VOLUME 4

Go-to-Market Best Practice Series

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Executive Summary

ZoomInfo is known worldwide as the leading provider of go-to-market intelligence solutions that enable businesses to identify, engage, and close ideal buyers. However, the company does more than sell its go-to-market platform. ZoomInfo puts its own technology into action every day, using it to fuel its world-class go-to-market motion that drives the company's significant growth and profitability at scale.

ZoomInfo's go-to-market solution has three core components: the sales development representative (SDR) motion covering lead to sales demo, the account executive (AE) motion covering demo to closed sale, and the account manager/customer success manager (AM/CSM) motion covering customer onboarding, upsell, and renewal—all of which are preceded by marketing-driven lead generation.

This paper focuses on ZoomInfo's AM/CSM motion and describes in detail the best practices optimizing it. By providing this information, ZoomInfo aims to inspire others to maximize the effectiveness of their sales efforts and better serve their customers.

Introduction

ZoomInfo is the go-to-market intelligence solution for more than 20,000 companies worldwide. Pairing best-in-class technology with unrivaled data coverage, accuracy, and a tremendous depth of contacts, the ZoomInfo platform empowers businesses to effectively identify and engage ideal customers to boost conversions and increase sales. ZoomInfo does not just enable other companies' sales success, it also practices what it preaches, using its own go-to-market motion to provide ZoomInfo's prospects and customers with a superior experience, while maximizing the revenue potential for each opportunity.

As explained in more detail in The Data-Driven Revenue Engine, the first white paper in this series, ZoomInfo anchors its sales philosophy and activities around five core tenets:

1. **Data-driven decision making**
   ZoomInfo uses data from its own offerings combined with data from other first- and third-party applications to drive key decisions. This data also triggers automated workflows, guides day-to-day actions, and pushes efficiency at scale.
2. **Continuous innovation**
   ZoomInfo regularly re-examines, deconstructs, and rebuilds processes, even rethinking practices that have proven effective in the past. By continually iterating on and testing hypotheses and leaning on data to determine the best path forward, ZoomInfo has pioneered several practices to optimize its go-to-market operations.
3. **Executive sponsorship**
   At ZoomInfo, the CEO and other top executives not only sponsor this continuous-learning philosophy, but also champion a culture that embraces the discomfort of change, challenging the organization to reach, stretch, and improve. This tone cascades from the top down to all organizations supporting the go-to-market engine.
4. **Robust technology stack**
   ZoomInfo recognizes that an effective go-to-market tech stack requires continuous evaluation of new technologies; planning around customer implementation, integration, onboarding, and adoption; alignment on expected outcomes and measurement; and predicting customers' openness to further investment—or divestment—dependent on observed KPIs.
5. **"Do it now" mindset**
   ZoomInfo understands that there is no time like the present to start optimizing processes. The company has created a "what if" culture where it is more acceptable to think about how something can get done now, than to come up with reasons not to do it.

Together, the three motions (SDR, AE, and AM/CSM) enable ZoomInfo to optimize roles and responsibilities across its sales teams, maximize sales opportunities, shorten sales cycles, and improve customer lifetime value (LTV)—all while reducing customer acquisition costs (CAC).

This white paper focuses on ZoomInfo's AM/CSM motion but is not intended as a "how to" primer for establishing a customer success function. It assumes that the reader has experience in post-sales account management and customer success and is ready to implement one or more of ZoomInfo's best practices to take their own efforts to the next level.

At ZoomInfo, improving revenue operations is an ongoing process. The company fully recognizes that making changes in these areas is not always easy. The core tenets that drive the Data-Driven Revenue Engine were pioneered by DiscoverOrg before it acquired ZoomInfo (and became today's ZoomInfo), and later were adopted by the legacy ZoomInfo team as a new way of working. The results of this adoption speak for themselves.

The keys to this approach are to continually monitor tactics so that decisions are informed by data, and to fully recognize that no matter where your organization is on the go-to-market maturity curve, there is always value in taking the next step. Every incremental effort and investment implemented can result in improvement and positive ROI.

As mentioned above, the first white paper in this four-part series, The Data-Driven Revenue Engine, provides a general overview of ZoomInfo's go-to-market best practices. The second white paper, Optimizing Sales Development Representative Processes, explores the best practices of the company's SDR motion. The third white paper, Maximizing Account Executive Results, describes how ZoomInfo optimizes the AE motion, and this, the fourth and final white paper, provides a deep dive into ZoomInfo's AM/CSM motion.

> **"Renewal is not an event, renewal is an outcome. If you treat renewal like a discrete moment, you're going to show up too late to affect it. ZoomInfo looks at renewal as the byproduct of the work you have done prior. So don't treat the renewal like this thing you need to do. Do everything else right before the renewal and the renewal will happen."**
>
> **Dominic Constandi**
> SVP, Head of Customer Success | Support | Implementation

ZoomInfo AM/CSM Flow Overview

ZoomInfo's account management/customer success manager (AM/CSM) motion consists of the people, processes, systems, and practices involved in ensuring an excellent customer experience and maximizing revenue, renewals, and upselling within the customer base. (See Figure 1.) The specific best practices guiding this flow are discussed in the sections that follow.

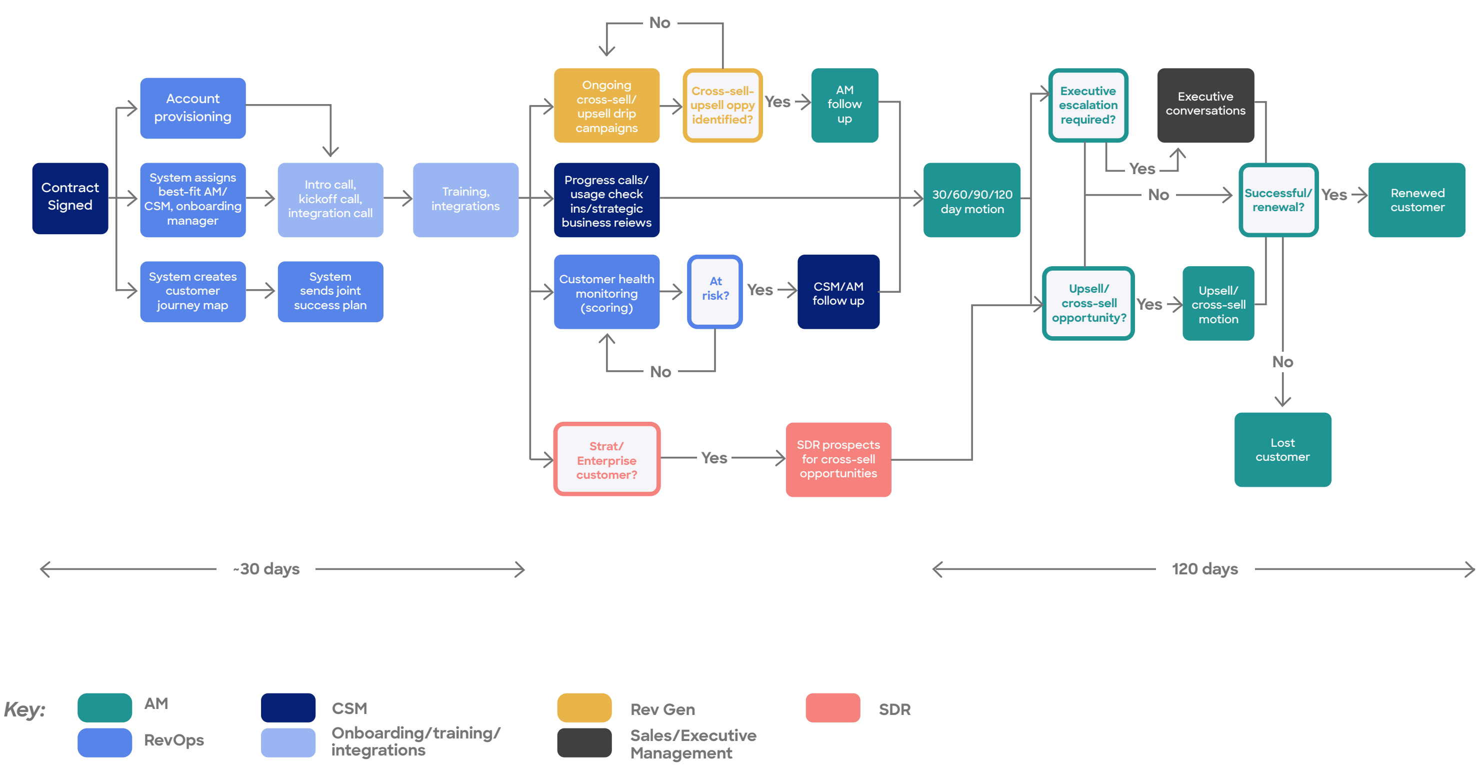


Figure 1: *ZoomInfo's AM/CSM motion consists of clear, integrated steps linking the people, processes, systems, and practices involved in delivering demos of ZoomInfo products, and the follow-up on those earlier connections to close sales.*

ZoomInfo AM/CSM Best Practices

Building Loyalty and Maximizing Opportunity Within the Customer Base

Many companies place a great deal of emphasis on their lead generation, opportunity nurturing and qualification, and deal closing. However, all too often, once a deal is closed the primary sales focus moves on to net new opportunities. Responsibility for ensuring current customer success and satisfaction shifts to a non-revenue oriented service team or, in some cases, is largely neglected.

By contrast, ZoomInfo considers the post-sale customer experience to be a fundamental part of its Data-Driven Revenue Engine, of equal importance to sales development and account executive functions. Its AM and CSM organizations are tasked with managing the customer's ongoing experience and driving the renewal, cross-sell, and upsell conversations. They are linked into the sales function and are supported by the same data-driven philosophy, technologies, processes, and support teams that drive its SDR and AE functions.

ZoomInfo views renewal as the logical result of all interactions throughout the customer's lifecycle, rather than a single transactional moment in time. It believes that continually working with the customer to ensure successful adoption and usage of the ZoomInfo offerings is more effective than treating the renewal conversation as a discrete event.

To support this philosophy, ZoomInfo has pioneered and adopted several best practices in its AM and CSM motion, including:

1. Role specialization
2. Orchestrated customer journey framework
3. Intelligent assignment routing and account segmentation based on growth potential
4. Load balancing
5. Customer onboarding
6. Automation/Rev Ops
7. Customer health monitoring
8. Targeting growth opportunities within accounts
9. Targeting motions to customer adoption/maturity
10. Matching promotions to observed needs
11. Centralized, dedicated Rev Gen orchestration team
12. Goal-based AM/CSM playbooks
13. Leveraging data from SDR and AE motions
14. Executive involvement

Role specialization

At the highest level, ZoomInfo splits responsibility for the attention it provides to customers post-sale into two organizations: the Account Management (AM) team and the Customer Success Management (CSM) team. The AM team is a direct sales team responsible for renewal and growth within ZoomInfo's existing customer base. It is part of the Sales organization and reports into the Chief Operating Officer.

The CSM team focuses on ensuring customer success and adoption throughout the customer lifecycle. The CSM team comprises 7 highly specialized roles and reports into ZoomInfo's Customer Experience organization. Although they are not a direct sales team, they also report into the COO and are closely aligned with Sales.

Account Management

As recently as four or five years ago, ZoomInfo's sales organization was solely focused on closing deals. Once a customer came on board, responsibility for them was handed over to the Customer Service Organization. No one on the sales team was responsible for the customer's post-sale experience. Realizing that it was leaving opportunity on the table, ZoomInfo established the Account Management function as part of its sales organization with the charter of growing the ZoomInfo footprint within large, strategic customers; driving sales of new products, as well as platform updates and upgrades; improving customer retention; and generating upsell opportunities.

ZoomInfo's AMs are stratified by the size of the customer as measured by employee count, with segments breaking down into small and medium businesses (SMB), Mid-market, and Enterprise. In addition, a small subset of accounts is pulled out for special attention; these are known as Strategic Accounts. An overview of the AM types is found in Figure 2 below.

	Customer:AM Ratio	Annual Customer Revenue Footprint	Frequency of AM/ SDR Interactions
SMB (1-99 employees)	170 : 1	$8k - $16k	Monthly
Mid-Market (100-999 employees)	100 : 1	$20k - $80k	Weekly
Enterprise (1000+ employees)	50 : 1	$50k - $100k	Daily
Strategic Accounts (Hand Picked)	5 : 1	$125K	Hourly

Figure 2: *ZoomInfo's approach to AM assignments is driven by key factors such as size of the account, projected revenue, and anticipated number of monthly AM and SDR interactions.*

At the higher end, ZoomInfo and its AMs do a lot of detailed account planning. For example, at the beginning of the year the AM team identifies two Strategic Account targets for each individual territory. They put together a detailed account plan to broaden the ZoomInfo footprint during the upcoming year. The AM team then works that plan in close coordination with the CSMs, solution engineers, and SDRs on that account.

Note the key role that the SDR team plays, working closely and programmatically with the AMs to identify and target new opportunities within the customer base. ZoomInfo has specific customer SDRs that specialize on driving referrals from the main point of contact (MPOC) at existing customers, working with them to understand other roles and departments within their enterprise that may benefit from ZoomInfo, and making introductions to the AMs and AEs.

Customer Experience Management

The heart of the Customer Experience team is the Customer Success Manager (CSM). CSMs manage the relationship with the customer and are responsible for conducting ongoing progress meetings and business reviews. The CSM is the primary point of contact for the customer throughout the customer's lifecycle. They are always available to help customers navigate the internal ZoomInfo hierarchy.

Unlike AMs, CSMs are not direct sellers. Nevertheless, their efforts impact much of what happens on the renewal side. They are also stratified by customer size, with the higher-end CSMs handling fewer, more strategic accounts. The breakdown of accounts per CSM by segment is:

- SMB: 200-250 customers/rep
- Mid-market: 100-150 customers/rep
- Enterprise: 75-100 customers/rep
- Strategic accounts: 20-30 customers/rep

In addition to the CSMs, there are several highly targeted roles under the Customer Experience team, each focused on providing an excellent experience and maximizing customer success throughout the customer lifecycle.

- **Onboarding Managers** specialize in the steps required to get a customer up and running on ZoomInfo. They manage the entire onboarding process, setting up and running kickoff meetings, and orchestrating all customer touch points during the onboarding process.
- **Learning & Development Managers (LDMs)** are training experts that transfer the skills customers require to use the ZoomInfo tools and platform.
- **Integration Specialists (IS)** are highly skilled technical experts who perform any necessary integrations during the onboarding process.
- **Customer Delivery Representatives (CDRs)** bring a more advanced level of subject matter expertise around areas like project management, program management, and even the ZoomInfo product. CDRs are brought into larger or more strategic engagements to provide greater insurance of success for complex onboarding processes.
- **Client Services Team** acts as a "technical partner" and supports onboarding and AM teams with customer education, training, and issue resolution. It documents best practices, identify renewal risks, guide customers on third-party products and integrations, and provide tier 1 and 2 support to customers.
- **Customer Sales Development Representatives (CSDRs)** are members of the SDR team who are paired with AMs to help identify and qualify upsell or cross-sell opportunities in the customer base.

The advantage of role specialization is that each stage of the customer journey can be handled by an individual who has the specific depth of training to make that stage successful. In comparison, in a company where there is a single individual whose role is to onboard, train, set up customers, and manage integrations, it is more likely that some of those steps may be missed or performed poorly. With the onboarding manager handling only that role and coordinating experts from around the organization, there is a much lower chance of delivering a poor customer experience.

Role specialization has yielded tangible benefits for ZoomInfo. For example, it has improved its training rate (the number of people within any given account who have gone through training), as well as first-60 day implementation, and usage rates for its tools and offerings. ZoomInfo has observed that getting customers off to a fast start and using the product quickly is one of the most significant factors driving renewal predictability.

> **When I started, an AE would sell something and then the CSM took over at that point and we would say 'have at it.' As you might imagine, that was clunky. Stuff got missed…but we were a small organization and it made sense. Now, we have so much volume that we've evolved not only to the point of splitting apart AM and CSM, but now we have multiple specialists who help the customer at every stage of the lifecycle."**
>
> **Dylan Conant**
> Chief of Staff, COO at ZoomInfo

The AM/CSM Relationship

AMs and CSMs work in close coordination over the lifecycle of the customer to ensure customer success, each playing a role to build the groundwork for smooth renewal and expansion within an account. To support this, AMs and CSMs are paired within account territories, with CSMs assigned to specific AM accounts.

They communicate regularly, including weekly meetings to discuss account strategy. In fact, a portion of the CSM's compensation is based on their AM's revenue performance, which aligns the two individuals' goals around increasing the revenue footprint within their accounts

For the strategic accounts segment, the ratio of CSMs to AMs is one-to-one, and the ratio in the enterprise segment is also nearly one-to-one. At the mid-market segment the ratio of CSMs to AMs is closer to two-to-one, and at the SMB segment the ratio is much larger. Whenever an AM changes territory assignments (see below) the CSM will move along with them.

ZoomInfo's RevOps team has built a customer journey tool into ZoomInfo's Salesforce instance that allows the AM and CSM roles to coordinate across every step of the customer journey. The tool captures the customer's health score, trigger events, and other account data. It contains the annual account plan and provides a single view that the AM and CSM can use to coordinate their efforts. They can flag all interactions, testimonials, risk items, and escalation requests. This tool is particularly helpful at the SMB/mid-market level where it is challenging for AMs and CSMs to communicate directly about each of the hundreds of accounts they are managing.

Orchestrated customer journey framework

ZoomInfo uses an orchestrated customer journey framework to guide all interactions with its customers throughout their lifecycle as a customer. It touches upon all phases of the customer journey. A graphical representation of the customer journey is shown below. (See Figure 3.)

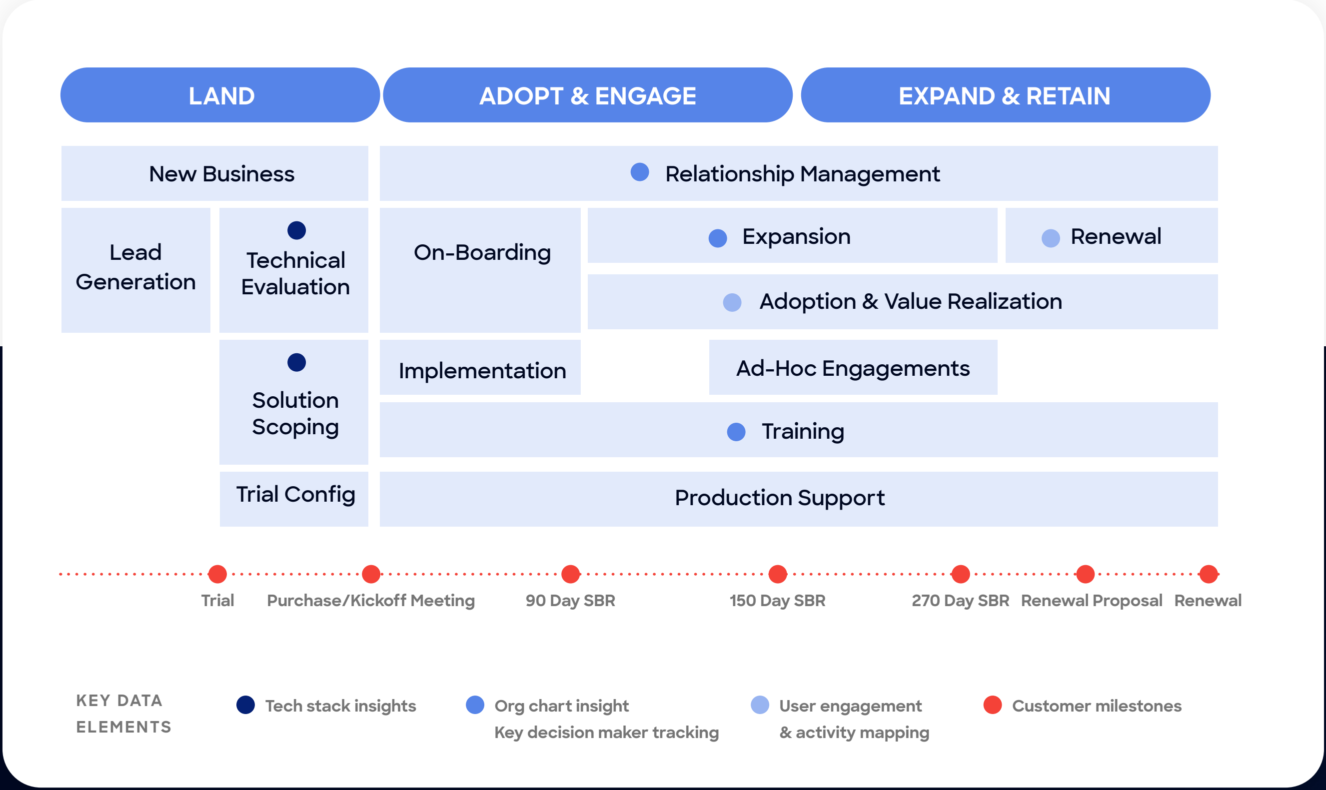


Figure 3: *ZoomInfo has identified three key stages in the customer journey: "Land," "Adopt & Engage," and "Expand & Retain." ZoomInfo has assigned a set of actions to each stage, along with corresponding milestones for onboarding the new customer.*

At the highest level, the three stages of the customer journey are **Land, Adopt & Engage,** and **Expand & Retain**. Underneath these stages, there are different swimlanes based on the different parts of the business. Figure 3 depicts all the major actions and actors that cover the course of these three phases with foundational milestones shown at the bottom.

- **Land**: This portion of the customer journey consists of new business development and migrating customers from prospects to closed deals. It is led by the AE and SDR teams and covers lead generation, technical evaluation, solution scoping, and guiding the prospect through a free trial.
- **Adopt & Engage**: Once a prospect signs a contract and becomes an official ZoomInfo customer, the Adopt & Engage portion of the journey kicks in. The earliest stages consist of customer onboarding, implementation, and

training. Relationship management in the form of introductions to the CSM and AM begin right away, as does technical support. (ZoomInfo terms this production support). The onboarding portion usually occurs within the first 30 days, and the remainder of the Adopt & Engage process usually extends from days 30-180.

- **Expand & Retain:** Once the customer is fully onboarded and the implementation is in place, the focus turns to expanding the relationship and setting the stage for the renewal conversation. Relationship management, production support, and training continues. AMs and CSMs begin looking for expansion opportunities, as well as adoption and value realization opportunities (to ensure they are getting the most out of their ZoomInfo investment). Ad hoc service engagements can also occur. These are akin to professional services engagements, although ZoomInfo does not charge for them. The Expansion stage usually spans days 180-270, and beginning 90 days before the renewal conversation (day 270), the renewal conversation process kicks in.

Within these three stages, specific highlights of the customer journey include:

- **Integration and implementation** are driven by integration teams, which are mapped out according to the needs of the different integrations.
- **Training** is a key part of the onboarding process and is tailored to the specific customer's needs and market segment. The core concept behind training is to make it role-based and frequent. Strategic accounts receive the most customized experience, which can include personalized training sessions from dedicated trainers. ZoomInfo can provide role-based training (for example, for technical audiences, marketing audiences, sales operations, etc.) or webinar-style training on a regular, ongoing basis to provide foundational training to a broad swathe of a customers' employee base. Training happens concurrently with integration and implementation.
- **Production support** is the label ZoomInfo gives to its help desk support, which kicks in the minute that a customer signs up for ZoomInfo. ZoomInfo offers different levels of support depending on what the customer has selected. For example, customers can receive 24/7 coverage, including international access, and phone, email, and chat support.
- **Expansion**. ZoomInfo leverages its own data to drive expansion and renewal conversations within an account. It uses this data both to determine if it can achieve better penetration within existing customer organizations and whether it could expand its footprint to other parts of a customer's business. Ongoing training also plays a key role in expanding the number of users and licenses within an existing account.
- **Renewal**. The AM takes the lead on renewals, but the CSM plays a role as well. While the process typically begins with conversations 90 days from the renewal time, the reality is that every aspect of the customer's experience throughout their journey plays a role. All touchpoints throughout the customer journey are foundational for value realization and therefore the renewal conversation.

ZoomInfo creates an individualized customer success plan for every new customer it brings on board. While Figure 3 (above) provides a general framework following the Land, Adopt & Engage, and Expand & Retain framework, each customer journey map is individualized to the specific customer. It spells out the deployment of resources against customer accounts from the day the customer signs an account until they leave. It specifies different tactics, touchpoints, and processes around each individual role, including the CSM and AM, as well as onboarding specialists, integration specialists, and learning and development managers. It is prescriptive, orchestrated, and cross-functional in nature and helps ensure that AMs and CSMs are having the right conversation with the customer at the right time to maximize customer outcomes.

The customer journey map is created in an automated manner by the RevOps team. It is based on the specific characteristics of the customer surfaced during the sales discovery process, as well as the products purchased by the customer. It contains a UI displaying all of the customer touchpoints, allowing ZoomInfo an instant view of what is happening in each account.

As part of the journey map, RevOps creates a customer success plan, which contains a summary of everything that is going to happen to them over the course of their time with ZoomInfo. This is shared with the customer and acts as a sort of verbal contract that sets expectations for what to expect and when, which contributes to delivering a better overall customer experience.

Figure 4 below provides an example of elements of a customer success plan created for an individual customer.

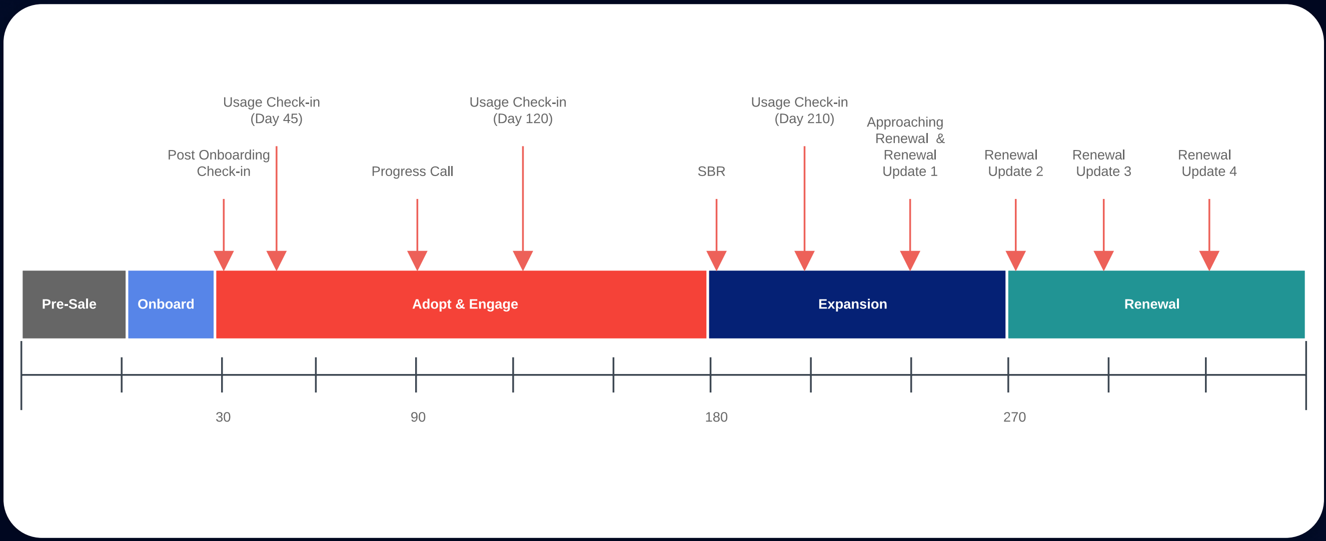


Figure 4: *ZoomInfo customizes their customer success plans for each individual customer, identifying key success factors, milestones and target metrics for each.*

The degree of engagement customers receive depends on their market segment, with each segment having a different engagement model. Strategic accounts receive the most care and attention from the most specialized onboarding and training personnel, while SMBs receive a higher-volume, lower-touch model, constructed to still give them the feel of a top-tier experience. Note that even at the low end, all SMBs hear from ZoomInfo, and when feasible they even receive in-person check-ins from their AM.

Intelligent assignment routing and account segmentation based on growth potential

ZoomInfo combines principles of modern intelligent tiering and assignment with old-school rules of engagement with remarkable efficiency. In addition to its core segmentation by customer size (SMB, mid-market, enterprise, strategic accounts), ZoomInfo further separates customers into three sub-segments—Preserve, Growth, and VIP—based on the growth potential of the account. Factors influencing which of the three segments customers fall into include seat saturation, employee growth, customer tenure, ACV, contract expiration date, and firmographics (such as industry, sales team size, growth rate, and year founded). Separating out accounts this way enables ZoomInfo to put more focus and resources into accounts with the greatest potential (VIP), and to better align AM and CSM skills to account needs.

A more detailed description of the three account growth potential types follows:

Preserve

Customers in the Preserve segment are SMBs and less volatile accounts (less likely to grow or churn), and may have been ZoomInfo customers for several years. While they are stable, they typically have the lowest growth potential. CSMs/AMs who work with them are primarily renewal-focused.

Growth

These are often companies in the enterprise or mid-market segments. These accounts have a higher propensity to grow, are often underpenetrated, and potentially open for competition. CSMs/AMs assigned to these accounts have a strength in finding and capturing new opportunities.

VIP

These customers consist of enterprise and strategic accounts with many sales FTEs, potential for future headcount growth, and a high propensity for areas of integration. These are accounts with the highest likelihood of upsell and growth, and many are among ZoomInfo's largest customers. The VIP customer is surrounded by additional support staff from every perspective.

ZoomInfo uses predictive analytics and analyses of historical trends to understand the characteristics of companies that have shown the most rapid growth vs. those who have been less likely to grow and churn. The RevOps team builds and runs this model. Its predictive analytics also indicate the best time to reach out to customers to help ensure the deal.

ZoomInfo then matches companies to the best AMs and CSMs based on their experience with specific types of customers and skillset/talent. ZoomInfo uses a scorecard based on sales performance and assigns the best-performing AMs to VIP and Growth segments. Unlike AEs who only touch accounts during the sales process and therefore can be easily moved from segment to segment, the AM stays with their customers for the duration of the customer journey. It doesn't make much sense to move them from segment to segment and thereby change their book of customers. In this way, ZoomInfo demonstrates that common sense and old school client relationships are still valuable in a complex go-to-market model.

ZoomInfo reevaluates and scores AMs about every six months. While it is possible for AMs who are doing well to move up to higher-tier segments and others to move down, ZoomInfo's focus on providing a consistent customer experience means that roughly 90% of AMs remain with their assigned customers.

CSMs are also evaluated based on how well they deliver against customer journey expectations, but do not have scorecards akin to the AEs' scorecards. Further, since CSMs are tied to AEs, when an AM does switch accounts the CSM is typically brought along.

A definition of the Preserve, Growth, and VIP segments by customer size and spend is found in Figure 5.

		Employees		
		<100	*100-999*	*1000+*
		SMB	**Mid Market**	**Enterprise**
Spend (ACV)	**Preserve**	<$15k	<$23k	-
	Grow	<$15k - $28k	<$23k - $32k	<$40k
	VIP	>=28k	>=32k	>=40k

Figure 5: *ZoomInfo uses staggered tiers to define its Preserve, Growth, and VIP segments based on the customer's annual spend within each company size segment.*

Load balancing

Because renewal is the busiest time for AMs, ZoomInfo analyzes and balances the load of accounts that an AM carries in their Book of Business based on when those accounts renew. By level-loading the workload, ZoomInfo avoids situations in which AMs are too busy to provide adequate focus at renewal time and are underutilized at other times of the year (see figure 6) .

It's important to ZoomInfo that the customer experience does not slip. By assigning accounts with renewal dates spread throughout the year rather than concentrated in any single month, ZoomInfo can cover its portfolio of customers with fewer AMs and still devote adequate attention to each customer.

RevOps plays a key role in load balancing. It has developed growth prediction models and an automated load balancer engine that dynamically balances account loads as they are managed and ensures appropriate CSM and AM coverage. Note: This engine factors in the size of the accounts and not just the number of accounts per AM. For example, a single $250,000 account may require as much effort to renew as three separate $50,000 accounts.

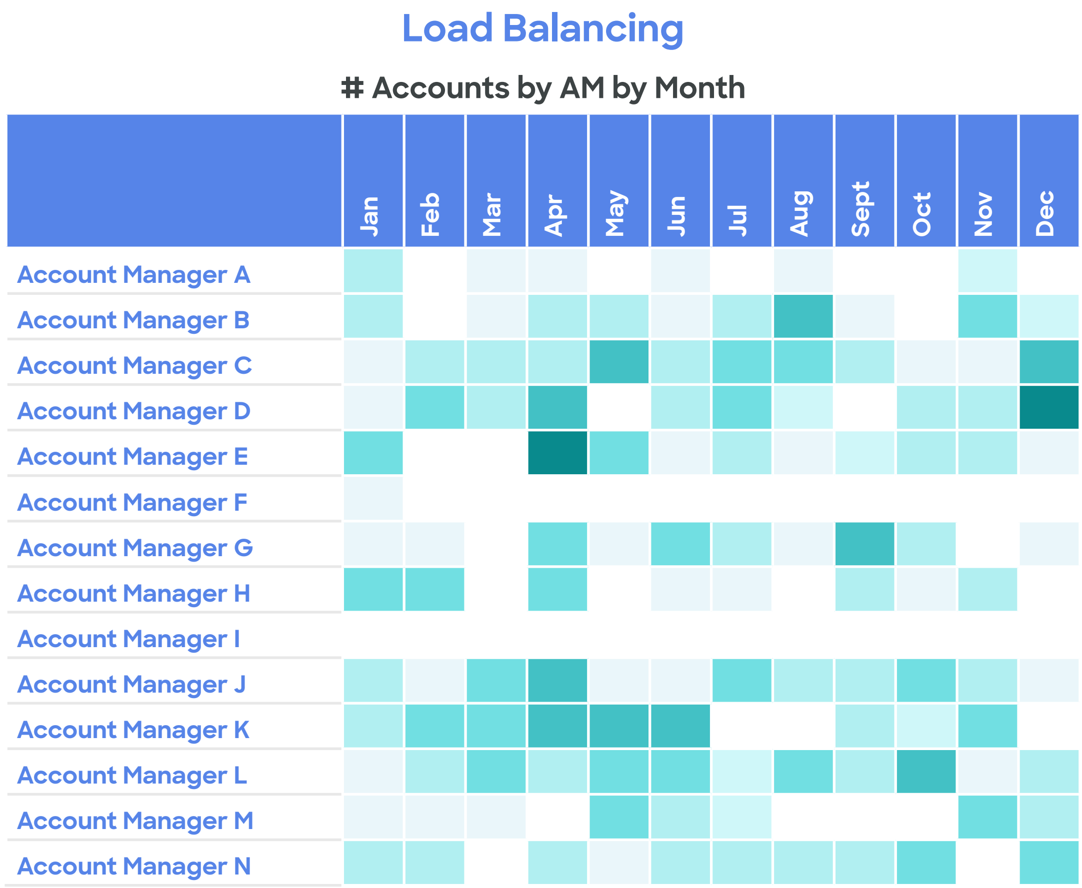


Figure 6: *ZoomInfo spreads renewal dates for each of its account managers throughout the year to avoid chokepoints or overly idle periods.*

Customer onboarding

Customer onboarding is a key component of the customer journey with ZoomInfo. It is a moment of truth that will shape the rest of the customer's experience with the company. ZoomInfo believes that any time a customer signs up for a new service or takes on a new feature it's an opportunity for a better customer experience. Given that ZoomInfo has finite resources to spend across its customer journey, it believes that the onboarding experience is the perfect moment to invest in to ensure the customer's experience is spot on.

ZoomInfo utilizes a dedicated team of onboarding specialists. When a new customer comes on board, a CSM, an AM, and an onboarding manager are assigned from the contract start. An email is sent to the customer introducing the onboarding manager, who oversees all onboarding interactions for roughly the next month, until the time the customer is fully onboarded. While the CSM is on point for all aspects of the customer journey, the onboarding manager coordinates all training, integrations, and other aspects of onboarding to provide all the personalized care and services the customer requires.

Figure 7 below provides a sample onboarding flow chart for Mid-market and Enterprise customers, including key responsibilities by role.

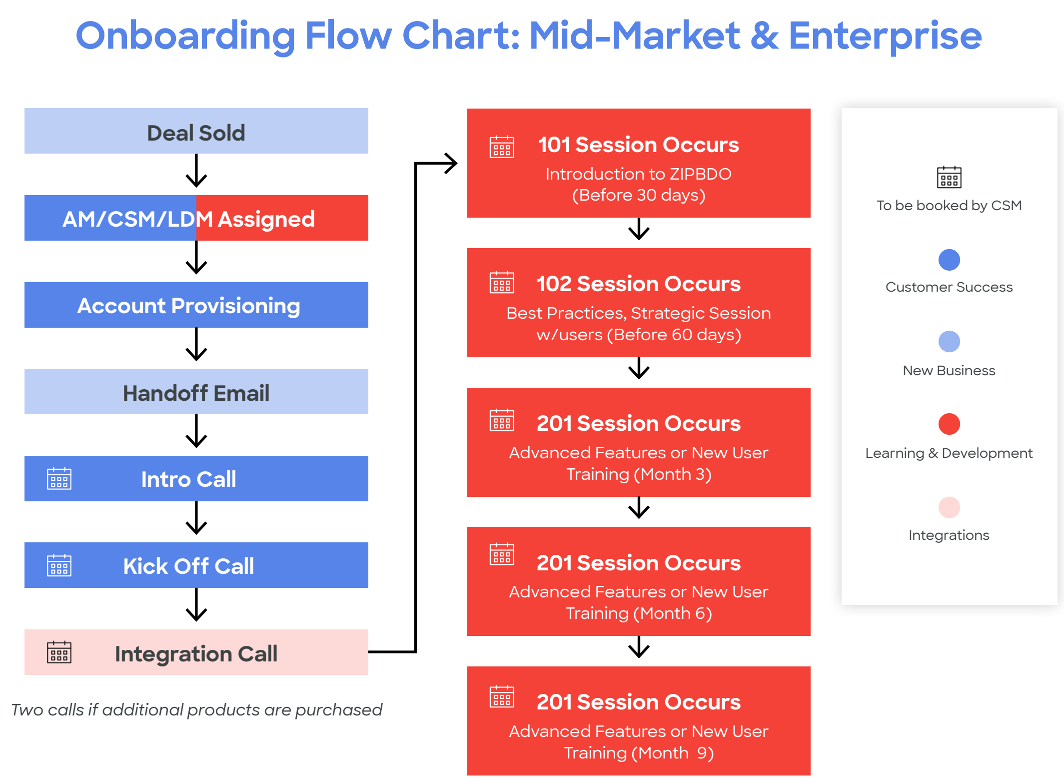


Figure 7: *As seen in this sample onboarding flow, ZoomInfo identifies and assigns specific responsibilities for each step in the customer onboarding process*

Automation/RevOps

Automation drives a great deal of the customer journey process. ZoomInfo's RevOps team has recently implemented a number of technologies to help with automated outreach and uses tools like Gainsight and Totango to automate outreach at various points across the customer journey. For example if a customer hasn't used a particular feature in a certain amount of time or if a large number of its employees haven't logged in, automated emails are issued on behalf of the CSM to the AM with reminders to check in with the customer. CSMs are also provided with automated reminders so that they know what their next steps are and what they need to accomplish for each customer.

The RevOps team has also developed several automations that help guide the onboarding process. For example, if a customer buys a package with ZoomInfo Engage (Salesforce connector), ZoomInfo will prepopulate the customer's journey map with Engage trainings, Engage setup, 30-day usage check ins, and scheduled quarterly progress updates and pre-renewal conversational items. In other words, it pre-prescribes the entire onboarding journey and specifies SLAs for the onboarding team to achieve.

Customer health monitoring

ZoomInfo scores the health of each customer and uses that health score to monitor the risk of customer defections. It uses a model created internally by its RevOps team that looks at ongoing customer license usage data, as well as firmographic and other data, to make predictions about which and how many customers are likely to churn. ZoomInfo uses this model in a proactive manner to drive increased customer retention, both at an overall segment level and at an individual account level.

The heart of this customer health model is based on ZoomInfo platform adoption—the percent of their ZoomInfo licenses that customers are actually using, compared to what ZoomInfo thinks they should be using. ZoomInfo refers to this as the customer's level of compliance. If a customer is using less than a set percent of its licenses on a trailing 30-day basis, they are considered to be out of compliance. (Note that the compliance threshold is 50% of licenses for SMB customers, with mid-market, enterprise, and strategic accounts customers requiring higher thresholds). In addition to their compliance, the model looks at other factors such as whether or not the customer is using ZoomInfo integrations and other product features.

The CSM is the primary consumer of the compliance view. Whenever a customer falls out of compliance the system automatically alerts the CSM and prescribes a set of touchpoints designed to understand why the customer is out of compliance and attempt to bring them back in.

Compliance is the primary metric driving CSMs. At the end of the month the number of customers in or out of compliance is calculated for each CSM, and the CSM's monthly compensation is tied to how many customers they were able to bring back into compliance. Accounts in and out of compliance are published for everyone at ZoomInfo to see, while CSMs have dashboards for their own Book of Business to understand the status of their accounts.

The model also assigns customers a likelihood to churn score of A, B, C, D, or F, where A means the customer is very unlikely to churn and F indicates high likelihood of churn. This part of the model uses machine learning and is based on several variables, including ZoomInfo product used, firmographics, spend, and customer tenure. Unlike the compliance scoring part of the model, this part does not take usage into account, instead predicting likelihood to churn based on variables more intrinsic to the customer and its type of business. The data generated by this model provides the AM team with the information needed to make decisions and take steps to reduce customer churn.

These decisions are made both at the macro level and the individual account level. At the macro level, ZoomInfo uses this information to forecast outcomes and churn rates. AM and CSM leadership hold a monthly meeting similar to a pipeline forecasting meeting. If the forecast churn across the board (or in any given segment) is higher than what the business plan calls for, the team attempts to diagnose the reasons and put any necessary mitigating factors in place on a programmatic basis. Interventions might include drip campaigns, pricing promotion, or advanced training sessions.

At the account level, individual AMs use the likelihood to churn scores on a customer-by-customer basis to inform their approach to renewal conversations. Customers in the A category are very unlikely to churn, so the AM knows they can hold the line in contract negotiations and focus more on upsell and cross-selling opportunities. On the other hand, accounts with an F are very unlikely to renew, so the AM may go into save mode, for example by offering dramatic discounts with the goal of keeping them.

If ZoomInfo detects a negative change in a customer's usage pattern or receives a negative health score for the customer, it will flag it as a "revenue at risk" customer journey item. The account would go through a whole remediation escalation process. ZoomInfo tailors each customer journey map to every different product purchased, every integration setup, and the various packages that customers create as different sub-customer journey items.

At renewal time, AE/CSM collaboration is an especially crucial division of labor. The CSMs are non-revenue producing, non-transactional in nature, hence their primary focus is on the compliance portion of the model. In contrast, AMs are responsible for renewing customers and minimizing customer churn. They are the primary audience for the at-risk portion of the model, so they can identify customers with the potential to churn and try to do something about it.

The use of customer health monitoring has yielded great success for ZoomInfo, with overall logo retention rates rising by nearly 10 basis points between January 2019 and March 2021. ZoomInfo realized improvement across all segments, with the most dramatic being in SMB.

Compliance scoring can also be useful in the upsell/cross-sell conversation. Occasionally, ZoomInfo will notice that a customer's health score is "too good," e.g., they are using too many of their licenses. The system may see situations in which a customer has purchased, say, five licenses, but has 50 IP addresses accessing those licenses. This provides opportunities for the AM to reach out to those customers and right size the number of ZoomInfo licenses in that account.

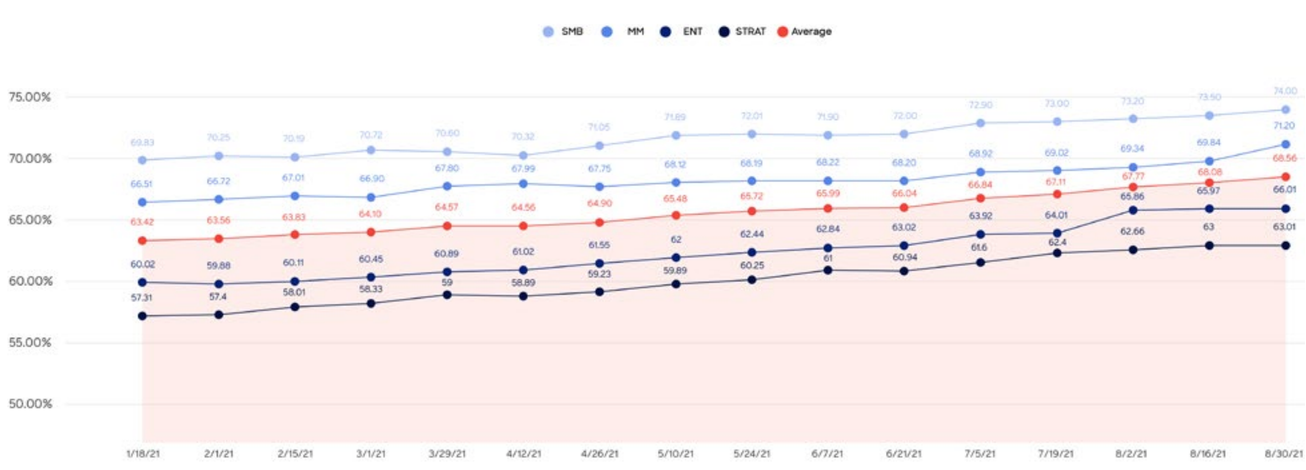


Figure 8: *ZoomInfo tracks customer compliance by segment, using predictive measures to anticipate and proactively address potential churn among customers out of compliance.*

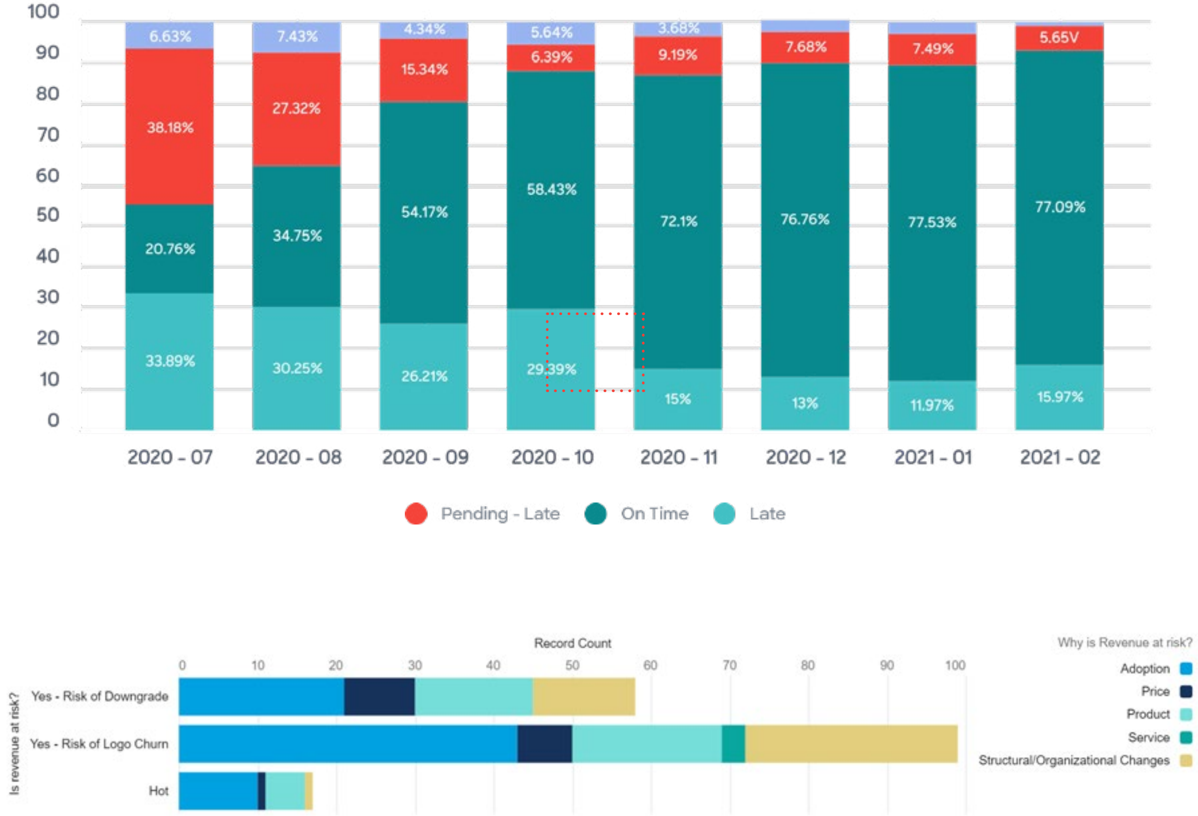


Figure 9: *ZoomInfo CSMs take advantage of customer health reports to identify overall engagement trends and potential risk factors across their portfolios.*

Targeting growth opportunities within accounts

ZoomInfo takes a systematic approach to targeting growth opportunities within accounts, classifying growth opportunities into two categories:

Upselling

Upselling consists of increasing the number of seats and licenses with an existing customer or expanding the footprint of ZoomInfo offerings they are currently using. This enables ZoomInfo to increase adoption within the customer and for the customer to maximize the value of the ZoomInfo offering. This is the most straightforward and easiest motion to go after.

Cross-selling

Cross-selling consists of identifying opportunities to sell new ZoomInfo products and services, either within the current buying organization or into a new organization within the customer entirely.

For both of these motions, ZoomInfo leverages a number of data sources to identify potential growth opportunities. This includes information from its own data platform generated by its RevOps team, for example, the number of sales reps at an account, employee growth rates, funding announcements, buying center intelligence, and intent data.

This data is supplemented by intelligence gathered by the CSM and AM teams during the conversations they have 90, 60, and 30 days leading up to renewal. This could include items such as new or upcoming initiatives, projected hires, growth, and planned adoption of technologies. AMs set up alerts for news feed scoops or intent triggers within their customer accounts, providing them with an opportunity to reach out and engage in appropriate upsell or cross-sell conversations.

ZoomInfo leverages testimonials from free trial users within accounts to create groundswell support that can be used to pitch decision makers on the value of rolling out a solution more broadly. It also leverages new and existing relationships to gain introductions into other departments within the organization for cross-selling purposes.

Targeting motions to customer adoption/maturity

ZoomInfo recognizes that no two businesses are alike in how they use data in their go-to-market operations. It treats customers differently depending on where they are in the maturity curve of using data. Whether they are in the early stages and struggling to discover opportunities, have progressed to the middle stage where they are using data to fuel growth, or are at an advanced stage and using data to orchestrate and optimize operations. (For further discussion of go-to-market data maturity and how that affects ZoomInfo's go-to-market motions see *The Data-Driven Revenue Engine*.)

To understand where a customer is on the maturity curve, ZoomInfo relies upon information gathered during regular conversations between the CSM and the customer, both during ongoing progress calls and quarterly strategic business review sessions. The CSM then shares this knowledge with the AM and they use it to determine the most appropriate new ZoomInfo products and services to introduce next.

The core idea is to introduce customers to the products, features, data, and packages that make sense for the next step in their journey. For example, it would be premature to introduce the concept of AI-based targeting (an advanced feature used by customers who are in the orchestration stage) to a customer in the initial discovery stage who is using ZoomInfo for simple firmographic targeting. This customer is better served by being introduced to next-step-up features and functionality, which might include insight- or intent-based targeting, or both.

Centralized, dedicated Rev Gen orchestration team

One of the most unique aspects of ZoomInfo's go-to-market motion is its Rev Gen team, which supports not only the ZoomInfo SDR motion, but also its AM/CSM motion. This centralized team aids the AM team and orchestrates its activities.

Similar to the way it supports the SDR motion, the Rev Gen team operates programmatically, analyzing the ZoomInfo customer database, assessing account lists for upsell and cross-sell opportunities, and looking for new potential users and decision-makers within accounts. The Rev Gen team performs monthly nurture email drip campaigns into the set of customers who are not up for renewal in the next 60 days and forwards all new identified leads to the AM team.

As with the SDR motion, when opportunities are identified as part of the drip campaigns, the Rev Gen team sets up triggers and sends out automated introduction emails on behalf of the AM, (typically without the rep's knowledge about any specific outbound touch) and offers an auto-provisioned free trial. Using this automated approach to providing new opportunities for AMs saves time and frees them up to spend more of it having conversations with customers.

Rev Gen drip campaigns are tailored by market segment and persona (sales, marketing, and sales/marketing ops), with a special set of drips targeted to CxOs. The campaigns can be focused on looking for opportunities to upsell new offerings, such as ZoomInfo Engage to existing accounts.

Another important role of the Rev Gen team is to orchestrate and manage the interactions between AMs and SDRs for smaller-business segments where there is a more programmatic approach to the AM/SDR relationship

Matching promotions to observed needs

Another best practice that ZoomInfo follows is to offer promotions to customers on products they are currently evaluating, to help get them over the hump and close the sale. All these promotions are managed by the Rev Gen team, which monitors the ZoomInfo customer database and programmatically identifies targeted promotional opportunities. Promotions offered typically provide for additional products/services, pricing discounts, or upgrades, and are targeted to address the observed needs of specific customers.

For example, when ZoomInfo first launched its Engage product, it assumed that it would be a good product for SMBs who might not own a competitive offering and targeted existing customers within that segment with promotions. Another example centers around promotional credits. The ZoomInfo platform runs off credits. As soon as customers reach 20% of their remaining credits, they're sent an automated message about replenishment from an AM. They may also receive promotions to increase their credits.

The intelligence built into promotional activities plays a strong role in helping ZoomInfo think creatively about how to evolve its sales team: the roles it will need, how to organize the team, and how to target people. It also helps ZoomInfo institute best practices, like the low-on-credit motion above. This programmatic support replaces managing by manual process checks, freeing up more time for strategic actions. The increased analytics for understanding how different segments respond to different promotional opportunities gives ZoomInfo the ability to test theories and then adjust its go-to-market motions based on that data.

Goal-based AM/CSM playbooks

ZoomInfo maintains detailed playbooks that guide the AM and CSM teams through all stages of the customer journey. The playbooks are extremely detailed and include information for the reps and their management teams. Contents include sales and customer service plays, go-to-market motions, resources, and initiatives. The playbooks are designed to be highly prescriptive to provide a complete blueprint for everything the rep requires to set ZoomInfo up for success in an account-based world.

There are two separate playbooks: one for the AM team and one for the CSM team. The AM playbook includes information on how the AMs can use the ZoomInfo solution to subscribe to and monitor their accounts to watch for intent signals indicating upsell opportunities. It includes talk tracks designed to arm the AM for various conversations, as well as information about sales triggers and desired outcomes.

Topics in the AM playbook include:

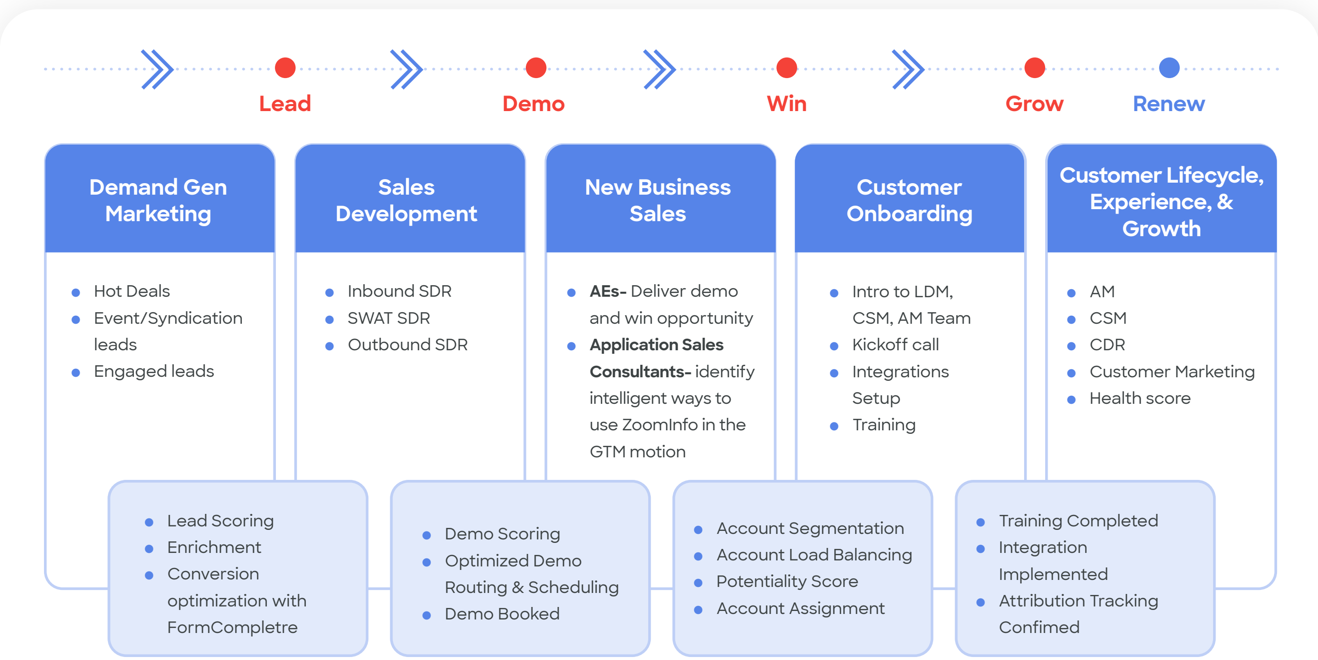
- Measuring success
- ZoomInfo's data quality story
- How ZoomInfo goes to market
- Buyer personas
- Customer experience
- Collaborating with SDRs, CSMs, and other customer experience team members
- Collaborating with sales management
- The ZoomInfo product
- Processes (pricing and packaging, renewals, deals, winback, large deal planning, forecasting, etc.)
- Sales strategies (upselling, maintaining license compliance, buying center multi-threading, competitive selling, obtaining internal referrals, leveraging strategic business reviews, etc.)
- Impact sales plays
- Using the ZoomInfo technology stack
- Structuring your day
- Helpful links and resources

The CSM playbook is designed to help CSMs talk to the customer and realize the maximum success with ZoomInfo, without making the customer feel they are being "sold to." By arming CSMs with the ability to maximize customers' success in any engagement, ZoomInfo can increase overall adoption and drive increased future revenue.

Topics in the CSM playbook include:

- Measuring success
- ZoomInfo's data quality story
- Buyer personas
- Collaborating with AEs/AMs and other customer experience team members
- The ZoomInfo product
- Processes (onboarding, adoption, touch patterns, strategic business reviews, etc.)
- Tactics (scenario-based guidance, engaging out of compliance accounts, setting up account alerts, etc.)
- Using the ZoomInfo technology stack
- Structuring your day
- Helpful links and resources

Both the AM and CSM playbooks are time-bound and prescriptive, describing desired outcomes that ZoomInfo can measure success against and deploy other resources as needed. The playbooks cover AM and CSM actions for every stage in the GTM cycle, as shown below in figure 10.



Note: AE = Account Executive, LDM = Learning & Development Management, CSM = Customer Success Manager, AM = Account Manager, CDR = Customer Development Rep, SDR = Sales Development Rep

Figure 10: *ZoomInfo provides CSMs and AMs with customized playbooks to guide them through their assigned customer interactions throughout the customer lifecycle. These are pages from the CSM playbook.*

Leveraging data from SDR and AE motions

ZoomInfo appreciates that the initial customer sale is not simply a “one-and-done,” but rather an entry point to grow and expand the relationship as ZoomInfo continues its relationship with the customer. The information it learns during the early stages of the customer journey, including the qualification and sales motions, is carried over to later stages of the journey to set the AM team up for success.

Information learned about the customer during the selling process is stored in ZoomInfo’s Snowflake customer database and is available to the ZoomInfo onboarding teams and CSMs as they guide customers through their customer journey. This information includes all customer data, user data, usage data, and ZoomInfo data. It can cover areas spanning the customer’s challenges, organizational structure, items included in the tech stack, and metrics for success.

To show how this can play out, consider an engagement with a sales organization in a fast-growing mid-market company. To get the deal quickly approved the AE may structure the deal with only two licenses. However, during the hand-off process, the AM sees from the AE’s discovery that the company has aggressive growth plans and is hiring a new CMO. This gives the AM the insight to know that this company is a strong candidate both to expand the number of licenses and introduce entirely new solutions, such as the ZoomInfo Engage communication platform

Executive involvement

ZoomInfo finds that executive-to-executive connections are instrumental in ensuring customer renewals. Sixty days prior to renewal, a ZoomInfo executive reaches out to executives at the customer organization to understand how their purchasing processes or needs may have changed. ZoomInfo can then proactively propose the best offer based on the customer's current and prospective needs and situation.

It is culturally encouraged at ZoomInfo that everybody, regardless of their level within the organization, makes themselves available at any time to talk to anybody. ZoomInfo leverages its RevOps systems to send customers automated messages from executives. An executive communication can also go out ahead of renewal to check on the health of the customer.

At ZoomInfo, an executive gets involved in the renewal conversation or an upsell or cross-sell conversation more frequently than in most companies. Executive involvement encourages customers to open up more readily about their needs and challenges and enables ZoomInfo's executives to hear first-hand what customers are saying and to experience what AMs are up against. This puts them in a better position to design retention programs, better articulate aspects of the ZoomInfo value proposition, and identify opportunities for upsell and cross-sell.

Results and Metrics

The use of these AM/CSM best practices has enabled ZoomInfo to achieve results in its AM/CSM motion that exceed industry benchmarks (see Figure 11).

ZoomInfo AM/CSM benchmarks exceed established industry practices

	Target	Benchmark
Phone/Set-up	˜7 days depending on complexity	5 days - 7 days
Email	˜7 minimum	<5 max
Training Rate	>90% Trained within 30 days	<90% within first 60 days
Implementation Rate	>90% Implemented within 60 days	<75% Implemented within first 60 days

**note these are in total averages that are not weighted by segment*

Figure 11: *ZoomInfo AM/CSM benchmarks exceed established industry practices.*

Conclusion

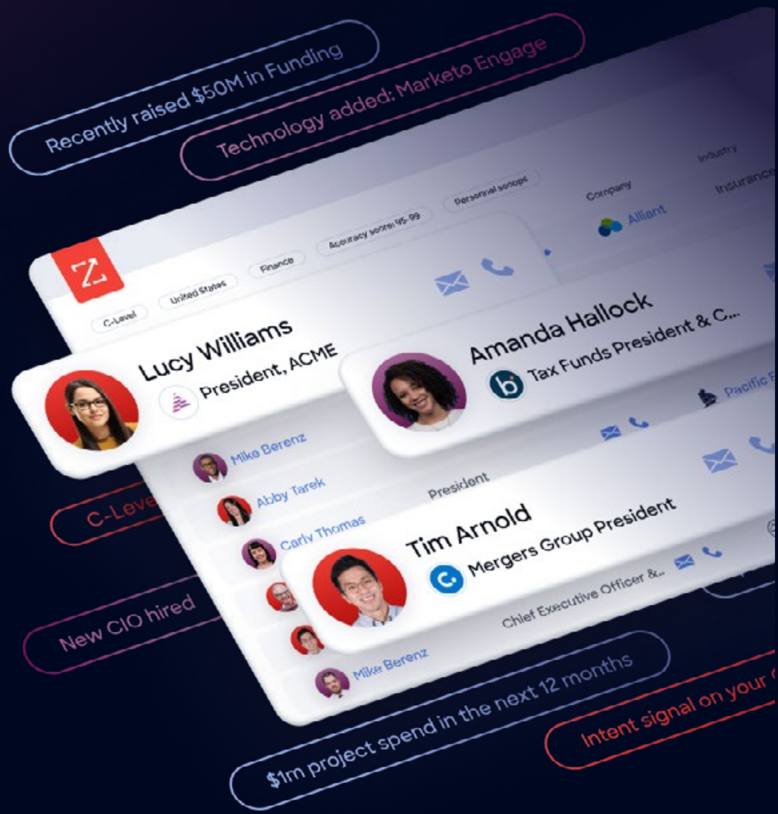
ZoomInfo is the world's leading provider of go-to-market intelligence solutions, supporting sales and marketing organizations around the globe with high quality data to improve go-to-market efforts. But in addition to selling its platform, ZoomInfo has put that same technology to the test, pioneering a number of best practices in its own go-to-market motions. It uses these practices not only to identify and close deals, but also in its AM/CSM motion, to maximize customer retention and identify ways to continually monetize its customer base with proven results.

By providing information about its AM/CSM best practices, ZoomInfo aims to inspire other companies to do the same. Even though real change won't happen overnight, every incremental effort and investment can result in progress. Start by committing to a data-driven approach to your post-sale customer journey, backed by executive-level support. And remember, regardless of where you are on the maturity curve, it is important to keep evolving. You can always find ways to better use data and achieve ROI.

ZoomInfo's data team stands ready to work with you to help understand where you are in your go-to-market maturity and how you can improve your sales and customer account operations. Contact your ZoomInfo representative or visit our website to learn more.

About the ZoomInfo Sales Best Practices Series

This white paper is the fourth in ZoomInfo's four-part Go-to-Market Best Practices series. The series showcases the best practices in ZoomInfo's account management and customer success management model, with the goal of inspiring their adoption by ZoomInfo customers and other enterprise sales organizations. The four papers include a general overview (Volume 1), and three papers detailing the main components of ZoomInfo's data-driven revenue engine: the SDR motion (Volume 2), the AE motion (Volume 3), and the AM/CSM motion (Volume 4).



About ZoomInfo

ZoomInfo (NASDAQ: ZI) is a Go-To-Market Intelligence Solution for more than 15,000 companies worldwide. The ZoomInfo platform empowers business-to-business sales, marketing, and recruiting professionals to hit their number by pairing best-in-class technology with unrivaled data coverage, accuracy, and depth of company and contact information. With integrations embedded into workflows and technology stacks, including the leading CRM, Sales Engagement, Marketing Automation, and Talent Management applications, ZoomInfo drives more predictable, accelerated, and sustainable growth for its customers. ZoomInfo emphasizes GDPR and CCPA compliance. In addition to creating the industry's first proactive notice program, the company is a registered data broker with the states of California and Vermont. Read about ZoomInfo's commitment to compliance, privacy, and security. For more information about our leading Go-To-Market Intelligence Solution, and how it helps sales, marketing, and recruiting professionals, please visit www.zoominfo.com.