

Project Documentation: ZoomInfo Optimization

Project Name: ZoomInfo Advanced Lead Intelligence & Workflows

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Project Duration: 3–5 Days

1. Project Objective

The goal of this project is to optimize ZoomInfo for identifying high-quality prospects and automating lead identification workflows. This setup will enable your team to generate and export high-intent data directly into existing Salesforce processes and outreach cadences, without modifying Salesforce configurations as part of this scope.

Expected Outcomes:

- Clearly segmented ICP tiers within ZoomInfo
- Automated ZoomInfo workflows for job changes and intent signals
- High-intent lead lists ready for export
- WebSights dashboard configured for visitor intelligence

2. Project Scope (ZoomInfo Only)

Task	Description	Deliverable
ICP Definition	Create three ICP tiers (Tier 1, Tier 2, Tier 3) based on company size, revenue, industry, and geography	Saved Searches and Tags in ZoomInfo
Tech Stack Segmentation	Build three AP maturity segments: Manual AP, Mid-Digital, Enterprise ERP	Technographic Filters in ZoomInfo
Job Change Monitoring	Enable job change alerts for finance decision-makers (CFO, VP of Finance, Head of Finance, Controller)	ZoomInfo Workflow Triggers

Intent Signals	Activate intent streams for AP automation, payments, and fraud-related topics	Intent Signals Visible in ZoomInfo
High-Intent Lead Lists	Combine ICP tiers, technographics, job changes, and intent data	Dynamic Lead Lists Ready for Export
WebSights Setup	Configure the WebSights dashboard to identify and filter companies visiting your website	WebSights Filtered Dashboard
Handover	Walkthrough and explanation of the complete ZoomInfo setup	Live Training / Review Session

3. Requirements & Access

ZoomInfo

- Admin-level or standard user access to configure searches, tags, workflows, and WebSights dashboards

Note:

- Salesforce access is not required for this scope
- Website or GTM access is not required (tracking code installation will be handled by the client team)

4. Project Timeline

Day 1

- Project kickoff
- ZoomInfo access confirmation
- Final validation of ICP and segmentation criteria

Day 2

- ICP tier creation
- Tech-stack segmentation setup

Day 3

- Job change monitoring workflows
- Intent signal activation

Day 4

- WebSights dashboard configuration
- High-intent list finalization

Day 5

- Final review
- Client walkthrough and handover

5. Deliverables

- Three ICP tiers fully tagged in ZoomInfo
- Three AP tech-stack segments created
- Job change alerts active in ZoomInfo dashboards
- Intent signals streaming for AP automation and payments
- High-intent lead lists prepared for export
- WebSights dashboard configured and filtered
- Live walkthrough and operational guidance

6. Success Metrics

- ICP tiers clearly segmented and usable
- Job change alerts triggering consistently
- Intent signals generating actionable leads
- WebSights identifying relevant visitor companies
- Sales team able to export and act on leads without manual filtering

7. Summary of Scope Alignment

- Focused exclusively on ZoomInfo optimization
- No Salesforce configuration or automation included
- No website tracking code installation included
- Accelerated delivery timeline focused on immediate lead intelligence value