

Buying Groups

New Logo and Engagement Scoring Guide

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This document explains two key intelligence features of the Buying Groups app: New Logo tracking and Engagement Scoring. Both features update automatically in real time as your Salesforce data changes.

Part 1 - New Logo

1.1 What is New Logo?

In B2B sales, a 'New Logo' refers to a prospect that has never purchased from you before - a pure new business opportunity. Once a prospect makes their first purchase they become an existing customer and are no longer a New Logo.

The Buying Groups app tracks this automatically using the `New_Logo__c` field on the Buying Group object. This field tells your sales team at a glance whether a buying committee represents a new business opportunity or an existing customer relationship.

New_Logo__c Value	Meaning	What It Tells Your Team
True (checked)	No Closed Won opportunities linked to this Buying Group	This is a new business opportunity. The buying committee has never purchased from you.
False (unchecked)	At least one Closed Won opportunity exists on this Buying Group	This is an existing customer. At least one member of this buying committee has already purchased.

1.2 How New Logo is Set and Maintained

`New_Logo__c` is calculated automatically by `BuyingGroupOpportunityRollupService` whenever an Opportunity linked to a Buying Group changes. The calculation is simple:

- `New_Logo__c` = true if the Buying Group has zero Closed Won opportunities
- `New_Logo__c` = false if the Buying Group has one or more Closed Won opportunities

The rollup fires in the following situations:

Trigger Event	What Happens
Opportunity is created on an Account in a BG	New Logo recalculated for that BG
Opportunity Stage changes (e.g. to Closed Won)	New Logo recalculated immediately - if this is the first Closed Won, <code>New_Logo__c</code> flips to false
Opportunity is deleted	New Logo recalculated - if the deleted opp was the only Closed Won, <code>New_Logo__c</code> flips back to true
Account moves to a different BG	New Logo recalculated for both old and new BG
Opportunity amount changes	<code>Open_Opportunities_Amount__c</code> recalculated (New Logo unaffected unless stage also changes)

1.3 Related Opportunity Rollup Fields

New Logo is calculated as part of a broader opportunity rollup. The following fields are all updated together on the Buying Group record whenever an opportunity changes:

Field	API Name	Description
New Logo	THRINF__New_Logo__c	True if zero Closed Won opportunities. False if one or more Closed Won opportunities exist.
Open Opportunities	THRINF__Open_Opportunities__c	Count of open (not closed) opportunities linked to this Buying Group
Closed Won Opportunities	THRINF__Closed_Won_Opportunities__c	Count of Closed Won opportunities linked to this Buying Group
Open Opportunities Amount	THRINF__Open_Opportunities_Amount__c	Total amount of all open opportunities linked to this Buying Group

Note: Opportunities are linked to Buying Groups via the Account relationship. When an Account is assigned to a Buying Group, all of that Account's Opportunities are automatically linked to the same Buying Group. If the Account later moves to a different Buying Group, the Opportunities move with it.

1.4 How Buying Groups Are Initially Flagged as New Logo

When the matching engine creates a new Buying Group automatically, it sets New_Logo__c = true immediately. This reflects the fact that a brand new Buying Group has no purchase history.

When a user creates a Buying Group manually, it is also created with New_Logo__c = true by default. The field will be updated to false automatically as soon as a Closed Won opportunity is linked.

1.5 Using New Logo in Your Sales Process

New_Logo__c is a standard Salesforce checkbox field that can be used in all standard Salesforce features:

- List Views - create a 'New Logo Opportunities' list view filtered by New_Logo__c = true to see all prospect buying groups
- Reports - segment pipeline reports by New Logo vs existing customer to track new business vs expansion revenue separately
- Dashboards - build separate dashboard components for new logo pipeline vs expansion pipeline
- Flows and Process Builder - trigger different sales plays or assign different queues based on New_Logo__c value
- Assignment Rules - route new logo accounts to a new business team and existing customers to an account management team

Important: New_Logo__c reflects the current state of Closed Won opportunities. It is recalculated dynamically - if a Closed Won opportunity is deleted or moved to a different stage, the field will update accordingly. Do not treat it as a permanent flag.

Part 2 - Engagement Scoring

2.1 What is Engagement Scoring?

Engagement Scoring measures how actively a buying committee is engaging with your marketing activity. It counts the number of Salesforce Campaign responses across all members of a Buying Group - both Contacts and Leads.

A higher engagement score means the buying committee is responding to more of your campaigns. This helps sales teams prioritise which Buying Groups to focus on and gives marketing teams visibility of which accounts are warming up.

Field	Object	API Name	Description
Campaign Responses	Buying Group Member	THRINF__Campaign_Responses__c	Number of Salesforce Campaigns this member has responded to. Updated in real time.
Total Engagement Score	Buying Group	THRINF__Total_Engagement_Score__c	Sum of Campaign_Responses__c across all Buying Group Members. Updated in real time.

2.2 What Counts as a Campaign Response?

A Campaign response is counted when a CampaignMember record has HasResponded = true. This is the standard Salesforce Campaign Member responded flag. It can be set:

- Manually by a user changing the Campaign Member status to a responded status
- Automatically by Marketing Cloud, Pardot/Account Engagement or other marketing automation tools that sync to Salesforce Campaign Members
- Via data imports or API updates to the HasResponded field

Note: Only CampaignMember records with HasResponded = true are counted. Being added to a Campaign without responding does not contribute to the engagement score.

2.3 Real-Time Scoring - How It Works

Engagement scores update in real time via the BuyingGroupCampaignMemberTrigger which fires on CampaignMember insert, update and delete. The handler (BuyingGroupCampaignMemberHandler) increments or decrements the score immediately when responses change.

Event	What Triggers It	Effect on Score
CampaignMember inserted with HasResponded = true	Contact or Lead added to a Campaign and immediately marked as responded	Campaign_Responses__c on BGM increments by 1. Total_Engagement_Score__c on BG recalculated.
CampaignMember updated: HasResponded changes from false to true	Contact or Lead responds to a Campaign	Campaign_Responses__c on BGM increments by 1. Total_Engagement_Score__c on BG recalculated.
CampaignMember updated: HasResponded changes from true to false	Response is reversed - status changed back to non-responded	Campaign_Responses__c on BGM decrements by 1 (minimum 0). Total_Engagement_Score__c on BG recalculated.
CampaignMember deleted with HasResponded = true	A responded Campaign Member record is deleted	Campaign_Responses__c on BGM decrements by 1 (minimum 0). Total_Engagement_Score__c on BG recalculated.
CampaignMember deleted with HasResponded = false	A non-responded Campaign Member record is deleted	No change to scores.

Note: Campaign_Responses__c on the Buying Group Member record will never go below zero. If a decrement would result in a negative value it is capped at zero.

2.4 Real-Time Scoring - No Date Filter

The real-time trigger path counts all campaign responses regardless of when they occurred. There is no date filter applied in real time. This means:

- A response from 3 years ago counts the same as a response from yesterday in real-time scoring
- The Engagement_Score_Days__c setting in Default Settings does not apply to real-time updates
- The Engagement_Score_Days__c rolling window is only applied when the Engagement Score Batch runs

2.5 Engagement Score Batch - Rolling Window Recalculation

The BuyingGroupEngagementScoreBatch provides a full recalculation of all engagement scores using the Engagement_Score_Days__c rolling window setting. Unlike real-time scoring, the batch applies a date cutoff:

- The batch queries CampaignMember records where HasResponded = true AND CreatedDate >= today minus Engagement_Score_Days__c days
- It recalculates Campaign_Responses__c on every BGM from scratch based on this filtered count
- It then recalculates Total_Engagement_Score__c on every BG
- This overwrites any real-time accumulated values with the correctly windowed values

Scenario	Real-Time Score (before batch)	Batch Score (after batch, 90 day window)
Contact responded to 5 campaigns - 3 in the last 90 days, 2 over 90 days ago	5	3
Lead responded to 2 campaigns - both within the last 90 days	2	2
Contact responded to 1 campaign 6 months ago, no recent responses	1	0

2.6 When Does the Batch Run?

The Engagement Score Batch runs in two scenarios:

- Automatically when Engagement_Score_Days__c is changed in Default Settings - the BuyingGroupSettingsTrigger detects the change and fires the batch immediately
- Manually when scheduled by an administrator - the batch implements the Salesforce Schedulable interface and can be scheduled via Setup > Apex > Schedule Apex, or via Anonymous Apex using: `System.schedule('Buying Groups Engagement Score', '0 0 0 * * ?', new BuyingGroupEngagementScoreBatch());`

Note: The batch is not scheduled automatically on installation. If you want scores to be recalculated on a regular schedule (e.g. nightly) to apply the rolling window, an administrator needs to schedule it manually. Real-time scoring will continue to work without the batch being scheduled.

2.7 Engagement Score Days Setting

The Engagement_Score_Days__c field in Default Settings controls the rolling window used by the batch. The default is 90 days.

Setting Value	Effect	Recommended For
30 days	Only campaign responses in the last 30 days count	High-velocity sales environments where recency of engagement is critical
90 days (default)	Campaign responses in the last 90 days count	Most B2B sales cycles - balances recency with sufficient history
180 days	Campaign responses in the last 6 months count	Long sales cycles where older engagement still indicates interest
365 days	Campaign responses in the last year count	Enterprise sales with very long buying cycles

Note: Changing Engagement_Score_Days__c automatically triggers the batch to recalculate all scores with the new window. You will see the batch run in Setup under Apex Jobs shortly after saving the settings change.

2.8 Engagement Scoring and Lead Conversion

When a Lead is converted to a Contact, their Buying Group Member record is deleted and a new Contact BGM is created on the Account's Buying Group. The engagement score on the Buying Group is recalculated at this point to reflect the removal of the Lead's responses. The Contact's own campaign responses will then be tracked on their new Contact BGM going forward.

2.9 Using Engagement Scores in Your Sales Process

Total_Engagement_Score__c is a standard Salesforce number field that can be used across all standard Salesforce features:

- List Views - sort Buying Groups by Total_Engagement_Score__c descending to see your most engaged prospects at the top
- Reports - combine engagement score with pipeline data to identify high-engagement accounts with open opportunities
- Dashboards - visualise engagement score distribution across your Buying Groups
- Flows - trigger sales alerts or task creation when a Buying Group's engagement score crosses a threshold
- Lead Scoring - use as an input into your broader lead and account scoring model

2.10 Engagement Score Summary

Aspect	Detail
What is counted	CampaignMember records with HasResponded = true
Who is counted	Contacts and Leads who are Buying Group Members
Real-time update	Immediate on CampaignMember insert, update or delete. No date filter.
Batch recalculation	Applies Engagement_Score_Days__c rolling window. Overwrites real-time values.
Batch trigger	Fires automatically when Engagement_Score_Days__c changes. Can also be scheduled manually.
Minimum score	0 - scores never go below zero
Default rolling window	90 days
Score on new BG	0 - new Buying Groups start with zero engagement score