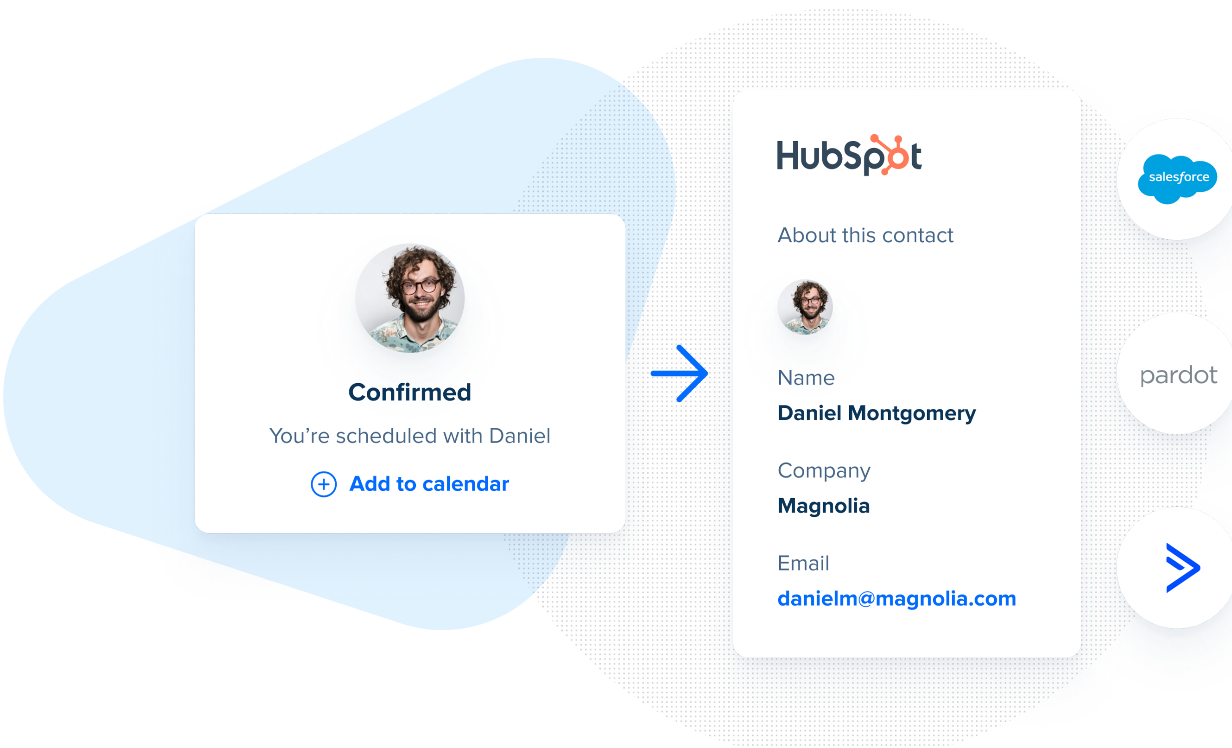
Your meeting lifecycle isn't over when the meeting ends. That's the time to keep the conversation going so you can get the next meeting, share something new, or close a deal.

- Send a quick "thank you" to make your attendees feel appreciated and ready for the next engagement.
- Provide follow-up materials such as an ROI calculator or a customer survey to allow your prospect or customer to continue their journey to learn more about your business and share their feedback.

Eliminate admin tasks post-meeting

Take scheduling automation a step further to alleviate the admin tasks that take up too much time after each meeting or the tasks your team might forget to do.

- Automatically add the meeting to your CRM so you can properly track engagement and trust that your data is accurate.
- Use further tech stack integrations to update other platforms/ solutions that fit into your reporting or workflow needs.



Don’t forget about security, user/data management, and IT policies

Since everyone in an organization can benefit from scheduling automation, we often see instances where a bunch of individual users or small groups have their own Calendly accounts. When that’s the case, though, your company is missing out on the benefits of having one centralized account.

Using Calendly as a team is where you’ll unlock the greatest value.

Answer these important security, IT, and operational questions, and you’ll see what we mean:

Are you meeting compliance requirements and overall security standards?

Security consciousness is a growing need for companies of all sizes. With strict regulatory requirements, an organization might need to address internal policies they want to uphold to ensure their data, their users and customers, and the overall business are secure.

- Use SAML-based Single Sign-On (SSO) and System for Cross-Domain Identity Management (SCIM) provisioning to centrally manage and authenticate users and securely onboard new users.
- Easily de-provision users to ensure past employees are removed, or offboard users as their roles/needs change.

- Delete customer and user data in a few simple clicks to stay compliant with regulatory requirements, and embed Calendly's data deletion mechanism within your existing data deletion practices.
- Get support from Calendly experts with security and legal reviews, so you never have to wonder if you meet compliance or security requirements.

Do you know who your users are?

If you don't know who in your organization is using Calendly because they're all on different accounts, then you don't have insights into success metrics, whether security is being maintained, or — and this is a big one — billing.

When your whole team shares a Calendly account, you can:

- Manage seats to ensure users who host or participate in external meetings have a Calendly seat, and spread any unused seats to other users that need them.
- Check usage and pull reports in Calendly to verify users are active, and track the performance of meetings and campaigns in one place.
- Control spending by having all users under one account and on the right plan with features that meet your needs.

Should all users have permissions to do anything and everything?

If you're working in a regulated industry or your organization has clear communications policies, it makes sense to maintain tighter control over, and have visibility into, external messaging and meeting processes.

- Avoid "over-granting" permissions for the sake of flexibility or convenience.
- Ensure consistency and compliance by limiting some user capabilities, such as who can set up Round Robin and co-hosted Event Types, or who can create, edit, and delete Workflows (sending reminders, sharing content, follow-up notes, etc).

- Update user roles/groups and control visibility into data to maintain customizations for certain departments and any necessary confidentiality between different teams.

Are you integrating with other tools to increase efficiency and maintain accurate data?

Get more ROI from your existing tech with integrations that keep reps working where you want them, and prevent inaccuracies between records so you can trust your data.

For example: Directly integrate with Salesforce and easily customize for your needs with Calendly's pre-built functionality, including:

- Eliminate manual data entry: Any meeting booked with Calendly is logged in the right customer record, or a new lead and event is created. And you can capture canceled events.
- Ensure records are accurate: The SFDC ID can be carried in a Calendly link and carried back across to SFDC to check records.
- Customize to use at scale across your organization: Create filters to only process certain record types. For instance, if your HR/recruiting team uses Calendly, they don't need a new SFDC record created for each candidate they interview.
- Optimize marketing automation: When someone fills out a website form, they're assigned to a rep based on your logic, and receive an automated email with the rep's Calendly link.
- Route known leads and customers: Send existing leads or customers directly to their account owner's booking page. (This happens behind the scenes using a Salesforce ownership lookup — no manual reassignment needed.)

Set up similar workflows with other CRM tools, as Calendly is easily customized for your needs.

You can also leverage web browser and LinkedIn extensions so your users can embed suggested times in emails for one-click booking, or quickly share scheduling links anywhere they engage with prospects.

How is Calendly different?

Calendly is the first platform to automate both inbound and outbound revenue generation for thousands of revenue teams — sales, marketing, and customer success — looking to increase revenue, accelerate pipeline, and improve customer retention all along the customer lifecycle.

> “ **Calendly has literally increased the velocity of the conversations we are scheduling — how quickly we are able to get in contact with partners — because the scheduling aspect and the friction are completely resolved.”**
>
> **Winta Habteslassie**, Partnerships Manager, Square

Like Winta, millions of sales and customer success pros email and send LinkedIn messages with Calendly scheduling links to book appointments … but that’s only one step in the meeting lifecycle.

Calendly is trusted by not only revenue teams, but also recruiting, product management, and executive teams. In other words, Calendly is likely used by every department in your company, which makes consolidating on one platform appealing and easy. In addition, Calendly is built with privacy and security features such as SSO and SCIM — features required by IT colleagues in companies of all sizes.

Unlike conventional online calendar companies’ approaches to scheduling tools that focus on one-to-one booking, Calendly offers scheduling automation for your whole revenue team (from Round Robin distribution and collective scheduling to admin-powered standardization of how Calendly is used team-wide), messaging and notifications all along the customer lifecycle (Workflows), and security and privacy features for Enterprises.

And while sales automation platforms focus on SDR email delivery, Calendly has a more complete offering for your entire revenue team, including scheduling tools for inbound demand generation (website scheduling and lead routing), team-based scheduling (collective events with coworkers, Meeting Polls), and email reminders and notification (Workflows).

Calendly is the most complete scheduling automation platform on the market for revenue teams (and every team). Thousands of sales, marketing, and customer success professionals use Calendly today — some for inbound marketing, and many for outbound.

By implementing Calendly in both your inbound and outbound marketing efforts, revenue teams can increase revenue, accelerate pipeline, and improve customer retention.

Talk to a sales representative about how Calendly can help your organization earn more revenue.

Set up a call