



## TimeTrade Scheduler for Salesforce®. Intelligent Appointment Scheduling for Marketing, Sales and Customer Success Teams.

### Scheduling meetings with prospects and customers is frustrating

Coordinating availability between prospects or customers and team members is complex and time consuming. Endless back and forth using multiple systems—email, voicemail, web conferencing and CRMs—to manually schedule meetings wastes valuable time. When a meeting is finally booked, often someone needs to reschedule, triggering more back and forth. As time passes, the lead grows cold and the revenue opportunity slows or disappears.

### Scheduler for Salesforce fixes the problem

Scheduler for Salesforce makes it easy for marketing, sales and customer success teams to allow prospects and customers to schedule meetings right from Salesforce. The result? Happier prospects and customers and faster revenue growth. Use Scheduler for Salesforce throughout the customer engagement lifecycle to connect with prospects and customers more quickly.

### Connect with, acquire, and retain more customers

As a sales professional, you are constantly trying to fill your pipeline. Scheduler for Salesforce helps you **connect with new customers** by allowing prospects to schedule time with you and automating all of the administrative tasks associated with booking the meeting.

As part of a marketing team, you are tasked with identifying prospects and turning them into leads. **Acquire prospects** through email campaigns, social media channels, and your website by offering prospects the ability to schedule an appointment for a demo or a sales call.

And, if you are a service and support professional, you are likely to spend much of your time trying to connect with customers, often resulting in back-and-forth emails and voicemail tag trying to find a mutually convenient time to meet. **Retain existing customers** by making it easy for them to schedule time to initiate on-boarding, resolve support issues, or conduct regular check-ins.

*TimeTrade has revolutionized the way that we do the most tedious part of the job (meeting logistics) and allowed us to use it as a strategic tool to fill our pipeline.*

—Matt Maggitti, Vorsight

## More than 200 companies already benefit from the power of combining Salesforce and TimeTrade. Here's how you can too.

### Book meetings with one click

Easily book meetings right within Salesforce or share one-click scheduling links through email, web, or social media. Let prospects and customers automatically book confirmed meetings at times you're available.

### Pool availability to provide the best available times

Whether you have two or 2,000 team members available to take appointments, you can pool your team availability and prioritize employees based on who is best available and qualified to help.

### Integrate fully with your teams' calendars

Whether you use Outlook, Google, iCal, Office 365, and/or Salesforce calendar, Scheduler ensures that free and busy times are properly reflected, and all booked meetings are added to your personal calendar as well as attendees' calendars.

### Control when you're available with customized availability

Some clients or meeting types might need unique meeting times. Customized availability lets you choose specific dates and times to craft personalized meetings. You can also offer fully open availability, rolling availability, or a set date range.

### Schedule meetings on behalf of a colleague, one-on-one, or with teams

Sometimes you just want to meet one-on-one with a prospect or customer, sometimes you need to include one or more colleagues, and other times you need to let people schedule on your behalf. Scheduler for Salesforce supports any scenario by showing the availability of anyone included on the meeting, allowing customers and prospects the ability to book a meeting when everyone is available.

### Easily reschedule, add invitees, and manage changes

Plans change constantly, and your team and systems need to be kept in the loop. Prospects and customers can easily update their appointments by rescheduling or adding attendees and other information, and Scheduler will automatically keep all attendees and Salesforce up-to-date.

### Automatically schedule meetings with artificial intelligence

Leverage Salesforce Einstein to automatically generate a meeting with a prospect based on an assigned lead score. Meetings are scheduled, prospects are engaged and leads move quickly through the pipeline—much faster than with a traditional manual process.

### Include web conferencing details with ease

Scheduler integrates with leading web conferencing providers such as WebEx, GoToMeeting, Join.me and Zoom, so you can easily include conferencing details in your invitations. No more cutting and pasting links from your web conferencing system into the meeting invitation: Scheduler auto-generates a unique link for each meeting.

### Route inbound meetings to the right team member

Inbound meetings from your website, marketing campaigns, social media, and sales and customer service emails, are automatically routed to the most qualified available expert based on skill set, location, time and duration of the meeting, or any other criteria that you set—ensuring you match prospects and customers with the employee who can best meet their needs.

### Eliminate the risk of double bookings

Scheduler for Salesforce knows the unique availability of each person in your organization. Internal meetings, vacation times, and free time are instantly synced, ensuring the times you are offering to prospects and clients are truly available without the fear of double booking.

## A seamless, end-to-end customer experience built for Salesforce

TimeTrade understands Salesforce. Leveraging our years of Salesforce expertise, we enable your team to manage the entire customer engagement process directly within Salesforce, without having to manage different vendors, ecosystems or applications. The result is a smooth end-to-end experience—from point of deployment to scheduling and management all within Salesforce—which results in ongoing customer success.

- ✓ Complete integrated with Lightning, available in the AppExchange®, tested and approved by Salesforce.
- ✓ Fully compatible with Salesforce Shield, providing enhanced protection, monitoring, and retention of your critical data stored in Salesforce.
- ✓ Requires no development or deployment of IT resources. You can be up and running in minutes.
- ✓ Integrated with the end-to-end customer journey—no matter what Cloud you're on: Sales, Marketing, Service, Financial Services, or Community Cloud.