

Total Economic Impact

The Total Economic Impact™ Of ZoomInfo

Cost Savings And Business Benefits Enabled By ZoomInfo

A FORRESTER TOTAL ECONOMIC IMPACT STUDY COMMISSIONED BY ZOOMINFO, OCTOBER 2025

FORRESTER®

Executive Summary

B2B sales, revenue operations (RevOps), and marketing organizations are seeking targeting and differentiation to identify and influence buyers. They see an opportunity in genAI, but trust is required. Data and insights drawn from data are barriers: either dealing with conflicting, untried data silos and disparate tools to access the data or integrated data that is outdated by the time it is made available. This need has led to the creation of sales and marketing data and tools platforms to provide industry, organization, and account data and tools to provide timely, valuable insights.

ZoomInfo is a go-to-market intelligence platform that provides an extensive database on industries, organizations, and contacts; tools to provide intent signals and search-driven insights; cleansing and enrichment of CRM and other data; and automation tools to allow teams to focus on revenue-generating activities. The database is a timely, cleansed collection of public records, web crawlers, and data partnerships. AI-powered analysis tools leverage the database to provide valuable insights throughout the application and through an easy-to-use natural language interface.

ZoomInfo commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying ZoomInfo.¹ The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of ZoomInfo on their organizations.



To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed decision-makers with experience using ZoomInfo at five organizations that have currently adopted it. For the purposes of this study, Forrester aggregated the experiences of the interviewees and combined the results into a single composite organization, a global B2B business with revenue of \$1.5 billion per year.

Interviewees said that prior to using ZoomInfo, their organizations shared common challenges related to data, nonrevenue-producing activities, disconnected tools and processes, security and compliance regulations, and difficulty drawing valuable insights from data. Data issues were related to inconsistencies across multiple sources, quality shortcomings, gaps in the available data, out-of-date data, and the inability to obtain a single source of truth. Manual data entry was common, time-consuming, and prone to errors. Having multiple disconnected tools and processes for data analysis led to more effort and discrepancy challenges. Interviewees also shared that using legacy technology meant that security policies and regulatory requirements were not fully adhered to. Finally, interviewees wanted a more agile environment, allowing them to better respond to new requirements.

After the investment in ZoomInfo, the interviewees described a solution that helps sales, RevOps, and marketing organizations increase sales. Team member efficiencies enable more time spent on revenue-generating activities. Data and tool improvements provide more timely, higher-quality leads and knowledge to improve both marketing and sales outcomes. Key results from the investment include sales opportunity and outcome improvements for previously used approaches, marketing campaigns in weeks vs. months, and new hyperpersonalized marketing and sales opportunities with a higher likelihood of producing additional revenue.

Key Findings

Quantified benefits. Three-year, risk-adjusted present value (PV) quantified benefits for the composite organization include:

- **ZoomInfo-associated revenue improvement of 1.5% due to better data quality, more knowledge, reduction in manual efforts, signal alerts, and improved search.** ZoomInfo provides the composite organization with high-quality, near-real-time data, including industry, organization, and contact information that is more expansive than before. ZoomInfo's integration with CRM and other applications reduces manual tasks for sales, RevOps, and marketing teams, allowing team members to spend more

time on revenue-producing activities. ZoomInfo Copilot, signals, analyses, and natural language search capabilities quickly provide more actionable information. The composite organization sees a net margin improvement of \$5 million.

- **Personalized targeting by both marketing and sales, improving lead generation rate and lead-to-sale conversion rate.** The composite organization performs hyperpersonalized targeting that previously had not been possible or was created through custom effort. Timeliness and accuracy lead to a highly repeatable process to quickly identify strong leads. The composite organization sees a net margin improvement of \$1.3 million.
- **Labor reassessments to higher-value work as a result of ZoomInfo of \$1.1 million.** The composite organization transitions some RevOps personnel to non-revenue-producing roles due to the level of automation, elimination of manual tasks, and data analysis improvements.
- **Avoided costs for third-party tools, databases, and internal labor of \$249,000.** The composite organization is able to reduce some existing tools, databases, and associated IT labor due to ZoomInfo's data and capabilities.

Unquantified benefits. Benefits that provide value for the composite organization but are not quantified for this study include:

- **Single version of the truth.** ZoomInfo serves as the sales and marketing data source of record for the composite organization. The platform provides trusted, current, and valuable data that is frequently used by team members.
- **Strategic partner.** ZoomInfo is considered a crucial partner by the interviewees' organizations.
- **Future reduction in tools, data, and labor.** The interviewees' organizations are currently prioritizing building market share over retiring legacy solutions. Related cost savings will increase as ZoomInfo takes on more historical sales and marketing use cases.
- **Compliance and security improvements.** Interviewees' organizations have seen significant improvements in their compliance and security posture through centralized data access controls, encryption, and built-in compliance features.
- **Employee satisfaction improvements.** The interviewees shared that the sales, RevOps, and marketing teams are happier due to the ZoomInfo implementation. Eliminating manual tasks has allowed them to do more value-adding work. ZoomInfo data and ZoomInfo as a tool have allowed them to produce better results.
- **Knowledge for decision-making.** ZoomInfo is providing new insights to the interviewees' organizations. ZoomInfo industry and global region knowledge are examples of ZoomInfo helping to improve strategy and tactical decision-making.

Costs. Three-year, risk-adjusted PV costs for the composite organization include:

- **Licensing, subscriptions, support, and ongoing administration.** The composite organization has a license to use the ZoomInfo solution, with subscriptions to support its data and integration requirements. The composite organization also gets premium support from ZoomInfo and has some ongoing internal administrative requirements.
- **Implementation costs of \$58,000.** The composite organization has a broad team from sales, revenue ops, marketing, and IT to support the implementation. The composite organization utilizes ZoomInfo professional services to perform data management activities, including deduplication of existing data.
- **User training costs of \$56,000.** The composite organization provides initial training to the sales, revenue ops, and marketing organization, with additional training for each team to cover new capabilities and to train new employees.

The financial analysis that is based on the interviews found that a composite organization experiences benefits of \$7.6 million over three years versus costs of \$1.8 million, adding up to a net present value (NPV) of \$5.8 million and an ROI of 316%.

Key Statistics

316%

Return on investment (ROI)

\$7.6M

Benefits PV

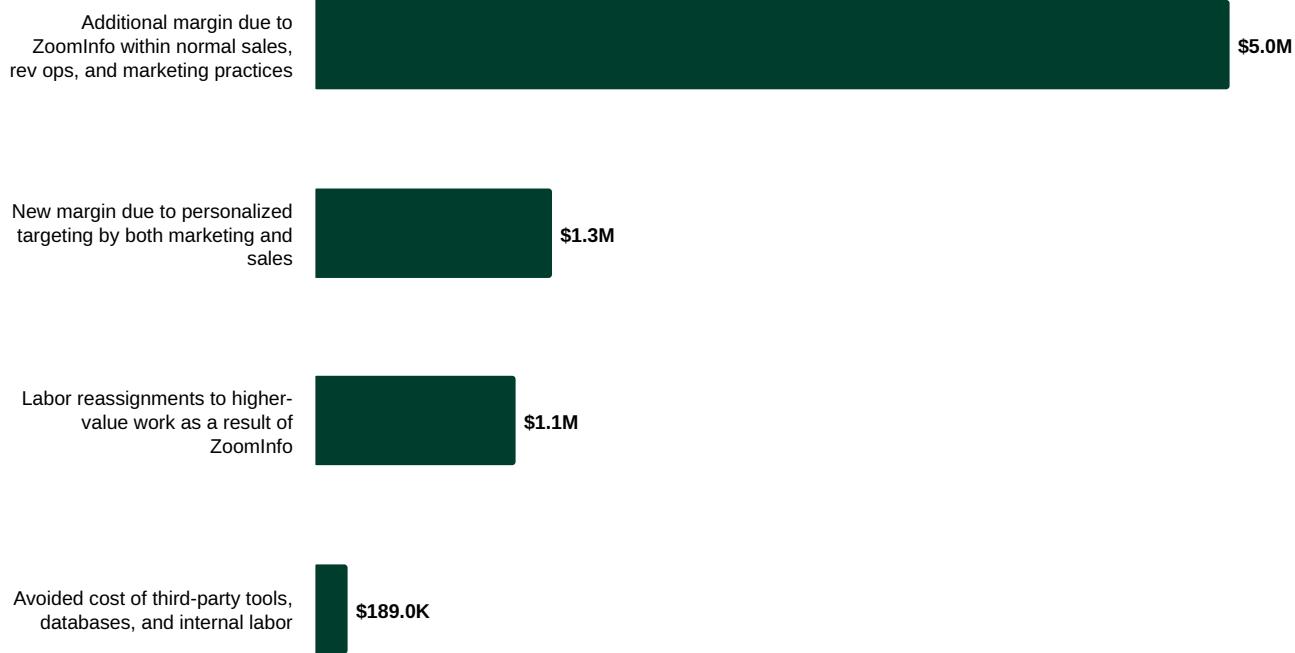
\$5.8M

Net present value (NPV)

<6 months

Payback

Benefits (Three-Year)



The ZoomInfo Customer Journey

Drivers leading to the ZoomInfo investment

Interviews			
Role	Industry	Region	Annual Revenue
CSO and sales SVP	Financial services	US	\$100 million
Senior manager of revenue technology	Technology	Global	\$1 billion
Managing director of data integration	Payment services	Global	\$35 billion
Manager of cloud engineering	Technology	Global	\$50 billion
VP of revenue operations	Software	Global	\$750 million

Key Challenges

Interviewees' organizations shared common challenges related to having multiple disparate data sources for sales and marketing data, data issues, manual data entry requirements, ineffective data aggregation processes, multiple disconnected tools and processes for analyzing the data, meeting security and regulatory compliance requirements, and providing valuable insights. Data issues were related to inconsistencies across sources, quality, thoroughness, timeliness, and the inability to obtain a single source of truth. Manual data entry was time-consuming and prone to errors. Having multiple disconnected tools and processes for data analysis led to an ineffective sales and marketing environment. Interviewees also shared that security policies and regulatory requirements were not fully adhered to for things like role-based security and encrypted communications. Finally, interviewees wanted to obtain insights by connecting data or responding to new requirements that couldn't be done with current tools and data.

Interviewees noted how their organizations struggled with common challenges, including:

- **Multiple flawed data sources.** The interviewees described having multiple data sources that were not aggregated into a single source or were accessed separately by sales, RevOps, and marketing teams. Data was consistently incomplete, conflicting, erroneous, or out of date, leading to incorrect, conflicting, or suboptimal results. Team members frequently spent additional time trying to validate results by doing additional research on their own.

“The data preparation process used to be very iterative, very cumbersome, and very painful. It may be three months, or more, before it gets to marketing and sales.”

Managing director of data integration, payment services

- **Manual data entry and analysis.** Interviewees described team members having to perform data entry and manual processes that they felt should have been automated — particularly when staff needed to re-enter data into multiple solutions. Not only were these activities time-consuming, but errors were common.

“Previously, a salesperson would spend 8 to 10 hours per week doing research.”

VP of revenue operations, software

“Their job is to go have productive selling conversations, not to do administrative tasks like loading contacts.”

Senior manager of revenue technology, technology

“We could only review a handful of accounts each week because the process was so manual.”

Manager of cloud engineering, technology

- **Ineffective data aggregation.** Interviewees shared that they lacked an effective data aggregation processes and architecture, as well as a lack of breadth of data, especially internationally. There was a trade-off of timeliness and data quality. Conflicting data existed, and the thoroughness of the account information didn't meet expectations. In addition, the processes to aggregate the data required significant labor and IT resources.

“In APAC, we didn't have the cultural or contextual knowledge to make our sales efforts effective.”

Manager of cloud engineering, technology

- **Too many data analysis tools and inconsistent processes.** Interviewees shared that team members were expected to use multiple tools and processes to analyze data, then connect the dots themselves to accomplish many tasks. Utilization of the tools was lacking, due to usability and time constraints.

“We had tools that some reps used and others didn't, which made it hard to standardize our process. Sales reps were also Googling, using LinkedIn, and using outdated lead lists to find contacts.”

CSO and sales SVP, financial services

“We had internal tools and our CRM system, but they weren't giving us real-time, targeted insights.”

Manager of cloud engineering, technology

- **Security and regulatory compliance.** Interviewees described the use of tools that didn't meet enterprise-level security policies and others with regulatory compliance concerns. Specific concerns were the lack of controls on data use by roles or individuals and the lack of encrypted communications. The payment services company's managing director of data integration shared, “We needed better governance and compliance than our previous systems could offer.”
- **Limited insights.** According to interviewees, many new insight requests required lengthy projects to extract new data or perform new analyses. Also, team members could not perform effective hypertargeting due to the inability of the tools to make connections across data sources or data content. For example, users could not identify champions of their organizations' solutions who had changed employers and provided new organization and contact information. The technology company's manager of cloud engineering shared, “We needed to do a better job of identifying the key accounts that have a higher probability to do a migration.”

"We've struggled to track people who have been championed in our technology before but have moved on to a new prospective organization."

Senior manager of revenue technology, technology

"We had difficulty scaling operations and adapting to new requirements with the old system."

CSO and sales SVP, financial services

Composite Organization

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the interviewees' organizations, and it is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

- **Description of composite.** The composite organization is a global, multibillion-dollar organization headquartered in the US. Its sales and marketing organizations are supported by a RevOps organization. The marketing organization typically develops marketing campaigns in three to six months. The sales organization obtains leads from marketing campaigns, through networks, and via direct sales. Database administrators and data scientists cleanse and aggregate multiple data sources, merging results into the organization's CRM system.
- **Deployment characteristics.** The composite organization uses ZoomInfo professional services for data management, data deduplication, and application integration. Training is tailored to the sales, marketing, and RevOps organizations.

KEY ASSUMPTIONS

- Global organization
- \$1.5 billion annual revenue
- Sales, RevOps, and marketing organizations
- Average order value of \$15,000

Analysis Of Benefits

Quantified benefit data as applied to the composite

Total Benefits						
Ref.	Benefit	Year 1	Year 2	Year 3	Total	Present Value
Atr	Additional margin due to ZoomInfo within normal sales, RevOps, and marketing practices	\$1,912,500	\$2,017,688	\$2,128,660	\$6,058,848	\$5,005,441
Btr	New margin due to personalized targeting by both marketing and sales	\$540,000	\$540,000	\$540,000	\$1,620,000	\$1,342,900
Ctr	Labor reassessments to higher-value work as a result of ZoomInfo	\$440,000	\$440,000	\$440,000	\$1,320,000	\$1,094,215
Dtr	Avoided cost of third-party tools, databases, and internal labor	\$76,000	\$76,000	\$76,000	\$228,000	\$189,001
Total benefits (risk-adjusted)		\$2,968,500	\$3,073,688	\$3,184,660	\$9,226,848	\$7,631,557

Additional Margin Due To ZoomInfo Within Normal Sales, RevOps, And Marketing Practices

Evidence and data. Interviewees shared that ZoomInfo increased sales by improving upon existing sales, RevOps, and marketing activities. The ZoomInfo capabilities that drove the revenue improvements included the combination of automating processes, shortening the time to perform research tasks, improving data quality, providing a single source of truth, expanding upon data scope, and providing better signals and analyses.

“Our national account managers’ annual revenue has increased by over 50% since we started using ZoomInfo.”

CSO and sales SVP, financial services

- Improvement to data quality was referred to by interviewees as a significant change for the better. Users no longer needed to double-check results, and contact attempts have been far more successful.

“We have eliminated a lot of data noise. That makes it easier for our team to identify higher-potential accounts and contacts.”

Manager of cloud engineering, technology

“ZoomInfo actually gives us the actual person’s name, title, and direct contact info, which saves time and prevents guessing who to contact.”

CSO and sales SVP, financial services

“We removed over 200,000 invalid accounts from our CRM, which provided a significant improvement in data quality.”

Senior manager of revenue technology, technology

- Process automation combined with the ability to perform research activities in much less time has enabled team members to spend more time doing revenue-generating activities. Sales reps have been able to reach out to more accounts, marketing has been able to plan and launch campaigns much quicker, and RevOps has been able to support both sales and marketing more effectively.

“ZoomInfo has reduced the time salespersons spend doing research by 4 to 5 hours per week, giving them more time to sell.”

Manager of cloud engineering, technology

“We now provide briefings of about 5x to 10x more accounts than we did previously, improving strategic alignment and executive input.”

Manager of cloud engineering, technology

“Our campaign preparation time has been reduced from approximately five months to two to three weeks.”

Managing director of data integration, payment services

“Marketing-driven leads are presented to sales instantaneously with organization and contact information, when it previously took a day. This has improved our probability of closing a deal by around 25%.”

VP of revenue operations, software

- The use of ZoomInfo Copilot; ZoomInfo-sourced signals; and the expanded breadth of ZoomInfo industry, account, and contact information helped improve sales at interviewees' organizations in numerous ways. ZoomInfo Copilot has simplified research through its natural language interface, while providing insights by connecting information better and supporting new research, like what-if analysis. ZoomInfo-sourced signals are timely with high-quality insights, leading to better actions, sooner. The breadth of data improvements provided valuable new learnings, including nuances such as recommending ways to address individuals more effectively in different regions of the world.

“Accounts with ZoomInfo-sourced signals have shown a 2.7x increase in deal size.”

Senior manager of revenue technology, technology

“Our sales and marketing teams really like [ZoomInfo] Copilot. They are doing interactive chats with the data, including what-if scenarios. The ability to ask questions about unstructured data has really helped them with their analyses.”

Managing director of data integration, payment services

"We have seen a 2x to 3x increase in outreach response rate in certain verticals and regions, especially in Asia."

Manager of cloud engineering, technology

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Revenue is \$1,500,000,000 in Year 1, \$1,582,500,000 in Year 2, and \$1,669,537,500 in Year 3.
- Direct sales revenue due to improved data quality, more knowledge, reduction in manual efforts, signal alerts, and improved search comprises 1% of total revenue.
- Marketing-sourced revenue due to improved data quality, more knowledge, reduction in manual efforts, signal alerts, and improved search is an additional 0.5% of total revenue.
- The composite organization's net margin is 10%.

Risks. This benefit may vary across organizations for the following reasons:

- Maturity and quality of sales and marketing data and search processes.
- Adoption by sales and marketing organizations.
- Market growth opportunities.
- Net margin.

Results. To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$5 million.

Additional Margin Due To ZoomInfo Within Normal Sales, RevOps, And Marketing Practices

Ref.	Metric	Source	Year 1	Year 2	Year 3
A1	Revenue	Composite	\$1,500,000,000	\$1,582,500,000	\$1,669,537,500
A2	New direct sales revenue due to improved data quality, more knowledge, reduction in manual efforts, signal alerts, and improved search	Interviews	1.0%	1.0%	1.0%
A3	New marketing-sourced revenue due to improved data quality, more knowledge, reduction in manual efforts, signal alerts, and improved search	Interviews	0.5%	0.5%	0.5%
A4	New revenue within normal sales, RevOps, and marketing practices	A1*(A2+A3)	\$22,500,000	\$23,737,500	\$25,043,063
A5	Net margin	Research data	10%	10%	10%
At	Additional margin due to ZoomInfo within normal sales, RevOps, and marketing practices	A4*A5	\$2,250,000	\$2,373,750	\$2,504,306
	Risk adjustment	↓15%			
Attr	Additional margin due to ZoomInfo within normal sales, RevOps, and marketing practices (risk-adjusted)		\$1,912,500	\$2,017,688	\$2,128,660

Three-year total: \$6,058,848

Three-year present value: \$5,005,441

New Margin Due To Personalized Targeting By Both Marketing And Sales

Evidence and data. Interviewees shared that they have been able to do more hyperpersonalized targeting in both their sales and marketing efforts. They described how this quickly led to highly qualified leads, with positive sales results. In some cases, interviewees said that they were able to do the targeting before, but it was time-consuming and never as accurate as ZoomInfo has been for their teams. A few examples of hyperpersonalized targeting include:

- The VP of revenue operations at the software company described how a competitive solution's company was acquired due to noncompeting solutions within that company's portfolio, leading to confusion on the future of the competitive solution. With

ZoomInfo, a team was able to quickly identify organizations with contacts using the competitor's solution, contact them, and convince some of them to switch to their company's solution.

- Interviewees described how, in general, their teams have expanded personalized targeting, with positive outcomes. Sales reps have been able to go beyond identifying better organization and contacts to target by having more knowledge about the industry, organization, and contacts going into reach-outs and conversations. Marketing campaign strategies included personalized targeting where possible.

"We are making it more personal. Our outreach is more effective because it is more personalized. On the marketing side, we are doing more effective hyperpersonalized campaigns."

Managing director of data integration, payment services

- Interviewees described ZoomInfo's ability to match contacts' roles to personas, which can be matched to their organization's product/service portfolio. This has led to multiple reach-outs within organizations, with better results.

"ZoomInfo's ability to identify contacts at a persona level has allowed us to target different individuals in the same organization to different products. Technology sales are made to IT contacts, and consumer sales are made to appropriate operational contacts."

VP of revenue operations, software

- Interviewees also described doing original or vastly improved work on identifying champion contacts for their organization's solution who have moved to a new employer, then reaching out to them as a highly qualified lead. Turnaround time was fast, and the process proved to be repeatable and simple, producing positive results.

"A single alumni-tracking initiative using ZoomInfo generated \$2 million in pipeline from 10 deals in just the first two weeks."

Senior manager of revenue technology, technology

"During ZoomInfo's comprehensive training, a team member identified champions of our solution who moved to other organizations, providing current contact information. We quickly identified 700 individuals, increased pipeline, and closed deals."

VP of revenue operations, software

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite targets 10,000 new accounts using a combination of direct sales and focused marketing campaigns.
- The normal lead generation rate is 20%. The lead generation rate with ZoomInfo-enabled personalized targeting is 30%.
- The normal conversion rate from lead to sale is 10%. The conversion rate from lead to sale with ZoomInfo-enabled personalized targeting is 15%.
- The average order value is \$15,000.
- The composite organization's net margin is 10%.

Risks. This benefit may vary across organizations for the following reasons:

- The personalized targeting opportunities available or identified.
- Normal lead generation rates and lead-to-sale conversion rates.
- Average order value.
- Net margin.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.3 million.

New Margin Due To Personalized Targeting By Both Marketing And Sales					
Ref.	Metric	Source	Year 1	Year 2	Year 3
B1	Targeted accounts due to ZoomInfo unique sourcing capabilities	Composite	10,000	10,000	10,000
B2	Lead generation rate before ZoomInfo	Composite	20%	20%	20%
B3	Lead generation rate due to personalized targeting with ZoomInfo	Interviews	30%	30%	30%
B4	Conversion rate from lead to sale before ZoomInfo	Composite	10%	10%	10%
B5	Conversion rate from lead to sale due to personalized targeting with ZoomInfo	Interviews	15%	15%	15%
B6	Total leads converted to sale with personalized targeting	(B1*B3*B5)	450	450	450
B7	Average order value	Composite	\$15,000	\$15,000	\$15,000
B8	Net margin	Research data	10%	10%	10%
Bt	New margin due to personalized targeting by both marketing and sales	B6*B7*B8	\$675,000	\$675,000	\$675,000
Risk adjustment		↓20%			
Btr	New margin due to personalized targeting by both marketing and sales (risk-adjusted)		\$540,000	\$540,000	\$540,000
Three-year total: \$1,620,000			Three-year present value: \$1,342,900		

Labor Reassignments To Higher-Value Work As A Result Of ZoomInfo

Evidence and data. Interviewees shared that ZoomInfo provided labor savings to the sales, RevOps, and marketing teams through automation, elimination of manual tasks, and data extraction improvements. The labor productivity within the sales and marketing organizations led to team members using the time saved to perform additional revenue-producing work. In the case of the RevOps roles of sales development reps and lead management specialists, the labor productivity was significant enough that some employees were transitioned to nonrevenue-producing roles, as is presented in this benefit.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Two sales development reps are reassigned due to ZoomInfo data collection automation.
- Three lead management specialists are reassigned due to ZoomInfo improvements.
- The average fully burdened annual salary for RevOps employees is \$110,000.

Risks. This benefit may vary across organizations for the following reasons:

- The maturity of RevOps and marketing data and processes.
- Role assignments.
- The extent that labor productivity can be transitioned to revenue-generating activities.
- Labor rates.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.1 million.

“We set up workflows to automatically identify and enrich contacts. It seemed like RevOps was manually enriching every record previously.”

CSO and sales SVP, financial services

“We have been able to reduce the size of RevOps teams to find the contacts within the system at scale.”

Senior manager of revenue technology, technology

“Due to ZoomInfo, we have been able to shift 80% of our lead management specialists to value-add work within marketing. ZoomInfo data collection automation has allowed us to shift 15% of our sales enablement reps to value-add work.”

VP of revenue operations, software

Labor Reassignments To Higher-Value Work As A Result Of ZoomInfo

Ref.	Metric	Source	Year 1	Year 2	Year 3
C1	Reassigned sales development reps due to ZoomInfo data collection automation (FTE)	Composite	2	2	2
C2	Reassigned lead management specialists due to ZoomInfo (FTE)	Composite	3	3	3
C3	Average fully burdened annual salary of RevOps employees	Composite	\$110,000	\$110,000	\$110,000
Ct	Labor reassignments to higher-value work as a result of ZoomInfo	(C1+C2) * C3	\$550,000	\$550,000	\$550,000
	Risk adjustment	↓20%			
Ctr	Labor reassignments to higher-value work as a result of ZoomInfo (risk-adjusted)		\$440,000	\$440,000	\$440,000
Three-year total: \$1,320,000			Three-year present value: \$1,094,215		

Avoided Cost Of Third-Party Tools, Databases, And Internal Labor

Evidence and data. Interviewees shared that ZoomInfo had replaced some existing tools and databases, which also reduced internal IT labor associated with them. Interviewees also noted that business priorities were to drive new revenue, not to produce cost savings. Thus, the replacement process, though valid, was occurring naturally as existing revenue-generating processes were moved over to ZoomInfo as time permitted, vs. planned.

“ZoomInfo has displaced two [point] solutions and, to our surprise, provided us with a capability that negated the need for a third solution.”

VP of revenue operations, software

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Avoided labor and solution cost of redundant legacy tools is \$70,000 per year.
- Avoided labor and solution costs of redundant legacy business information databases is \$25,000 per year.

Risks. This benefit may vary across organizations for the following reasons:

- The ability to transition revenue-generating use cases to the ZoomInfo implementation.
- Organizational priorities toward transitioning existing revenue-generating use cases to the ZoomInfo implementation.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$189,000.

Avoided Cost Of Third-Party Tools, Databases, And Internal Labor					
Ref.	Metric	Source	Year 1	Year 2	Year 3
D1	Avoided labor and solution cost of redundant legacy tools	Composite	\$70,000	\$70,000	\$70,000
D2	Avoided labor and solution cost of redundant legacy business information databases	Composite	\$25,000	\$25,000	\$25,000
Dt	Avoided cost of third-party tools, databases, and internal labor	D1+D2	\$95,000	\$95,000	\$95,000
	Risk adjustment	↓20%			
Dtr	Avoided cost of third-party tools, databases, and internal labor (risk-adjusted)		\$76,000	\$76,000	\$76,000
Three-year total: \$228,000			Three-year present value: \$189,001		

Unquantified Benefits

Interviewees mentioned the following additional benefits that their organizations experienced but were not able to quantify:

- **Single version of the truth.** ZoomInfo was transformative for the interviewees' organizations, in that the data is trusted, current, expansive in scope, and provides insights for multistep requests. The technology company and the software company have utilized ZoomInfo to solve a historical problem of ambiguous territory assignments by having ZoomInfo associate prospective customers with a territory. The technology company's senior manager of revenue technology said, "We want to make sure that we have equitable regions for all of our sales reps."

"ZoomInfo has improved the quality of data related to organizations, contacts, etc., which eliminates getting conflicting results from multiple sources."

VP of revenue operations, software

- **Strategic partner.** Interviewees shared that their sales, RevOps, and marketing teams consider ZoomInfo a strategic partner. As the software company's VP of RevOps described, "They are strategic partner with strong support in every area, from their account team to customer support to training."
- **Compliance and security improvements.** Interviewees' organizations have seen significant improvements in their compliance and security posture through centralized data access controls, encryption, and built-in compliance features. The technology company's senior manager of revenue technology shared: "The deduplication and hierarchy tools help us stay compliant with our data policies. Having everything centralized means we have better control over who accesses what."

"The ZoomInfo platform provides better encryption and access controls, which improved our data security posture. The solution helped us meet regulatory requirements more effectively with its built-in compliance features."

Manager of cloud engineering, technology

- **Improvements in employee satisfaction.** The sales, RevOps, and marketing teams at interviewees' organizations are happier due to the ZoomInfo implementation. Automation has allowed them to do more value-adding work and improved the quality,

breadth, and timeliness of the data. Moreover, the ease of drawing insights using ZoomInfo has enabled them to produce better results.

“We have achieved broad adoption of ZoomInfo, with over 800 active users in the sales organization.”

Senior manager of revenue technology, technology

- **Knowledge for decision-making.** ZoomInfo provides knowledge about individuals, organizations, industries, global regions, etc. that interviewees used to set short-term and long-term strategies, as well as to take action that is more focused and more personally targeted. The payment services company’s managing director of data integration shared, “Our outreach is now more personalized, which is more effective.”

“We have used ZoomInfo at the account level to help understand the ability to buy our service.”

Senior manager of revenue technology, technology

“We are able to identify common interests and match them with industry trends, which helps us to prioritize on certain accounts.”

Manager of cloud engineering, technology

Flexibility

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement ZoomInfo and later realize additional uses and business opportunities, including:

- **Enabling global expansion.** Interviewees who described global regions where their sales and marketing efforts were doing poorly have been turned around due to ZoomInfo’s understanding of language, communication style, formatting, and other regional idiosyncrasies.

“Instead of just reaching out, it really talks in their language. Our current communications resonate with [customers] much better.”

Managing director of data integration, payment services

- **Ability to respond to new requirements.** Interviewees shared that the breadth of quality, real-time organizational data has made them more agile in responding to new requirements. ZoomInfo has enabled new marketing campaigns and new sales initiatives. ZoomInfo alerts and knowledge of industry trends have further augmented sales and marketing activities.

“When a competing solutions’ company was acquired, we were able to take advantage of concerns about the future of that solution, reach out to their customers, and convince some of them to switch to our solution. This wouldn’t have been possible before as quickly or as effectively.”

VP of revenue operations, software

- **Future reduction in tools, data, and labor.** The composite organization has a strategy to increase market share and has prioritized using ZoomInfo to that end at this point. Currently, the retirement of the original tools and processes has been through attrition. Related cost savings will continue as more and more use cases are transitioned to ZoomInfo.

“We aim to sunset existing tools and data sources, although this process will take time due to proprietary laws and existing valuable pipelines.”

Managing director of data integration, payment services

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in [Total Economic Impact Approach](#)).

Analysis Of Costs

Quantified cost data as applied to the composite

Total Costs							
Ref.	Cost	Initial	Year 1	Year 2	Year 3	Total	Present Value
Etr	Licensing, subscriptions, support, and ongoing administration	\$0	\$692,293	\$692,293	\$692,293	\$2,076,879	\$1,721,630
Ftr	Implementation costs	\$57,500	\$0	\$0	\$0	\$57,500	\$57,500
Gtr	User training	\$34,500	\$5,175	\$10,350	\$10,350	\$60,375	\$55,534
	Total costs (risk-adjusted)	\$92,000	\$697,468	\$702,643	\$702,643	\$2,194,754	\$1,834,664

Licensing, Subscriptions, Support, And Ongoing Administration

Evidence and data. Interviewees described paying an annual licensing fee for ZoomInfo. In addition, annual data and API fees were paid to ZoomInfo for ZoomInfo data access and application integrations, and premium support was provided. Finally, ZoomInfo required IT administration over time.

Pricing may vary. Contact ZoomInfo for additional details.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- ZoomInfo licensing, platform subscriptions, and support costs are \$596,494 annually.
- Ongoing administration of ZoomInfo is \$5,500 annually.

Risks. These costs may vary across organizations for the following reasons:

- ZoomInfo licensing requirements.
- Number of data sources, quantity of data, and quality of data.
- Number of applications to integrate ZoomInfo and the complexity of those integrations.
- Support needs for ZoomInfo.
- Complexity of implementation, data sources, and integrations.

Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.7 million.

Licensing, Subscriptions, Support, And Ongoing Administration						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
E1	ZoomInfo Copilot licensing, platform subscriptions, and support costs	Composite	\$0	\$596,494	\$596,494	\$596,494
E2	Ongoing administration	Interviews	\$0	\$5,500	\$5,500	\$5,500
Et	Licensing, subscriptions, support, and ongoing administration	E1+E2	\$0	\$601,994	\$601,994	\$601,994
	Risk adjustment	115%				
Etr	Licensing, subscriptions, support, and ongoing administration (risk-adjusted)		\$0	\$692,293	\$692,293	\$692,293
Three-year total: \$2,076,879				Three-year present value: \$1,721,630		

Implementation Costs

Evidence and data. Interviewees' organizations had an implementation team consisting of members from sales, RevOps, marketing, and IT. The implementation was far less labor-intensive than a typical major technology solution implementation. As part of the implementation, ZoomInfo professional services prepared existing data for use with ZoomInfo's cloud-based data, including data-cleansing activities such as eliminating data duplication.

Some organizations included a proof-of-concept (POC) phase that added some costs to their implementation, but this helped decision-makers test ZoomInfo with sales, marketing, and RevOps teams before making a final commitment. This cost is not included in this analysis but may be a consideration for some organizations.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Internal implementation costs are \$25,000.
- Professional services costs for data management and deduplication total \$25,000.

Risks. These costs may vary across organizations for the following reasons:

- Complexity of implementation, including whether a POC phase is included.
- Skill level of an organization's internal IT team.
- Number of data sources and quality of data.

Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$58,000.

Implementation Costs						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
F1	Internal implementation costs	Interviews	\$25,000			
F2	Professional Services for data management/deduplication	Interviews	\$25,000			
Ft	Implementation costs	F1+F2	\$50,000	\$0	\$0	\$0
	Risk adjustment		115%			
Ftr	Implementation costs (risk-adjusted)		\$57,500	\$0	\$0	\$0
Three-year total: \$57,500				Three-year present value: \$57,500		

User Training

Evidence and data. Interviewees described having comprehensive sales, revenue ops, and marketing training as part of the implementation, with ongoing training as needed.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Sales training costs total \$10,000 during the initial period, then are \$1,500 in Year 1 and \$3,000 in subsequent years.
- Marketing training costs total \$10,000 initially, then are \$1,500 in Year 1 and \$3,000 in subsequent years.
- RevOps training costs are \$10,000 initially, then are \$1,500 in Year 1 and \$3,000 in subsequent years.

Risks. These costs may vary across organizations for the following reasons:

- Size and distribution of sales, RevOps, and marketing teams.
- Training requirements.

Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$56,000.

“Historically, we would provide sales [with] two weeks of training. We currently allocate three days of training [with ZoomInfo].”

Managing director of data integration, payment services

User Training						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
G1	Sales training	Interviews	\$10,000	\$1,500	\$3,000	\$3,000
G2	Marketing training	Interviews	\$10,000	\$1,500	\$3,000	\$3,000
G3	RevOps training	Interviews	\$10,000	\$1,500	\$3,000	\$3,000
Gt	User training	G1+G2+G3	\$30,000	\$4,500	\$9,000	\$9,000
	Risk adjustment	±15%				
Gtr	User training (risk-adjusted)		\$34,500	\$5,175	\$10,350	\$10,350

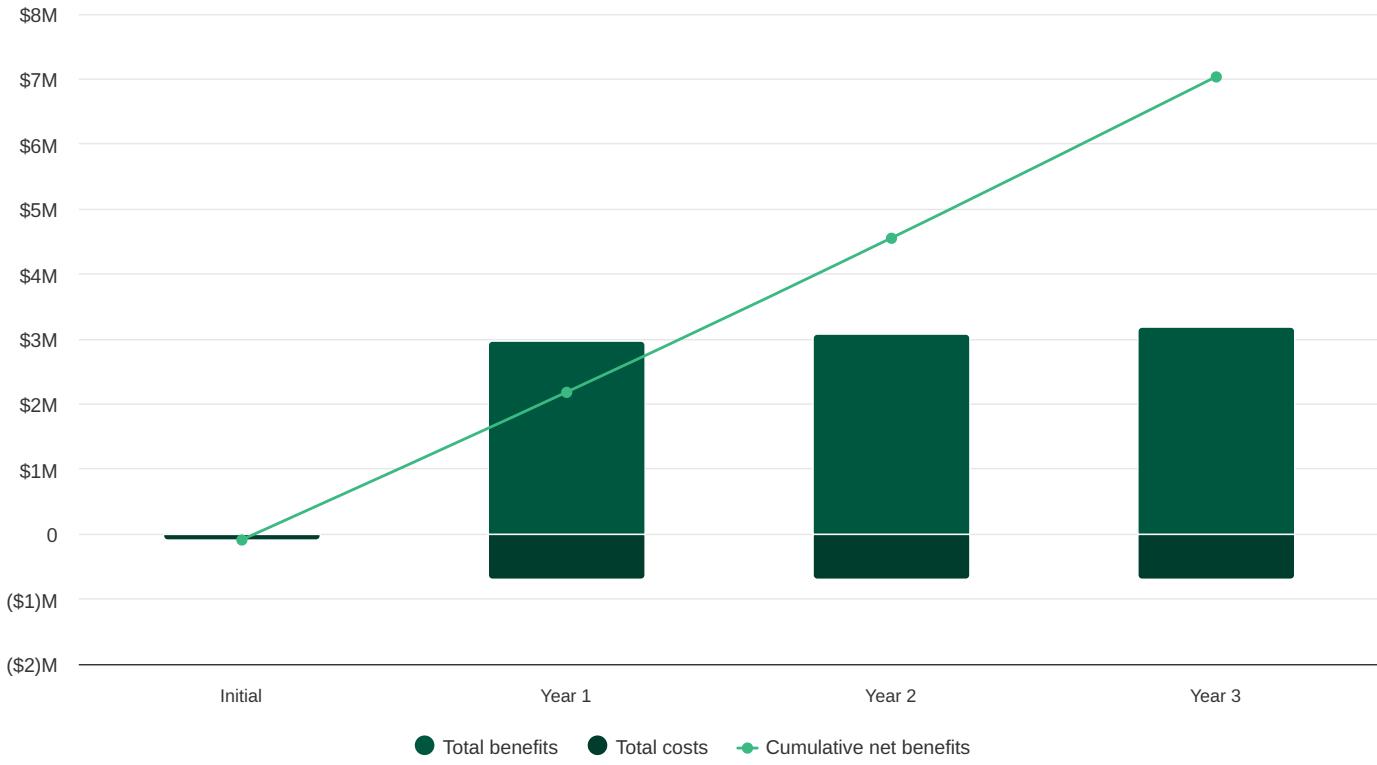
Three-year total: \$60,375

Three-year present value: \$55,534

Financial Summary

Consolidated Three-Year, Risk-Adjusted Metrics

Cash Flow Chart (Risk-Adjusted)



Cash Flow Analysis (Risk-Adjusted)

	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	(\$92,000)	(\$697,468)	(\$702,643)	(\$702,643)	(\$2,194,754)	(\$1,834,664)
Total benefits	\$0	\$2,968,500	\$3,073,688	\$3,184,660	\$9,226,848	\$7,631,557
Net benefits	(\$92,000)	\$2,271,032	\$2,371,044	\$2,482,017	\$7,032,093	\$5,796,893
ROI						316%
Payback						<6 months

Please Note

The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted ROI, NPV, and payback period values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

The initial investment column contains costs incurred at "time 0" or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.

TEI Framework And Methodology

From the information provided in the interviews, Forrester constructed a Total Economic Impact™ framework for those organizations considering an investment in ZoomInfo.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision. Forrester took a multistep approach to evaluate the impact that ZoomInfo can have on an organization.

Due Diligence

Interviewed ZoomInfo stakeholders and Forrester analysts to gather data relative to ZoomInfo.

Interviews

Interviewed five decision-makers at organizations using ZoomInfo to obtain data about costs, benefits, and risks.

Composite Organization

Designed a composite organization based on characteristics of the interviewees' organizations.

Financial Model Framework

Constructed a financial model representative of the interviews using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewees.

Case Study

Employed four fundamental elements of TEI in modeling the investment impact: benefits, costs, flexibility, and Risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see [Appendix A](#) for additional information on the TEI methodology.

Glossary

Total Economic Impact Approach

Benefits

Benefits represent the value the solution delivers to the business. The TEI methodology places equal weight on the measure of benefits and costs, allowing for a full examination of the solution's effect on the entire organization.

Costs

Costs comprise all expenses necessary to deliver the proposed value, or benefits, of the solution. The methodology captures implementation and ongoing costs associated with the solution.

Flexibility

Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. The ability to capture that benefit has a PV that can be estimated.

Risks

Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on “triangular distribution.”

Financial Terminology

Present value (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.

Net present value (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made unless other projects have higher NPVs.

Return on investment (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.

Discount rate

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.

Payback

The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

Appendices

APPENDIX A

Total Economic Impact

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

APPENDIX B

Supplemental Material

Related Forrester Research

[Invest In A Comprehensive B2B Marketing And Sales Data Strategy To Cut Waste And Drive Revenue](#), Forrester Research, Inc., September 20, 2023

[Unified Buyer Engagement Starts With Interaction Data](#), Forrester Research, Inc., October 15, 2024

[Trust Is Foundational To Realizing Generative AI's Value For Sellers](#), Forrester Research, Inc., December 12, 2024

[Blend Frontline Responsibilities Across The Opportunity Lifecycle To Boost Value](#), Forrester Research, Inc., November 12, 2024

[The Forrester Wave™: Marketing And Sales Data Providers For B2B, Q1 2024](#), Forrester Research, Inc., March 13, 2024

APPENDIX C

Endnotes

¹ Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

Disclosures

Readers should be aware of the following:

This study is commissioned by ZoomInfo and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in ZoomInfo. For any interactive functionality, the intent is for the questions to solicit inputs specific to a prospect's business. Forrester believes that this analysis is representative of what companies may achieve with ZoomInfo based on the inputs provided and any assumptions made. Forrester does not endorse ZoomInfo or its offerings. Although great care has been taken to ensure the accuracy and completeness of this model, ZoomInfo and Forrester Research are unable to accept any legal responsibility for any actions taken on the basis of the information contained herein. The interactive tool is provided 'AS IS,' and Forrester and ZoomInfo make no warranties of any kind.

ZoomInfo reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

ZoomInfo provided the customer names for the interviews but did not participate in the interviews.

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