

# Implementation Guide

# **ZoomInfo Enrich for Marketo**

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# Overview

Welcome to ZoomInfo Enrich for Marketo!

ZoomInfo Enrich contains two applications for keeping your Marketo database up to date with accurate B2B contact and company data.

With **Instant Enrich**, your lead records will be instantly appended with ZoomInfo data as they are created in your Marketo environment.

**Scheduled Enrich** provides scheduled jobs to keep your Marketo lists enriched on a regular cadence.

With ZoomInfo Enrich for Marketo, enriching leads with deep, high-quality data has never been easier. Configure ZoomInfo Enrich to automatically append inbound leads, and create scheduled jobs to maintain data quality on an on-going basis. Fill in the missing data fields for improved lead scoring, segmentation, and sales follow-up. Spend less time digging and researching and more time selling using ZoomInfo data within your current Marketo workflow.

# Getting Started

## Create Custom Fields in Marketo

Let's get started by creating a few key custom fields in Marketo to capture ZoomInfo data. These custom fields will be used to track enrichment usage, reporting and help troubleshoot any errors.

1. Log into your Marketo environment. (*Note: Must use admin user*)
2. Follow the steps detailed [here](#) to create custom fields for contacts.
3. Create the following **Contact** properties (enter the exact text for the Display Names):
  - a. ZoomInfo Contact ID
  - b. ZoomInfo Company ID(*Note: Set the Field Type to String*)

## Custom Field Recommendations

1. We strongly recommend creating custom fields for **ALL** ZoomInfo fields you would like to capture. By creating and storing all ZoomInfo data in custom fields you do not risk losing any existing data. Additionally, tracking ZoomInfo data in separate custom fields allows you to understand exactly which fields were enriched by ZoomInfo.
2. Marketo Smart Lists allow you to create a custom view for the data fields which matter to you. Create a Smart List for viewing fields enriched by ZoomInfo. Follow [these steps](#) to create a view dedicated to ZoomInfo Enrich by filtering on leads that contain the ZoomInfo Contact or Company ID.

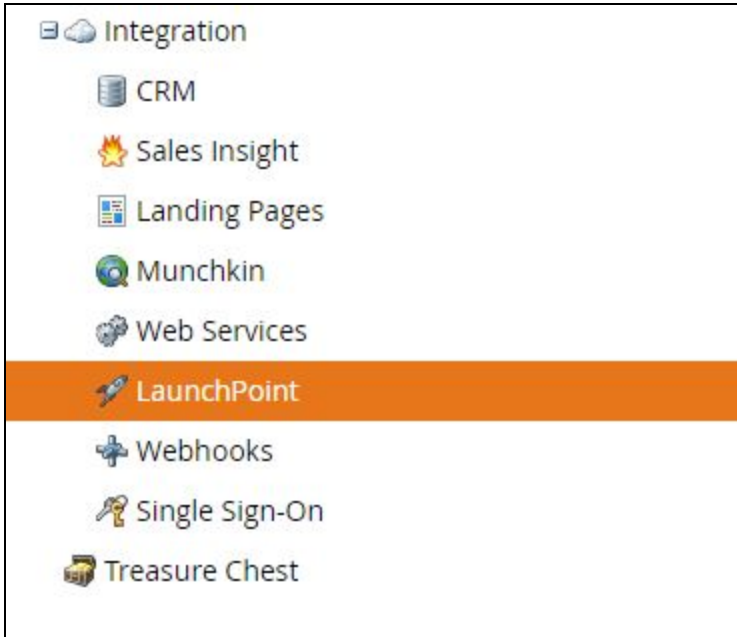
## Create Marketo API User

The LaunchPoint Service you will create in the next step requires an API only user to be linked as the 'Authorized User'. This user must have the following permissions:

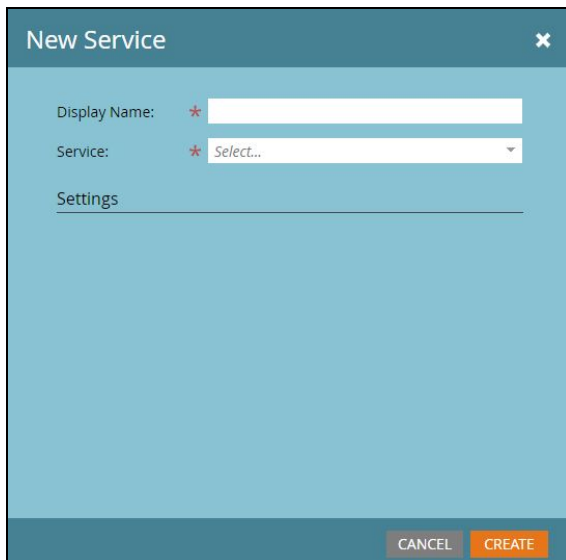
- Access Admin
  - Access Field Management
- Access API
  - Read-Write Company
  - Read-Write Lead
- Access Database
  - Advanced List Import

# Create LaunchPoint Service

1. Log into Marketo.
2. Select **Admin** gear in top right of page.
3. In the sidebar, select **LaunchPoint**.



4. Create a **New Service**
  - a. Display Name: ZoomInfo Enrich
  - b. Service: Custom
  - c. Description: Enrich Leads with ZoomInfo
  - d. API Only User: Select the API only user created in the previous section.

A screenshot of the 'New Service' form in Marketo. The form has a title bar with 'New Service' and a close button. It contains two required fields: 'Display Name' with a text input field and 'Service' with a dropdown menu showing 'Select...'. Below these fields is a section titled 'Settings' with a horizontal line underneath. At the bottom of the form are two buttons: 'CANCEL' and 'CREATE'.

# Scheduled Enrich

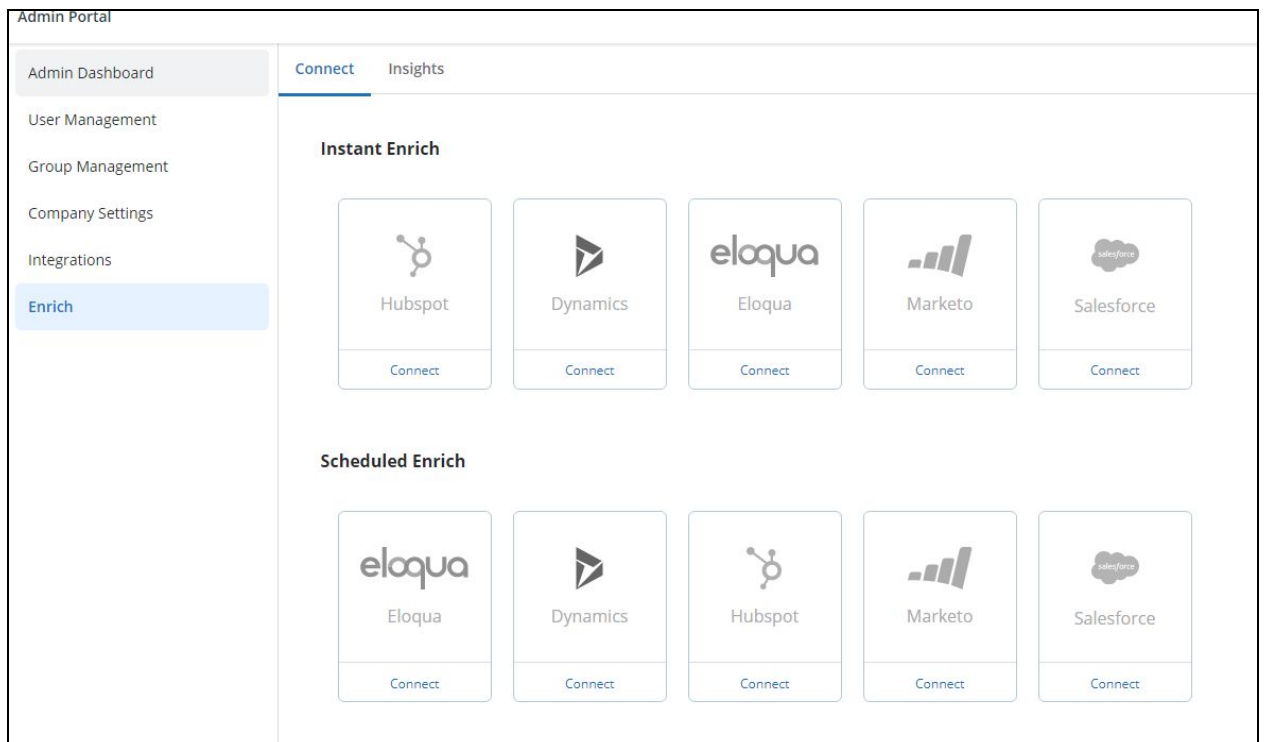
Keep your Marketo database up to date with routine data enrichments. Data enrichment jobs allow you to select a frequency you would like to update your Marketo database and custom mapping configuration to determine exactly how you want to capture and write ZoomInfo data.

## Create a Marketo List to Enrich

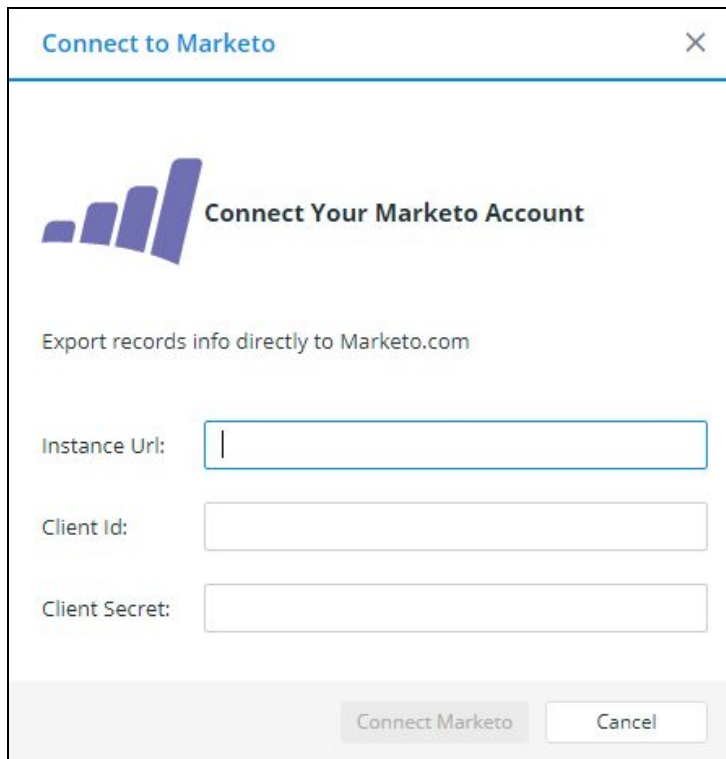
In this section, we will determine which leads within your Marketo environment you would like to enrich. To do so, we will build a static list within Marketo. Click [here](#) to learn more about static lists; how to create them and how to add leads to them. Once you have created a static list, add leads to the list that you would like to enrich.

## Connect ZoomInfo to Marketo

1. Login to ZoomInfo web application: **app.zoominfo.com**
  - a. Enter user credentials
  - b. After successful login, you will arrive at the ZoomInfo home page
2. Click on the **Admin Portal** in the navigation bar at the top of the page
3. Select the Scheduled Enrich tab and click **Connect** within the Marketo tile



4. In the pop-up window, enter the following information:

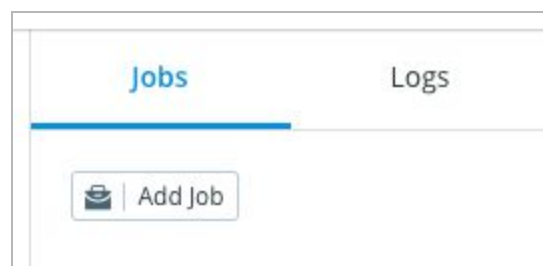


- a. Instance URL: this can be found in the Web Services tab of the Marketo Admin menu.
    - Use the Endpoint listed under REST API, but exclude **/rest** from the URL. The Instance URL should end with **.com**
    - Example: `https://123-ABC-456.mktorest.com`
  - b. Client Id and Client Secret are obtained from the **ZoomInfo Enrich** LaunchPoint service you created. Click **View details** to find your Client ID and Client Secret.
  - c. Click **Connect Marketo**
5. After connection is made to Marketo, the Marketo tile will display **Manage** option. Click into **Manage** to create and view scheduled enrichments.

## Add Scheduled Jobs

Now, we'll create recurring scheduled jobs to keep your Marketo data enriched. Within each job, you'll specify the frequency of enrichment, specify the static list to enrich and mapping of ZoomInfo data to Marketo fields.

1. Select **Add Job**.



2. Next to **Object Type**, select **Leads** in the drop-down.
3. Provide a job name (optional).
4. Provide a description (optional).
5. Select a **Time Interval** for recurring jobs. (daily or weekly) *\*jobs begin at 12:00 AM ET\**
6. Select a List to Enrich from the dropdown list.
7. Configure **Mapping** to determine how ZoomInfo data will be captured.

The screenshot shows the 'Add New Job' configuration form. It has a 'Jobs' tab and a 'Runs' sub-tab. A 'Back to job list' link is at the top left. The form fields are: Platform (Marketo), Object Type (Leads), Job Name (Marketo\_Leads\_Job), Description (empty), Time Interval (Weekly), Day (Friday), Select a List to Enrich (Static List), and a Mapping section. At the bottom are 'Verify and Save' and 'Cancel' buttons.

▼ Mapping [Back to default preferences](#)

ZoomInfo Field	Marketo Field	Example	Update Option
First Name	→ First Name	e.g. Hila	Complete if ...
Last Name	→ Last Name	e.g. Nir	Complete if ...
Company Name	→ Company Name	e.g. Zoom Information, Inc.	Complete if ...
Job Title	→ Job Title	e.g. Vice President of Marketing...	Complete if ...

- **ZoomInfo field:** Select the ZoomInfo data point you would like to return
- **Marketo field:** Select the Marketo field you would like to capture ZoomInfo data (supports custom fields, as well)
- **Update Option:** Select whether you would like to overwrite existing data for complete if missing.



8. Select **Verify and Save** to finish creating the job (*Note: any errors with job configuration will appear when clicking Verify and Save*).
9. After your job is created successfully, you should see the new job listed in your **Jobs** table. You can enable or disable jobs by toggling the **Status** slider to On or Off.

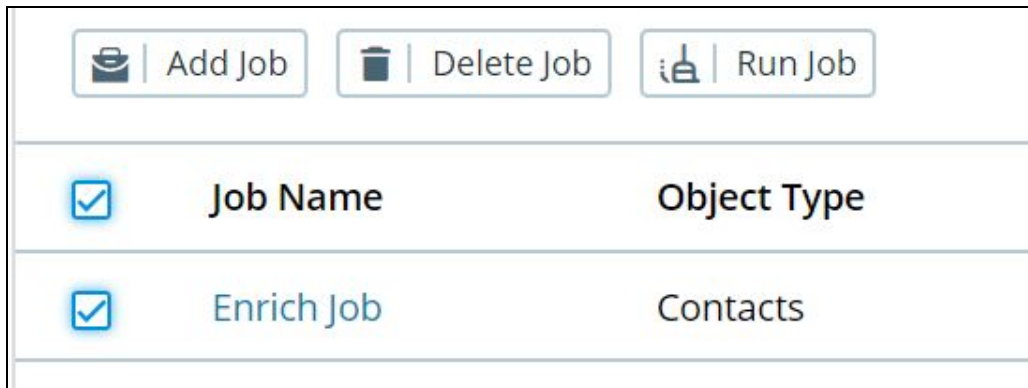
## Mapping Best Practices

- ZoomInfo Person ID and Company ID are unique identifiers for ZoomInfo person and company records. It is recommended that custom properties are created and mapped to these fields.
- ZoomInfo recommends you do not overwrite standard HubSpot properties

## Run Job

You have the ability to initiate a job run immediately by selecting a job and clicking Run Job.

1. Select a Job.
2. Select **Run Job**.



<input checked="" type="checkbox"/>	Job Name	Object Type
<input checked="" type="checkbox"/>	Enrich Job	Contacts

## View Job Runs

Each run of your Enrich Jobs will appear in the **Runs** table. Runs are created as soon as a job is initiated. Check the **Runs** table to view the status of jobs currently in progress and to historical list of completed runs.

1. Open **Runs**.
2. Run information
  - a. **Job Name:** Name of associated job.
  - b. **Start Time:** Start time of run.
  - c. **Finish Time:** Finish time of run.
  - d. **Total Records:** Total number of contact records processed.
  - e. **Matched:** Number of records matched to ZoomInfo database.
  - f. **No Match:** Number of records not matched to ZoomInfo database.
  - g. **Enriched Records:** Number of records successfully enriched.
  - h. **Errors:** Number of records which returned errors when enriching.
  - i. **Status:** Current status of run (Completed or Processing).

# Instant Enrich

Receive immediate insights into leads as they flow through Marketo Smart Campaigns by enabling instant enrichment.

## Create a Webhook

First, we will get started by creating a webhook in Marketo. Webhooks will allow you to call ZoomInfo's database and return data directly to your Marketo leads.

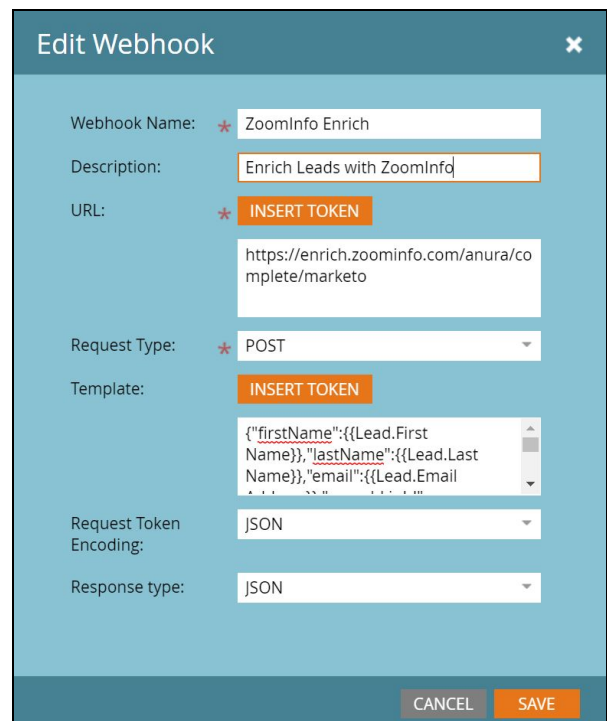
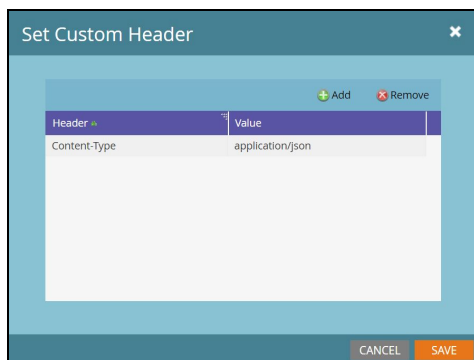
1. Follow the steps detailed [here](#) to create a new webhook. Enter each field exactly as you see below.
2. **Webhook Name:** ZoomInfo Enrich
3. **Description:** Enrich Leads with ZoomInfo
4. **URL:**

<https://enrich.zoominfo.com/anura/complete/marketo>

5. **Request Type:** POST
6. **Template:**

```
{ "firstName": {{Lead.First Name}}, "lastName": {{Lead.Last Name}}, "email": {{Lead.Email Address}}, "munchkinId": {{system.munchkinId}}, "id": {{lead.ID}}, "title": {{lead.Job Title}}, "companyName": {{company.Company Name}} }
```

7. **Request Token Encoding:** JSON
8. **Response Type:** JSON
9. Your webhook should appear like this:
10. Click **Create**
11. Click **Webhook Actions**
12. Click **Set Custom Header**
13. Click **Add**
14. Set Header: Content-Type
15. Set Value: application/json



## Add Webhook to Smart Campaign

To trigger the webhook, add the webhook to a Smart Campaign. If you already have a smart campaign you would like to use, you can add the webhook to the existing smart campaign. Click [here](#) to learn more about Marketo Smart Campaigns.

(Note: You must use a Trigger Smart Campaign, Batch Smart Campaigns are not supported).

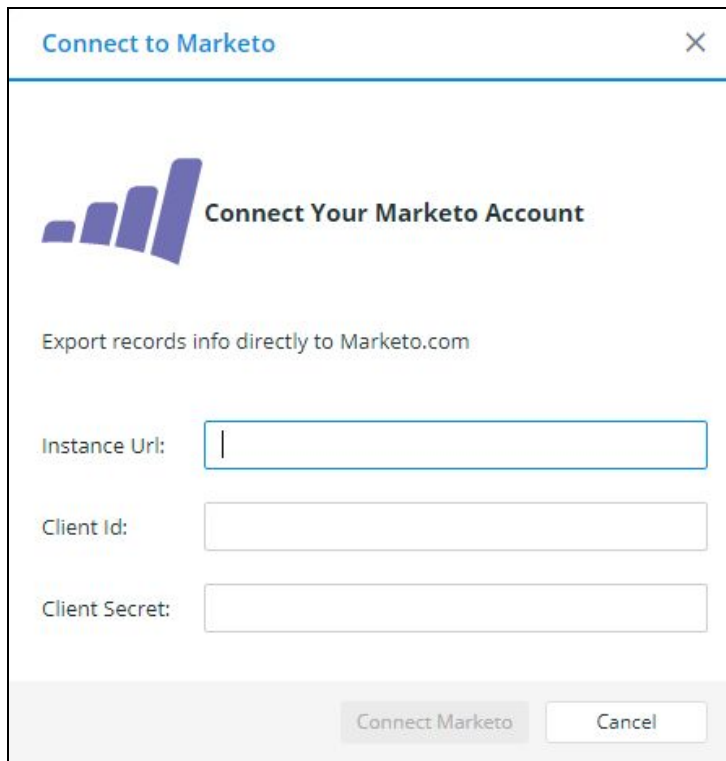
1. Create a new Trigger Smart Campaign by following [these steps](#).
2. Define the Smart List for your Smart Campaign [here](#).
3. Within your new Smart Campaign, add a Flow Action to call the ZoomInfo Enrich webhook. Learn how to call webhooks from a Flow Action [here](#).
4. Within your Flow, call the **ZoomInfo Enrich** webhook you previously created.
5. Save your Smart Campaign.
6. View your Smart Campaign Results to view enrichments occur. Learn more about Smart Campaign Results [here](#).

## Connect ZoomInfo to Marketo

Now that Marketo webhooks and smart campaigns are configured, connect ZoomInfo to Marketo and determine how you would like to send data to Marketo.

1. Log into [app.zoominfo.com](http://app.zoominfo.com)
2. Select the **Admin Portal** in upper navigation bar.
3. Select the **Enrich** tab in the left sidebar.
4. Under Instant Enrich, select **Connect** within the Marketo tile.

5. In the pop-up window, enter the following information:



Connect to Marketo

Connect Your Marketo Account

Export records info directly to Marketo.com

Instance Url:

Client Id:

Client Secret:

Connect Marketo Cancel

- a. Instance URL: this can be found in the Web Services tab of the Marketo Admin menu.
    - i. Use the Endpoint listed under REST API, but exclude **/rest** from the URL. The Instance URL should end with **.com**
    - ii. Example: `https://123-ABC-456.mktorest.com`
  - b. Client Id and Client Secret are obtained from the **ZoomInfo Enrich** LaunchPoint service you created. Click **View details** to find your Client ID and Client Secret.
  - c. Click **Connect Marketo**
6. After connection is made to Marketo, the Marketo tile will display **Manage** option.
  7. Click into **Manage** to configure the instant enrichment settings.
  8. Enable or Disable Lead enrichment with the slider.

## 9. Configure the custom mapping

ZoomInfo Field	Marketo Field	Example	Update Option
First Name	First Name	e.g. Hila	Complete if ...
Last Name	Last Name	e.g. Nir	Complete if ...
Company Name	Company Name	e.g. Zoom Information, Inc.	Complete if ...
Job Title	Job Title	e.g. Vice President of Marketing ...	Complete if ...

- ZoomInfo field:** Select the ZoomInfo data point you would like to return
- Marketo field:** Select the HubSpot property you would like to capture the specified data (supports custom properties, as well)
- Update Option:** Select whether you would like to overwrite existing data or complete if missing. **NOTE:** *ZoomInfo strongly recommends that you do not overwrite existing data*
- Save and Verify:** After configuring the mapping schema, select Save and Verify on bottom of page

## Mapping Best Practices

- ZoomInfo Person ID and Company ID are unique identifiers for ZoomInfo person and company records. It is recommended that custom properties are created and mapped to these fields.
- ZoomInfo recommends you do not overwrite standard HubSpot properties. Set standard HubSpot properties to “Complete if missing” to keep original data intact.
- When configuring your mapping settings, it is a good time to review the custom properties you have created.

ZoomInfo Field	Marketo Field	Example	Update Option
First Name	First Name	e.g. Hila	Complete if ...

## Disconnect ZoomInfo Instant Enrich

1. Disconnect ZoomInfo from Marketo by clicking the **Disconnect** button in the top right.