

LEANDATA JOURNEYS

Unify customer signals across every deal and buying group, so GTM teams stay aligned and always know the next move.

The Challenge

Every deal already has a buying group. Even without a formal buying group program, the average B2B purchase pulls in a committee of stakeholders – a champion, an economic buyer, a technical evaluator, a handful of influencers – each engaging on their own timeline through campaigns, events, outbound, and self-directed research. The problem is that most GTM systems were built around individual leads or entire accounts, so each stakeholder's activity lands in a separate record and the rep working the deal never sees the buying group's engagement as one connected picture.

The result is a deal that looks single-threaded even when it isn't. Marketing engagement doesn't connect to the opportunity it influenced. Reps work the one contact who filled out the form and discover the real decision-maker weeks later. Opportunities close without key contact roles, so there is no record of who actually bought. When a champion goes quiet or leaves, the deal stalls or slips – lost not to a competitor, but to the stakeholders no one engaged.

2-3x

higher win rates with
buying group engagement

(Demandbase)

8%

of single threaded
deals close

(Ebsta)

22

people involved in the typical
B2B buying decision

(Forrester)

The Solution

LeanData Journeys unifies customer signals across every deal and buying group, so GTM teams stay aligned and always know the next move – all inside Salesforce, with no new process to roll out and no new tool for reps to learn. With one shared account view, teams can quickly identify the stakeholders already engaged, understand their roles in the buying decision, and surface the personas still missing from the deal. Confirmed members sync to Opportunity Contact Roles automatically, so the buying group lives in the system of record rather than in a rep's head.

From there, Journeys accelerates sales cycles by tracking and visualizing every signal across the buying group journey – from marketing and sales engagement to intent sources – delivering the rich context reps need to make data-driven decisions instead of assumptions. AI summarizes what changed and recommends the next step, and reps take action directly from the Journey, engaging every stakeholder in the deal rather than the one person who happened to raise a hand. It all boils down to the three key things reps need to close: clean, governed GTM data they can trust; a documented process so teams know what to do and when; and shared context from one source of truth. The result? Faster deal velocity, larger deals, and higher win rates.



See the Entire Buying Group & Journey

JOB TITLE CLASSIFICATION

Resolve inconsistent job titles into standardized Job Function and Job Level categories, so every contact maps to the right buying group role.

JOURNEY CREATION

Customize how Journeys are configured based on the account criteria, personas, and signals that fit your unique GTM motion.

JOURNEY LIST VIEW

Access a prioritized list of active Journeys showing stage, status, ownership, and buying group coverage, with inline flags for missing roles.



Track Every Stakeholder & Signal

JOURNEY TIMELINE VIEW

Monitor a stage-by-stage view of how a Journey progressed, including buying group composition, role coverage, and the full signal feed that captures engagement and intent signals from marketing automation, sales engagement, and other tools in your stack.

JOURNEY REPORTING

Measure buying group role coverage, track how quickly Journeys move from first signal to closed, evaluate campaign attribution, and gain insight into engagement by persona with Salesforce-native reporting.



Take Action with Full Journey Context

AI ASSISTANT (BETA)

Ask plain-language questions and get answers grounded in Journey, member, signal, Account, Opportunity, and activity context.

AI SUMMARY & NEXT STEPS (BETA)

Get an instant recap of who engaged and what changed, plus up to three recommended next steps based on Journey activity.

JOURNEY FLOWBUILDER

Build customized workflows that automate buying group member assignment, handoffs, and SLAs.

GET STARTED TODAY

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

REQUEST A DEMO

Why LeanData?

LeanData is the leading platform for AI GTM Orchestration, sitting at the intersection of AI agents, human sellers, and the systems they share. As the connective tissue across the entire revenue lifecycle, LeanData ensures every signal, whether AI-generated, system-triggered, or human-driven, is routed, actioned, and governed with the same rigor. 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 translate GTM strategy into coordinated execution across customer acquisition, adoption, account retention and expansion.