

AI-powered persona & Buying Group generation

We're excited to introduce a new AI feature at Demandbase that automatically generates Personas and Buying Groups for customers' tenants. By analyzing CRM data, this model identifies key roles and groups involved in sales opportunities, helping you target the right people effectively. This feature focuses on generating accurate Personas, which serve as the foundation for identifying Buying Groups, streamlining your sales and marketing efforts.

How the model works

Our AI workflow leverages your customers' CRM data to create Personas automatically. The AI-generated Buying Group is a collection of these Personas.

Data Collection

We analyze first-party (1P) CRM contacts who showed engagement (e.g., email opens, clicks) over the past 12 months from accounts with opportunities (either opened/in-progress in the past 12 months or closed in the past 12 months). Contacts engaging during an opportunity are likely involved in the buying process. For disconnected customers, AI Buying Groups can be generated if opportunity, activity, and 1P contact data is uploaded via CSV.

Persona generation

Unique (de-duped) job titles, levels, and functions of these contacts are fed into a Large Language Model (LLM). The LLM groups similar titles and roles into Personas based on its understanding of job nuances. A post-processing step merges similar Personas to keep the list concise and actionable.

Explainability

For each Persona, we identify the top 25 job titles most semantically similar to it (e.g., "Director of Marketing" might align with "Marketing Lead"). These titles become `inclusive_title_keywords`, helping you see what roles fit each Persona.

Integration

The Personas are loaded into the Demandbase tenant. Our data processing uses the inclusive title keywords to automatically stamp both 1P and third-party (3P) contacts with the right Personas, so new contacts are tagged effortlessly.

Benefits for you and your customers

Saves time: No more manual Persona creation—automation handles it.

Accurate targeting: Personas are built from real engagement and opportunity data, ensuring relevance.

Better insights: Understand key decision-makers and influencers in the buying process.

Scalable solution: Works across tenants of all sizes, adapting to their unique data.

Enhanced personalization: Precise Personas improve your marketing and sales strategies.

What are Personas and Buying Groups?

Personas: Profiles representing key individuals or roles within a target account involved in the buying process (e.g., "Marketing Director" or "Sales Manager").

Buying Groups: Collections of Personas that collaborate during a purchase decision, helping you understand the decision-making team.