Mastering Buying Groups with LeanData

Accelerating Revenue Through Intelligent GTM Execution

Moving the Right Deals Forward *Faster*

Navigating the transition from lead-centric and ABM strategies to an opportunity-focused, go-to-market motion is admittedly no small task. Yet, the early results speak volumes, with adopters of a Buying Groups GTM motion reporting:

15% improvement in revenue

2X closed won rate

20% improvement in MQL to Opportunity conversion rate

10X increase in pipeline progression

LeanData's Buying Groups Blueprint lays the groundwork by helping you understand the structure of your Buying Groups while providing an economic rationale for a Buying Groups motion.

Then, Buying Groups Edition brings these insights into action within your CRM, creating a seamless, automated process to move deals forward, *faster*.

With LeanData, your Buying Groups GTM motion has the powerful execution engine it needs to drive results.

Ready to accelerate your revenue? 🚀

Here's how we make it happen.

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Executive Summary

Executive Summary

LeanData's Buying Groups solution offers a sophisticated go-to-market (GTM) approach that leverages data, automation, and strategic insights to operationalize Buying Groups in your CRM.

Buying Groups Blueprint initiates this transformation by providing an in-depth analysis of your past opportunities, surfacing Buying Group members beyond those explicitly added by sales reps, delivering a more complete view of the people engaged in your historic opportunities.

In addition, Blueprint assesses your organization's readiness to adopt a Buying Groups motion, providing insights that guide decisions on processes, data, and technology.

Once Blueprint lays the groundwork, Buying Groups Edition brings the plan to life in your CRM.

Edition keeps track of Buying Groups throughout their journey, using AI to assign roles, track engagement signals, and show a clear journey for each group member, allowing marketing and sales to work in sync.

The best part? **This powerful orchestration takes place right where sales operates—in Salesforce itself.** No need for external tools, just seamless, integrated workflows within the platform your team already knows and trusts.

With LeanData's tools and expertise, your team can adopt a Buying Groups strategy — driving faster, smarter, and scalable growth.
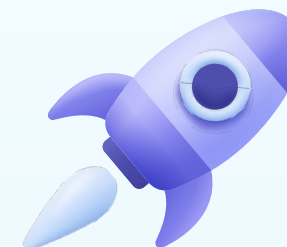
Economic Rationale

The best way to get executive stakeholders aligned on a Buying Groups GTM motion is to **provide a clear business case.** You've got to show the revenue impact these changes will bring to your organization.

Enter Buying Groups Blueprint.

Buying Groups Blueprint **uncovers and reports on the data** that justifies moving forward with a Buying Groups motion.

It looks at your historical data and determines what revenue outcomes would have happened differently if the signals had been applied to a Buying Groups motion.

Revenue Acceleration
Buying Groups Blueprint determines the revenue lost as a result of not implementing a Buying Groups approach. It also extrapolates what the win rate could be if opportunities contained complete Buying Groups.

Lead Inefficiency
Buying Groups Blueprint reveals if your organization is experiencing a common lead inefficiency known as "Second Lead Syndrome." For example, Buying Groups Blueprint will find leads not associated with an opportunity, but engaged with an account within 90 days of opportunity creation. Plus, it will identify which of these MQLs were Decision Makers or Executive Buyers.

Uncovered Revenue Insights
Buying Groups Blueprint shows where OCRs were associated with other opportunities. This information uncovers which contacts could have been added to make the deal better or a potential cross-sell/ upsell opportunity.

Deal Size
Buying Groups Blueprint will compare the average deal size of won opportunities versus lost opportunities and if the size of the Buying Group has any correlation.

Buying Groups Blueprint: Visibility into Past Opportunity Data

After analyzing historical data, Buying Groups Blueprint delivers new reports and dashboards in Salesforce showing the key information needed to support a Buying Groups GTM motion.

More Insight into Opportunities

Get visibility into win/loss data from historical opportunities. Armed with this data, you'll be able to establish a baseline of existing GTM efforts versus the potential revenue growth from a Buying Groups motion.
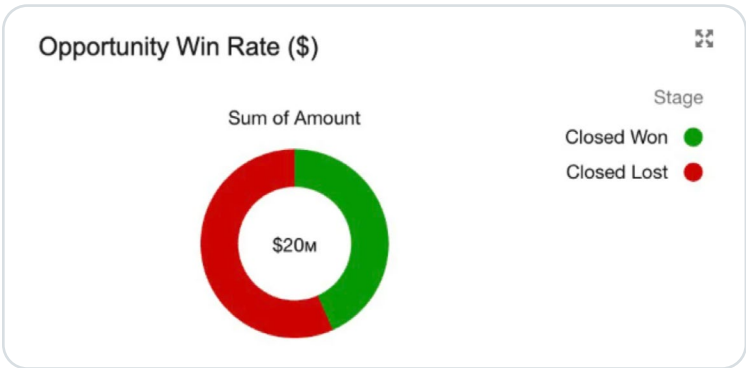
Determine Contact Influence

Pinpoint any gaps in your selling process by revealing win/loss rates for opportunities with key contact roles versus without.
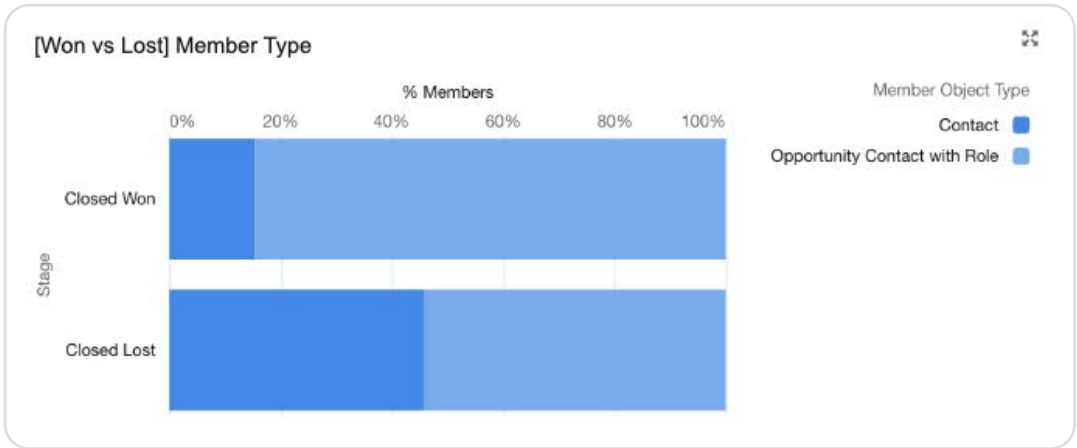
Buying Groups Blueprint: Visibility into Past Opportunity Data

Uncover Persona Trends

By leveraging AI, Buying Groups Blueprint clusters key job titles to uncover trends on critical personas in every opportunity. These insights identify persona influence on the outcome of your opportunities.

Understand Sales & Marketing Influence

Blueprint dives even deeper into opportunity data by revealing how different personas interact with sales and marketing touches. These insights into signals uncover gaps in your revenue funnel and help iterate on existing processes.

[Closed Won] Top Title Clusters

Title Bucket ↓	Record Count	% of Opportunities with Persona
Marketing	105	30.46%
Revenue Operations	494	28.16%
Sales Operations	213	20.69%
Marketing Operations	160	19.54%
Demand Generation	69	16.09%
Sales	37	14.94%
Sales/Market Dev Leadership	33	13.22%
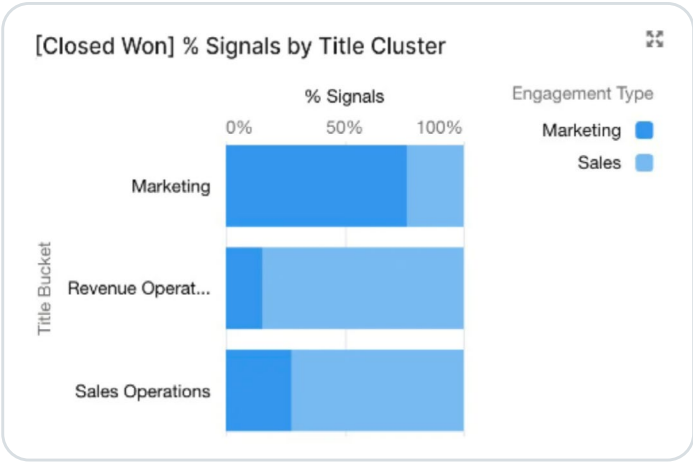
Track Pre-Opportunity Engagement

Blueprint identifies key campaign types that drive the most engagement prior to opportunity creation. This helps teams double down on campaigns that drive the most value.

Buying Groups Blueprint Scorecard

Upon completion of the analysis, Buying Groups Blueprint delivers a detailed scorecard showing the key metrics and insights your organization will leverage to refine and optimize your Buying Groups strategy.

Strategic Assessment		
Buying Group Structure	🟡	
Process Maturity	🔴	
Persona Development	🔴	
Organizational Buy-In	🟢	

System Assessment		
Data Hygiene	🔴	
Automation Complexities	🟡	
Tech Stack Readiness	🟢	

Economic Rationale		
Revenue Acceleration	🟢	
Uncovered Opportunities	🟡	

Processes, Data & Tech Stack Readiness

Adopting a Buying Groups motion requires a strategic look at your processes, data, and tech stack to determine your organization's readiness for moving to Buying Groups.

Specifically, Buying Groups Blueprint performs a strategic assessment and a systems assessment.

Strategic Assessment

In the strategic assessment, Blueprint identifies key personas, evaluates process maturity, and fosters organizational alignment to streamline implementation.

System Assessment

In the system assessment, Blueprint evaluates data hygiene, automation readiness, and tech stack completeness. It identifies any nuances caused by messy data, evaluates automation alignment in relation to business complexity, and verifies core technology capabilities like lead-to-contact conversion.

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# Operationalizing a Buying Groups Motion: Buying Groups Edition

Buying Groups Edition

Buying Groups Blueprint lays the groundwork and helps you understand the structure of your Buying Groups, providing the path forward for transforming your GTM operations. Once Blueprint has defined these foundational elements, **it passes the baton to Edition.**

Built on the foundation of LeanData's best-in-class matching and routing, Buying Groups Edition continuously populates Buying Groups, capturing buying signals and assigning members to roles even before an opportunity is created.

Buying Groups Edition introduces two powerful tools to operationalize a Buying Groups motion in your CRM.
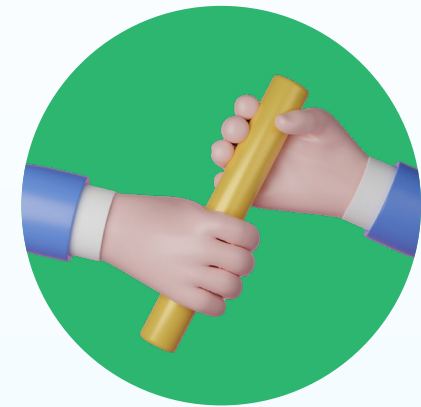
Buying Group Journey Object
Contains items to review such as verifying new Buying Group members, members confirmed by users, and signals occurring across all members.

Buying Groups Visualizer
A visual tool that manages Buying Group Journeys by tracking Buying Group members (both identified and missing) by name, job title, contact role, and engagement signals.

Buying Group Journey Object

Buying Group Journey is **a custom Salesforce object**, similar to an opportunity object, designed to **provide visibility into all buyers involved in the decision-making process.**

It serves as a systematic solution for aligning marketing and sales efforts around complex Buying Groups, ensuring no key decision-maker is overlooked and driving more efficient, streamlined sales cycles.

Key functions of the Buying Group Journey object include:

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INSIGHT INTO BUYER ROLES

Leveraging insights from Buying Groups Blueprint as well as AI buyer-persona technology, Buying Group Journey groups job titles to help understand what persona a lead or contact may fall under. This helps sales and marketing teams understand who plays what part in the buying decision.

PRE-OPPORTUNITY GROUPING

Buying Group Journey allows marketing teams to **group potential buyers from an account into a pre-opportunity state** before an official sales opportunity is created. This ensures marketing can continue to nurture contacts without disrupting the sales process.

Plus, Buying Group Journey not only groups existing buying signals and members, but will continuously track new buying signals and new members, from the very first buying signal revealed by a lead or contact.

Other key functions of the Buying Group Journey Object:

SEAMLESS HANDOFF TO SALES

Once the Buying Group reaches a customizable, predefined threshold, Buying Group Journey will route to a SDR/BDR or sales rep of your choosing, where they will confirm any automatically identified members.

Further, Edition allows users to create an opportunity based on a Buying Group Journey. Confirmed members of the Buying Group will be mapped to contact roles on the opportunity.
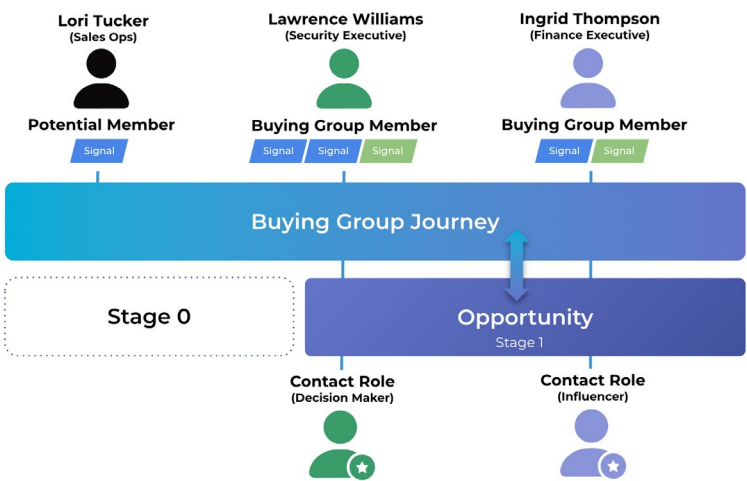

MANAGING GAPS IN BUYING GROUPS

Buying Group Journey continuously **monitors the Buying Group and identifies gaps**, such as missing decision-makers. This allows both marketing and sales to fill these gaps with new contacts or by nurturing existing leads.

PARALLEL MARKETING & SALES EFFORTS

Even after the opportunity is open, Buying Group Journey continues to function, **allowing marketing to engage** with any missing or unresponsive decision-makers. This prevents any interference from marketing while the **sales team focuses on advancing the deal.**
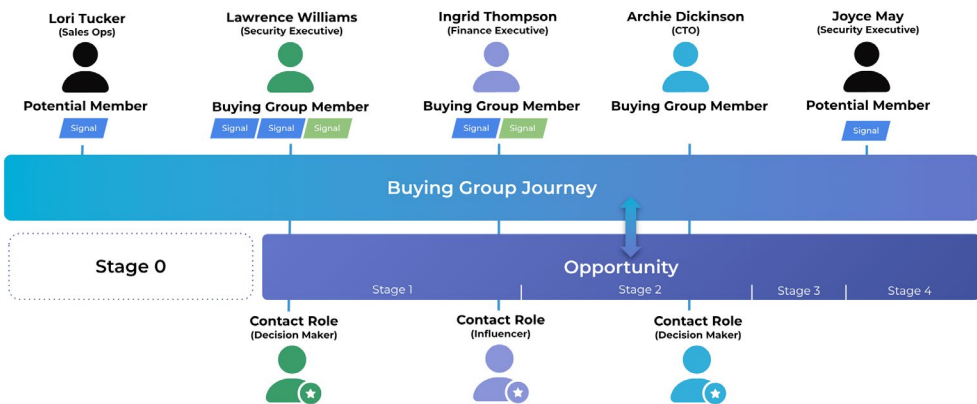
Buying Group Journey Visualizer

The Buying Group Journey Visualizer is a companion to the Buying Group Journey, providing marketing and sales key insights into the Buying Group, pre-opportunity to close.

Buying Group Visualizer Elements:

Feed	Contains items to review such as verifying new Buying Group members, members confirmed by users, and signals occurring across all members.
Journey Tracker	A visual flowchart which summarizes which key Buying Group roles are participating and influencing deals.
Buying Group Members	View the names, job titles, roles, and signal scores for each member of the Buying Group. The list also identifies which key members of the Buying Group are missing.
Potential Members	View members automatically identified as relevant to the Buying Group. Once confirmed, the members are moved into the Buying Group members tab for further tracking.

PART 04

Your Execution Engine for a Buying Groups Motion
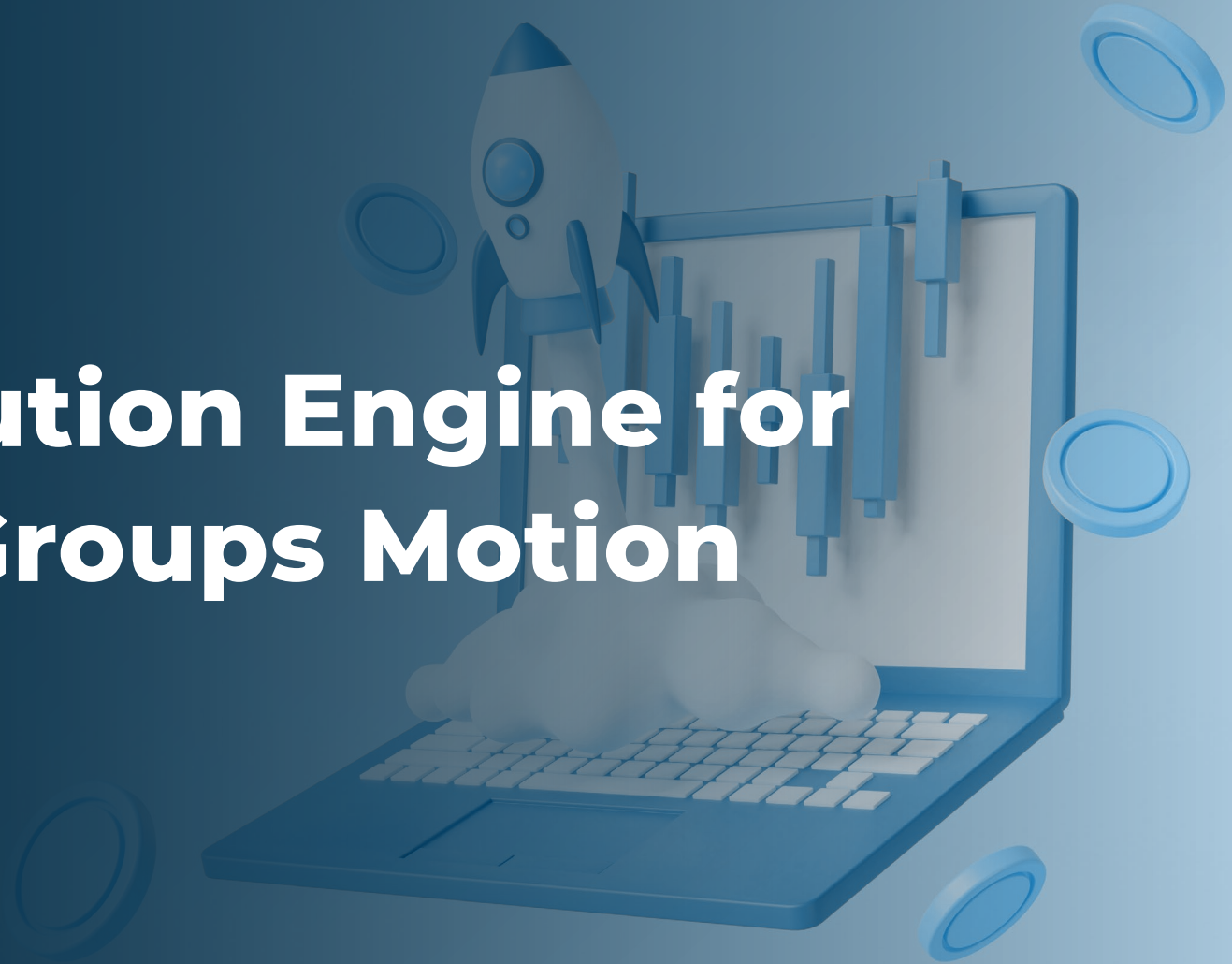
Your Execution Engine for a Buying Groups Motion

Some of the greatest innovations come from real pain.

And that's exactly how Lean Data's **Buying Groups product suite** came to life — born from teams working at cross purposes, revenue down, trying to do more with less.

Specifically, traditional lead-centric and ABM models were falling short when engaging with buying committees, where multiple stakeholders joined the sales process at different stages.

And while selling to Buying Groups isn't new, the data, systems and processes to support this go-to-market strategy did not exist until now:

Buying Groups Blueprint and Edition.

Built with the power and flexibility of LeanData Revenue Orchestration, these tools are the **execution engine for a Buying Groups GTM motion.**

Reach out to LeanData today to get started on your Buying Groups transformation.

Get in Touch

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Appendix

Key Questions To Answer Before Deploying Buying Groups

Key Questions	Operational Detail
How will you structure your Buying Groups?	• What historical data can you analyze for insights? • Who is in your Buying Group? • Who engages and when?
How will you align teams to your process?	• When do you convert a Lead to a Contact? • When do you auto-create an Opportunity? • When do you automatically add someone with OCR?
How will you connect all the Buying Group data?	• How do you manage duplicates? • How do you track a journey object from pre-Opportunity to close? • How do you attach all marketing and sales events to individual OCR?
How do you ensure you're executing on your process?	• What happens if someone is a "potential member"? • How do you expose these to your sales teams? • Pre-Opportunity, how do you enable marketers to drive engagement?
How do you prove your strategy is working?	• How do you track which sales or marketing touchpoints are influential? • How do you analyze win and loss rate based on Buying Group completeness?

CRM

salesforce · HubSpot · Microsoft Dynamics 365

MARKETING ACTIVATION

Intent Data Providers
6sense · DEMANDBASE · FOUNDRY (Formerly IDG Communications)
INFLU2 · terminus · N.Rich

Personalization
Intellimize · TOFU · Optimizely
Mutiny · QUALIFIED

Chat & AI
DRIFT · HubSpot · #Warmly,
QUALIFIED · INTERCOM

Digital Ad Campaign Management
AdRoll · bloomreach
RollWorks · StackAdapt

Advertising Networks
AdRoll · Google
LinkedIn · Meta · mediaocean

SALES ACTIVATION

Sales Engagement Tools
Apollo.io · groove · GONG · LinkedIn SALES NAVIGATOR
salesforce sales engagement · HubSpot Sales Hub · Salesloft · Outreach

Meeting Scheduling Tools
BookIt · HubSpot · salesforce
Calendly

Sales Collaboration
LeanData · Rattle · salesforce
slack

REPORTING & ANALYTICS

Engagement	Buying Groups
Heap · GONG · Gainsight	LeanData

Attribution	Sales Forecasting
factors.ai · FUNNEL · HockeyStack · Dreamdata	Clari · DOMO

Data Analytics & Visualization
Looker · Power BI · snowflake · tableau

Data Enrichment & Prospecting
Apollo.io · 6sense · clay · Clearbit
cognism · LinkedIn SALES NAVIGATOR · leadiQ · dun&bradstreet
Leadspace · informa techtarget · DEMANDBASE
zoominfo · Lusha

ORCHESTRATION
LeanData

ABM Platforms
G2 · 6sense
DEMANDBASE
zoominfo

Data Automation
Clari
Nektar
people.ai

Marketing Automation Platform
Marketo An Adobe Company
eloqua · HubSpot
salesforce pardot · salesforce marketing cloud

LeanData

Buying Groups Tech Map

About LeanData

The Buying Groups Adoption Journey

The Buying Groups Adoption Journey

EBOOK

The Buying Groups Resource Center

The Buying Groups Resource Center

WEBSITE

Buying Groups Demo Video

Buying Groups Demo Video

VIDEO

Get Started Today

Visit **LeanData.com** to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Buying Groups, or visit us on **AppExchange**.

Request Demo

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 RevTech stack. The LeanData Revenue Orchestration Platform, powered by No-Code Automation, simplifies and accelerates coordination of all the plays, people and processes needed to transform buying 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. Join the movement!