



# The RevOps playbook for buying groups: how to prepare your data for B2B account engagement

Just when you thought you had finally mastered account-based marketing/selling (ABX), thought leaders are now buzzing about **buying groups (BGs)**. While the concept isn't new—SiriusDecisions, now part of Forrester, introduced the concept of demand units and buying centers in its 2017 Demand Unit Waterfall model—it has recently gained momentum as an evolution of ABX, sometimes referred to as ABX 2.0.

Forrester's model offers a highly prescriptive approach to redefining your funnel and CRM opportunities. However, fully implementing this model is often impractical for most organizations due to the complexity of change management and the advanced data automation required. Instead, many companies find value in focusing on **buying groups** as a more manageable and impactful way to refine their ABX strategies. This playbook will guide you through preparing your data to support buying groups, enabling more precise and effective go-to-market motions.

## Step 1: Understand buying groups (BGs)

### What are buying groups?

Buying groups are a more granular evolution of ABX, where enterprise companies are viewed not as single buying entities but as collections of smaller, specialized buying units. A person can belong to multiple BGs and take on different roles within each group.

### Key roles in a buying group

Every company must have a definition of BG that makes sense for its business. Here are some of the most common ways BGs are defined:

- by functional department, such as finance, HR, sales
- by geographical business unit, such as North America, Western Europe, Asia PAC
- by vertical business unit, such as automotive, financial services, healthcare
- by product or product line, such as glass bottles, glass jars, glass tiles
- by mission or purpose, such as ISO, HIPAA, GDPR



Modern B2B buying groups typically consist of 6 to 9 members. Common roles include:

- Executive sponsor
- Budget owner
- Decision maker (technical or business)
- Process owner
- Influencer
- Detractor
- Procurement
- Legal
- Information security



# Step 1: Understand buying groups (BGs) cont.

## Example of buying groups in action

Let's say you sell project management software. Here are three potential BGs within an enterprise:

Group	Roles
Marketing	Budget owner: Jane (CMO)
	Decision maker: Mark (Director of Marketing Operations)
	Influencer: David (Marketing Program Manager)
HR	Budget owner: Frank (VP of HR)
	Decision maker: Emma (Director of HR)
Information security	Budget owner: Pam (CISO)
	Decision maker: Bob (IT)

### How Openprise helps

Openprise provides the tools to organize and manage buying groups effectively by automating role assignment, integrating account data, and enriching contact profiles. This ensures your BG definitions are precise and actionable.

## Step 2: Assess your data readiness

However your buying groups are defined, you must ensure the data you need to define those BGs and roles is available and of good quality. For example:

- If by functional unit, you need job function / department data
- If by geography, you need address data
- If by vertical, you need industry / SIC / NAIC data

The data you need will generally fall into these categories:

- Company/account data, especially industry, address, number of employees, and revenue
- Contact/person data, especially job title; license, certification, education, gender are less common
- Interest and intent
- Product and technology usage
- Purchase and usage history

### How Openprise helps

Openprise ensures your data readiness by automating the collection, cleaning, and standardization of critical data fields such as job function, address, and industry codes. With Openprise, you can confidently define and maintain buying groups with high-quality data.



## Step 3: Automate and enhance data management

To support buying groups, automation is critical. You must be able to access the data you need in a reliable and timely manner, and keep the data quality high enough to enable reliable automation. This means you will need these capabilities:

**Automate data pipelines:** Integrate data sources reliably

**Clean data:** Deduplicate and validate records

**Unify data:** Standardize across platforms

**Enrich data:** Fill in gaps with third-party sources

**Match data:** Link contacts to accounts and buying groups

### How Openprise helps

Openprise RevOps Data Automation Cloud simplifies these tasks with a no-code platform that integrates, enriches, and automates data management workflows. Openprise RDA Cloud improves the quality of account and contact data through:

- A multi-vendor enrichment solution with industry-leading match rates that are 40% higher than any single-vendor solution
- A vertically integrated, no-code platform built for GTM data and operations users
- Pre-built recipes for enriching data using leading data enrichment sources
- Automated data cleaning and standardization across systems

## Step 4: Segment and assign roles

Job title contains a wealth of information and is a primary source to help determine if the person belongs to specific BGs and what roles they play. However, this data element is notoriously inconsistent: it can be very confusingly phrased, it is industry dependent, and people often get a bit too creative. To make use of job title data, you first need to segment this unstructured data element into structured data elements:

- **Segment by level:** (e.g., C-level, director, manager, individual contributor)
- **Segment by function:** (e.g., IT, marketing, sales, HR)
- **Segment by sub-function:** (e.g., digital marketing, demand gen, analyst relations)

Using segmented data, assign contacts to specific BGs with defined roles. Using the example from above, Emma can be assigned to BG HR (Decision Maker) and BG Information Security (Influencer).

### How Openprise helps

Openprise RDA Cloud simplifies the building and administration of BG automation with the flexibility and scalability trusted by Fortune 500 enterprises. This unique, no-code, end-to-end automation platform:

- Solves the job title challenge with ready-to-use segmentation algorithms
- Automatically assigns roles to BG members, unifying data from your trusted platforms, and automates enrichment and segmentation
- Eliminates the need to cobble together a bunch of point solutions using point-to-point integrations
- Grows with your organization, offering the option to pursue full Demand Unit Waterfall automation after implementing BG



## Step 5: Monitor and optimize

Once buying groups are defined, you'll likely find gaps in roles. For example, for the Marketing BG you may be missing a Decision Maker and for the HR BG you may be missing an Executive Sponsor and a Budget Owner. To address this, implement automated processes to:

- Detect role gaps
- Acquire missing contacts
- Replace contacts when they move out of their roles

### How Openprise helps

Automated processes in the Openprise RDA Cloud ensure BG roles are always filled with the right contacts, and the Champion Mover solution continuously monitors your BGs, detecting role gaps and tracking contact movements. Our comprehensive BG membership management:

- Sources missing BG members using multiple industry-leading data sources
- Automatically evaluates potential contacts against your precise requirements
- Charges only for the contacts you decide to keep
- Tracks BG members joining and exiting both the BG and the company
- Detects gaps when members leave
- Automates backfilling of roles using the multi-vendor acquisition solution

## Conclusion: Ready your data for buying group success

If you sell to enterprise and have concluded that ABX is too blunt an instrument, buying groups represent a game-changing evolution, allowing more precise account planning, personalized nurturing, and effective expansion strategies. However, to succeed with BGs, companies must achieve a higher level of data readiness.

Openprise RevOps Data Automation Cloud provides the tools to prepare, enrich, and automate your data—empowering you to implement ABX 2.0 effectively. Ready to take the next step? Contact us for a demo or to learn more.



### About Openprise

Openprise is a leader in revenue operations (RevOps) data automation, helping companies transform their data into action at scale. We pioneered the first end-to-end, no-code RevOps Data Automation Cloud purpose-built for non-programmers to integrate and unify siloed data and automate key go-to-market processes. Our single cloud platform aligns marketing, sales, and customer success teams and simplifies their technology to deliver fast and efficient revenue growth. Revenue leaders from Fortune 500 and fast-emerging enterprise companies depend on Openprise and our industry-leading partner ecosystem to drive competitive advantage. To learn more, visit [www.openprisetech.com](http://www.openprisetech.com) and follow us on [LinkedIn](#), [X](#), and [Facebook](#).

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