

Buying Groups 101

What is a Buying Group?

A committee comprising individuals involved in an organization's decision-making process.

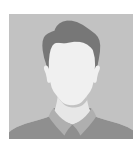
Common Roles on a B2B Buying Committee



Initiator: Identifies the need or opportunity the purchase could address.



Decision Maker: Authorized to say yes or no to the purchase.



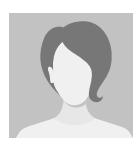
Champion: Internal advocate pushing the decision forward and rallying stakeholder support.



Influencer: Shares expertise and advice based on subject knowledge or authority.



Gatekeeper: Controls the flow of information and access to other buying committee members.



Financial Approver: Approves the financial purchase, including the budgetary allocation.



User: Directly and regularly interacts with the product or service.



Buyer: Negotiates terms, and manages contracts and compliance.



Sniper: Has power to veto the purchase and kill the deal.

Why Buying Groups Matter

"On average, 13 people within an organization are involved in a buying decision, and 89% of purchases in our survey involved two or more departments."

- Forrester, The State of Business Buying 2024

"The only real path from go-to-market bloat to business efficiency is to know your market, your landscape, and buying group thoroughly. For marketing to drive an organization's position in their market, marketers must weave together disparate intent signals, truly own pipeline orchestration, and partner with sales for opportunity-based selling."

- Maura Ginty, Fractional CMO, State of GTM Efficiency Report

Buying Groups Motion Defined

A B2B sales approach where marketing and sales collaboratively engage all buying committee members as a single Opportunity aligned to a specific solution.

Benefits of a Buying Groups Motion

Aligning marketing and sales around purchase-ready groups, streamlining the buyer journey, and uncovering both new and expansion opportunities drives:

- Higher conversions
- Greater efficiency
- Higher revenue

Delivering a verified buying group to sales results in a 20% to 50% improvement in conversion rates

- Forrester

5% to 15% increase in hidden Opportunities as a result of an Opportunity-based Buying Groups motion.

10% to 20% increase in new Opportunities as a result of better prioritization and qualification of buying groups.

Forrester 2024 B2B Summit – Embracing The Business Value Of Buying Groups

How to Adopt a Buying Groups Motion

Align around 5 building blocks:

- Who is in the buying group?
- What solution are they looking for?
- What are the key roles and buying drivers?
- How can we connect these people and qualify them?
- How can we orchestrate the go-to-market motion?

The Revenue Impact of Buying Groups

In a Forrester webinar, LeanData customer Reltio reported powerful results after shifting to a buying group strategy:

- 20% growth in actionable sales pipeline
- 24% faster Opportunity progression compared to previous year
- 50% reduction in Closed-Lost Opportunities
- 20% year-over-year increase in pipeline

"Looking to the future of go-to-market strategies, I see more and more sellers moving away from lead-centric processes toward a Buying Group motion based in Opportunities. This shift will impact the revenue tech stack, requiring systems to work together seamlessly to support the buyer journey from end to end."

- Evan Liang, CEO and Co Founder, LeanData

Problems With a Lead-Centric Playbook

6 Reasons MQLs Don't Work for Buying Groups

- Lack of Insight:** Lead-based models miss the full buying committee, leaving sellers blind to key signals and influence.
- Poor Buying Experience:** Treating buyers as isolated Leads creates confusion, misaligned messaging, and inconsistent engagement.
- Waste of Marketing Investment:** Misidentifying or poorly targeting buyers results in lost resources and missed opportunities.
- Leaky Sales Funnel:** Premature or delayed handoffs and missed signals cause deals to stall or fall through.
- Longer Sales Cycle:** Limited visibility forces sales to fill in the gaps, delaying decisions and dragging out deals.
- Low Conversion Rates:** Single-contact Opportunities convert poorly, leading to lost revenue and slower growth.

"30% of a pipeline goal is often achieved even though companies meet 100% of their MQL goal."

- Madkudu

"The fundamental problem with the MQL approach is that it ends up treating marketing too much like a gumball machine. We've trained executives to think they can put money into marketing and get MQLs out. Marketing doesn't work that way."

- Jon Miller

100 MQLs yield approximately 13 SQLs.

- ClickUp

50% of companies report that the definition of an MQL is susceptible to change from quarter to quarter.

- Databox

The Power of Buying Group Signals

- Multiple contacts signal stronger intent:** Engagement from multiple people at the same company is a more reliable buying indicator than a high lead score from one person.
- MQLs ignore key signals:** A rigid MQL-focused approach overlooks critical buying signals from multiple stakeholders within an account.
- Every action generates a signal:** Every interaction from a buying group member, whether known or anonymous, provides valuable insight into their interest and intent.
- Listening to signals is key:** Track these signals, understand their context, and connect them to the right opportunity.

Getting Started With Buying Groups

4 Steps to a Buying Groups Motion

- Align:** Secure cross-functional buy-in, align your data strategy, and analyze past deals to define your ideal buying group.
- Build:** Set up systems and processes to capture buying signals and structure Opportunities around buying groups.
- Orchestrate:** Coordinate marketing, sales, and BDRs/SDRs to engage each buying group member with tailored outreach.
- Measure:** Track performance, build dashboards, and assess impact to refine and scale buying group strategy.

Form an Economic Rationale

- Investigate Revenue Acceleration:** Estimate lost revenue and potential win rates by modeling fully formed buying groups.
- Reveal Lead Inefficiencies:** Identify missed engagement opportunities, including unlinked leads and "Second Lead Syndrome."
- Uncover Revenue Insights:** Highlight overlooked contacts that could have improved deals or driven cross-sell/upsell.
- Compare Deal Sizes:** Analyze whether larger buying groups correlate with bigger, more successful deals.

Gain Visibility into Past Opportunity Data

- More Insight into Opportunities:** Analyze win/loss data to benchmark GTM efforts and uncover revenue potential with Buying Groups.
- Determine Contact Influence:** Spot gaps in your selling process by seeing how key roles impact win rates.
- Uncover Persona Trends:** Use AI to reveal which personas influence opportunity outcomes.
- Understand Sales & Marketing Influence:** Understand how different personas respond to sales and marketing to uncover revenue funnel gaps and optimize engagement.
- Track Pre-Opportunity Engagement:** Identify the campaigns that drive the most value before Opportunities are created.

Adopt the Crawl, Walk, Run Approach

- Audit current systems.** Where are gaps in matching, scoring, or routing buying group data?
- Reframe success.** Move from lead-centric metrics to buying group coverage and engagement scores.
- Invest in orchestration.** Choose platforms that help unify, score, and act on buying group signals.
- Educate teams.** Help sellers and marketers see the big picture about relationships vs. leads.

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 an Opportunity Contact Role?

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 OCRs?

How do you ensure you're executing on your process?

- What happens if someone is a "potential member"?
- How do you expose these potential members 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 rates based on buying group completeness?

Signs You're Ready for a Buying Groups Motion

Revenue Process

- Most Opportunities are Closed-Lost or recycled.
- Lead-to-Opportunity conversion is low.
- Opportunities have just 1-2 Contacts, though buying committees are larger.
- Sales lacks visibility into full buying committee activity.
- SDRs, BDRs, and marketing chase high Lead volumes that rarely convert.

Marketing & Sales Processes

- Marketing runs persona-based campaigns.
- Marketing and sales adapt and respond based on buying group member engagement.
- Sales programs follow a consistent process to define and update Opportunity stages.
- Marketing and sales together plan typical Opportunity volume by account or segment.

Buyer Journey

- You sell multiple products or solutions to different buyer groups.
- Purchases require input from multiple stakeholders.
- Your buyers research and compare options before deciding.
- Buying committee members for your products typically include users, decision makers, gatekeepers, champions, financial approvers, and other influencers.

Seller Characteristics

- Your product is a high-consideration, direct purchase; not self-serve or ecommerce.
- SDRs or BDRs qualify Leads for marketing and/or sales.

The Buying Groups Motion Tech Stack

6 Primary Functions of a B2B Buying Groups Tech Tool

- Identify buying group members and assign committee roles
- Manage end-to-end buying groups buying journey
- Gauge engagement and influence of each member
- Pinpoint tactics or stakeholders that influenced past deals
- Engage members to advance the deal
- Define and track ROI of the Buying Groups motion

5 Core Components of a Buying Groups Tech Stack

- Data Automation:** Captures data from email, calendar, and CRM to track stakeholder activity across buying groups.
- Data Enrichment & Prospecting:** Improves account/contact data, maps buying groups, and captures intent signals to prioritize outreach.
- Marketing Automation Platform:** Automates personalized campaigns by role, syncing stakeholder engagement data with your CRM.
- Account-Based Marketing Platforms:** Targets and measures engagement across accounts with multiple stakeholders using intent and scoring.
- Orchestration:** Aligns sales and marketing with lead-to-account matching, routing, and buying group management, including:
 - Buying group recognition and routing
 - Opportunity management
 - Lead-to-Contact conversion
 - Lead, Contact & Account distribution
 - Contact-to-Opportunity automation

Marketing Activation Tool



Intent Data: Identify in-market accounts and prioritize active stakeholders.



Personalization: Tailor content and experiences to each stakeholder's role, updating messaging across the journey.

Sales Activation Tool



Sales Engagement Tools: Automate and track outreach to engage multiple stakeholders efficiently.



Meeting Scheduling Tools: Simplify scheduling by letting buying group members book their own meetings.

Reporting & Analytics

- Engagement:** Track buying group interactions across digital channels to reveal patterns that influence decisions.
- Attribution:** Unify data from multiple channels to analyze and predict buying behavior and optimize resources.
- Buying Groups:** Define and visualize the buying group journey, from pre-Opportunity to Closed Won/Lost. Assess revenue attribution for each member, identify gaps in the buying committee, and track engagement to measure Opportunity health. Gain insights into which marketing and sales efforts are driving results.

How Automation Enhances Buying Group Impact & Efficiency

- Lead and Contact Matching:** Automatically associates leads with the right contacts and open Opportunities.
- Opportunity Expansion:** Identifies missing decision-makers and adds them to the open Opportunities.
- Intent-Based Prioritization:** Uses AI and intent data to detect which stakeholders are actively engaging.
- Reporting & Dashboards:** Provides real-time visibility into buying group completeness and pipeline impact.

7 Buying Group Essentials



Identify initial buying groups criteria based on scoring and/or signals.



Create buying groups journeys for target accounts by establishing a custom object to track the entire process.



Map member engagement across the buying journey from pre-opportunity to sales close.



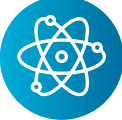
Activate SDRs & marketing to build and qualify complete buying groups.



Alert sales to which buying group roles are engaged and which are missing in key deals.



Enable marketing to focus on programs that mature opportunities and complete buying groups.



Synthesize sales and marketing signals to drive improvements in deal conversion and overall GTM strategy.

3 Musts for a Tech Stack Supporting Buying Groups

- Unifying Data Across Roles, Accounts, and Systems:** To work buying groups, you need a unified view across leads, contacts, and accounts. This requires advanced data matching beyond standard CRM capabilities.
- Smart Scoring That Reflects Group Behavior:** Traditional lead scoring falls short. Modern teams score individuals and the full group using blended data signals to prioritize key roles and guide strategic response.
- Orchestration That Goes Beyond Handoffs:** Your tech should drive action: routing contacts, triggering personalized campaigns, and alerting sellers. Orchestration must be always on, adjust in real time to buying group engagement, and span both sales and marketing.

Change Management in a Buying Groups Motion

Key Changes in BDR Tasks

- From Individual Leads to Buying Committees:** BDRs identify groups of decision-makers, not just single leads.
- New Focus on Personas:** BDRs use shared persona data from marketing and sales to target the right stakeholders.
- Continuous Feedback Loop:** BDRs continually add missing personas, with input from AEs on deal influencers. Marketing refines messaging based on BDR and AE insights.

BDR Mindset Shift

BDRs may struggle moving from lead-based models to buying groups without understanding it's a company-wide GTM strategy.

Clear communication on the "why" helps drive adoption.

As Natalia Kochem of OpFocus says:

"This is how we win as a company. We all succeed together when we engage the right people."

Changes to Compensation

BDR comp plans must evolve beyond single-lead meetings to reflect buying group responsibilities.

Successful models reward meetings with key personas or tie comp to Closed-Won deals.

Employee reactions to comp changes vary, so minimize backlash with:

- Clear, honest communication
- A transition period
- Impact analysis
- Involving them in discussions

Overcoming Resistance

Terry Flaherty of Forrester says culture is the top reason companies resist adopting a buying groups motion.

Marketing Concerns: Shifting from lead-based metrics to buying groups means redefining success and possibly changing comp plans.

Sales Concerns: Sales leaders may resist marketing's involvement in Opportunities, but both marketing and sales need to add contacts to the buying group even after the Opportunity is created.

IT Concerns: Lead-centric systems may need customization, integration, or new tools to support a buying group motion.

Metrics of a Buying Groups Motion

The Metrics that Actually Matter

- Buying Group Completeness Score:** % of required personas identified, answering "Did we engage everyone we need to?"
- MQL to Opportunity Conversion Rate:** How well marketing converts leads into sales opportunities.
- Buying Group Influence Pipeline:** How many pipeline opportunities include a complete buying group, avoiding single-threaded deals.
- Average Deal Size Growth:** Do buying groups result in larger deals?
- Sales Cycles Acceleration:** Deal velocity for buying group-driven vs. lead-based deals.

"We're not saying forget about the MQL. We're saying look beyond it. Opportunity-based buying groups are the next ABM. It's opportunity-based marketing."

- Jeremy Schwartz, Sr. Manager Global Lead Management & Strategy, Palo Alto Networks

Measuring the Impact and ROI of Deploying a Buying Groups Motion



To understand the full impact of a buying group strategy, compare performance with previous methods and assess the ROI.

- BDR activity impact:** Productivity improvements from automation, like lead-to-contact creation and meeting scheduling.
- Number of opportunities created:** Opportunities with multiple stakeholders, which typically lead to higher win rates and deal size.
- Opportunities influenced by BDRs:** Opportunities created or expanded through buying group identification.

LeanData Tools for Buying Groups

Buying Groups Blueprint

Helps analyze sales patterns to identify buying group members and roles, creating a data-driven foundation for buying groups.

- Business Case Development:** Uses historical data to establish ROI and success metrics.
- Buying Group Intelligence:** Analyzes CRM data to uncover Opportunity trends, evaluate marketing signals, and map actions to buying group personas.
- Strategy Development:** Identifies key buyers, builds persona-based sales influence models, and uncovers buying committee patterns across Opportunities.

Buying Groups Edition

Automates and scales the Opportunity-centric motion directly within your CRM.

- Member Targeting:** Identifies buying group members by role and influence, then uses AI to update groups and streamline handoffs from marketing to sales.
- Signal Tracking:** Visualizes the buyer journey and evaluates intent signals to spot missing members so teams can re-engage them with targeted tactics.
- Conversion Optimization:** Gives reps a real-time view of all interactions across personas, helping build stronger relationships and win deals faster.

Buying Groups Salesforce Journey Object

Gives clear view of all deal influencers. Tracks roles, supports pre-opportunity engagement, routes qualified groups to sales, and identifies role gaps (even after the deal opens) to help marketing and sales align and close more deals.