

# LeanData

## THE AUTHORITATIVE GUIDE TO BUYING GROUPS

ALL YOUR QUESTIONS ABOUT AN OPPORTUNITY-FOCUSED MOTION, ANSWERED

# INTRODUCTION

Goldilocks obviously wasn't working in the SaaS industry when she entered the Three Bears' cottage.

Yet B2B go-to-market motions in today's large enterprise organizations are experiencing a familiar Goldilocks pattern.

**Leads are too small of a target.** In the rise of marketing automation, MQLs ruled the world, but for many, leads are simply too small a target.

**Accounts are too big a target.** An account is not your buyer. There are groups of buyers within an account with many potential opportunities.

**The opportunity motion, centered in buying groups, is just right.** Today, pipeline grows faster and more efficiently when marketers and sellers adopt an opportunity-focused model centered around buying groups.

For many enterprise organizations, the B2B buyer is in actuality a buying group

composed of multiple players, a scenario that renders the traditional MQL model less effective.

However, changing sales and marketing culture, and adjusting systems, processes and employees to transition from leads to buying groups may seem like climbing Mount Everest.

Most B2B sellers' revenue engines are set up to identify, nurture, and sell to leads. They're not engineered to identify buying groups and focus on opportunities, not to mention nurture the buying group successfully from inquiry to close.

Nevertheless, there's hope. Things often seem impossible, until they're done.

After supporting several LeanData customers through their shift from MQLs to buying groups and an opportunity-based motion, we can say with confidence:

Transitioning to buying groups always delivers multiple positive outcomes: **a better buying experience, greater marketing and sales efficiency, and increased revenue growth.**

This guide will help you understand why and how organizations are transitioning to the Buying Groups Motion, the impact of this shift, and demonstrate how LeanData can help.

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# EXECUTIVE SUMMARY

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The old revenue processes of qualifying individual leads or targeting large accounts are no longer effective. The primary reason is, for many organizations, the B2B buyer is not one person, but a buying group composed of multiple players.

Applying lead-centric or legacy ABM processes to members of a buying group results in a longer sales cycle, a poor buying experience, lead leakage, and a waste of marketing investment.



The better solution is a Buying Groups Motion where revenue teams focus on identifying, qualifying and moving opportunities through the sales cycle. A Buying Groups Motion meets buyers with the right message, acting as an ally the moment they're ready to take action.

**By shifting to a Buying Groups Motion, sellers will experience several revenue-impacting benefits:**

- Efficiency in marketing and sales processes
- An improved, contextual response to buyer signals
- Increased velocity of the sales cycle
- The delivery of new opportunities that were previously ignored
- Better sales and marketing alignment

Say goodbye to an obsolete process that's leveraging concepts and technology based on a 25-year-old buying journey. By implementing a Buying Groups Motion, sellers will increase revenue through efficiency — working smarter, not harder.

## PART 01

# A NEED FOR CHANGE

# THE OLD MODELS ARE BREAKING DOWN

## IT'S AN AGE-OLD PROBLEM:

The marketing team is high-fiving each other over all the leads pouring into the pipeline, while the sales team is complaining about lousy leads.

The problem usually starts when marketing passes leads to sales too early in the buying cycle. Then, as leads are thrown over the proverbial fence, it's a jump ball as to who's going to nurture the account. Is sales responsible for connecting the dots? Is marketing supposed to be performing outreach on other buyers at the account?

More and more sales and marketing teams are noticing that the old go-to-market processes are breaking down.

## HERE ARE THE TELL-TALE SIGNS:

- » The majority of opportunities are either Closed-Lost or recycled
- » Lead-to-Opportunity conversion rates are low, wasting resources and spending
- » Opportunities have only one contact when there are obviously more people on the buying team
- » The sales team has no visibility into the interactions of the full buying team
- » SDR, BDR, and marketing teams are chasing after high lead volumes that don't convert down the funnel

Companies who achieve 100% of their MQL goal, often only achieve around 30% of their pipeline goal.

**- Madkudu**

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

**- Databox**

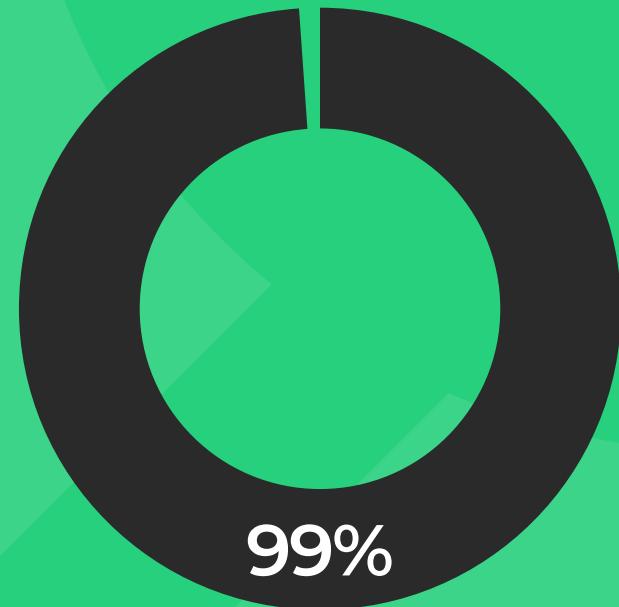
For every 100 MQLs, each marketing campaign should yield at least 13 successful SQLs.

**- ClickUp**

Companies are stuck on a hamster wheel of MQLs that don't convert and don't result in revenue. And, it doesn't seem to matter what version of a lead or account-centric model you try: demand gen, lead gen, ABM or ABX, **they're all failing to deliver an efficient, effective revenue process.**

“A lead-centric process has a  
**99%**  
failure rate, from inquiry to close.”

**– Forrester**



# SIX PROBLEMS WITH MQLS

Another problem with these old, broken-down GTM models is their attachment to their favorite KPI: the marketing qualified lead (MQL). As previously described, the shift from one buyer to a buying group has rendered MQLs less effective.

When an organization treats members of a buying group as individual leads or contacts, and focuses their efforts on qualifying individual buyers, several problems often occur:

1

## Lack of Insight

Focusing on leads under-estimates all the personas on the full buying committee. Essential context about the group making the buying decision, including relevant buying signals, is missing.

2

## Poor Buying Experience

Treating members of a buying group as individual leads often creates a poor buying experience. Traditional marketing automation may assign leads from the same company to different sellers, creating multiple MQLs rather than connecting them to a buying group.

3

## Waste of Marketing Investment

Treating buying groups as MQLs leads to wasted marketing investment and missed opportunities. Without a clear understanding of who to engage with and what product to promote, sellers may spread their efforts too thin or target the wrong individuals entirely.

4

## Leak Leakage

Under the MQL model, if a lead is handed off too early, it may potentially sit untouched and go stale. If a lead is handed off too late, a competitor may come in and steal the sale. These process breakdowns create leaks in the sales funnel, and cause sellers to lose track of key members of a buying group.

5

## Longer Sales Cycle

Relying on one or two leads or contacts to disperse data to the entire group causes misinformation and long delays. Plus, when the revenue process from marketing to SDRs/BDRs to sales only fits one contact, sales is now tasked with the work to research the buying group.

6

## Low Conversion Rates

When sales reps accept opportunities with only one contact in the pipeline, deals have a lower conversion rate. Further, focusing on individual leads puts BDR and marketing teams on a hamster wheel, chasing after ever-higher lead volumes which do not convert down the funnel.

# THE ROLE OF BUYING SIGNALS IN THE MODERN REVENUE PROCESS

Another reason that old go-to-market models are breaking down involves the new buyer journey. The modern B2B buyer wants to remain anonymous as long as they can, navigating as much ungated content as they can, before speaking to a seller.

That's how buyers want to buy.

And here's the most important change: for high-consideration products, **the new B2B buyer is not an individual, but a group of individuals, working together on a buying committee, making a collective decision to buy.** This makes the anonymous buying journey even more challenging for sellers who are trying to track buying signals.

When leads are the focus of systems and processes, the sales team doesn't have a holistic view of the signals of the whole buying team. **Intent signals may be firing on an account, but large accounts often contain multiple account hierarchies.** Not to mention, consolidating all the engagement signals of individuals at an account level is logically complicated.

Conventional wisdom believed the buying committee was around six people. In reality, buying committees are 10, 12, 14 people or more.

– Forbes

The average number of people involved in the purchasing process inside the company is 13.  
– The State of Business Buying, Forrester

**“MQLs ignore the signals  
that matter.”**

**– Forrester**

# THE ROLE OF BUYING SIGNALS IN THE MODERN REVENUE PROCESS (CONTINUED)

In order to create a level of prioritization, some companies use lead scoring to qualify buyers. However, scoring the activities of an individual lead doesn't accurately reflect engagement of the buying group. Not to mention, not all members of the buying group will send enough signals to reach a company's scoring threshold.

To make matters worse, signal management becomes impossible for members of a buying team who don't engage with the seller at all. For example, there are buying team members, strong influencers such as IT professionals, who rarely if ever show their faces during the customer journey.

**Modernizing today's broken revenue processes requires a new approach to engaging with buyers. Sellers must track signals from the entire buying group and respond to buying group members with the appropriate context.**

**Simple lead and account scoring models can't do that.**



# GETTING IT JUST RIGHT

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The well-known tale of Goldilocks and the Three Bears uncovers the solution to today's failing GTM motions.

## TOO SMALL: THE LEAD-CENTRIC, VOLUME MODEL

In the lead-centric model, organizations typically segment their target market into different types of companies and engage with individual leads. This motion relies heavily on lead engagement and lead scoring.

As mentioned previously, this model ultimately falls apart as companies get stuck on a hamster wheel of MQLs that don't convert and don't result in revenue. The lead object is too narrow of a target.

**Lead-based marketing is too narrow. Accounts are too broad. Buying groups are just right.**

**– Jon Miller**  
**MarTech Entrepreneur**

# GETTING IT JUST RIGHT (CONTINUED)

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## TOO BIG: ACCOUNT-BASED MARKETING (ABM) MODEL

In the ABM model, organizations create an ideal customer profile (ICP), find companies that match that ICP, and engage with people at those accounts. Similar to the lead-centric model, this motion relies on account scoring and account engagement.

The problem with ABM is that the account target is too big. An account is not your buyer. Accounts are made up of groups of buyers with many potential opportunities.

Treating every group at an account as if they worked in the same department seeking the same solution creates false assumptions. In reality, you may sell different products to the same departments, the same product to different departments, or some combination of both.

Other common failures of ABM include a constantly shifting list of target accounts, outdated lists, and misalignment between sales and marketing activities. Like the lead-centric model, ABM is yet another misaligned, high-spend, low-conversion strategy.

## JUST RIGHT: THE BUYING GROUPS MODEL

The Buying Groups Motion doesn't completely replace the lead-centric or ABM models. Rather, it extends those motions, like a logical next step.

A Buying Groups Motion recognizes that today's B2B buyer is a group of individuals, each performing a specific role on the buying committee. In a Buying Groups Motion, marketing teams focus on identifying members of the buying committee and engaging with all of them.

Then, as marketing creates and qualifies a buying group, they are placed into an opportunity and sent to the sales team. An opportunity-based motion satisfies the demands of multiple contacts while also allowing for multiple opportunities from the same account. Plus, in this model, marketing and sales work collaboratively, coming out of their silos, and aligning around the same goal.

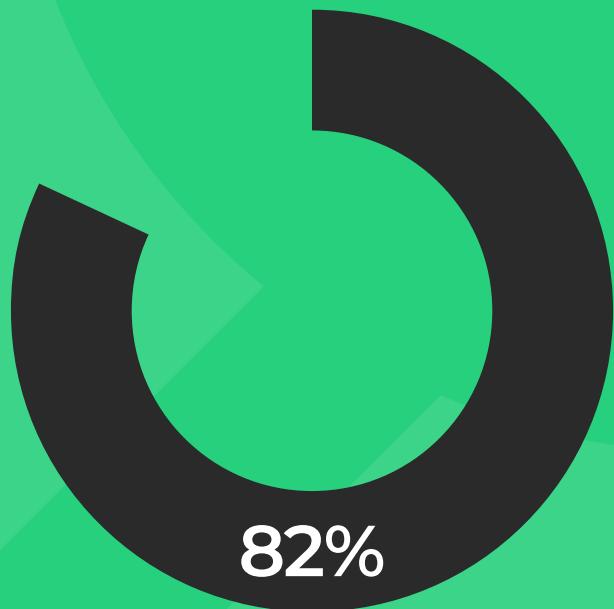
**It's time for a major shift where interactions with multiple buying team members and higher-quality opportunities become the gold standard in go-to-market motions.**

**It begins by focusing on buying groups.**

**“ 82%**  
of buying decisions are  
made by a buying group”

– Forrester

Say Goodbye to MQLs



## PART 02

# THE NEW WAVE

# BUYING GROUPS: THE NEW GTM MOTION

In a Buying Groups Motion, the basic buying journey doesn't change. However, the tasks are tackled by a wide range of players, not a single individual.

## AN ORGANIZATION:

- » Identifies a problem (Awareness)
- » Investigates solutions to solve the problem (Consideration)
- » Makes a decision on the final resolution (Decision)

## ALIGNMENT ON THE OPPORTUNITY OBJECT

On the seller's side, a Buying Groups Motion is a natural extension of lead-centric and ABM models. However, a Buying Groups Motion is aligned around opportunities. The opportunity object is like a container tied to a solution that has the ability to hold multiple contacts from a buying group. The opportunity object not only reflects how sellers think, it matches how buyers buy.



# BUYING GROUPS: THE NEW GTM MOTION (CONTINUED)

## FUNDAMENTAL BUILDING BLOCKS OF A BUYING GROUPS MOTION

There are five fundamental building blocks marketing and sales teams need to consider in a Buying Groups Motion:

**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?**

On a tactical level, a Buying Groups Motion is played out in **three basic stages**:

- » Stage one involves the detection of buying group members.
- » Stage two focuses on building and qualifying the buying group.
- » Stage three assigns the buying group as a qualified opportunity to the sales team.

## ORGANIZATIONS BEST SUITED FOR A BUYING GROUPS MOTION

The two primary characteristics of companies who will benefit from a Buying Groups Motion are fairly straightforward:

### #1 Multiple People Involved in the Buying Process

The organization is selling to a buying committee. The product or service being sold requires input from multiple individuals and stakeholders in order to make a purchase decision.

### #2 High Consideration Direct Purchase

The product being sold is a high consideration, direct purchase. This means the buyers will spend time and energy researching the product and will carefully weigh their options before making a decision. In addition, the product is typically sold directly from the seller. The buying process is not an ecommerce, self-driven purchase.

**“The best buying signal you will ever get is the presence of multiple individuals from the same organization researching your solutions at the same time.”**

**– Kerry Cunningham,  
6sense Research & Thought Leadership**

# BUYING GROUPS DEFINED

Buying groups are buying committees, just like those found in most account-based marketing (ABM) initiatives. Additionally, a buying group is connected to a particular deal moving through a sales cycle. **At their core, buying groups are made up of individuals involved in an organization's decision-making process.**

Each member of a buying group is influenced by information they've gathered independently which they then share with the group.

There may be members of different opportunities in different buying groups, within the same account, influencing one another. That is one major benefit of the buying group motion: greater visibility into multiple selling opportunities within an account.

Buying groups vary in size. In Forrester's **revenue operations survey**, 94% of sellers reported they sell to groups of three or more individuals. Thirty-eight percent sell to groups of 10 or more.

Forrester estimates an average of **27 engagements** with seller-related content (both known and anonymous) across a buying group.

# ROLES WITHIN A BUYING GROUP

**Buying groups are made up of multiple departments, roles, and personas. While an individual's department and persona are static, their role on the buying committee may change depending on the product under consideration.**

Buying groups usually consist of subject-matter experts, contributors from a relevant department, and other stakeholders (or gatekeepers) from finance and IT.

For example, for marketing purposes, your organization may target personas like the Head of Marketing. This job title is often associated with a primary decision maker. However, in the buying group context, that Head of Marketing may fill the role as someone who simply advises.

Each person in the group has their own needs, priorities, and concerns. Some people have the power to make the final decision, while others provide important input that influences the final decision.



# ROLES WITHIN A BUYING GROUP (CONTINUED)

## WHO IS ON THE BUYING COMMITTEE?

Members of the buying committee cover a broad range of responsibilities and perspectives to ensure a thorough evaluation and decision-making process. Here's a breakdown of the different roles you may find on a B2B buying committee:



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



**User:** Directly interacts with the product or service on a regular basis. Their feedback is crucial for understanding the practical implications and benefits of the purchase.



**Influencer:** Shares expertise and advice through their knowledge or authority on the subject.



**Decision Maker:** Has the authority to say yes or no to the purchase, often senior executives



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



**Buyer:** Handles the procurement and purchasing process by negotiating terms, managing contracts and compliance



**Champion:** Advocate for the purchase internally, pushing the decision forward and rallying support among stakeholders



**Financial Approver:** Approves the financial aspect of the purchase including the budgetary allocation



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

## ENGAGING WITH THE BUYING COMMITTEE

To effectively engage with members of the buying committee, the seller must market to individuals, taking into account their needs, priorities, concerns, and objectives. The message and approach to each committee member should be distinct.

In addition, keep in mind that buying committee members enter the buying journey at different stages. While a particular member may enter at a later stage, sellers should not assume the member is at ground zero, lacking product knowledge or deal information. Members of the buying group will naturally move forward as a group and should be treated as such.

# BENEFITS OF A BUYING GROUPS MOTION

Buying groups have a huge propensity to buy. That is their purpose: to vet a solution and make a purchase decision. Other benefits of a Buying Groups Motion include:

## Higher Conversion Rates

Organizations using a buying group motion experience increased pipeline, higher quality pipeline, reduced sales cycles, significant time savings, and increased revenue.

## Internal Efficiency

By focusing on buying groups, sellers eliminate manual processes that slow the buyer journey. There's less wasted effort on leads and accounts that will not convert.

## Identification of Multiple Selling Opportunities Within an Account

Demand generation and ABM plays typically focus on acquiring new customers. Buying Groups Motions help identify expansion opportunities.

## Better Alignment

In a Buying Groups Motion, there's better alignment between marketing, operations, and sales departments to engage, qualify, and win opportunities.

## PART 03

# IMPLEMENTING A BUYING GROUPS MOTION

# INTERNAL TEAMS IMPACTED BY A BUYING GROUPS MOTION

When an organization transitions from an MQL or ABM model to a Buying Groups Motion, several internal teams will be impacted:

## SDR/BDR TEAMS

Sales development representatives (SDRs) or business development representatives (BDRs) have likely been trained to find one contact in the past. Now they must proactively flush out more members of the buying committee in order to create an opportunity.

This changes the insights that SDRs/BDRs will gather and the actions they will take. Plus, qualification criteria will change. The shift to buying groups often requires a new compensation structure. For example, SDRs may only get compensated for opportunities where at least three key buying members have been identified.

## ACCOUNT EXECUTIVES

Most sales teams are accustomed to a large volume of leads. A Buying Groups Motion changes the focus from quantity to quality. As a result, the daily priorities of Account Executives (AEs) will change.

Discovery questions now involve determining the role of the prospect in the purchase and adding more members of the buying committee to meetings. AEs will look for and engage with more personas in a Buying Groups Motion than under a lead-centric motion.

Kate is online



John  
Account Exec.

We've met with Finance, but I'd love to better understand how IT & Services will be involved.



Kate  
Marketing Ops

Great idea, let's move them into this discussion.

# INTERNAL TEAMS IMPACTED BY A BUYING GROUPS MOTION (CONTINUED)

## OPERATIONS

With existing processes engineered around leads, a move to buying groups will require significant changes to sales and marketing automation. Platforms and flows will be rearchitected. Systems may require custom builds or even the purchase of new technologies.

The Marketing Ops and Sales Ops teams now have to be aligned on how the data will look and how sales teams will interact with contact records. Plus, marketing automation must be aligned with the CRM.

## MARKETING

A Buying Groups Motion is ultimately a sales and marketing initiative, therefore, neither can work as a siloed team. Marketing must work collaboratively with a go-to-market team and an SDR/BDR organization, often reporting on new shared metrics.

Next, with MQLs out of the picture, attribution models and metrics will change. The Buying Groups Motion turns traditional marketing metrics on their head and requires full funnel attribution. **Forrester** recommends alternative metrics such as number of engaged buying group members, average buying group members at a qualified stage, or average buying group members who attended a meeting.

Last, with less emphasis on lead volume, some organizations choose to ungate their content, focusing their efforts on identifying prospects who are on a buying journey and surfacing those contacts to the SDR/BDR team.

## EXECUTIVE TEAM

A Buying Groups Motion will impact the ways an executive team assesses the value of individual organizations like marketing and sales. Specifically, with regard to reporting, executive teams may have expectations around MQLs or other legacy metrics they relied on in the past.

Therefore, it will be important to involve executive team members in the transition to a Buying Groups Motion. This new model fundamentally changes how marketing and sales work together and will require executive buy-in.



**“Buying groups actually naturally create a RevOps motion. And, it creates a much more natural partnership between sales and marketing.”**

**– Jeremy Schwartz,  
Sr. Manager, Global Lead Management & Strategy,  
Palo Alto Networks OpsStars 2025**

# ANATOMY OF A BUYING GROUPS MOTION



# TECHNOLOGY CONSIDERATIONS

## SYSTEMS AND PROCESSES

By aligning on the opportunity object, buying group members and all of their interactions with the seller (or sellers, for more complex sales organizations working within opportunity teams) are contained in one place, visible to the sellers' revenue teams.

An effective Buying Groups Motion exposes not only key members required to close the deal, but also the engagements of all the different people in a buying group.

Unfortunately, organizations capture more insights than are typically shared with SDR/BDR and sales teams. The challenge becomes how to aggregate the insights and share them efficiently.

Under an MQL model, the systems and processes for collecting buying signals are typically not engineered to notice or respond to multiple members of a buying group. Therefore, implementing a Buying Groups Motion involves converting existing systems from a lead-centric process to an opportunity-focused strategy.

**Forrester** recommends creating an opportunity for every solution within an account, since marketing campaigns for multi-product organizations are primarily centered around solutions offered to the customer rather than single product lines.

The opportunity starts at a suspect level. Then, the goal across all teams then becomes to fill that opportunity with the right people who are engaging, before moving the opportunity forward to the next stage.

**“In our current model based on the MQL, we were projecting we would generate under 25 million in potential pipeline. However, when we took our data and moved into a buying groups model with three plus members, we were going to project over 80 million in potential revenue and pipeline.”**

– Mikayla Wilson,  
Senior Data Analyst, Workiva

**OpsStars 2025 Gaining Ground with Buying Groups: A Practical Guide for Building Organizational Buy-in**

# OPERATIONALIZING A BUYING GROUPS MOTION WITH LEANDATA

Signals now shape every buying group journey, yet most organizations struggle because those signals sit fragmented across systems that do not connect easily. When teams use platforms that unify buying group signals and orchestrate the right actions, they replace reactive outreach with a coordinated, predictive motion that increases revenue outcomes.

With efficiency top-of-mind, LeanData's Buying Groups Edition and Intelligent GTM Orchestration operationalizes the four stages of a Buying Groups Motion as follows:

## STAGE 1: IDENTIFYING BUYING GROUP MEMBERS

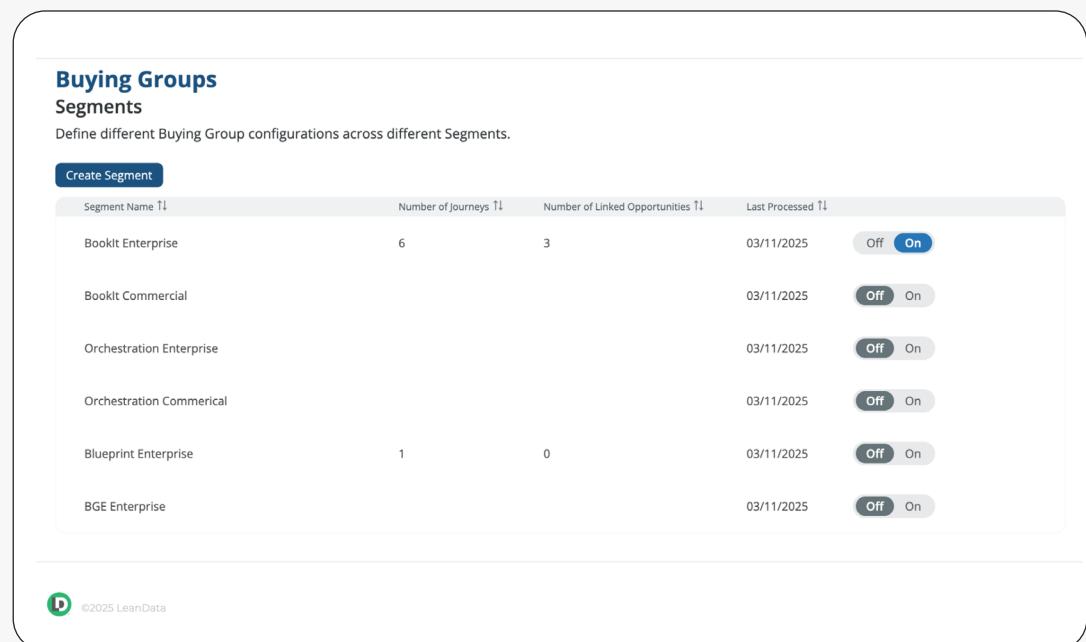
LeanData Buying Groups Edition begins by identifying who belongs in a buying group through scoring, signals, AI-powered title clustering, and journey segmentation. These inputs help define clear criteria for grouping buyers across complex product lines, regions, or account segments, giving teams a reliable and centralized method for determining who should be included.

To support this identification process, LeanData automatically creates Buying Group Journeys inside Salesforce using a dedicated custom object. This structure captures pre-opportunity interactions, stores all member data in a single place, and ensures signals from multiple systems are consistently tracked.

Stage 1 is focused entirely on **who** belongs in the group and **how** they will be tracked from the start. It establishes the buying group, the journey object, and the segmentation rules that guide all downstream activity.

## STAGE 2 SOLVES:

- » Lack of clear criteria for buying group members
- » Scattered buyer signals that never consolidate into a unified framework
- » No central location for tracking early buying activity



The screenshot shows a user interface for managing buying group segments. At the top, a header reads "Buying Groups Segments" with a sub-instruction "Define different Buying Group configurations across different Segments." Below this is a "Create Segment" button and a table with the following data:

Segment Name ↑↓	Number of Journeys ↑↓	Number of Linked Opportunities ↑↓	Last Processed ↑↓	Actions
BookIt Enterprise	6	3	03/11/2025	<input type="button" value="Off"/> <input checked="" type="button" value="On"/>
BookIt Commercial			03/11/2025	<input type="button" value="Off"/> <input checked="" type="button" value="On"/>
Orchestration Enterprise			03/11/2025	<input type="button" value="Off"/> <input checked="" type="button" value="On"/>
Orchestration Commercial			03/11/2025	<input type="button" value="Off"/> <input checked="" type="button" value="On"/>
Blueprint Enterprise	1	0	03/11/2025	<input type="button" value="Off"/> <input checked="" type="button" value="On"/>
BGE Enterprise			03/11/2025	<input type="button" value="Off"/> <input checked="" type="button" value="On"/>

At the bottom of the interface, there is a small circular logo with a 'D' and the text "©2025 LeanData".

# OPERATIONALIZING A BUYING GROUPS MOTION WITH LEANDATA (CONTINUED)

## STAGE 2: BUILDING AND ADVANCING THE BUYING GROUP

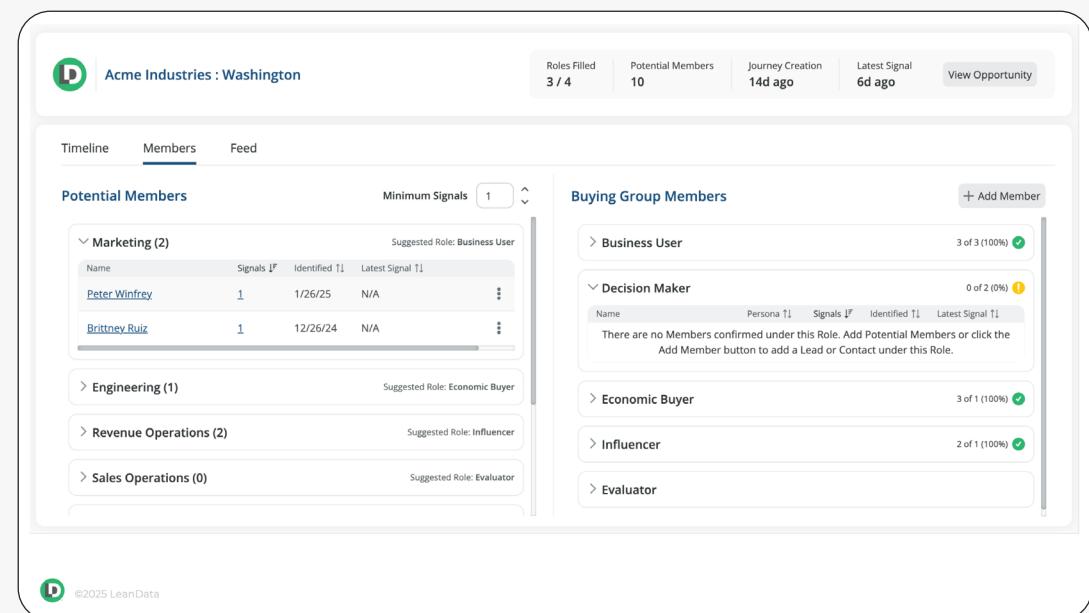
Once buying groups are defined and structured, Edition helps teams build out complete groups and advance them through the revenue process. This begins with mapping engagement across the journey, making it easy to see which members are involved, who is already showing interest, and which essential roles are missing.

SDRs and marketing teams are then activated to drive the right outreach. Engagement signals guide who to add, who to nurture, and where momentum is forming. LeanData's journey reporting, Journey Tracker, and automation tools give teams shared visibility and ensure smooth handoffs as the group matures.

Marketing can stay involved mid- and late-funnel by running deeper targeting programs that build buying-team alignment, while sales benefits from clearer insight into the full buying committee. Alerts notify teams when key roles are engaged or missing, helping prevent deal friction.

## STAGE 2 SOLVES:

- » Incomplete buying groups that slow progression
- » Role blind spots that create risk in deal cycles
- » Disconnected workflows between marketing, SDRs, and sales
- » A lack of clarity around buying group qualification and momentum



Acme Industries : Washington

Roles Filled 3 / 4 Potential Members 10 Journey Creation 14d ago Latest Signal 6d ago View Opportunity

Timeline Members Feed

Potential Members Minimum Signals 1

Marketing (2) Suggested Role: Business User

Name	Signals	Identified	Latest Signal
Peter Winfrey	1	1/26/25	N/A
Brittney Ruiz	1	12/26/24	N/A

Engineering (1) Suggested Role: Economic Buyer

Revenue Operations (2) Suggested Role: Influencer

Sales Operations (0) Suggested Role: Evaluator

Buying Group Members + Add Member

- Business User 3 of 3 (100%) ✓
- Decision Maker 0 of 2 (0%) ⓘ
- Economic Buyer 3 of 1 (100%) ✓
- Influencer 2 of 1 (100%) ✓
- Evaluator 0 of 1 (0%)

There are no Members confirmed under this Role. Add Potential Members or click the Add Member button to add a Lead or Contact under this Role.

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# OPERATIONALIZING A BUYING GROUPS MOTION WITH LEANDATA (CONTINUED)

## STAGE 3: ALERTING AND ACTING ON QUALIFIED BUYING GROUPS

Once buying groups are fully identified and progressing through the journey, Edition equips sales with real-time visibility into the health and completeness of each deal. Alerts surface which buying group members are engaged, which critical roles are missing, and where additional outreach is needed to maintain deal momentum.

This prevents sellers from relying on a single contact and helps teams proactively strengthen relationships across the buying committee.

LeanData also synthesizes every marketing signal and sales interaction into a unified view, enabling deep reporting on buying group activity.

Teams can compare win rates by buying group size, analyze role engagement across segments and geographies, and diagnose deal risk based on participation levels. These insights help sales, marketing, and RevOps refine their approach and strengthen overall GTM performance.

## STAGE 3 SOLVES:

- » Lack of visibility into buying group completeness and deal health
- » Overreliance on a single champion within an account
- » Missed signals that could accelerate or stall opportunities
- » Difficulty improving conversion rates across products or segments

Journeys Past Stage 2 Missing Champions						
Journey Name	Roles	Personas	Stage	Completeness	Last Engagement	
ACME : Orchestration	Decision Maker Champion Economic Buyer	Marketing Leadership IT Finance	Stage 2: Discovery	66%	2 days ago	
ACME : BookIt	Decision Maker Champion Economic Buyer	Marketing Leadership IT Finance	Stage 3: Business and Solution Alignment	33%	1 day ago	
Globex Corp. : Orchestration	Decision Maker Champion Economic Buyer	Marketing Leadership IT Finance	Stage 3: Business and Solution Alignment	66%	3 days ago	

# OPERATIONALIZING A BUYING GROUPS MOTION WITH LEANDATA (CONTINUED)

## STAGE 4: ASSIGNING AND ORCHESTRATING QUALIFIED OPPORTUNITIES

Once the buying group is complete, as defined by your criteria, and signals show the deal is ready for sales, LeanData Routing ensures the opportunity reaches the right seller without delay.

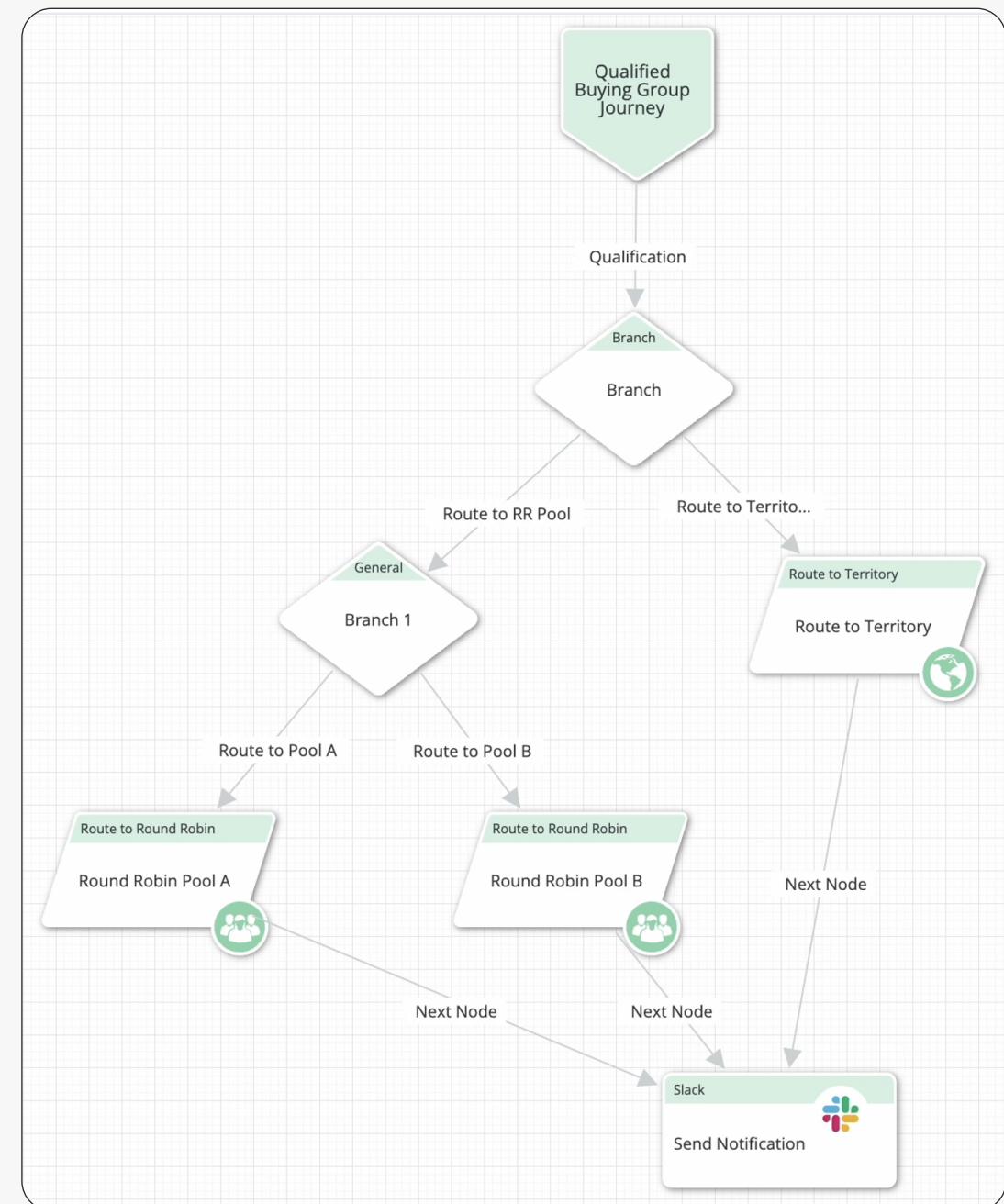
Routing rules consider territories, pre-existing relationships, segments, partner channels, and team structures so qualified opportunities land with the correct owner every time.

Automated notifications and SLA tracking help sellers respond quickly, while matched opportunity routing preserves buying group context throughout the process.

This final stage connects the work done upstream in Buying Groups Edition with the execution power of LeanData's orchestration platform, enabling sales teams to take immediate action and maintain deal momentum. Organizations benefit from faster speed-to-lead, fewer assignment errors, and consistent delivery of revenue-ready opportunities.

## STAGE 4 SOLVES:

- » Slow or inconsistent opportunity assignment
- » Lost context during handoff
- » Channel conflict
- » Delayed time to first sales touch



# BENEFITS & CHALLENGES

Organizations who have transitioned from a lead-centric or ABM motion to a Buying Groups Motion report several common benefits and challenges.

## MEASURABLE BENEFITS

As shared in the [\*\*Benefits of a Buying Group Motion\*\*](#) section of this ebook, a Buying Groups Motion will deliver a holistic understanding of an account, create internal efficiencies, and improve conversion rates.

LeanData customers using a Buying Groups Motion today also report the following improvements:

- » Less siloed departments
- » Competitive advantage
- » Decreased lead assignment time
- » Shorter sales cycles

In a [\*\*recent case study\*\*](#), LeanData customer Palo Alto Networks shared the following benefits that resulted from their shift to buying groups:

- » 15% improvement in revenue
- » 2x Closed Won rate
- » 20% improvement in MQL to Opportunity conversion rate
- » 10x increase in pipeline progression

## DIGITAL TRANSFORMATION CHALLENGES

The challenges of a Buying Groups Motion transition are typical to any large organization facing cross-departmental digital transformation:

- » Gaining employee buy-in
- » Concerns over compensation
- » Sales, Operations, and Marketing alignment
- » New metrics and KPIs
- » Changes to attribution models
- » Changing company culture, i.e. “We’ve always done it this way...”

One organization shared that the transition to buying groups required a total mindset shift. However, employee buy-in increased when they understood the “why” behind the changes.

Another organization reported that it helped to have a feedback loop between departments to understand what processes were (or were not) working. This required recurring go-to-market pipeline meetings as well as coordinated marketing campaigns.

**“What we’ve seen is both quality and velocity have improved, which helps us achieve our revenue targets and our bookings targets.”**

**– Maria Robinson,  
Head of Marketing, Reltio**

# CONCLUSION

# EMBRACING BUYING GROUPS FOR GTM SUCCESS

Navigating the transition from lead-centric and ABM strategies to an opportunity-focused go-to-market motion is admittedly no simple feat. Adjusting sales and marketing paradigms to accommodate buying groups is both a cultural and operational shift.

This transformation requires a thorough internal process evaluation, an understanding of industry best practices and data management strategies, and potentially the adoption of new technologies.

However, as the saying goes, “The definition of insanity is doing the same thing over and over again and expecting different results.”

Continuing to apply MQL and ABM models to a buying group scenario is inefficient, largely ineffective, and will not result in the revenue growth your organization is seeking.

Many enterprise organizations have successfully made the transition from leads and accounts to buying groups, delivering measurable improvements to processes, pipeline, and revenue.

Consulting groups like Forrester and others have experience guiding organizations through this positive transition.

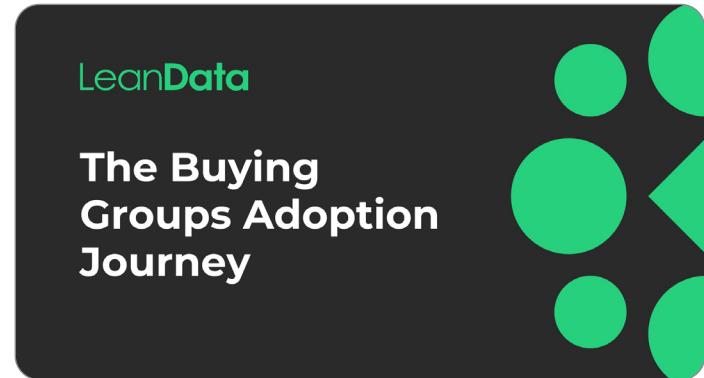
And, as always, LeanData is here to help.

**CONTACT  
LEANDATA**

**for a buying group readiness assessment today.**

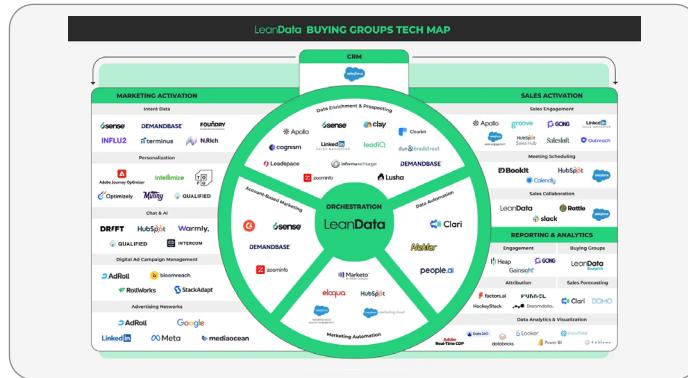
**LET'S TALK**

# RECOMMENDED RESOURCES



EBOOK

[The Buying Groups Adoption Journey](#)



INFOGRAPHIC

[Buying Groups Motion Tech Stack Map](#)



CUSTOMER STORY

[Palo Alto Networks Sees Revenue Increases with Buying Groups Strategy](#)

## GET STARTED TODAY

Visit [LeanData.com](https://www.leandata.com) to learn more about LeanData's go-to-market operations solutions for Automated Scheduling, Matching, Routing and Engagement, and Buying Groups, or visit us on the Salesforce [AppExchange](#).

[REQUEST A DEMO](#)

## Why LeanData?

LeanData helps B2B enterprises fuel efficient growth by aligning marketing, sales, and customer service execution with the buyer journey. Our Intelligent GTM Orchestration platform acts as the connective tissue across the revenue lifecycle, integrating and normalizing buyer data, automating signal-driven workflows, and delivering AI-powered insights. The result is faster, cleaner execution and the ability to adapt GTM motions with agility without coding. More than 1,000 leading companies and a community of 5,000+ OpsStars rely on LeanData to achieve speed to lead, higher conversions, accelerated pipeline, and predictable growth by turning buyer signals into coordinated action.



The Authoritative Guide to Buying Groups