

Buying Groups

Automatically identify and track buying committees in Salesforce

Native Salesforce App - 2GP Managed Package - Lightning Ready - Free on AppExchange

In B2B sales, buying decisions are never made by one person. A typical enterprise purchase involves 6-10 stakeholders across multiple roles - economic buyers, technical evaluators, champions and influencers. Without a clear view of the entire buying committee, your sales team is flying blind. **Buying Groups** solves this by automatically grouping your Accounts, Leads and Contacts into buying committees using intelligent name matching. No manual data entry. No complex setup. Just install, run the matching batch, and your buying committees are identified automatically. Every Buying Group gives your team a single, unified view of all the people involved in a purchasing decision - whether they are existing customers, new leads or current contacts - along with their campaign engagement history and pipeline activity.

5
Matching Methods

Real-Time
Engagement Scoring

Zero
Manual Data Entry

Free
On AppExchange

The Challenge

Fragmented Data	Accounts, Leads and Contacts related to the same company are stored as separate records with no connection between them. Your team has no way to see the full buying committee in one place.
Invisible Engagement	Marketing campaigns touch multiple people at the same account but engagement data is scattered across individual records. There is no buying-committee-level view of who is warming up.
New Business vs Customer Blindspot	Without a structured way to track buying committees, it is hard to distinguish pure new business prospects from accounts that have already purchased - especially when both Leads and Accounts exist for the same company.
Manual Effort	Sales teams spend time manually researching and linking related records instead of selling. This work is never complete and goes out of date quickly.

How It Works

1	Install	Install Buying Groups free from the AppExchange. A Default Settings record is created automatically with sensible defaults. No complex configuration required.
2	Run Matching	Click Run Buying Group Matching. The app analyses all your Accounts and Leads and groups related records into Buying Groups automatically using five matching methods.
3	Stay Current	New Accounts and Leads are matched in real time as they are created. Buying Groups update automatically as your data changes - no manual maintenance required.
4	Sell Smarter	Your sales team now has a unified view of every buying committee - who is in it, how engaged they are, what pipeline exists, and whether they are a new logo or existing customer.

Key Features

Intelligent Name Matching	Five matching methods work together: Exact Name, Stripped Name (removes Ltd, Inc, Corp etc.), Account Hierarchy, Email Domain and Fuzzy Name matching using the Jaro-Winkler algorithm. All five are configurable.	New Logo Tracking	Every Buying Group is automatically flagged as New Logo (no purchase history) or Existing Customer (at least one Closed Won opportunity). The flag updates in real time as opportunities progress.
Real-Time Engagement Scoring	Campaign responses from every Contact and Lead in a Buying Group are aggregated into a Total Engagement Score. Scores update the moment a campaign response is recorded.	Unified Buying Committee View	Accounts, Leads and Contacts belonging to the same company are brought together in a single Buying Group - giving your team the full picture of a buying committee in one place.
Opportunity Intelligence	Open pipeline, Closed Won count and total opportunity value are automatically rolled up to each Buying Group - giving sales leaders a buying-committee-level view of pipeline health.	Three Automation Tiers	Automatic mode creates and assigns Buying Groups with no user input. Suggested mode creates Tasks for review. Manual mode gives full control to your users.
Primary Account Management	The system automatically designates and tracks the primary Account within each Buying Group, keeping your data clean as your buying committee evolves.	Easy Reset and Re-Run	Changed your matching configuration? Reset all Buying Groups and re-run the matching batch at any time. Configurable Max Records Per Run for large orgs.

Requirements

Salesforce Edition	Enterprise, Professional, Unlimited, Performance or Developer
User Interface	Lightning Experience
User Access	Assign the Buying Groups User permission set to non-admin users
Compatible With	Sales Cloud, Marketing Cloud Engagement, Marketing Cloud Account Engagement

Pricing

Free Available on AppExchange No cost to install or use Unlimited users 100% of features included
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