The New GTM Playbook:

18 Ways to Future-Proof Your Sales Team

zoominfo SalesOS
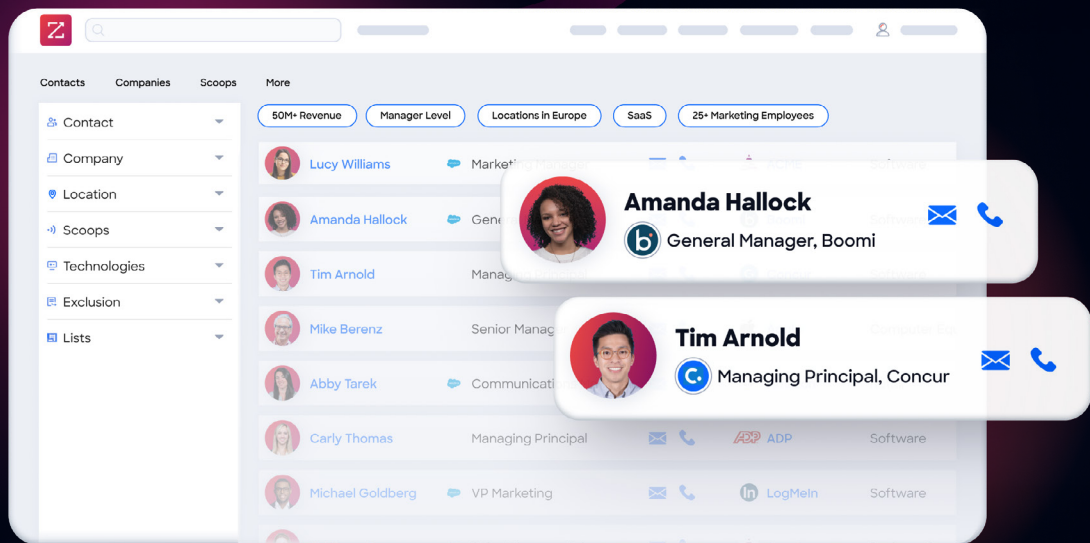
Introduction

Longer sales cycles. Increasingly discerning buyers. More meetings with more stakeholders. Intensifying competition. Economic uncertainty. Go-to-market teams of every size, in every industry, are grappling with these challenges firsthand.

Thankfully, there's an answer. At ZoomInfo, we've developed an entirely new way for GTM leaders to identify and execute proven, data-driven strategies that drive revenue. In this guide, you'll find 18 expert-crafted plays designed to aid your business through every stage of growth, from new lead creation and closing opportunities to retaining and upselling the customers you worked so hard to win.

Want to dig deeper? Explore our entire playbook to find plays that align with your goals, set up your workflows, and add them to your GTM motions. Get started today with ZoomInfo's GTM Plays — and get ready to unlock your team's full potential.

Amanda Hallock
General Manager, Boomi

Lee Keega
Managi

Sophia Hassan
Marketing Manager

ACME Tech.   402.390.4920
Boston, MA   s.hassan@acme.com

KEY ROLE EMPLOYEE COUNT	581
INDUSTRY	Software
COMPANY REVENUE	$280.5 Million
CRM	Salesforce

Table of Contents

Acquiring New Leads

Site Visit Targeting

GTM LEVEL: EASY

Using ZoomInfo's WebSights analytics tool, you can turn anonymous, high-value visits to your website into known accounts with strong first-party buyer intent signals.

You can then pull together a campaign to nurture and reach out to these prospects based on your typical buyer persona and ideal customer profile. Set up an automated workflow to trigger an outreach motion to buying committee members at these accounts.

Trigger

Identify companies within your ICP visiting specific pages on your website.

Actions

1. Filter companies to meet specific criteria based on page

2. Source expanded set of contacts which meet your persona definition mapped to each page

3. Send records to your CRM

4. Assign to an account owner

5. Enroll in site visit campaign

Channels Run

- Ads
- Email
- Mail
- Text
- Chat
- Events
- Phone

Impact of Play: High
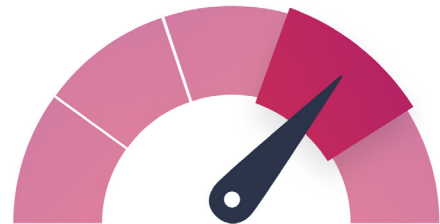
GET TEMPLATES AND TRY IT NOW

Review Site Intent

GTM LEVEL: INTERMEDIATE

You can purchase intent data from review sites to identify prospects that are further along in the buying process and actively in the market for solutions. This "late stage" intent data provides visibility into who is researching your category, specific products, or competitors (and possible alternatives).

Take your campaign to the next level by using company visitor information. Enhance the data to identify buying committee members at the interested companies.

Target these ready prospects with an automated email campaign that outlines what makes your product a better alternative to competitors' solutions.

Trigger

Identify companies that meet your "Saved Search" company filter criteria including views of review sites.

Actions

1. Source expanded set of contacts that meet your personas mapped to review category

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in review site campaign

Channels Run

- Ads
- Chat
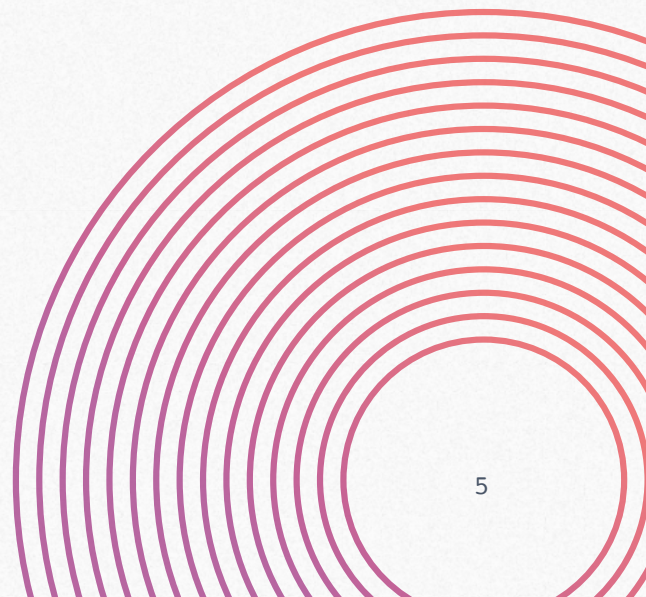- Email
- Events
- Mail
- Phone
- Text

Partners

G2   TR

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

Tech Install Targeting

GTM LEVEL: EXPERT

Knowing which tech solutions your product plays well with can expand your market. Identify which of your technologies complement the products or tools of other companies. Then run outbound campaigns to potential customers with messaging about using your product with that complementary technology.

You can automatically discover ZoomInfo contacts at these companies that fit the buying committee for those technologies. Create a play specific to each complementary technology and pair it with specific outbound messaging.

Trigger

Identify signals for specific technologies added at a company within your ICP.

Actions

1. Filter companies to reduce the records to meet specific criteria

2. Source expanded set of contacts which meet your persona definition mapped to each technology category

3. Send records to your CRM

4. Assign to an account owner

5. Enroll in tech install campaign

Channels Run

- Ads
- Chat
- Email
- Events
- Mail
- Phone
- Text

Impact of Play: Medium

GET TEMPLATES AND TRY IT NOW

Leads to Opportunities

Pre-Meeting Ads Aircover

GTM LEVEL: EASY

For upcoming demos, identify the buying committee at the prospective company and target them with display ads. This can be done by adding the company to a MarketingOS Audience to deploy a digital advertising campaign.

This will make you more present in their world and give you a share of their thought process. By the time you meet, you're already familiar to them.

Trigger

Identify contacts scheduled to attend meetings.

Actions

1. Source expanded set of contacts which meet your persona definition related to upcoming meeting attendees

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in pre-meeting aircover campaign

Channels Run

🖥 Ads

Impact of Play: Medium

GET TEMPLATES AND TRY IT NOW

Fast SLA on Form Fill

GTM LEVEL: INTERMEDIATE

Responding quickly to inbound inquiries will dramatically increase your chances for success. A recent study showed conversion rates are eight times higher when salespeople place their first call within five minutes of getting a lead.

When a website visitor fills out a web form for a product demo, the assigned SDR should receive an automated alert and contact the prospect immediately. If they can't reach the prospect, they should leave a voicemail and add the prospect to a follow-up email sequence requesting a call.

Trigger

Identify forms completed or abandoned by people at companies within your ICP (ideal customer profile).

Actions

1. Send company and contact records to a specific user or shared channel

2. Assign to an account owner

3. Send records to your CRM

4. Contact lead by phone and email (or text) within 90 seconds

5. Create an SLA of <90 seconds for the inbound team to talk to buyers when they're thinking about you. Report on and optimize this to maximize leads

Channels Run

✉ Email

☎ Phone

Impact of Play: Very High

GET TEMPLATES AND TRY IT NOW

Abandoned Chat Follow-up

GTM LEVEL: INTERMEDIATE

Interacting with prospects via chatbot is a valuable opportunity to connect in real time, answer questions, and point them in the right direction. However, the buyer has control over these conversations and can end them at any time.

If a prospect abandons a conversation before providing their contact information or filling out a form, use the IP and company data filter in ZoomInfo's RevOS platform to identify the visitor's company and enrich that data to identify the company's likely buying group.

Then set up an automated email sequence to the group. By reaching out to other potential decision-makers, you can ensure that this is not a missed opportunity, but rather a starting point to engage with the right people.

Trigger

Identify visitors who engage with website chat but do not convert

Actions

1. Source expanded set of contacts which meet your persona definition based on chat interaction

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in abandoned chat campaign

Channels Run

🖼 Ads   🖵 Chat

✉ Email

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

Trial Provisioning Flow

GTM LEVEL: INTERMEDIATE

Multiple inbound leads from a single prospect account may indicate that they face recurring business challenges that your product can solve. An email sequence offering a free trial and targeted to high-placed decision-makers at the account can start a useful conversation.

Acknowledging a heavy number of inbounds from a company and offering to support the issues that need to be fixed creates an opportunity to show the value of your product or service. Noticing inbound lead patterns and targeting higher-ups at an account takes advantage of data known about a prospect, increasing the chance of a sale.

Trigger

Identify accounts where more than one inbound lead received from a single account

Actions

1. Source expanded set of contacts which meet your persona definition

2. Send records to your CRM

3. Assign to a User

4. Enroll in Trial Offer campaign

5. Set up an auto-provisioned trial offer

Channels Run

- Ads
- Email
- Mail
- Text
- Chat
- Events
- Phone

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

Opportunity to Close

Stalled Opportunity Follow Up

GTM LEVEL: EASY

Just because an opportunity was created by a sales rep doesn't mean it's chugging along toward becoming a closed deal. Track deal progress to make sure things keep moving. When a stalled opportunity is identified (e.g., no movement for 30 days), have your VP of sales send an email that includes a clear call to action. You can automate this with custom messaging and a special offer.

Triggers

- Identify opportunities who have been in the same stage with no engagement for a given period of time.

- Take action on deals identified by Chorus to have a risk signal
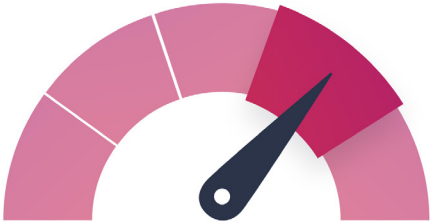
Actions

1. Source expanded set of contacts which meet your persona definition related to buying committee members

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in stalled opportunity campaign

Channels Run

- Ads
- Chat
- Email
- Events
- Mail
- Phone
- Text

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

Competitor Mentions

GTM LEVEL: EXPERT

When researching technology, buyers often encounter tons of information about available options, including those from your competitors. But they don't always get the full picture of how one solution compares to another.

When a competitor is mentioned on a sales call, set up an automated nurture program that highlights the advantages of your product over that competitor's product. This allows you to inform the buyer about your solution relative to the competitive landscape, regardless of the individual sales rep.

Trigger

Identify companies or contacts that have met a Chorus Tracker criteria related to one of your competitors.

Actions

1. Source expanded set of contacts which meet your persona definition related to competitor mentioned

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in competitor mentions campaigns

Channels Run

Ads		Chat	
Email		Events	
Mail		Phone	
Text			

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

Meeting No-Shows

GTM LEVEL: EXPERT

A certain percentage of prospects will always fail to show up to a pitch meeting, but you shouldn't let them slip away.

Set up notifications in your CRM for prospects that didn't show up to meetings. Dedicate a team (typically new SDRs) to reach out to no-shows by phone and email immediately after meetings for the first seven days. From days eight through 20 after the no-show, other reps can try to re-engage the prospect through calls and emails. This will keep your product top-of-mind and increase the likelihood of a closed-won opportunity.

Trigger

Identify a company or contact that does not attend a confirmed meeting.

Actions

1. Source expanded set of contacts based on meeting invite titles

2. Send records to your CRM

3. Assign to a user

4. Enroll in meeting no-show campaign

Channels Run

✉ Email   ☏ Phone

▯ Text

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

Upsell & Cross-Sell

User Expansion

GTM LEVEL: EASY

Surface untapped opportunities at customer accounts by calculating their user saturation rate. Determine the total number of potential users at an account (by counting all the contacts that have job titles, functions, and levels consistent with your typical user base), and compare with the number of their current user licenses.

Focus your efforts on expanding accounts that have relatively low saturation rates, but show enough adoption to indicate that they value your product — start with accounts showing a user saturation rate between 10-60%.

Trigger

Identify user saturation rate to identify accounts that are below target.

Actions

1. Source expanded set of contacts which meet your persona definition

2. Send record to your CRM

3. Assign to an account owner

4. Enroll in user expansion campaign

Channels Run

- Ads
- Email
- In App
- Phone
- Chat
- Events
- Mail
- Text

Impact of Play: Very High

GET TEMPLATES AND TRY IT NOW

Cross-Sell Targeting

GTM LEVEL: INTERMEDIATE

First-time buyers are often hesitant to take on more than they can handle. They often want to prove the value of a product with a smaller purchase before making bigger investments. To support new buyers and create upsell opportunities, circle back to them 90 days after the purchase, to confirm the value of the relationship and to demonstrate additional products that can help them achieve their goals.

Trigger

Identify existing customers who have strong adoption, but have not adopted all products.

Actions

1. Source expanded set of contacts which meet your persona definition related to target products to upsell

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in customer upsell campaign

Channels Run

	Ads		Chat
	Email		Events
	In App		Mail
	Phone		Text

Impact of Play: Medium

GET TEMPLATES AND TRY IT NOW

Product Feature Announcement

GTM LEVEL: INTERMEDIATE

Seize the opportunity to leverage a new product feature or functionality when it launches by sending release communications to three high-level groups:

1. Customers who already provisioned the new feature

2. Existing customers who don't have the feature

3. New prospects

Note: If you are releasing multiple features in a short period of time, it's better to roll all the updates into a single communication, such as a newsletter.

Trigger

Identify companies and contacts where a new product feature release matches "Saved Search" criteria including customer flag in CRM.

Actions

1. Source expanded set of contacts based on product type

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in product announcement campaign

Channels Run

Ads	Chat
Email	Events
In App	Mail
Phone	Text

Impact of Play: Medium

GET TEMPLATES AND TRY IT NOW

Product Usage Upsell

GTM LEVEL: EXPERT

If you sell a product that has a usage revenue model – something that runs out over time – you should automate an upsell motion to resupply your client's inventory and maintain the account.

For example, at ZoomInfo, we sell credits that allow users to export companies and contacts. When those credits run low, an automated trigger prompts us to inform customers that they should purchase more credits before their service is interrupted.

Trigger

Identify customers' existing product usage to inform when to sell them additional features or credits.

Actions

1. Source expanded set of contacts which meet your persona definition related to target products to upsell

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in product usage upsell campaign

Channels Run

Ads   Email

Phone   Text

Partners

correlated   Pocus

Impact of Play: Very High

GET TEMPLATES AND TRY IT NOW

Retention & Winback

Customer Awards or Recognition

GTM LEVEL: EASY

Everyone says they're doing more than selling a product — that they're really partnering for the long term. Show customers you really mean it by keeping tabs on their achievements.

When a customer wins an award, is featured in positive news coverage, or announces a major new initiative, launch a direct mail campaign or send a gift to celebrate the occasion.

Trigger

Identify a customer or contact that has won an award or launched a major new initiative.

Actions

1. Source expanded set of contacts (+ contact who won award) which meet persona definition

2. Send record to your CRM

3. Assign to an account owner

4. Enroll in award congratulations campaign

Channels Run

✉ Email   📞 Phone

📱 Text

Impact of Play: Medium

GET TEMPLATES AND TRY IT NOW

Low Adoption Engagement

GTM LEVEL: INTERMEDIATE

There's a downsell risk when customers aren't using the full scope of the product they purchased. Take a look at what each customer is paying for and pinpoint features that are under-used — or not used at all.

Automate outreach that highlights the benefits and value of those features and how they can get maximum value from their purchase. Offer support to help set up unused features and familiarize them with how they work.

Run this play at scale by analyzing product use data and automating messaging campaigns. Higher product use translates to more upsells, renewals, and customer satisfaction.

Trigger

Identify a customer account with low user adoption, product use, and/or churn risk.

Actions

1. Source expanded set of contacts which meet your persona definition related to low usage or other churn risk

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in low adoption campaign

Channels Run

- Ads
- Email
- In App
- Phone
- Chat
- Events
- Mail
- Text

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

At-Risk Customer Surveys

GTM LEVEL: EXPERT

Sending out a quarterly Net Promoter Score survey to identify customers at risk of churn allows you to pinpoint renewal problems before they happen. If possible, include a gift to encourage participation. Assess their responses and take appropriate corrective actions to save any at-risk accounts.

Trigger

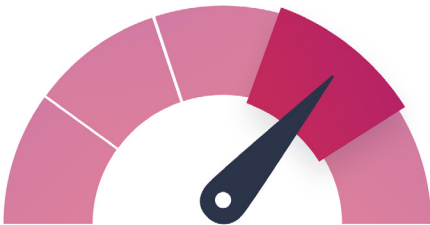Identify customers with low product use or poor adoption who meet the criteria for an at-risk survey.

Actions

1. Source expanded set of contacts which meet your persona definition related to low usage or other churn risk

2. Send records to your CRM

3. Assign to an account owner

4. Enroll in at-risk customer survey

Channels Run

⊞ Chat   ✉ Email

⊡ In App

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

Win Back
Churned Customers

GTM LEVEL: INTERMEDIATE

Churned customers aren't always gone for good. You can often win them back if you resolve their reasons for leaving, such as adding new features or improvements to a product.

Record the reasons for every lost customer and segment them into high-level categories, such as pricing, budget, product features, and customer experience. Capture relevant details, including desired features that didn't exist or a problem with your customer service.

Start campaigns with messages tailored to these reasons that acknowledge prior limitations and subsequent improvements. Combine the message with a free trial offer to win back the customer.

Trigger

Identify ex-customers that churned more than three months ago.

Actions

1. Wait for established period of time

2. Source expanded set of contacts based on previous product type and usage

3. Send records to your CRM

4. Assign to previous account owner

5. Enroll in win back campaign

Channels Run

- Chat
- Email
- Events
- In App
- Mail
- Phone
- Text

Impact of Play: High

GET TEMPLATES AND TRY IT NOW

Build Your Go-to-Market Playbook

We're just getting started. Visit the full GTM Plays site today to download AI-driven templates, watch helpful videos, and see how to put your plays into action at: zoominfo.com/plays