Buyer Role & Stakeholder Intelligence Playbook

How to Use This Playbook

A job title gives you context. It does not tell you everything about the buyer.

Two CFOs can care about completely different things depending on the company, problem, timing, budget, risk, and internal priorities.

Use this playbook to understand what a department typically cares about, then confirm what matters to the person in front of you.

> **House of Sales Principle**
>
> **Sell to priorities and context, not titles.**

Understanding the Buying Committee

In complex sales, one person rarely represents the entire decision.

A buyer may play one or more of these roles:

Economic Buyer
Has authority over the money or final business decision.

Champion
Believes in the change and helps move the opportunity internally.

End User
Will actually use or experience the solution.

Technical Evaluator
Determines whether the solution works technically.

Security / Compliance Evaluator
Assesses risk, privacy, security, or regulatory concerns.

Procurement
Manages commercial terms, vendor process, and purchasing requirements.

Legal

Reviews contractual exposure and obligations.

Executive Sponsor

Connects the purchase to larger business priorities.

Do not assume the person you first speak with is the final decision-maker.

1. Finance

Typical Titles: *CFO, VP Finance, Finance Director, Controller, Head of FP&A*

What They Care About

• Financial impact
• Cash flow
• ROI
• Cost control
• Predictability
• Risk
• Budget
• Payback period
• Financial exposure

What to Explore

• What does the current problem cost?
• Where does that cost appear?
• Is it direct cost, lost revenue, inefficiency, risk, or opportunity cost?
• Is budget already allocated?
• How is the investment evaluated?
• What financial threshold makes a project worthwhile?

Proof They Trust

• Clear business case
• Transparent assumptions
• Verified financial outcomes
• Total cost of ownership
• Payback analysis
• Relevant customer examples

Common Concerns

• “The return is not clear.”
• “This is more than we budgeted.”
• “The assumptions feel optimistic.”
• “There are other priorities competing for capital.”

Natural Next Step

Build the financial case together rather than simply defending the price.

2. IT & Technology

Typical Titles: *CIO, CTO, VP IT, IT Director, Head of Infrastructure, Enterprise Architect*

What They Care About

- Integration
- Reliability
- Security
- Architecture
- Scalability
- Supportability
- Implementation effort
- Technical debt
- System availability

What to Explore

- What systems are already in place?
- What must the solution integrate with?
- What could break during implementation?
- Who will maintain it?
- What security or architecture standards apply?
- What does implementation require from their team?

Proof They Trust

- Technical documentation
- Architecture diagrams
- Integration documentation
- Implementation plan
- Sandbox or proof of concept
- Relevant technical references

Common Concerns

- Integration complexity
- Additional workload for IT
- Vendor lock-in
- Security exposure
- Poor support
- Migration risk

Natural Next Step

Agree on the technical questions that must be validated before the business can move forward.

3. Security, Risk & Compliance

Typical Titles: *CISO, Security Director, Risk Officer, Compliance Officer, Privacy Officer*

What They Care About

• Security exposure
• Data protection
• Regulatory obligations
• Controls
• Auditability
• Vendor risk
• Incident response
• Governance

What to Explore

• What standards or regulations apply?
• What information will the vendor access?
• Where will data live?
• What controls must be demonstrated?
• What documentation is required?
• How does vendor review normally work?

Proof They Trust

• Security documentation
• Relevant certifications
• Audit reports
• Data-flow documentation
• Policies and controls
• Incident-response procedures

Common Concerns

• Weak controls
• Incomplete documentation
• Unsupported compliance claims
• Data exposure
• Poor vendor governance

Natural Next Step

Identify the exact review requirements early so security does not become a surprise at the end.

4. Sales Leadership

Typical Titles: *CRO, VP Sales, Head of Sales, Sales Director, BDR/SDR Leader*

What They Care About

• Pipeline
• Revenue
• Quota attainment
• Rep productivity
• Conversion
• Forecastability
• Sales-cycle efficiency
• Adoption

What to Explore

• Where does the sales process break today?
• Is the problem pipeline, quality, conversion, capacity, process, or execution?
• Which reps or teams are affected?
• What does good performance look like?
• What has already been tried?
• How is performance measured?

Proof They Trust

• Conversion improvement
• Pipeline quality
• Relevant sales use cases
• Adoption evidence
• Rep-level workflow examples
• Verified revenue outcomes

Common Concerns

• “Our reps will not use it.”
• “We already have enough tools.”
• “This creates another process.”
• “The team does not need more leads, it needs better leads.”

Natural Next Step

Validate how the solution fits the existing sales motion before discussing broad productivity claims.

5. Marketing

Typical Titles: *CMO, VP Marketing, Marketing Director, Head of Demand Generation, Growth Leader*

What They Care About

- Pipeline contribution
- Brand
- Demand
- CAC
- Attribution
- Conversion
- Audience quality
- Campaign performance

What to Explore

- What outcome is marketing responsible for?
- Where does the funnel currently leak?
- How is attribution measured?
- What is considered a qualified lead?
- How do sales and marketing define quality?
- Which channels are working today?

Proof They Trust

- Relevant campaign examples
- Funnel data
- Audience quality
- Conversion data
- Attribution methodology
- Clear measurement plan

Common Concerns

- Poor attribution
- Lead quality
- Channel saturation
- Existing tools
- Sales blaming marketing for pipeline quality

Natural Next Step

Agree on what success will actually be measured by before proposing a campaign or solution.

6. Revenue Operations

Typical Titles: *VP RevOps, Head of Revenue Operations, Sales Operations Director, GTM Operations*

What They Care About

- Process consistency
- Data quality
- CRM integrity
- Forecast accuracy
- Tool efficiency
- Automation
- Reporting
- Cross-functional alignment

What to Explore

- Where does revenue data break?
- Which processes rely on manual work?
- Where are handoffs weak?
- Which tools overlap?
- What reporting is unreliable?
- What is difficult to enforce across teams?

Proof They Trust

- Workflow maps
- Data architecture
- Integration capability
- Reporting examples
- Process improvements
- Implementation detail

Common Concerns

- Another disconnected tool
- Poor CRM adoption
- Bad data
- Complex implementation
- Duplicate functionality

Natural Next Step

Map the current workflow before recommending technology.

7. Operations

Typical Titles: *COO, VP Operations, Operations Director, Supply Chain Leader, General Manager*

What They Care About

- Efficiency
- Reliability
- Capacity
- Quality
- Cost to serve
- Throughput
- Visibility
- Process control

What to Explore

- Where are the bottlenecks?
- What causes delays or rework?
- What happens when the process fails?
- What does the problem cost operationally?
- What teams are affected?
- What would have to change for the process to improve?

Proof They Trust

- Process improvement
- Operational metrics
- Implementation plan
- Comparable workflows
- Reliability data
- Relevant customer examples

Common Concerns

- Operational disruption
- Implementation failure
- Previous unsuccessful projects
- Added complexity
- Unrealistic efficiency claims

Natural Next Step

Define the current process and the operational result that needs to change.

8. HR & People

Typical Titles: *CHRO, VP HR, HR Director, Talent Acquisition Leader, People Operations*

What They Care About

- Hiring
- Retention
- Employee experience
- Productivity
- Compliance
- Workforce planning
- Adoption
- Manager experience

What to Explore

- What employee or manager problem exists today?
- Who experiences it most?
- What does it create for HR?
- What does it create for the business?
- How are employees expected to adopt the change?
- What systems or policies must it work with?

Proof They Trust

- Adoption evidence
- Employee experience
- Time savings
- Relevant HR outcomes
- Compliance documentation where applicable
- Implementation support

Common Concerns

- Low employee adoption
- Change fatigue
- HR budget pressure
- Privacy concerns
- More administrative work

Natural Next Step

Understand both the HR outcome and the employee experience before recommending the solution.

9. Procurement

Typical Titles: *Chief Procurement Officer, Procurement Director, Purchasing Manager, Strategic Sourcing*

What They Care About

- Commercial value
- Vendor risk
- Contract terms
- Price
- Total cost
- Supplier reliability
- Purchasing policy
- Standardization

What to Explore

- What purchasing process applies?
- Are competitive bids required?
- What commercial terms matter?
- What documentation is required?
- Who owns vendor approval?
- What is negotiable and what is policy?

Proof They Trust

- Transparent pricing
- TCO analysis
- Vendor documentation
- References
- Clear scope
- Commercial consistency

Common Concerns

- Price
- Contract length
- Payment terms
- Vendor risk
- Nonstandard terms
- Lack of competitive process

House of Sales Rule

Procurement is not the enemy.

Understand their process and negotiate through trades, not random concessions.

Natural Next Step

Clarify the commercial and purchasing process before entering negotiation.

10. Legal

Typical Titles: *General Counsel, Legal Director, Corporate Counsel, Contract Counsel*

What They Care About

• Contract exposure
• Liability
• Obligations
• Data rights
• Intellectual property
• Termination rights
• Regulatory exposure
• Dispute risk

What to Explore

• Which clauses are likely to matter?
• Are there standard vendor terms?
• What areas usually slow contract review?
• What liabilities are unacceptable?
• Are data-processing terms involved?
• What approvals are required?

Proof They Trust

• Clear contracts
• Accurate representations
• Defined responsibilities
• Appropriate insurance
• Security/compliance documentation
• Reasonable risk allocation

Common Concerns

• One-sided contracts
• Unlimited liability
• Weak data protections
• Vague scope
• Unsupported claims

Natural Next Step

Understand the real contractual concern rather than treating every requested change as an objection.

11. Customer Success & Support

Typical Titles: *Chief Customer Officer, VP Customer Success, Head of Support, CX Director*

What They Care About

• Retention
• Adoption
• Churn
• Customer experience
• Resolution time
• Support capacity
• Expansion
• Customer health

What to Explore

• Why do customers leave?
• Where does support become overloaded?
• What prevents adoption?
• Which customer segments struggle most?
• How is customer health measured?
• What drives expansion today?

Proof They Trust

• Adoption improvements
• Retention evidence
• Customer satisfaction
• Support efficiency
• Relevant workflow examples
• Customer outcomes

Common Concerns

• Customer disruption
• Migration effort
• Poor adoption
• New system workload
• Automation hurting the customer experience

Natural Next Step

Identify the customer journey point that needs to improve first.

12. CEO, Founder & Executive Leadership

Typical Titles: *CEO, Founder, President, Managing Director, Board Member*

What They Care About

- Growth
- Profitability
- Strategy
- Competitive position
- Risk
- Execution
- Capital allocation
- Organizational capability

What to Explore

- Why does this matter at the company level?
- What happens if nothing changes?
- Which strategic priority does it support?
- What business outcome would justify the investment?
- Who needs to own implementation?
- What could prevent the initiative from succeeding?

Proof They Trust

- Clear business case
- Relevant strategic outcomes
- Executive references
- Implementation confidence
- Financial impact
- Evidence that the organization can execute

Common Concerns

- Not strategic enough
- Competing priorities
- Weak business case
- Execution risk
- Internal bandwidth

Natural Next Step

Connect the problem to a real business priority and determine who should own the evaluation internally.

How to Adapt Your Message by Buyer

Do not completely change your product story for every title.

Change what you emphasize.

Finance: economics and risk
IT: architecture and implementation
Security: exposure and controls
Sales: pipeline and execution
Marketing: demand and measurement
RevOps: process and data
Operations: efficiency and reliability
HR: people and adoption
Procurement: commercial terms and vendor risk
Legal: contractual exposure
Customer Success: retention and customer outcomes
Executives: strategic impact

Final House of Sales Principle

One solution can create different value for different stakeholders.

The salesperson's job is to understand:

- Who owns the problem
- Who experiences the problem
- Who benefits from solving it
- Who approves the money
- Who evaluates the risk
- Who can block the decision
- Who will ultimately use the solution

Then communicate the same business case in the language each stakeholder cares about.