



2025 ZoomInfo Copilot Release Notes

These release notes describe new features and improvements for 2025 ZoomInfo Copilot releases

Current Release

[Jun 17, 2025](#)

Our user experience continuously evolves. Over time, descriptions of new features and enhancements in these release notes may no longer accurately reflect the current user experience. Visit the [ZoomInfo Knowledge Center](#) for public content that supports the current functionality.

Previous Releases

[May 20, 2025](#)

[Apr 15, 2025](#)

[Mar 18, 2025](#)

[Feb 19, 2025](#)

[Jan 22, 2025](#)

[2024 \(All Releases\)](#)



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Jun 17, 2025 ZoomInfo Copilot Release

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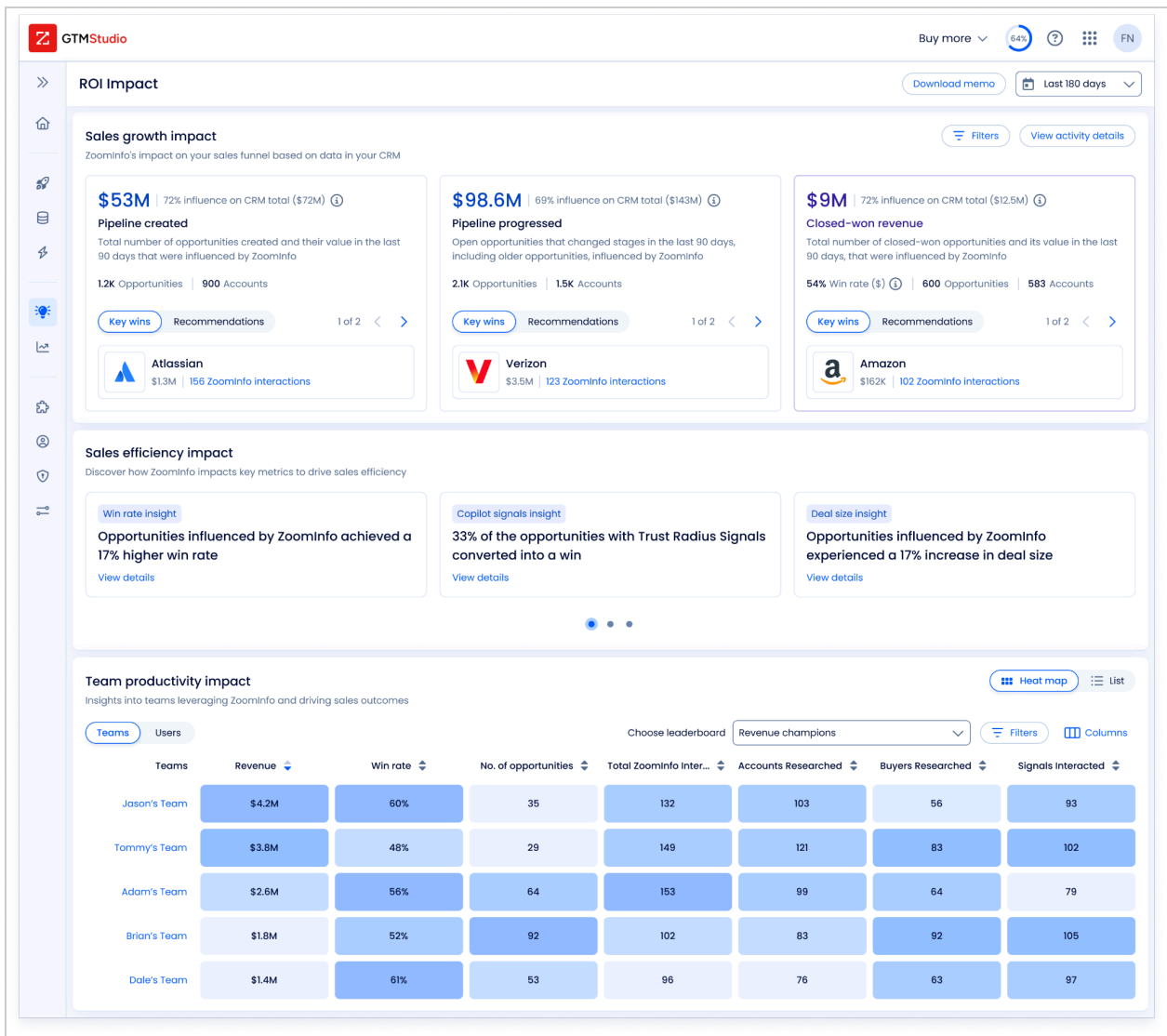
Go-To-Market ROI Dashboard

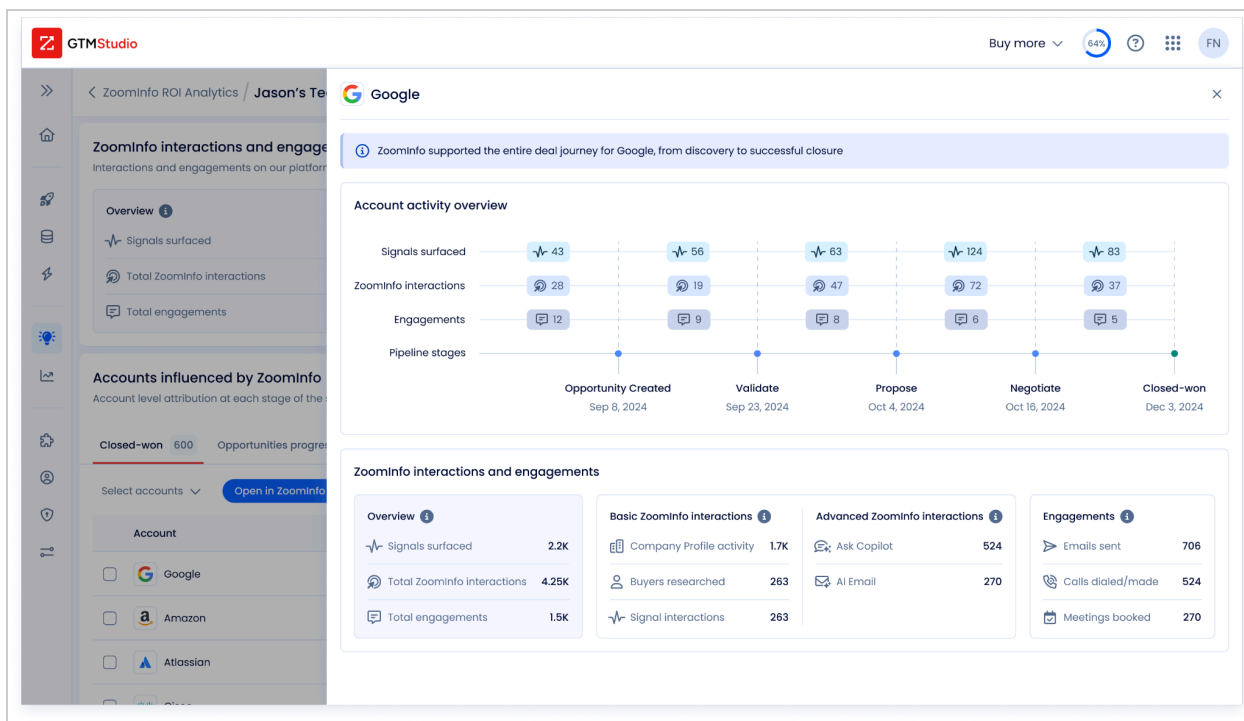
Connect ZoomInfo usage directly to closed revenue with analytics that show which interactions, signals, and team behaviors actually drive deals forward. Track the complete GTM workflow: marketers configure intent topics and signals in ZoomInfo Marketing, campaigns generate signals that flow into Copilot for sales activation, and the dashboard shows which signals get actioned by whom and what opportunities result.

Previously, proving ZoomInfo's business impact required manual CRM analysis and spreadsheet work that took hours to generate basic ROI reports. Now teams can see which specific signals and intent spikes rolled up to closed opportunities, who's taking action on signals and their conversion rates, and complete attribution from marketing campaigns through sales execution to deal close. This dashboard serves both revenue leaders building board-ready impact reports and RevOps teams identifying which signals drive sales performance, optimizing tool adoption across teams, and refining ICP based on what actually closes deals.

Use Case Tags: ROI Analytics, Account Insights, Deal Management, Account Prioritization

Primary Personas: Sales Leaders, Revenue Operations





Clari Copilot Integration Now Available

Access complete conversation context with your Clari call recordings automatically imported into Copilot every 24 hours. View recordings alongside emails, meetings, and other interactions in unified account timelines, giving account teams complete conversation context when preparing for renewals, expansion discussions, or deal rescue situations without switching between platforms.

Setup: Configuration > Intelligence > Meeting Import > Connect Clari (requires service account authentication)

Use Case Tags: Account Insights

Primary Personas: Account Executives, Account Managers

Quickly Spot Accounts That Need Attention

Instantly identify which accounts need attention with enhanced feed cards featuring colored left borders that signal account status (green for healthy, red for at-risk), customer and opportunity indicator chips, and prominently positioned "Ask Copilot" buttons. This redesign eliminates visual clutter and makes it easier to scan your feed and immediately identify priority accounts without reading through detailed descriptions.

The enhanced design appears automatically - no configuration needed.

Use Case Tags: Account Insights

Primary Personas: Account Executives, Sales Development Representatives, Account Managers

May 20, 2025 ZoomInfo Copilot Release

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ZoomInfo Sales Release Updates

Be sure to check out the [ZoomInfo Sales Release Notes](#) for new features and improvements to ZoomInfo Sales that also apply to ZoomInfo Copilot.



Signals and Notifications

Enhanced Website Visitor Identification with Third-Party Cookie Support

Increase visitor resolution rates and identify more potential buyers by enabling third-party cookie tracking across domains

WebSights' visitor identification capabilities have been enhanced with the addition of optional third-party cookie support. This new feature allows organizations to significantly improve their Visitor Resolution Rate (VRR) by aggregating visitor data across multiple ZoomInfo Script-enabled websites, providing a more comprehensive view of potential buyers engaging with your brand.

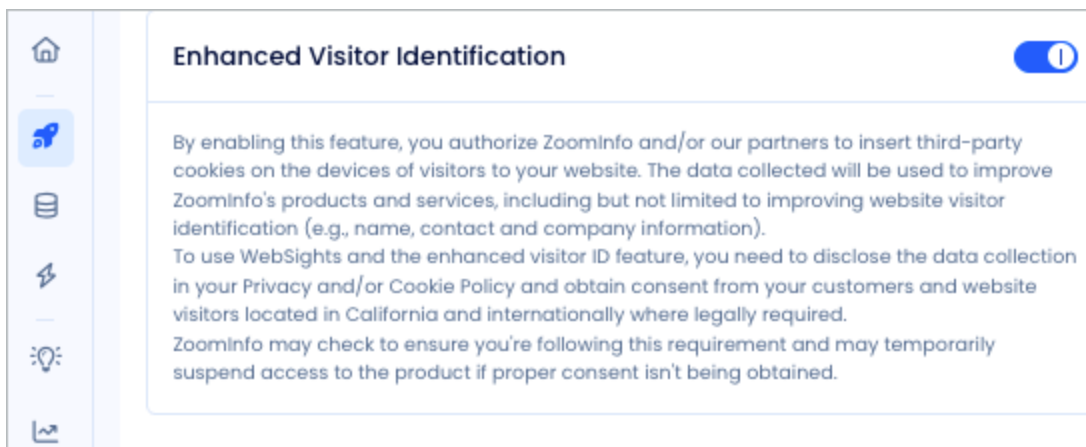
Opting into third-party cookies:

- Enables your sellers to identify more decision-makers and buying groups using tools designed with a focus on privacy and compliance.
- Expands the accuracy and reach of BuyerID signals, converting more anonymous website traffic into actionable sales opportunities.

The feature builds upon WebSights' existing capability to track website visitor behavior and maintains ZoomInfo's commitment to privacy and transparency by requiring explicit opt-in for this enhanced tracking capability.

How It Works (for Admins)

1. Navigate to **Configurations > Domains** in the **Admin Portal**.
2. Locate the **Enhanced visitor identification** toggle.



3. Review and confirm understanding of privacy compliance requirements.
4. Enable the toggle to activate enhanced visitor identification.
5. Ensure your website's privacy policy and cookie consent mechanisms are updated to reflect this change.

How It Works (for Users)

1. Look for more BuyerID signals in your Copilot feed.
2. Use these signals to identify and engage with potential buyers more effectively.

Learn More

See the following guides for setting up WebSights domains you want to track and installing the ZoomInfo Script on your web pages:

- [WebSights Implementation Guide](#)
- [ZoomInfo Script Implementation Guide](#)

Signal: Former Customer Contact Joined Account

Automatically track customer champions as they change roles or move to new companies

We've created a new signal that notifies you when someone who previously used your products or services at one company moves to another company that you're interested in working with. This feature helps you quickly identify potential champions at target accounts who have firsthand experience with your product or service.

This new ZoomInfo Copilot signal eliminates the manual work of tracking job changes and provides an immediate opportunity to engage with warm leads who are already familiar with your solution. These contacts can become valuable advocates within their new organizations, having experienced your product's benefits in their previous role.

The screenshot displays the ZoomInfo Copilot interface. On the left, under 'Top updates for today', there is a 'Smartsheet' signal. The signal text states: 'Smartsheet is a fast-growing SaaS collaborative work management platform, with over \$700 million in revenue and 3,000+ employees.' Below this, a green lightbulb icon indicates 'Now is a good time to reach out'. Under the heading 'Past week', a red-bordered box highlights the signal: 'Former Customer Joined: Charlotte Singh, AVP Sales, has joined the company'. A 'Dismiss' button is visible to the right of the Smartsheet signal. On the right side of the interface, a panel titled 'Former Customer joined' shows the same signal: 'Charlotte Singh, AVP Sales, has joined the company'. Below this, a red-bordered box highlights the detail: 'Previously employed at ServiceNow, a former customer'. The top of the right panel shows 'Smartsheet signals' and 'Former Cu...'. The date 'Aug 02, 2024' is also visible.

Note: This feature requires an active CRM connection.

Signal: Track Buying Group Member Departures

Stay informed when key decision-makers from your buying groups change roles or leave their companies

We've introduced a new signal that helps you stay ahead of important changes within your customer buying groups. The **Buying Group Departures** signal automatically notifies you when members of your designated buying groups undergo employment changes, including company departures, internal moves, or promotions.

This new capability helps you maintain deal momentum by alerting you to personnel changes that could impact your sales process. When a buying group member changes roles or companies, you'll receive an alert in your **Recent Updates Feed** and the company profile page.

Top updates for today
Prioritized by signal strength and recency

Powered by 

 **Smartsheet** Dismiss

 Great Account Fit  Account in CRM Target Account

Smartsheet is a fast-growing SaaS collaborative work management platform, with over \$700 million in revenue and 3,000+ employees.

 **Now is a good time to reach out**

Past week

- **C-suite departures:** [Sophia Jones](#), Chief Financial Officer, has departed the company and joined [Airtable](#). + 1 more C-suite Executive departures
- **Buying Group departures:** [John Lee](#), Director of Sales, has departed the company and joined [Notion](#). + 4 more personnel changes

Show 2 more ▾

Recommended Play: Funding Signal Follow up Why?

 [View the top contacts](#)  [Find Buying Group](#)

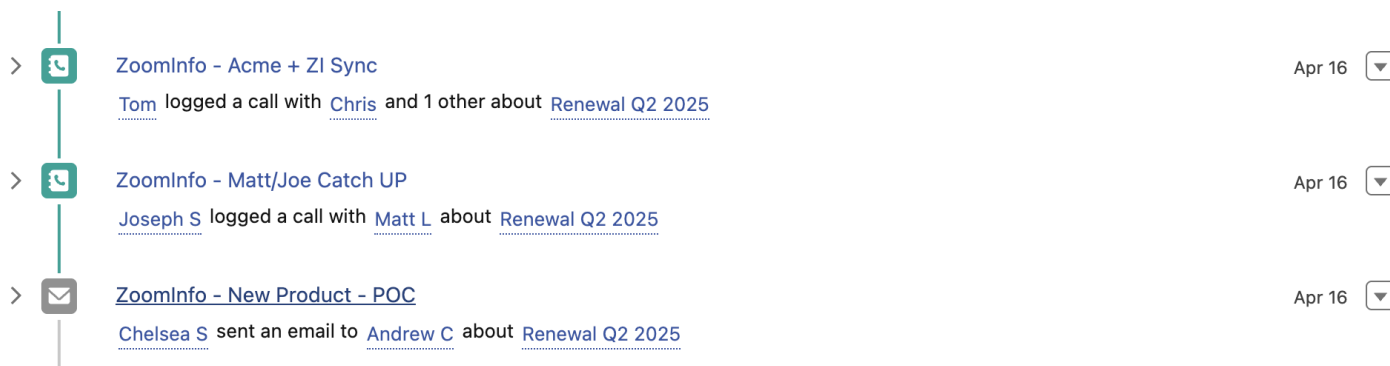


Learn more [How to Set Up Buying Groups on ZoomInfo Copilot](#)

CRM Writeback Activities Now Display ZoomInfo Prefix

Easily identify activities synced from ZoomInfo Copilot in your CRM with an updated prefix that clearly indicates the source

When ZoomInfo Copilot syncs activities to your CRM system, these entries will now display with a [ZoomInfo] prefix instead of [Chorus]. This update provides clearer identification of activities originating from ZoomInfo Copilot, helping teams better track and manage their sales engagement activities across platforms.



This improvement affects all supported CRM platforms including Salesforce, HubSpot, and Microsoft Dynamics, ensuring consistent identification of ZoomInfo-generated activities throughout your tech stack. The change helps sales teams and GTM leaders more accurately track activities and their impact on revenue generation, while maintaining the robust functionality of CRM Writeback including:

- Automatic logging of emails, calls, and meetings
- Creation of new contacts and accounts when needed
- Seamless activity synchronization across platforms

How It Works

1. Activities generated through ZoomInfo Copilot will automatically display with the [ZoomInfo] prefix in your CRM.
2. View these activities in your CRM's activity feed, task list, or event calendar.
3. Use the [ZoomInfo] prefix to easily filter or search for Copilot-generated activities.

Note: This update applies to Copilot Enterprise and Elite customers using CRM Writeback with Salesforce, HubSpot, or Microsoft Dynamics. No additional configuration is required to enable this change.

Homepage and Search

Understand Why Companies Appear in Your Target Accounts

Quickly understand why specific companies are included in your Target Accounts list

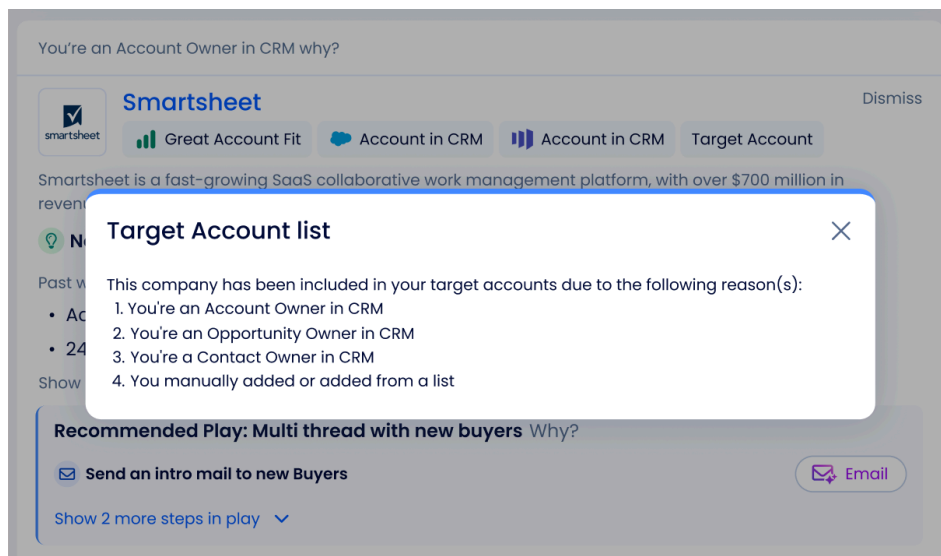
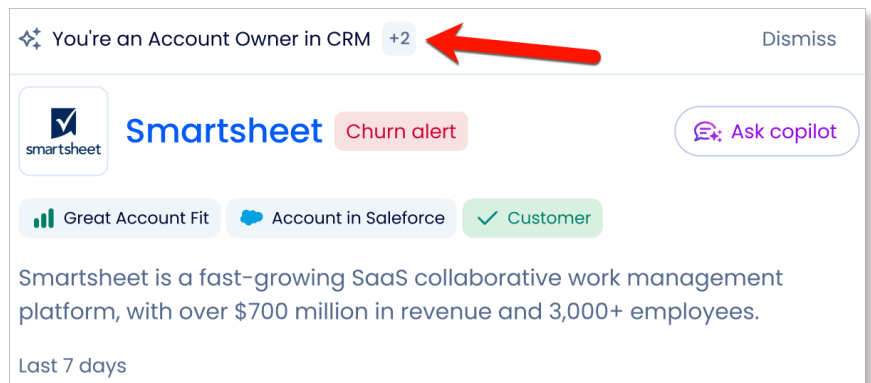
We've enhanced the Target Accounts experience on the Copilot homepage by clearly showing why each company appears in your list. The top left of each account card displays the primary reason for inclusion, such as "You're an Account Owner in CRM" or "You manually added the company." When multiple reasons exist, you can view all criteria that contributed to an account's inclusion by clicking the primary reason.

This new feature helps you:

- Quickly understand your connection to each target account
- Validate account assignments without leaving the ZoomInfo interface
- Maintain better visibility into your target account sources

How It Works

1. Navigate to your Target Accounts list in Copilot.
2. Click the primary reason link at the top of the account card to open a popup that displays all criteria that contributed to this account's inclusion.



Zoom Meeting Integration Now Available for ZoomInfo Copilot

Automatically import and analyze Zoom meetings to power meeting engagement insights across your Copilot workflows

In this release, we're including a new organization-wide Zoom meeting integration for ZoomInfo Copilot that streamlines how teams capture and learn from customer conversations. This integration enables automatic recording and analysis of all Zoom meetings, bringing meeting engagement insights to Copilot Chat, Account summaries, the Copilot Emailer, and the Account Activity Feed.

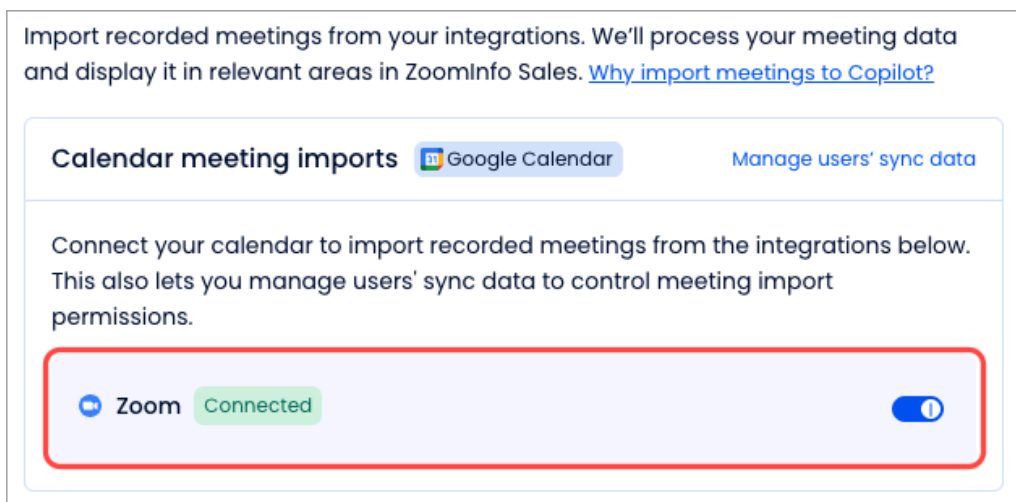
Prerequisites

This feature requires:

- Calendar integration with either Google or Microsoft Outlook
- Zoom Pro, Business or Enterprise
- Cloud recording enabled in Zoom

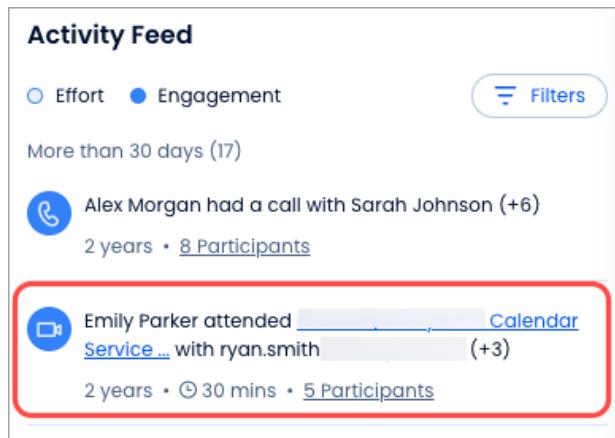
Admin Setup

1. Navigate to the **ZoomInfo Admin Portal**.
2. Click **Configurations > Intelligence** then select the **Meeting Import** tab.
3. Scroll to **Zoom**.
4. If you have already integrated Zoom with the ZoomInfo Copilot platform, **click the toggle on**.
5. If you have not yet integrated Zoom with ZoomInfo Copilot, click **Connect**, follow the prompts to integrate Zoom with ZoomInfo, then click the toggle on.



How It Works (for Users)

1. Access recorded meetings directly from the account Activity Feed or account page.



2. Click any recording to play it directly within the Copilot interface.

Salesloft Meeting Integration Now Available for ZoomInfo Copilot

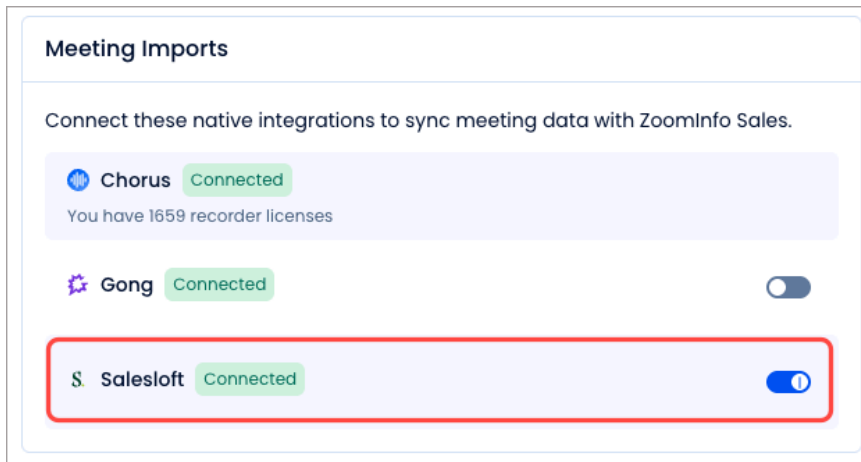
Automatically import and analyze all Salesloft meetings to power meeting engagement insights across Copilot workflows

Also in this release, we're including a new organization-wide Salesloft meeting integration for ZoomInfo Copilot that streamlines how teams capture and learn from customer conversations. This integration enables automatic recording and analysis of all Salesloft meetings, bringing meeting engagement insights to Copilot Chat, Account summaries, the Copilot Emler, and the Account Activity Feed.

How It Works

Admin setup:

1. Navigate to the **ZoomInfo Admin Portal**.
2. Click **Configurations > Intelligence** then select the **Meeting Import** tab.
3. Scroll to **Salesloft**.
4. If you have already integrated Salesloft with the ZoomInfo Copilot platform, **click the toggle on**.
5. If you have not yet integrated Salesloft with ZoomInfo Copilot, click Connect, follow the prompts to integrate Salesloft with ZoomInfo, then click the toggle on.



For users:

1. Access any account page within Copilot to view imported Salesloft recordings in the activity timeline.
2. Click on any recording to play it directly within the Copilot interface.



Target Accounts and Account Fit Score

Enhanced Dismiss Options for Recent Updates Feed Target Accounts and Suggestions

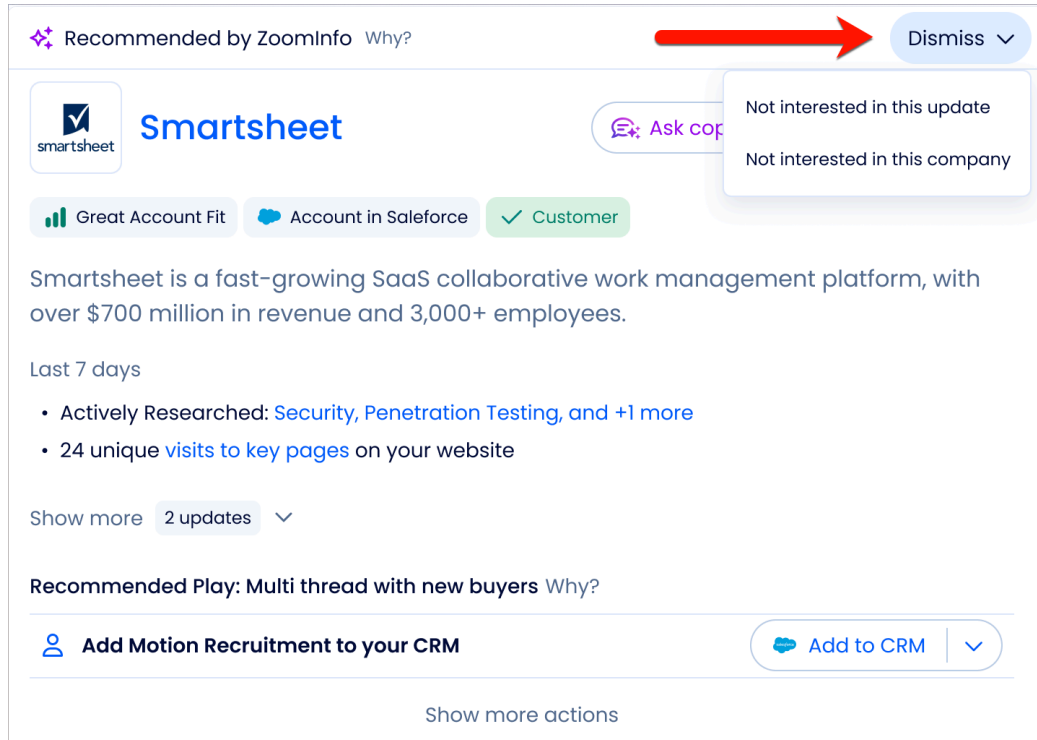
Manage your Target Accounts and Suggestions feeds more effectively with new dismissal options and simplified controls

We've enhanced the dismiss functionality in the Homepage **Recent Updates Feed** to give you more control over both **Target Accounts** and **Suggestions**. This update introduces contextual dismiss options through a dropdown menu on every account card, allowing you to better manage your feed and improve future recommendations.

The new dismiss options help you remove irrelevant or already actioned updates, making it easier to focus your account feeds on valuable, actionable information. When you dismiss items, your feedback is used to train ZoomInfo Copilot, resulting in more relevant future suggestions tailored to your needs.

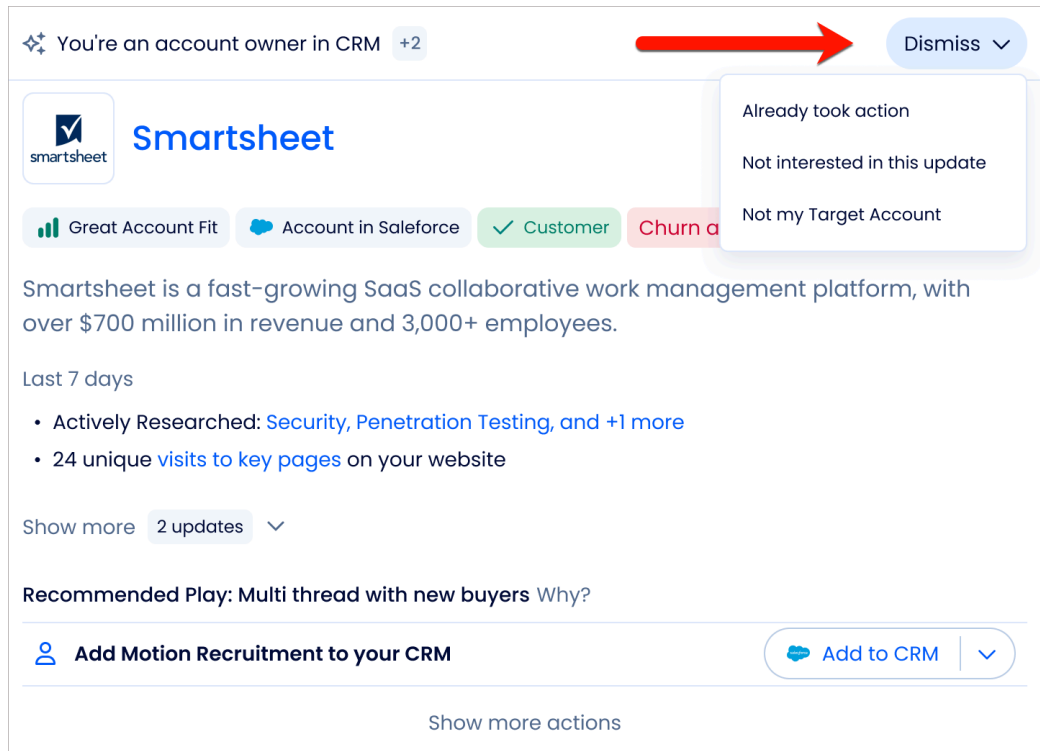
For Suggested Accounts:

1. Select the **Dismiss** dropdown menu next to any suggestion.
2. Choose **Not interested in this update** to remove specific content while keeping the company eligible for future suggestions.
3. Choose **Not interested in this company** to permanently remove the company from your suggestions.



For Target Accounts:

1. Click the **Dismiss** dropdown menu next to any Target Account update.
2. Select **Already took action** to remove processed updates.
3. Select **Not interested in this update** to hide specific content types.
4. Choose **Not my Target Account** to remove the account from your target list.

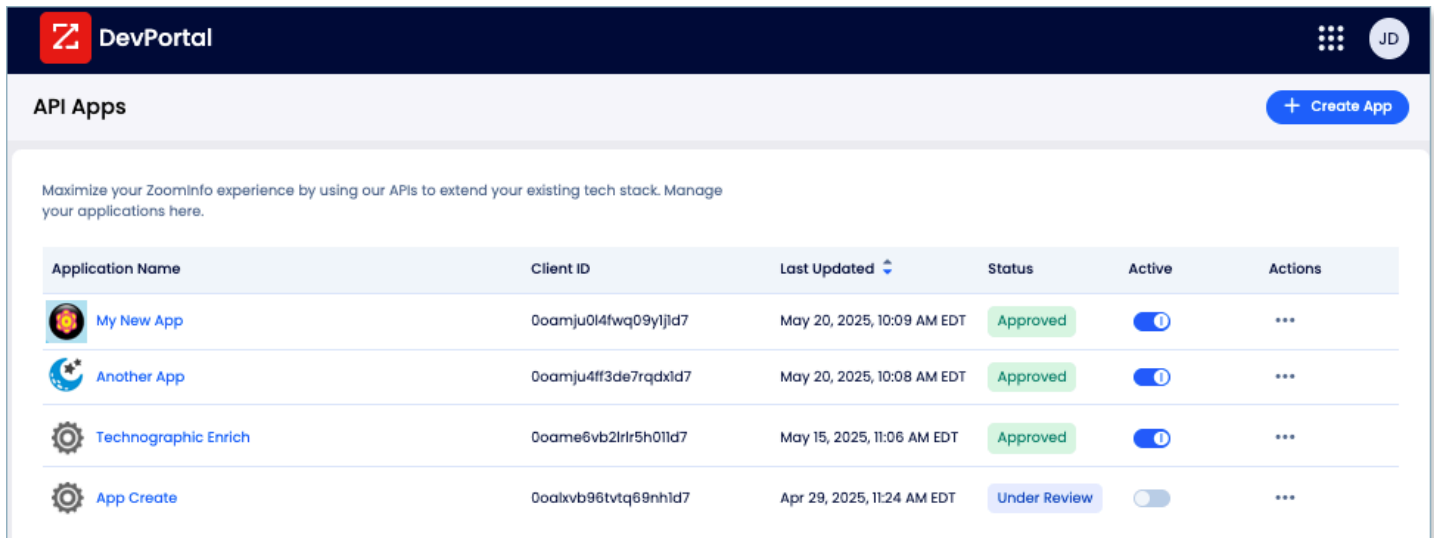


Platform and Admin

Developer Portal Now Available for API Management

Create and manage custom applications built with ZoomInfo APIs through a centralized developer platform that leverages OAuth authentication

Empowering RevOps, IT, and partners to build smarter, more efficient integrations, the **ZoomInfo DevPortal** provides a centralized hub to manage custom applications built with ZoomInfo APIs.



The screenshot shows the ZoomInfo DevPortal interface. At the top, there's a dark blue header with the ZoomInfo logo and 'DevPortal' text. On the right, there's a user profile icon labeled 'JD'. Below the header, the main section is titled 'API Apps' with a '+ Create App' button. A sub-header reads: 'Maximize your ZoomInfo experience by using our APIs to extend your existing tech stack. Manage your applications here.' Below this is a table with the following columns: Application Name, Client ID, Last Updated, Status, Active, and Actions. The table contains four rows of application data.

Application Name	Client ID	Last Updated	Status	Active	Actions
 My New App	0oamju0l4fwq09y1jld7	May 20, 2025, 10:09 AM EDT	Approved	☒	...
 Another App	0oamju4ff3de7rqdxld7	May 20, 2025, 10:08 AM EDT	Approved	☒	...
 Technographic Enrich	0oame6vb2lfr5h0lld7	May 15, 2025, 11:06 AM EDT	Approved	☒	...
 App Create	0oalxb96vtq69nhld7	Apr 29, 2025, 11:24 AM EDT	Under Review	☐	...

Through the DevPortal, ZoomInfo customers and partners can easily request new applications, define and manage access scopes, and test their integrations using realistic test data in one intuitive platform. This ensures seamless application management, accelerates innovation, and maximizes the value of ZoomInfo's data and tools.

Simplified Application Registration and Management

Registering an app in the DevPortal also registers it in ZoomInfo's Okta instance. This registration facilitates secure and scalable API access through OAuth 2.0 authentication.

Application Types

There are two types of apps:

- **Customer Applications**

Custom applications created and managed by customers through the DevPortal for internal ZoomInfo data usage will be automatically approved.

- **Partner Applications**

Partners developing custom applications must collaborate with the ZoomInfo API and Partnership product teams for review and approval. This process allows partners to onboard users from external tenants to their applications.

ZoomInfo API Scopes and Endpoints

Category	Scope	Description
ZoomInfo API (ziapi)	Search API	Returns a list of companies/contacts from ZoomInfo's data which meet the specified search criteria.
	Enrich API	Match company/contact information based on input values and return the desired output fields in the response.
	Copilot Read Account Summary API	Ask a question about the account summary for a specific company.
Marketing	Manage Audiences	Create, update, and delete audience lists.
	Manage Audience Members	Add, update, and remove companies and contacts within audience lists.

DevPortal Benefits

Developers can realize the following benefits by using the endpoints available in the DevPortal.

Benefit	Description
Simplified Schema Design	More intuitive structure, reducing development time for understanding and working with the data.
Streamlined Data Structure	Duplicate fields and inconsistencies removed; cleaner, easier to parse, and faster to integrate responses.
OAuth Access via Okta	Secure, scalable authentication aligned with modern identity management best practices; eliminates hardcoded credentials.
Developer Portal Access	Self-service key generation and application management provide more control and centralized governance.
Future-Proofing Your Integration	Fewer endpoints to manage result in a more efficient integration footprint and less long-term maintenance.
Ongoing Data Clean-Up	Continued improvements to field naming, structure, and relevance ensure access to the most actionable data.
DevPortal Enhancements	Access to new features like Account AI Summary via API will be exclusive to customers on the latest endpoints.



Learn more

To get started, see [ZoomInfo DevPortal Admin Guide](#) to get started.

This release also includes support for accessing Copilot AI Account Summaries using a connection through the DevPortal. See [Copilot API for Account Summaries](#) for details.



New Copilot API for Account Summaries

Access AI-powered account intelligence directly in your systems and workflows through our new API

The Copilot API for Account Summaries enables Copilot Enterprise customers to integrate AI-generated account intelligence directly into their systems and workflows. This new API delivers comprehensive account insights that combine firmographics, decision-maker information, earnings calls data, and private data from your CRM entries, call recordings, and calendar meetings.

The API allows you to retrieve real-time account summaries and ask detailed questions about accounts, making it possible to embed ZoomInfo's intelligent insights into your CRM, power internal AI agents, and create custom GTM workflows.

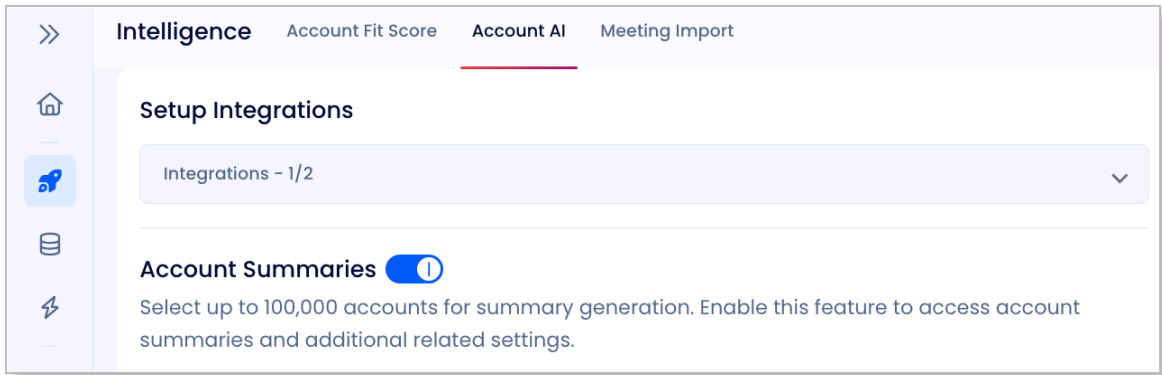
Unlike traditional data enrichment APIs that provide static information, this API delivers dynamic, AI-driven intelligence that updates daily to ensure your teams always have the most current account insights.

Common Use Cases

Use Case	Description
Account Planning	Automatically generate comprehensive account plans within your CRM
AI Agent Enhancement	Power internal AI agents with real-time account intelligence
Custom Workflows	Create personalized outreach and automated GTM processes
System Integration	Embed account insights into any internal system or application

How to Access

Your org must have a Copilot Enterprise subscription, and Account Summaries must be enabled (**Configurations > Intelligence > Account AI**)



The **Copilot Read Account Summary API** endpoint is exclusively accessible by setting up a secure connection using the new **ZoomInfo DevPortal**, which was also [announced in this month's release](#).

Getting Started

For admins and developers:

1. Ensure you have a Copilot Enterprise subscription with active CRM and email/calendar integrations set up.
2. Use the procedures described in the [ZoomInfo DevPortal Admin Guide](#) to authenticate your API access.
3. Ensure that the "Copilot Read Account Summary API" is included as a scope in your ZoomInfo API connection.
4. Test the endpoint using an account that has existing account summaries available.
 - a. You can verify that an account has a summary by checking the Account AI tab in the ZoomInfo platform.
 - b. See the **Account Summary API Endpoints** section below for syntax.
5. Integrate the API into your desired systems.

Account Summary API Endpoints

- **GET Get Account Summary**

Retrieve an account summary for a specific company.

https://api.zoominfo.com/gtm/copilot/v1/companies/{company_id}/account-summary

- **POST Ask Question on Account Summary**

Ask a question about the account summary for a specific company.

https://api-zoominfo.com/gtm/copilot/v1/companies/{company_id}/account-summary/actions/ask

Example:

```
{
  "data": {
    "type": "AccountSummaryQuestionRequest",
    "attributes": {
      "question": "What industry is this company in, and how many employees do they have?"
    }
  }
}
```

Streamlined Navigation Experience in the Admin Portal

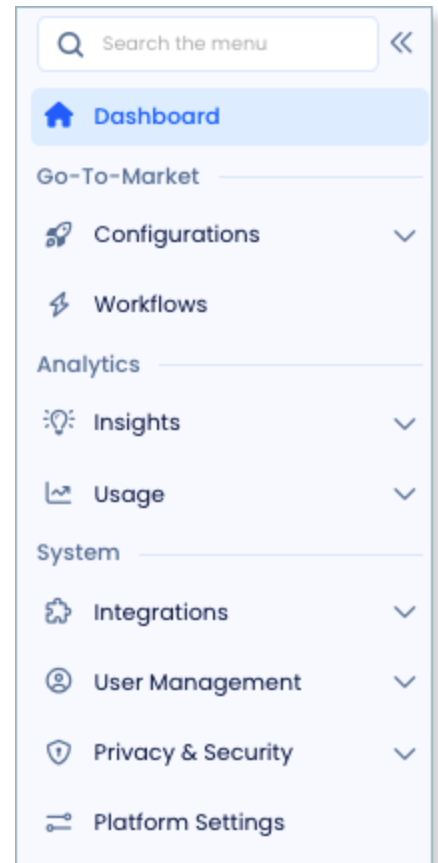
Benefit from a more intuitive and efficient way to manage your ZoomInfo settings with a redesigned navigation structure and new search capabilities

We've reimagined the ZoomInfo Admin Portal navigation to create a more intuitive and efficient experience for administrators. The new design organizes features into logical categories that align with how you think about and use ZoomInfo, making it easier to find and manage settings that matter most to your organization.

These improvements help reduce the time spent searching for settings, accelerate onboarding for new administrators, and increase overall efficiency in managing your ZoomInfo implementation.

How It Works

1. Access the **Admin Portal** as you normally would.
2. Navigate through the redesigned menu structure.
3. Use the new "Search the menu" option at the top of the navigation to quickly find specific settings or features.
4. Find consolidated features in logical locations - for example, all AI-related features under **Configurations > Intelligence** and role-based access controls under **User Management > Users > Roles**.



Note: The navigation options an admin sees will reflect your organization's specific ZoomInfo product entitlements and role-based access.

Navigation Categories and Their Contents

Category	Purpose	Key Features and Functions
 Dashboard	Admin Portal home page providing quick access to administrative functions	Returns user to the Admin Portal home page
 Configurations	Go-to-market settings and core platform capabilities that define how your teams leverage ZoomInfo data	• Targeting rules and preferences • Intent signal configuration • Product and service offerings management • AI and Intelligence settings • Domain management • GTM alert configuration
 Workflows	Workflow automation and process management tools to streamline operations	• Automated workflow creation and management • Sales and marketing playbooks • Trigger configuration • Automation rules and conditions
 Insights	Analytics and reporting tools to measure platform effectiveness	• Copilot engagement • Copilot potential
 Usage	Comprehensive view of how your organization utilizes ZoomInfo's features and licenses	• License management and allocation • Usage tracking across features • Enrich activity monitoring • Advertising spend analysis • Talent solution usage metrics
 Integrations	Connection points between ZoomInfo and your tech stack	• Third-party platform connections • Custom data connector setup • CRM integration and writeback rules • API configuration and webhook management

Category	Purpose	Key Features and Functions
		• Enrich settings • GTM object mapping
 User Management	Controls for managing access, permissions, and user authentication	• User account administration • Role-based access control • Group management • Automated user provisioning • SSO configuration and management
 Privacy & Security	Settings related to data protection, compliance, and security protocols	• Compliance settings and monitoring • Communication preferences • Data sharing controls • Security policy management
 Platform Settings	Platform-wide settings	• General settings • Dialer and email • Content enablement

New Role-Based Access Controls in the Admin Portal

We've made it easier to manage who can access what in the Admin Portal. Our new role-based access controls let you fine-tune Admin Portal permissions by section, improving governance while giving teams the access they need to be effective.

In addition to these new controls, we've also reorganized existing Role settings for feature-level access. These settings still determine which features users can access, but now they also enable data from those features to be shared across other ZoomInfo products.

Role-based access controls are available to organizations with Copilot Enterprise.

The screenshot shows the 'AdminPortal' interface for creating a new role. The page has a sidebar with navigation icons and a main content area. The main content area is titled 'Roles / Create Role' and contains the following sections:

- Name (35 characters max):** A text input field with the example 'e.g. SDR Team Admins'.
- Description (45 characters max):** A text input field with the example 'assign to sales rep in BOS office'.
- 6 applied**
- Admin Portal access**
Allows users to navigate and manage features in Admin Portal.
- Go-To-Market** (toggle on):
 - ☒ Configurations
 - ☒ Workbooks
 - ☒ Workflows
- Analytics** (toggle on):
 - ☒ Analytic Insights
 - ☒ Analytic Usage
- System** (toggle on):
 - ☒ Integrations
 - ☒ User Management
 - ☒ Privacy & Security
 - ☒ Platform Settings
 - ☒ Commerce Services
- Cross-product feature access**
Allows users to access and reuse feature data across ZoomInfo products like Sales and Marketing.
- AI** (toggle on):
 - ☒ AI Email Generation
 - ☒ Summarize Accounts
 - ☒ Chat with Copilot
 - ☒ Recieve Pre-Meeting Brief Emails
 - ☒ Call with Dialer
 - ☒ Send Email
- Copilot** (toggle on):
 - ☒ Whitespace Suggested Companies
- Exports** (toggle on):
 - ☒ Export to CSV
 - ☒ Export to CRM

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[AI Emailer and Dialer](#)

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ZoomInfo Sales Release Updates

Be sure to check out the [ZoomInfo Sales Release Notes](#) for new features and improvements to ZoomInfo Sales that also apply to ZoomInfo Copilot.



Signals and Notifications

Upcoming Renewal

Get notified when upcoming renewals lack recent engagement to help reduce churn risk and maximize revenue opportunities

Managing a large portfolio of accounts can make it challenging to track and properly engage with customers approaching renewal. To help account teams stay proactive, we've introduced a new **Upcoming Renewal Signal** within Target Accounts that automatically identifies accounts with upcoming renewals that haven't received recent outreach.

By surfacing these potential risk areas early, account managers can take action to re-engage customers, address concerns, and explore expansion opportunities before the renewal deadline.

This feature will send a notification within the account to the opportunity owner when both of these conditions are met:

1. An account is due for renewal within the next 60 days
2. The account has no outbound activity in the past 90 days

Click on the signal to view additional details and associated contacts.

Note: This feature requires an active CRM connection and both email and meeting tracking enabled in Chorus.

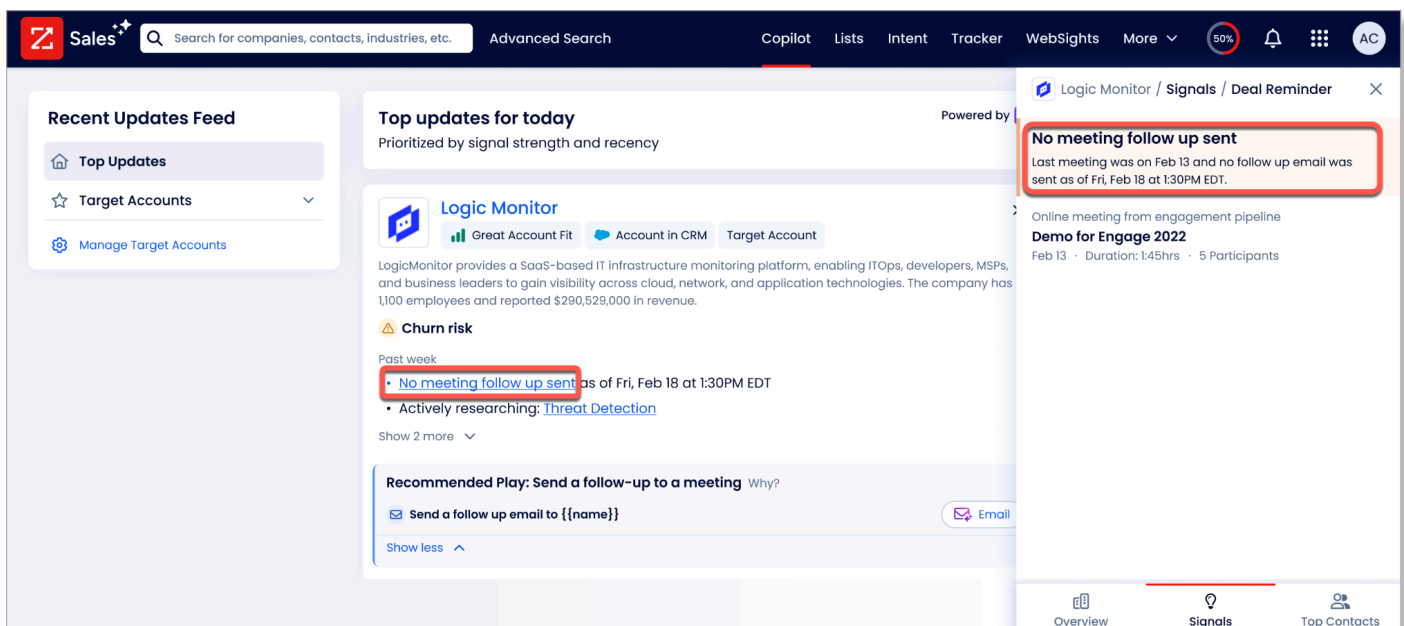
The screenshot displays the 'Logic Monitor / Signals / Deal Reminder' interface. A red-bordered box highlights a signal titled 'Upcoming renewal with no recent activity', which states: 'An opportunity with a renewal date of Mar 30 has no activity in the last 90 days, which is a risk to a potential renewal or upsell. Try to re-engage your contacts.' Below this, under 'Possible decision makers', there are four buttons: 'Previously Engaged Contacts' (checked), 'Not in Salesforce', 'No Recent Engagement', and 'Likely to Engage'. The section '16 Contacts' includes links for 'Open in search' and 'See all employees', along with '0 selected', 'Export', and 'Email' options. Two contacts are listed: Ahmad, Vice President of Sales, and Emery, Vice President of Marketing. Both are marked as 'Likely to Engage' and have a status of 'Not in CRM'. Each contact entry includes icons for email, phone, and a calendar, along with a timestamp of '3 months ago'.

No Meeting Follow-Up Sent

Receive automatic notification when you haven't sent a follow-up email within 48 hours of a meeting

ZoomInfo Copilot's new **No Meeting Follow-Up Signal** helps you stay on top of your post-meeting communications by automatically detecting when a follow-up email hasn't been sent within 48 hours of a meeting.

- This feature integrates with your target accounts, bringing missed follow-up opportunities to your attention before conversations go cold.
- If no follow-up email is sent within 48 hours after a meeting, a signal will automatically appear in your Target Accounts Digest.



How It Works

1. Click on the signal to view the meeting details and associated contacts.
2. Select a contact to quickly compose and send a follow-up email.

Note: This feature requires an active CRM connection and both email and meeting tracking enabled in Chorus.

Automated Account Reached and Clicked Signals in Copilot for DSP Campaigns

Get automatic notifications when your target accounts are reached with a ZoomInfo Marketing campaign

We've streamlined the Account Reached and Account Clicked signal functionality to automatically inform sellers when their target accounts are reached with ZoomInfo Marketing display campaigns (DSP). This enhancement creates stronger alignment between marketing and sales efforts by providing real-time visibility into account engagement.

Availability

This feature is available to organizations with ZoomInfo Copilot (Advanced or Enterprise) and ZoomInfo Marketing (ABM Lite or Enterprise).

No Configuration Needed

Previously, marketers had to manually configure campaigns and input specific information to generate these signals. Now, these signals are **automatically generated for all DSP campaigns**, regardless of size, making it easier for marketing teams to support sales efforts at scale.

When target accounts are exposed to Marketing display campaigns, **sellers receive immediate notifications through ZoomInfo Copilot**, enabling them to time their outreach more effectively based on marketing touchpoints.

The screenshot displays the ZoomInfo Copilot interface. The top navigation bar includes the ZoomInfo logo, a search bar, and various menu items like Home, Lists, Intent, Workflows, and More. A 50% progress indicator and a notification bell are also present. The main content area is divided into two panels. The left panel, titled 'Top updates for today Powered by AI', shows a 'Marketing Alert' for FedEx: 'FedEx is being reached by a ZoomInfo Marketing campaign.' The right panel, titled 'FedEx / Signals / Marketing', provides additional context, including 'Reasons to engage now' and 'Recommended Play: Reach out to campaign audience'.

Top updates for today Powered by AI
Prioritized by signal strength and recency

FedEx
Great fit Customer Target account

FedEx is a global transportation and logistics company that provides a wide range of services including air, ground, freight, and supply chain management.

Now is a good time to reach out.

Last 7 days

- Marketing Alert: FedEx is being reached by a ZoomInfo Marketing campaign.

Show 2 more

Follow up with **Dana Lev**, didn't answer email you sent 2 days ago

Reach out to campaign audience

Introduce yourself to **Andrew Turner**, who joined as Director, Information Technology

Show less

FedEx / Signals / Marketing

Great fit In CRM Target account

Reasons to engage now

Last 7 days

- FedEx is being reached by a ZoomInfo Marketing campaign.

Notes for sellers:
The main message of the "FedEx Buyers" campaign is "Sales growth for a great value". See our sales enablement deck [here](#).

Content for AI emailer:
It's Our Business to Grow Yours. Get the B2B data and software you need to connect with and close your most valuable buyers – all in one operating system

Recommended Play: Reach out to campaign audience

Reach out to campaign audience

For ZoomInfo Marketing Users

Create and run DSP campaigns as normal in ZoomInfo Marketing - no additional configuration is required.

For Copilot Users

1. Monitor target accounts in your Copilot feed for signals.
2. Look for notifications that indicate when your target accounts have been exposed to marketing campaigns:
 - a. **Account Reached:** (e.g., "Marketing Alert: [Account Name] has been reached by a ZoomInfo Marketing campaign").
 - b. **Account Clicked:** (e.g., "Marketing Alert: [Account Name] has clicked on a ZoomInfo Marketing campaign")

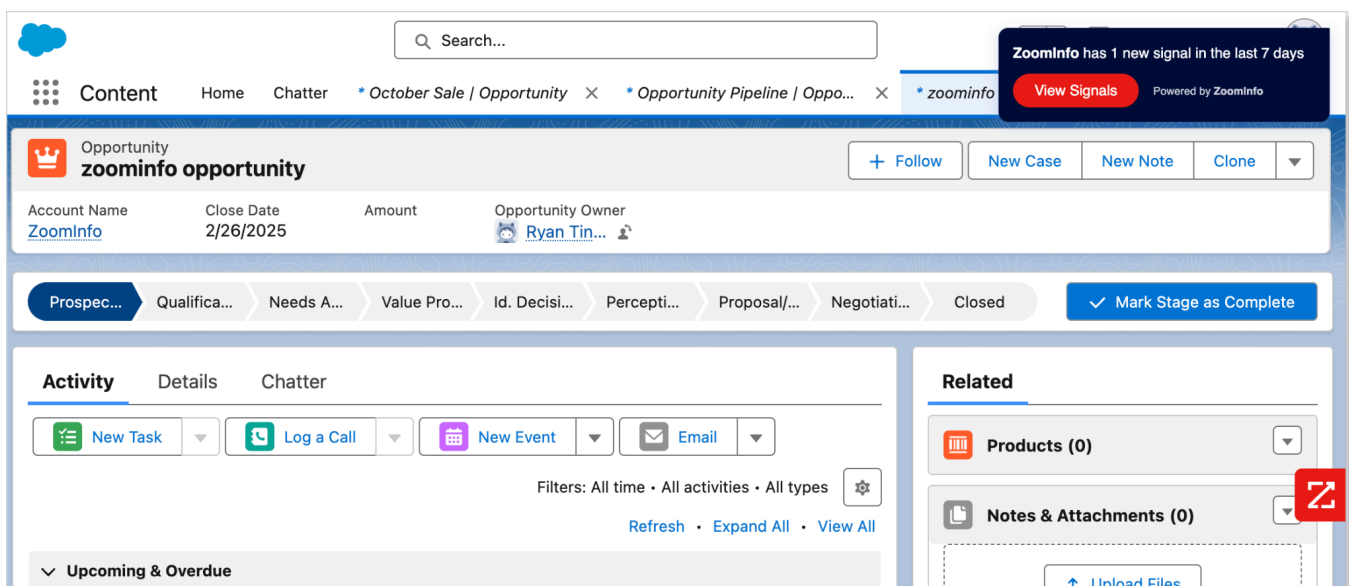
Use these signals, along with other account intelligence, to inform your outreach strategy.

Copilot Signal Notifications Now Available Across Nine Major Sales & Marketing Tools

Receive real-time buying signals across your revenue tech stack while viewing accounts, contacts, leads, and opportunities

We've significantly expanded our coverage for Copilot signal notifications across integrated revenue tools, enabling sales professionals to receive timely insights directly within their workflows. Building on our initial support for Salesforce and HubSpot, we now deliver critical buying signals across nine major sales and marketing tools, ensuring you never miss important updates about your prospects and customers while working in your primary sales environment.

The ZoomInfo Chrome Extension now automatically surfaces relevant Copilot signals from the past seven days while you're viewing supported objects in supported tools. These notifications appear even when the extension is collapsed, ensuring you stay informed of key buying signals without disrupting your workflow.



This enhancement helps sales teams stay on top of valuable intelligence such as personnel changes, competitive research activities, and other buying signals directly in their existing revenue tech stacks. By delivering these insights within your natural workflow, you can quickly identify and act on high-impact opportunities to drive better revenue outcomes.

We previously released support for Salesforce and HubSpot. With this release, we've added support for:

- Marketo
- Microsoft Dynamics
- Outreach
- Pipedrive
- Salesloft
- SugarCRM
- Zoho

Here's the consolidated list of tools and supported objects over which we can show notifications:

Sales/Marketing Tool	Supported Object
HubSpot	Company, Contact
Marketo	Contact, Lead
Microsoft Dynamics	Account, Contact, Lead
Outreach	Company, Contact
Pipedrive	Company, Contact
Salesforce	Account, Contact, Lead, Opportunity
Salesloft	Company, Contact
SugarCRM	Account, Contact, Lead
Zoho	Account, Contact, Lead

How It Works

1. Ensure you've installed and pinned the ZoomInfo Chrome Extension in your Chrome browser.
2. Navigate to supported object pages within your supported tool.
3. Watch for signal notifications that appear in the upper right corner of your browser, even when the extension is collapsed.
4. Click on any notification to view complete signal details.

Customize Your Breaking Alerts Preferences in Copilot

Control which Breaking Alerts you receive by enabling or disabling specific alert types across six different categories

Breaking Alerts in Copilot just got more personalized. Users can now fine-tune their notification preferences for six different types of Breaking Alerts for their target accounts, allowing them to focus on the signals that matter most to their role and stage in the sales process.

This enhancement gives you granular control over which Breaking Alerts you receive, helping you stay informed about relevant account activities while reducing notification noise. Whether you're focused on top-of-funnel prospecting or bottom-of-funnel opportunities, you can now customize your alert preferences to match your specific needs.

The six alert types you can now control include:

- **CXO Changes:** CXO Changes within target accounts
- **WebSights:** WebSights alerts for target account website visits
- **Customer Researching Competitor:** Customer competitor research activities
- **Previously Engaged Contacts Change:** Previously engaged contact changes
- **FormComplete:** FormComplete notifications for form submissions
- **Buyer ID:** Buyer ID signals from website visits

How It Works

1. Click your initials in Copilot to access the dropdown menu.
2. Select **Settings** from the menu options.
3. Navigate to the **Notifications** tab.
4. Review the list of available alert types in **Go-To-Market Alerts**.
5. Toggle individual alert types on or off and set any additional preferences.



Go-To-Market Alerts

Manage Target Account alerts being sent to you here. Most alerts are sent to you automatically based on the Target Accounts and Signals set up by your Admin.

Name	Last Modified	Email	In App	Slack	Teams	Frequency
Target Accounts Digest ⓘ	Mar 24, 2025	☐	-	-	-	Daily Weekly
Breaking Alerts - CXO Changes ⓘ	Mar 24, 2025	☒	☒	☒	☐	Immediately
Breaking Alerts - Websights ⓘ	Mar 24, 2025	☒	☐	☒	☐	Immediately
Breaking Alerts - Customer Researching Competitor ⓘ	Mar 24, 2025	☒	☒	☒	☐	Immediately
Breaking Alerts - Previously Engaged Contacts Change ⓘ	Mar 24, 2025	☒	☒	☒	☐	Immediately
Breaking Alert - FormComplete ⓘ	Mar 24, 2025	☒	☒	☒	☐	Immediately
Breaking Alerts - Buyer ID ⓘ	Mar 24, 2025	☒	☒	☒	☐	Immediately

Important Notes

- All alert types are enabled by default for supported notification channels
- Changes to alert preferences take effect immediately
- Some alert types may appear disabled if your package doesn't include certain features (such as WebSights or FormComplete)
- Admin-level notification settings will override individual user preferences
- You can modify your alert preferences at any time

Customize Your Pre-Meeting Brief Delivery Preferences

Control how and when you receive AI-powered meeting preparation insights with user and admin-level settings

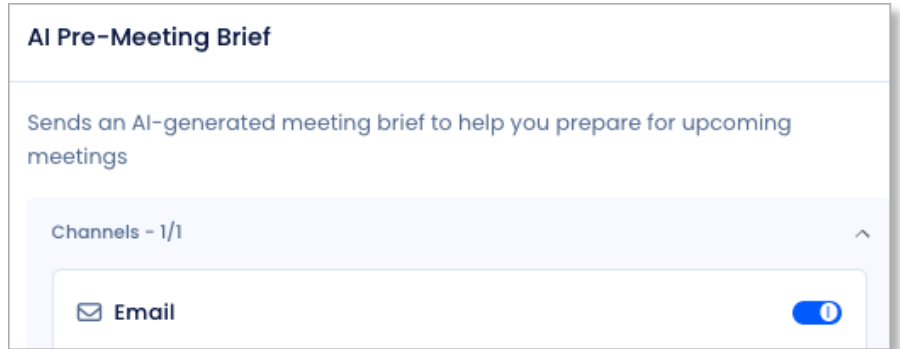
We're introducing new flexibility in how Pre-Meeting Briefs are delivered to your team. This update gives both users and admins greater control over the delivery of ZoomInfo's AI-powered meeting preparation insights, allowing organizations to align Pre-Meeting Brief delivery with their preferred workflows.

Pre-Meeting Briefs, which provide comprehensive meeting preparation materials including account opportunities, industry trends, and strategic talking points, can now be customized to match individual and organizational preferences. This enhancement helps reduce notification fatigue while ensuring teams can access valuable insights through their preferred channels and timing.

How It Works

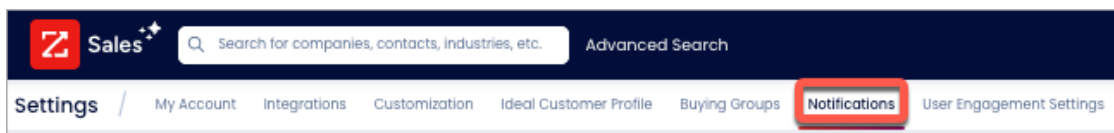
For Admins:

1. Navigate to the **Admin Portal > Set Up > Go-to-Market Alerts**.
2. Locate the **AI Pre-Meeting Brief** section.
3. Configure the default delivery settings for your organization.

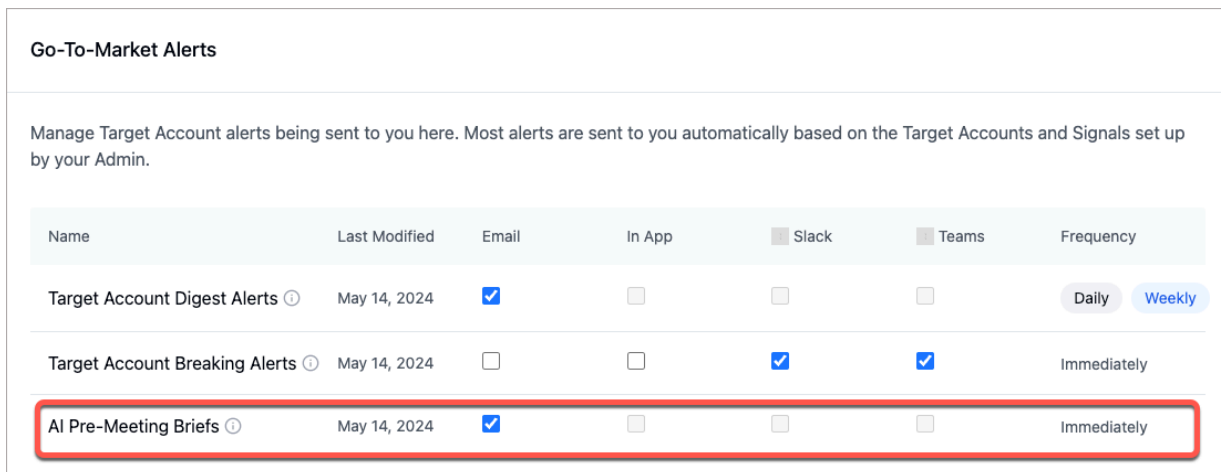


For Users:

1. Click your initials in the upper right corner then select **Settings**.
2. Click the **Notifications** tab.



3. In the **AI Pre-Meeting Briefs** row, use the checkboxes to turn on or off your preferred AI Pre-Meeting Brief delivery method.



Notes

- AI Pre-Meeting Briefs are only available if an administrator has enabled it for your organization.
- Currently, email delivery is the only available option.

Homepage and Search

Filter Account Level Intent by Signal Location

Search for accounts showing Intent from specific geographic locations using our new Intent Signal Locations filtering in Advanced Search

This feature will be rolled out in phases starting on Apr 15 and will be fully available to all eligible customers by Apr 17.

Account Level Intent helps you identify which companies are actively researching topics relevant to your business. Now, you can narrow down Intent signals to specific geographic locations, making it easier to focus on relevant buying groups within large global organizations.

The new **Intent Signal Locations** filter in Advanced Search allows you to discover companies showing Intent activity in specific regions, states, or countries. This new capability helps you concentrate your outreach efforts on locations that matter most to your business, ensuring more targeted and effective prospecting.

For companies with a global presence, this feature is particularly valuable as it helps distinguish between Intent signals coming from different office locations, giving you more precise insights into regional buying interest.

Key Features

- Filters work inclusively - see any Intent results that include your selected location, even if signals come from multiple locations.
- Results are based on the top 3 most active signal locations for each topic or topic cluster.
- Location data is continuously updated based on the previous two weeks of Intent activity.
- Confidence filtering ensures only high-quality location signals are included.

How It Works

1. Navigate to Advanced Search.
2. Expand the **Intent** filters and provide your search criteria (**Topic Clusters**, **Intent Score**, **Intent Lookback Period**).
3. In the new **Intent Signal Locations** filter, choose your desired location(s). You can search for a location, or find the location in a list.
 - For US/Canada: Filter by state/province or metro area.
 - For other countries: Filter by country.

The screenshot shows the 'Intent' filter panel in the Advanced Search interface. It is divided into several sections: 'Topic Clusters' with a dropdown menu set to 'Healthcare'; 'Intent Score' with radio buttons for 'High' (selected), 'Medium', and 'Low'; 'Intent Lookback Period' with radio buttons for 'Short Term (2 weeks)' and 'Long term (12 weeks)' (selected); and 'Intent Signal Locations' which features a search bar with 'California' entered, a list of selected locations ('Australia', 'California'), and a 'Clear' button. A red arrow points to the 'Intent Signal Locations' section header.

Select Multiple Intent Topics Within Topic Clusters in Advanced Search

Filter and view ZoomInfo Intent signals across up to six individual topics within a Topic Cluster to identify companies showing buying intent

We've enhanced **Account Level Intent** functionality in ZoomInfo Sales and Copilot to give you more flexibility when searching for companies showing intent signals. Now, instead of being limited to selecting a single topic within an **Intent Topic Cluster**, you can **select up to six individual topics** to get a more comprehensive view of buyer intent across related areas.

This improvement allows you to customize your intent signal tracking based on specific areas of interest within an Intent Topic Cluster.

For example, if you're interested in companies showing intent around "Application Development", you can now simultaneously monitor multiple related topics such as ".NET," "Agile Management," and "Angular" within the Application Development cluster.

The search results provide a clear view of companies showing intent across your selected topics, with an intuitive scoring display that shows the highest intent score plus the number of additional topics where intent is present (e.g., "High +2" indicates a high score in one topic and additional intent signals in two other selected topics).

Availability

This feature is available to organizations with **ZoomInfo Sales or Copilot** and **Account Level Intent** access.

How It Works

1. Navigate to **Advanced Search** and select **Intent** under the **Sales Signals** section.
2. Under **Topic Clusters**, click **Search Single Topic Cluster**.
3. Expand the desired cluster and select up to 6 specific topics that align with your search criteria.

Advanced Search

Filters 3 Clear all <

Intent —

Topic Clusters

▼

[Search Single Topic Cluster](#)

Business Intelligence ×

Intent Score

☒ High

☒ Medium

☐ Low

High × Medium ×

Single Topic Cluster

▶ ☒ Application Development

☐ .NET

☐ 3D Animation Software

☒ Agile Management

☒ Agile Software Development

☒ Agile Tools

☒ Agile Training

☒ Angular

☒ Assembler

▶ ☐ Accounting

6/6 selected Close Select

4. Apply your selection to view the filtered results.
5. In the search results, look for the intent score indicators (e.g., "High +2") in the **Intent** column. Click on the Intent score to view detailed intent insights for each topic showing activity.

0 Selected Export Tag Companies Find Contacts Subscribe Sort by Intent

☐	Company Name	City, State	Industry	Employees	Revenue	Intent
☐	FedEx	Charleston, WV	Finance and Insurance			
☐	Qualtrics	Jersey City, NJ	Educational Services			
☐	Indeed	San Diego, CA	Software Services			
☐	IKEA	Atlanta, GA	Retail			
☐	Kohl's	Jacksonville, FL	Arts, Entertainment and Recreation			
☐	Target	Baltimore, MD	Retail			
☐	KAYAK	Louisville, KY	Other Services			
☐	Okta	Little Rock, AR	Information Technology			

Intent 1 of 6

.Net High intent

Recent Spikes by Topic

.NET 7

Top 3 Signal Locations

Location	Buyers at Location
☒ San Francisco, CA	24
☒ Steamboat Springs, CO	23
☒ Pittsburgh, PA	18

Find Buying Group

New Link Tracking Controls for Better Email Deliverability

Manage URL tracking in Copilot emails at both individual link and organization-wide levels

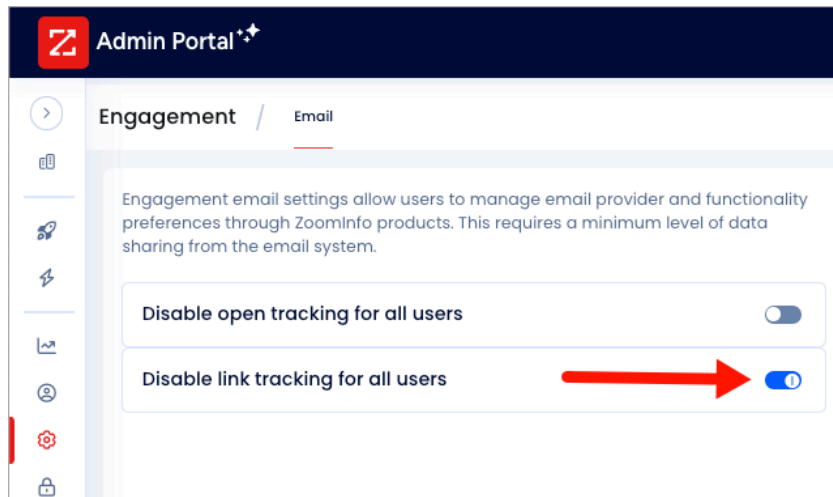
ZoomInfo Copilot now gives you greater control over link tracking in your emails. While link tracking provides valuable engagement insights, it can sometimes impact email deliverability, especially for businesses with newer domains. To help optimize email performance, we've introduced flexible link tracking controls that let you decide exactly which links to track.

By default, Copilot tracks all URLs in emails using a ZoomInfo domain. With our new controls, you can disable tracking for specific links within individual emails, or administrators can turn off link tracking completely across the organization. When tracking is disabled, links appear as standard URLs which can help improve deliverability rates and increase the likelihood of your emails reaching prospects' inboxes.

How It Works

For Admins:

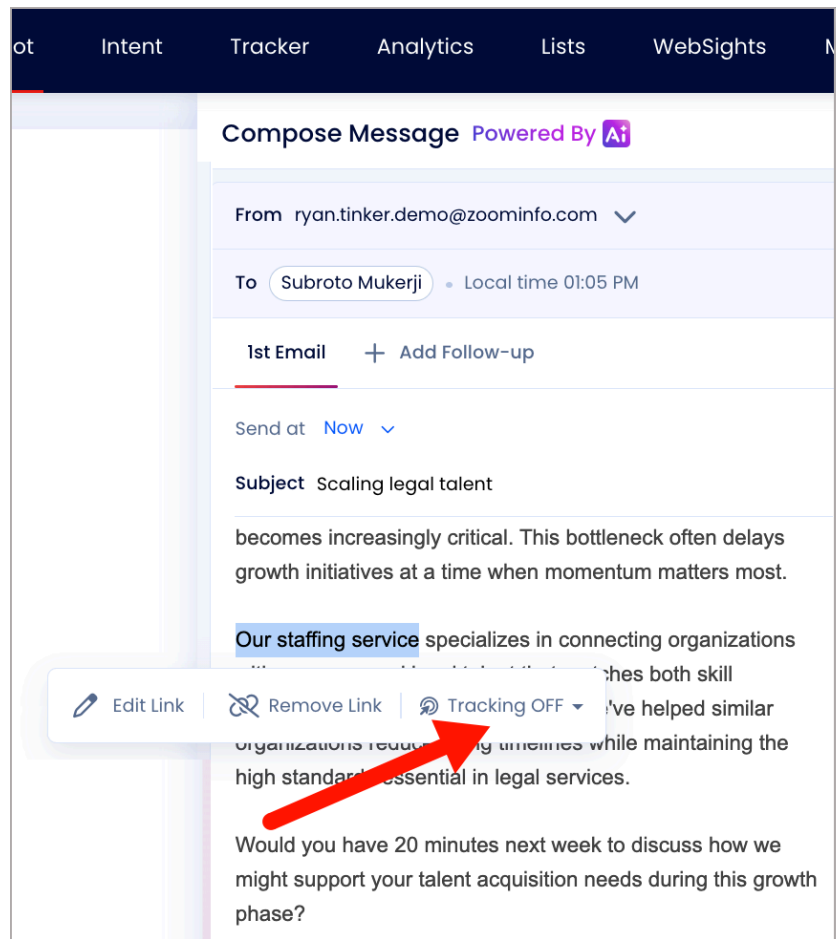
1. Navigate to **Admin Portal > Configurations > Engagement Settings > Email**.
2. Toggle on **Disable Link Tracking for All Users** to turn off link tracking organization-wide.



For Users:

1. While composing an email in ZoomInfo Copilot, add a URL to the message.
2. Hover over any link in your email to reveal the tracking controls.

Click **Tracking Off** in the popup to disable tracking for that specific link.



Mar 18, 2025 ZoomInfo Copilot Release

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ZoomInfo Sales Release Updates

Be sure to check out the [ZoomInfo Sales Release Notes](#) for new features and improvements to ZoomInfo Sales that also apply to ZoomInfo Copilot.



Signals

More Copilot Signal Notifications in Salesforce or HubSpot Using the Google Chrome Extension

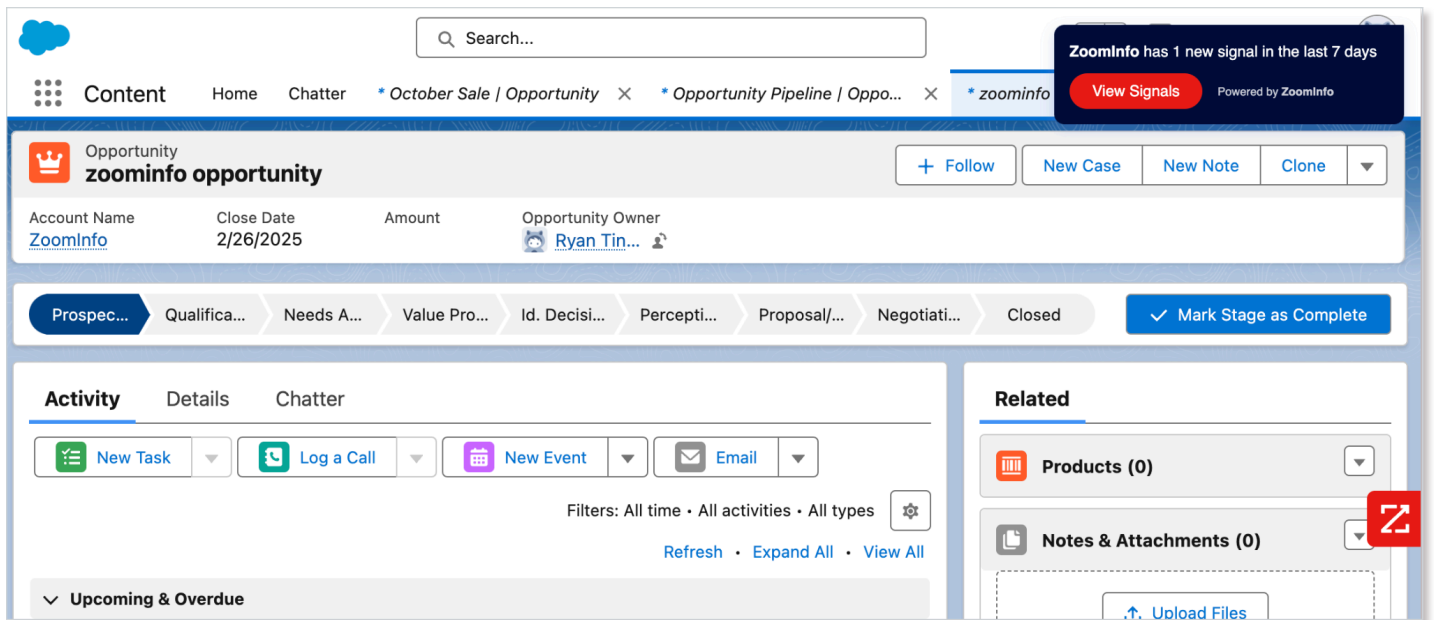
Access real-time buying signals while viewing specific objects in your CRM through the ZoomInfo Chrome Extension

Building on our recent launch of [Copilot Signals integration with CRMs](#) which surfaces relevant signals when viewing an Account in Salesforce or a Company in HubSpot, we've expanded these notifications to include:

- Salesforce Opportunities, Leads and Contacts
- HubSpot Contacts (with signal notifications for HubSpot Deals coming soon)

This enhancement ensures sales professionals stay informed about critical buying signals not just at the account level, but also when working directly with other objects in your CRM.

These timely notifications appear even when the Chrome Extension is collapsed, helping you stay informed of important activities without disrupting your workflow. By bringing actionable intelligence directly into your CRM workflows, sales teams can make more informed decisions and take timely actions based on real-time company signals.



How It Works

As a Salesforce or HubSpot user:

1. Ensure you have the ZoomInfo Chrome Extension installed and pinned in your browser.
2. Navigate to any Account, Opportunity, Contact, or Lead page in Salesforce, or a Company or Contact page in HubSpot.

3. The Chrome Extension automatically detects the associated company and displays relevant Copilot signal notifications from the past 7 days.
4. Click any notification to open the company profile in the Chrome Extension and view detailed signal information.
5. Take immediate action based on the signals directly from your Salesforce or HubSpot view.

Account AI

Direct Source Links Added to Copilot Chat Responses

Access original meetings and emails directly from Copilot's Chat responses with clickable source links

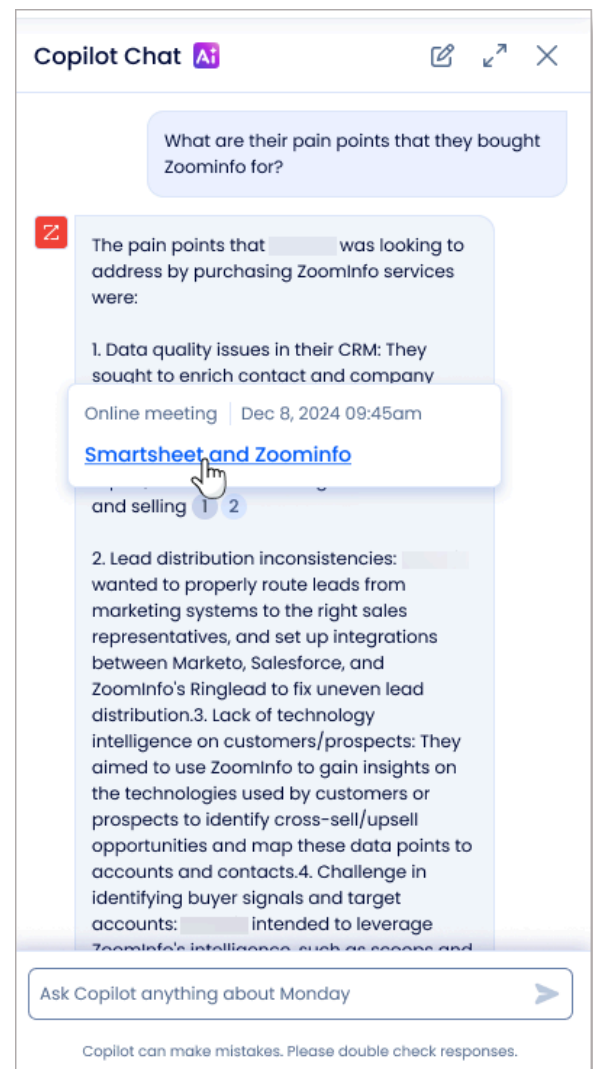
We've added direct source linking to Copilot Chat to help you quickly verify the context behind AI-generated insights. When Copilot references information from meetings and emails in its responses, you'll now see clickable links to the original sources.

This new feature adds a layer of transparency and verification to Copilot's intelligence, allowing you to validate information and dive deeper into specific customer conversations. Whether you're reviewing key concerns from a recent meeting or following up on email correspondence, you can now access the original content that Copilot references.

How It Works

1. Ask Copilot a question about account interactions or customer engagements. For example, sellers can ask Copilot for key concerns raised in a recent meeting.
2. When Copilot responds with information from meetings and emails, clickable links will appear within the response text.
3. Click any source link to open the original meeting recording or email.

Note: Currently, this feature only links to the engagement activity, not the moment in the recording.



Meeting Participant Briefs in Meeting Emails and Landing Pages

Get AI-generated summaries of meeting participants automatically included in meeting brief emails and landing pages before your meetings

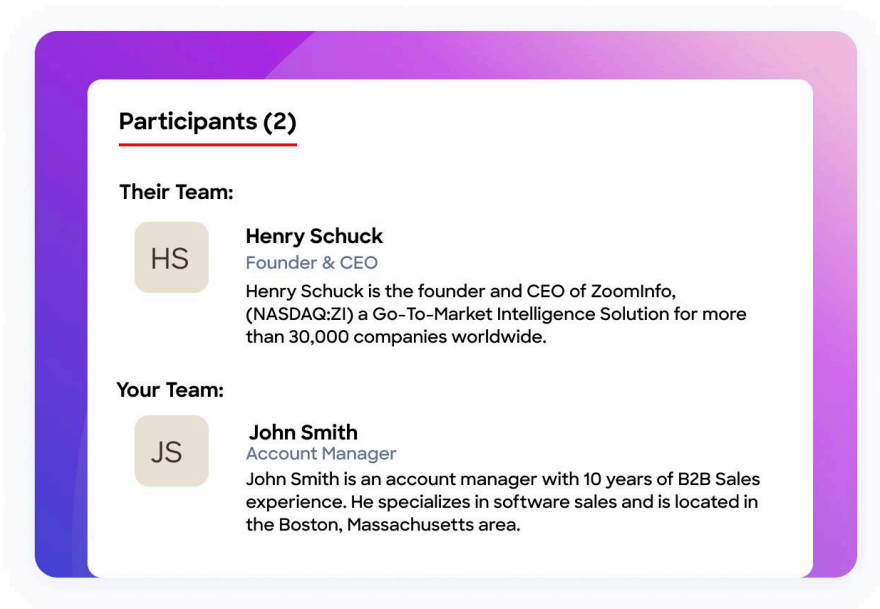
We're introducing the **Participant Overview Section in Pre-Meeting Briefs**, a new feature that automatically generates and delivers concise professional summaries of your meeting participants before your meetings. This feature lessens the need for manual research before customer meetings, allowing sales teams to focus on meaningful conversations and less on preparation.

Each participant brief provides essential context including relevant professional experience, key qualifications, expertise areas, and industry-specific credentials. These summaries help sales teams quickly understand who they're meeting with and enable more personalized, impactful conversations.

How It Works

1. Schedule a meeting with external participants.
2. Review the automated meeting brief email containing professional summaries for each participant before your meeting.

You can access the same participant information through the brief landing page for quick reference before or during your meeting.



Who Gets It

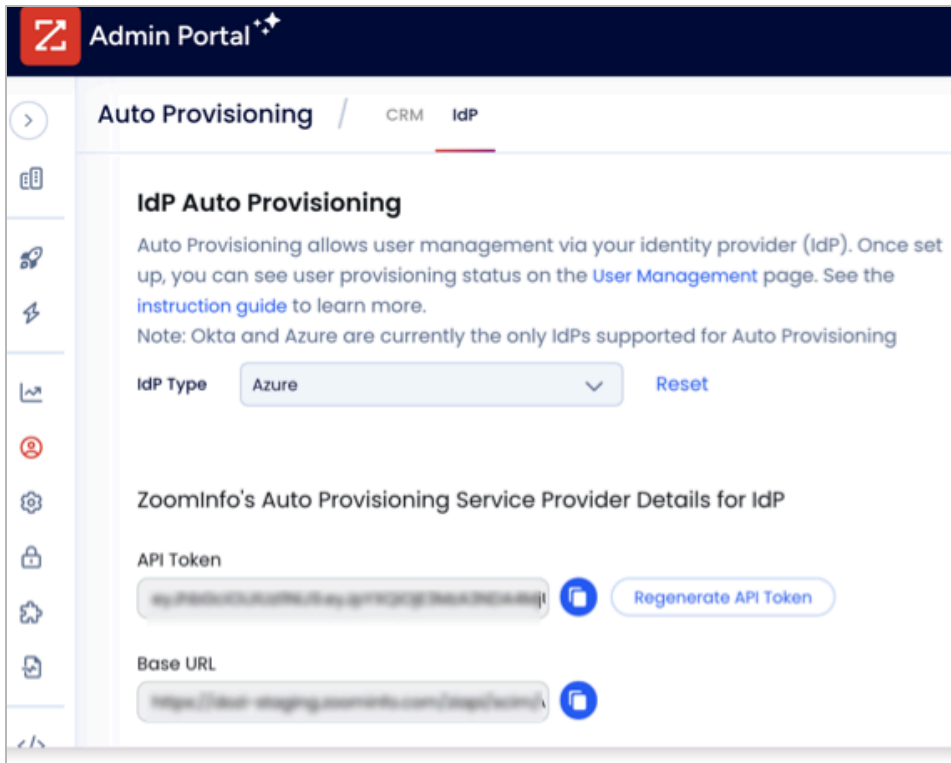
This feature is available for Chorus and Copilot Enterprise customers.

Important: Meeting participant information is pulled from the calendar event. Calendar integration must be set up for users for this feature to work. We currently support integration with [Google and Microsoft Outlook calendars](#).

Enhanced Microsoft Entra ID SCIM Token Management with Custom Expiration Settings

Set expiration dates for Microsoft Entra ID SCIM API tokens and receive timely renewal reminders

For organizations that set up SCIM auto provisioning for ZoomInfo products using Microsoft Entra ID ([formerly Azure](#)), our auto provisioning configuration requires that the API token used to authenticate the connection be periodically refreshed.



- When setting up or refreshing your API token, you'll need to choose a token expiration option (90 days, 180 days, or 1 year).
- All configured ZoomInfo admins for your organization will receive notifications (email and in-app) starting approximately 1 month before expiration.
- An admin can choose to refresh the token proactively at any time.
- The expiration of the token will not impact existing provisioned users. However, new subscription groups cannot be created, and provisioning activities cannot occur until the token is refreshed.



Learn more [Auto Provisioning with ZoomInfo and Microsoft Entra ID Integration Guide](#)

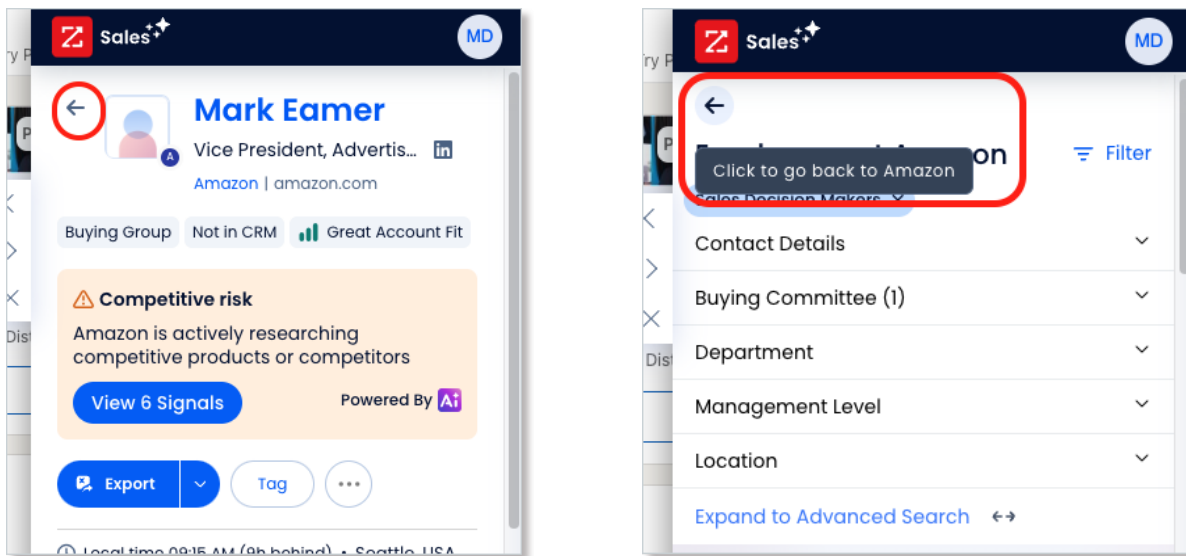
Mobile and Apps

Enhanced Profile Navigation in Google Chrome Extension Side Panel

Navigate between company and contact profiles directly within the Chrome Extension without opening new browser tabs

For Copilot users, we've streamlined how you explore ZoomInfo company and contact data within the ZoomInfo Google Chrome Extension. Previously, clicking on contact profiles would open new browser tabs, potentially cluttering your workspace when researching multiple prospects. Now, you can seamlessly view and navigate between profiles directly within the extension's side panel, maintaining your focus and improving your workflow efficiency.

This enhancement allows you to stay in context while researching companies and their associated contacts. The new navigation experience includes intuitive breadcrumbs, making it simple to track your path and move between different levels of information, from company overview to individual contact details.



How It Works

1. Click the ZoomInfo Chrome Extension icon to open the side panel while viewing any webpage.
2. Search for or navigate to a company profile within the extension.
3. When viewing company information, click on any associated contact to view their profile directly within the side panel.
4. Use the breadcrumbs navigation at the top of the panel to easily navigate back to previous pages.
5. If desired, click the option to open the full profile in ZoomInfo's web application for a more detailed view.

Feb 19, 2025 ZoomInfo Copilot Release

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ZoomInfo Sales Release Updates

Be sure to check out the [ZoomInfo Sales Release Notes](#) for new features and improvements to ZoomInfo Sales that also apply to ZoomInfo Copilot.



WebSights Visits Now Available as Signal Type in Salesloft Rhythm Workflows

Automatically discover and engage with website visitors by sending WebSights signals to Salesloft Rhythm through Workflows

We've enhanced our Signals trigger for Workflows by adding **WebSights Visits** as a new signal type. This addition enables sales teams to automatically capture and act on website visitor insights directly within Salesloft Rhythm.

- When prospects visit your website, the system can now automatically export their account and the signal data (domain and timestamp) to Salesloft Rhythm. As a seller, you can run a play on that signal directly within Salesloft Rhythm, ensuring your sales team can engage with high-intent accounts at the perfect moment.
- ZoomInfo can also discover relevant contacts for the account and export them to Salesloft Rhythm.

This powerful enhancement complements the existing **Account Level Intent Spike** signal, giving sales teams more ways to identify and act on buying signals. By incorporating website visit data into your automated workflows - and into Salesloft Rhythm - you can ensure faster response times to demonstrate buyer interest and create more efficient engagement processes.

Who Gets It

This feature is available exclusively for Copilot Enterprise package users with a Salesloft integration.

How It Works

For admins:

1. Ensure you have WebSights enabled and properly configured for your website.
2. In Salesloft:
 - a. Verify that your Salesloft integration is enabled by navigating to **Settings > Integrations** in Salesloft.
 - b. Navigate to **Settings > Plays** in Salesloft and enable the ZoomInfo Play.

For users:

1. Navigate to **Workflows** in ZoomInfo Copilot.
2. From the Playbook, select the **Send ZoomInfo signal to Salesloft Rhythm** play (or create a new Workflow).
3. Select **Signals** as the trigger type.
4. Configure your desired criteria for the Workflow.

The screenshot displays a workflow builder interface. On the left, a vertical sequence of four steps is shown, connected by a dashed line. The steps are: 1. 'Signals' (with a green checkmark), 2. 'Discover ZoomInfo Contacts' (with a green checkmark), 3. 'S. Export to Salesloft' (with a yellow warning triangle), and 4. 'S. Send Signal to Salesloft Rhythm' (with a green checkmark and highlighted with a blue border). Above the steps are icons for adding a new step, a list icon, and a refresh icon. On the right, a panel titled 'S. Send Signal to Salesloft Rhythm' is open. It features a 'Topic' dropdown menu. The dropdown is open, showing three options: 'WebSights Visits' (selected with a blue checkmark), 'Account Level Intent Spike', and 'WebSights Visits' (with a blue checkmark). A mouse cursor is pointing at the second 'WebSights Visits' option.

5. Activate the Workflow to begin automated monitoring and exports.

No Decision Maker Signal

Connect with key decision-makers to fast-track deals from qualification to close

We've introduced a **No Decision Maker** signal that helps sellers identify when their opportunities might be at risk due to lack of decision-maker engagement. This feature monitors your pipeline and notifies you when deals have been open for 30 days or more without any interaction from director-level or higher contacts as detected in email, meeting, and calendar engagements.

The signal not only identifies the risk, but also provides actionable recommendations by suggesting potential stakeholders within the target account who could approve the purchase decision.

This signal will automatically appear in your feed when the system detects an opportunity that meets the criteria.

The screenshot displays the Logic Monitor interface. On the left, under 'Top updates for today', there's a section for 'Churn risk' with a red box highlighting the signal: 'No decision maker: No activity detected from a director or higher on a recent opportunity'. Below this, a 'Recommended Play' suggests identifying and engaging potential decision makers. On the right, a 'Deal Reminder' panel shows the 'No decision maker' signal with a detailed explanation: 'A new opportunity was opened on this account more than 30 days ago, but no email, CRM, or calendar activity has been detected from a director-level or higher decision maker. Focus on identifying and engaging with contacts with decision making authority.' Below this, it lists 'Top Contacts' with filters for 'Default Buying Group Name' and 'Not in Salesforce', and shows a list of 16 contacts, including Ahmad, Vice President of Sales, who is marked as 'Likely to Engage'.

Notes

- Requires an active CRM connection and both email and meeting tracking enabled in Chorus
- Signals are generated for opportunities that are at least 30 days old
- This feature focuses on new business opportunities and excludes renewal, reactivation, and recurring business types

Low Active Contacts Signal

Engage the entire buying group early to fast-track deals from qualification to close

We've introduced a new signal that helps sellers identify when their deals might benefit from multi-threading strategies. The **Low Active Contacts** signal automatically detects when a deal has been open for 30 days or more but shows engagement with only one contact at the account. This helps prevent deal stagnation and reduces the risk of opportunities falling through when a single point of contact leaves the organization.

The signal will automatically appear in your feed and will provide actionable insights by suggesting additional potential decision-makers within the account, focusing on relevant titles and departments that typically influence purchasing decisions.

The screenshot displays the Logic Monitor interface. On the left, under 'Top updates for today', a 'Low active contacts' signal is highlighted with a red box. The signal text states: 'Activity on a recent opportunity is limited to one contact or less.' Below this, it mentions 'Actively researching a competitor solution, New Relic'. On the right, a sidebar titled 'Logic Monitor / Signals / Deal Reminder' provides more details. It explains that a new opportunity was opened more than 30 days ago with no recent engagement. Below this, 'Possible decision makers' are listed, including Ahmad Curtis (Vice President of Sales) and Emery (Vice President of Marketing). Ahmad Curtis is marked as 'Likely to Engage'.

Note: This feature requires an active CRM connection and both email and meeting tracking enabled in Chorus.

Activity-Based Account Suggestions Automatically Surface High-Priority Accounts

Receive company recommendations for your Target Accounts list based on your interactions and engagement patterns

We've added **Activity-Based Account Suggestions**, a new feature that automatically identifies additional companies for you to target based on your current engagement activity. This feature monitors your interactions within ZoomInfo Sales — such as exports, repeated company views, and engagement activities — and suggests companies that could be added to your Target Accounts list along with relevant signals.

Recent Updates Feed

- Top Updates
- Target Accounts 20
- Suggestions 16**
- Whitespace Companies 12
- Based on your activity **New** 4

[Personalize Target Market](#)

Suggested companies based on your activity
Let us recommend your next best prospect and sell smarter. Add these prioritized companies to your target accounts to receive ongoing updates. [Learn more](#)

You recently exported and emailed contacts

Apple
Great fit
[+ Target Accounts](#)

Apple is a fast-growing SaaS collaborative work management platform, with over \$700 million in revenue and 3,000+ employees. [Strategic highlights](#)

Now is a good time to reach out
Past week

- Expanding to Australia, opening an office there and started [hiring for new positions](#)
- Showed [buying intent](#) for SOC software, security, multi-cloud and digital transformation

Show 2 more

Recommended Play: Multi thread with new buyers Why?

Suggested for you based on your past ZoomInfo activity

Bank of America
Great fit
[+ Target Accounts](#)

Apple is a fast-growing SaaS collaborative work management platform, with over \$700 million in revenue and 3,000+ employees. [Strategic highlights](#)

Now is a good time to reach out
Last week

Never miss important updates about companies you're actively working with, even if you haven't manually added them to your Target Accounts list. The system automatically refreshes suggestions daily, providing you with timely recommendations based on your recent activities.

Clicking the **+ Target Accounts** button will add the account to your target accounts.

Enhanced Account AI Configuration Options for Admins

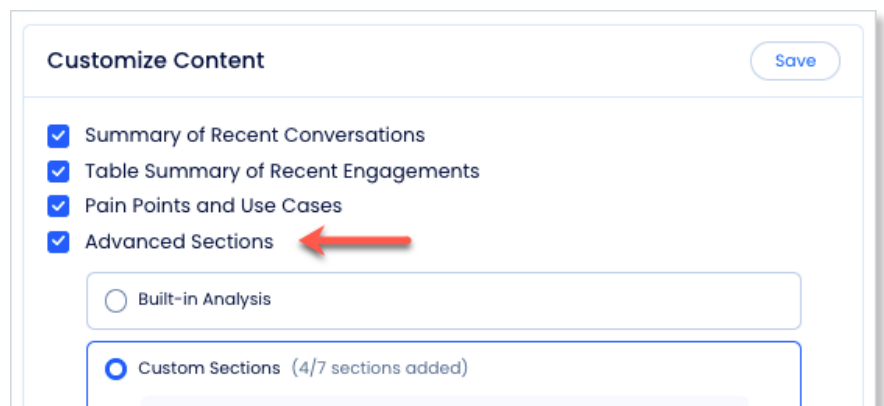
Configure custom questions for Earnings Reports in Account Summaries to generate more relevant AI responses

We've expanded the configuration options for Account AI, giving administrators more control over how ZoomInfo Copilot Chat analyzes and presents information in Account Summaries. This enhancement allows admins to customize the questions used to generate insights from earnings reports, ensuring the AI delivers more focused and relevant information for your team's specific needs.

- This update builds upon the existing Account AI customization capabilities, which already allow admins to tailor various content sections like engagement summaries and pain points.
- By extending customization to the **Earnings Reports** section, organizations can now better align AI-generated insights with their specific business intelligence requirements.

How It Works (for Admins)

1. Navigate to the **Admin Portal > Set Up > Account AI** page.
2. Expand **Advanced Sections**.
3. Here, you can add up to seven custom prompts using one of the data sources provided (**Engagements, Earnings Calls, Podcasts**).
4. Click **See Prompt Preview** to generate a preview of details returned and adjust your prompt as needed.
5. When satisfied with your customized prompts, click **Save**.

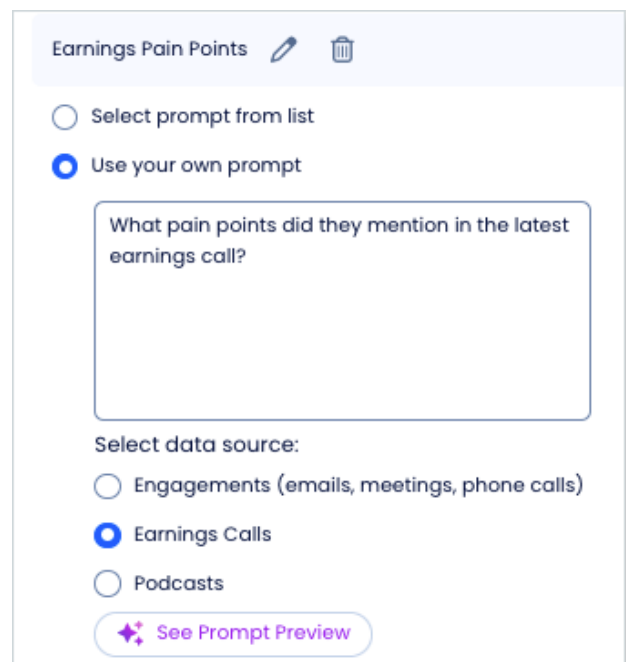


Customize Content Save

- ☒ Summary of Recent Conversations
- ☒ Table Summary of Recent Engagements
- ☒ Pain Points and Use Cases
- ☒ Advanced Sections

☐ Built-in Analysis

☒ Custom Sections (4/7 sections added)



Earnings Pain Points ✎ 🗑️

☐ Select prompt from list

☒ Use your own prompt

What pain points did they mention in the latest earnings call?

Select data source:

☐ Engagements (emails, meetings, phone calls)

☒ Earnings Calls

☐ Podcasts

🌟 See Prompt Preview

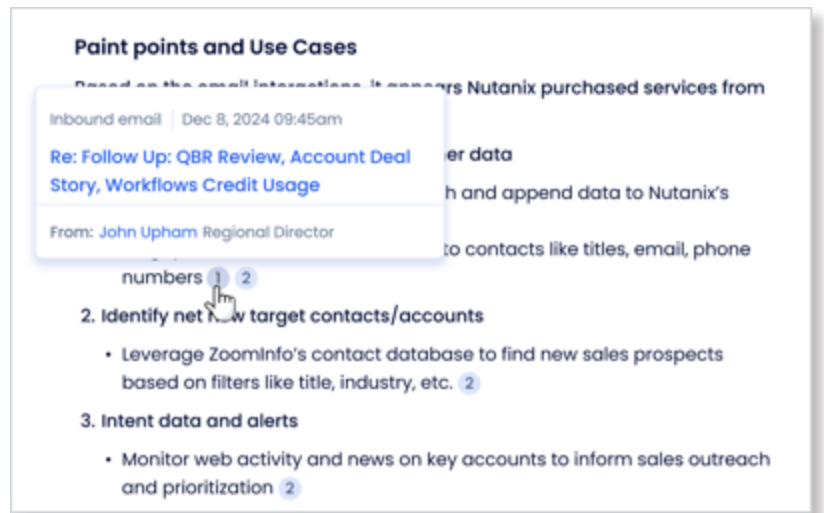
Show Source Attribution in Account Summaries

View the specific emails and meetings that inform your AI-generated Account Summaries in ZoomInfo Copilot Chat

We've enhanced Account Summaries in ZoomInfo Copilot Chat with greater transparency by revealing the source data used to generate insights. Users can now see which specific emails and meetings were analyzed to create their account summaries, providing clearer visibility into the AI's decision-making process.

This update helps users better understand how Copilot formulates its responses and recommendations, building greater trust in the AI-generated insights.

By exposing the underlying data sources, users can more confidently leverage the combined power of ZoomInfo's proprietary B2B data and their company's first-party interaction data.



How It Works

1. When reviewing an **Account Summary**, look for the new source attribution information, which displays the specific emails and meetings that contributed to the summary.
2. Click on individual source items to see more details about the interactions that informed the summary.

New Admin Controls for Email Open Tracking

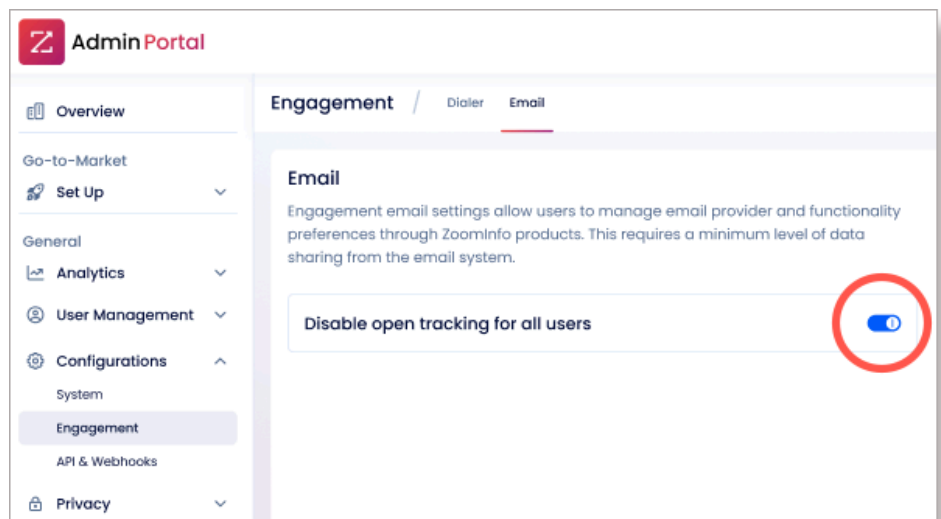
Admins can now disable email open tracking across their organization to enhance email deliverability rates

We've introduced a new administrative control that allows organizations to disable email open tracking pixels for outgoing emails across all user accounts. This feature addresses concerns about email deliverability and helps ensure your messages reach their intended recipients' inboxes.

While email open tracking can provide valuable analytics, some email providers may block messages containing tracking pixels. With the ability to disable open tracking, admins now have the option to prioritize successful email delivery over open rate analytics.

How It Works (for Admins)

1. Navigate to the **Admin Portal**.
2. Select **Engagement > Email**.
3. Enable the **Disable open tracking for all users** toggle to remove tracking pixels from all outgoing emails.



Note: Once disabled at the administrative level, individual users cannot override this setting. This ensures consistent email deliverability optimization across your organization.

Enhanced Email Follow-Ups with Multi-Step Sequences

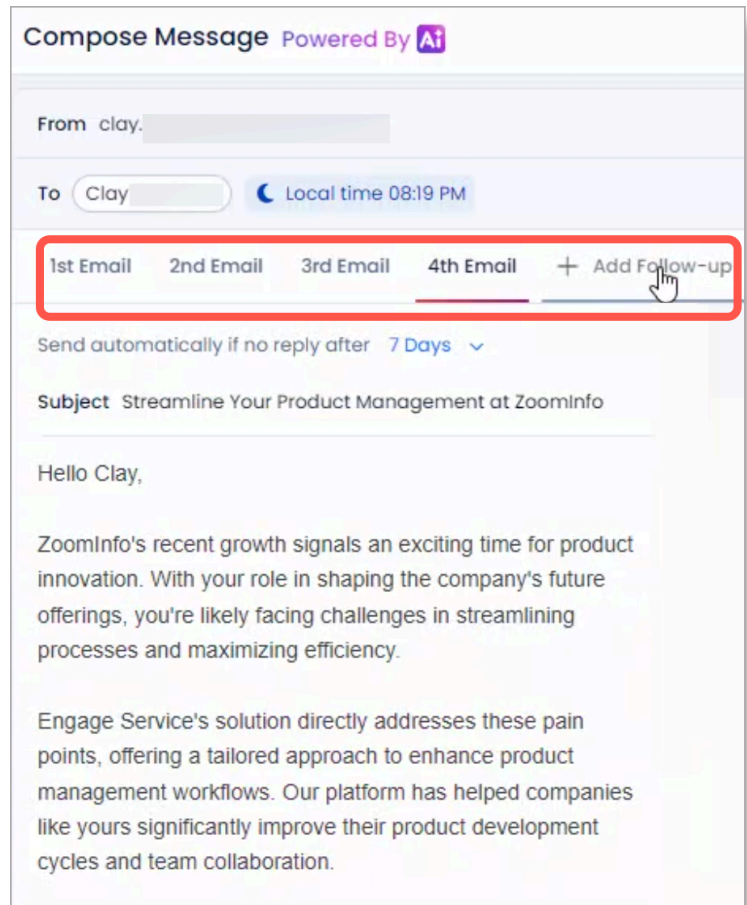
Schedule up to 5 automated follow-up emails with customizable waiting periods between each message

You can now create sequences of up to 5 automated follow-up emails, with each new message building upon previous communications. This enhancement gives you more control over your follow-up strategy while maintaining a natural conversation flow.

The system intelligently manages your follow-up sequence by automatically canceling any pending follow-ups once a reply is received, ensuring your communication remains relevant and timely.

How It Works

1. Start by composing your initial email as usual.
2. Click the **Add Follow-Up** button to create your sequence.
3. Set a custom waiting period for each follow-up email.
4. Compose each follow-up message (up to 4 additional emails).
5. Review your sequence and adjust timing and messaging as needed.



New Controls for AI Talking Points Visibility in Dialer

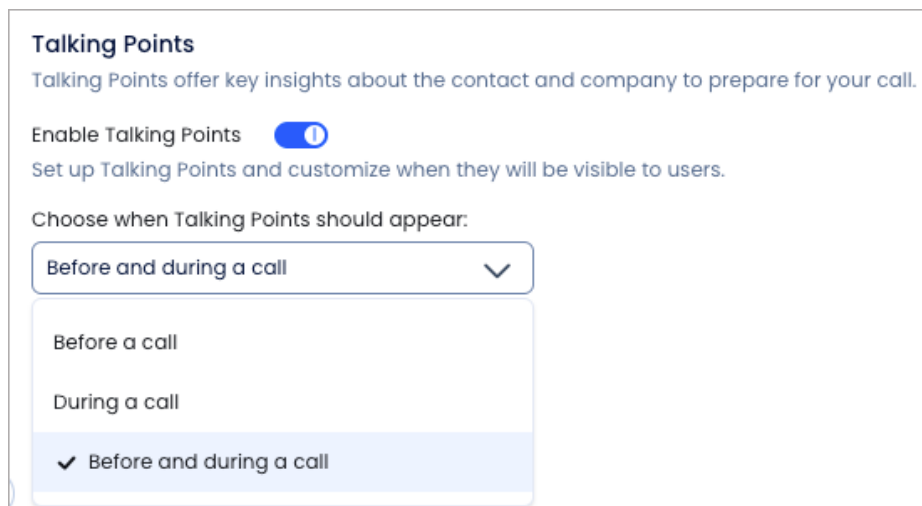
Customize when you see AI-generated Talking Points before and during calls to match your preferred workflow

In our January release we updated **AI Talking Points** letting you know that they are available both before and during your call.

This month we've enhanced the AI Talking Points feature by giving you more control over when these insights appear. You can now choose to view talking points before a call, during a call, both, or neither – allowing you to tailor the experience to your specific needs and preferences.

How It Works

1. Click your initials, select Settings, and go to the **User Engagement Settings** tab.
2. In the **Talking Points** section, enable the **Enable Talking Points** toggle.
3. Select your preferred talking points visibility option from the dropdown menu:
 - **Before and during a call** (Default): View insights both before dialing and during calls
 - **Before a call**: See talking points only before dialing
 - **During a call**: Access talking points only while on active calls
 - **Never**: Disable talking points completely



Target Accounts and AFS

Target Accounts Setup Gets a Streamlined Admin Experience

Configure and manage Target Accounts more efficiently with an enhanced admin interface featured improved CRM integration, and better list management controls

We've redesigned the Target Accounts setup experience to make it more intuitive and impactful for administrators.

Key Improvements

- Relocated the **Whitespace Companies** set up configuration to a dedicated page (see [Whitespace Companies: New Dedicated Setup Page](#) for details)
- Highlighted Target Account setup options (**Sync from CRM** or **Manually Upload Target Accounts**)
- Enabled seamless switching between CRM systems for Target Account generation
- Enhanced CRM connections with on-demand sync
- Improved CSV upload experience with detailed status updates and error handling
- New controls for managing user Target Account lists, including the ability to clear all accounts for fresh starts

The screenshot displays the 'Target Accounts' configuration page. At the top, a header reads 'Target Accounts'. Below it, a descriptive paragraph states: 'Empower your team by displaying key account signals on their ZI Sales homepage. Once accounts are added, track your team's interactions with the accounts in [Dashboard Analytics](#).' The interface is divided into two primary sections. The first section, 'Sync from CRM', includes a 'Settings' dropdown, a 'Syncing from:' field set to 'Salesforce' with a 'Last sync:' of '14 January, 2025', and 'CRM Filters' with checkboxes for 'Account Owner' and 'Opportunity Owner' (both checked). A 'Save' button is present. Below this is a 'User Permissions in ZI Sales' section with a checkbox for 'Allow users to edit their CRM matching rules in ZI Sales' (unchecked). The second section, 'Manually Upload Target Accounts', features an 'Upload' button, a description 'Manually add and update Target Accounts and their owners via a CSV file', and a 'User Permissions in ZI Sales' section with a checked checkbox for 'Allow users to upload CSV files of accounts in ZI Sales'. At the bottom of this section is a 'Reset All Manually Added Target Accounts' button, accompanied by explanatory text: 'Reset all Target Accounts, whether added manually by users or uploaded by admins. This is useful when switching from manual upload to CRM sync or refreshing the list.'

How It Works (for Admins)

1. From the Admin Portal, click **Set Up > Target Accounts**.
2. Choose your preferred method for Target Account configuration - either **Sync from CRM** or **Manually Upload Target Accounts** (via CSV).
 - If using CRM integration, connect your preferred CRM system (Salesforce, HubSpot, or Microsoft Dynamics) and use the Advanced Sync feature to ensure data accuracy.
 - For CSV uploads, use the enhanced upload interface which now provides detailed status updates and error notifications.
3. Use the new list management tools to clear existing Target Account assignments when needed.

Whitespace Companies: New Dedicated Set Up Page

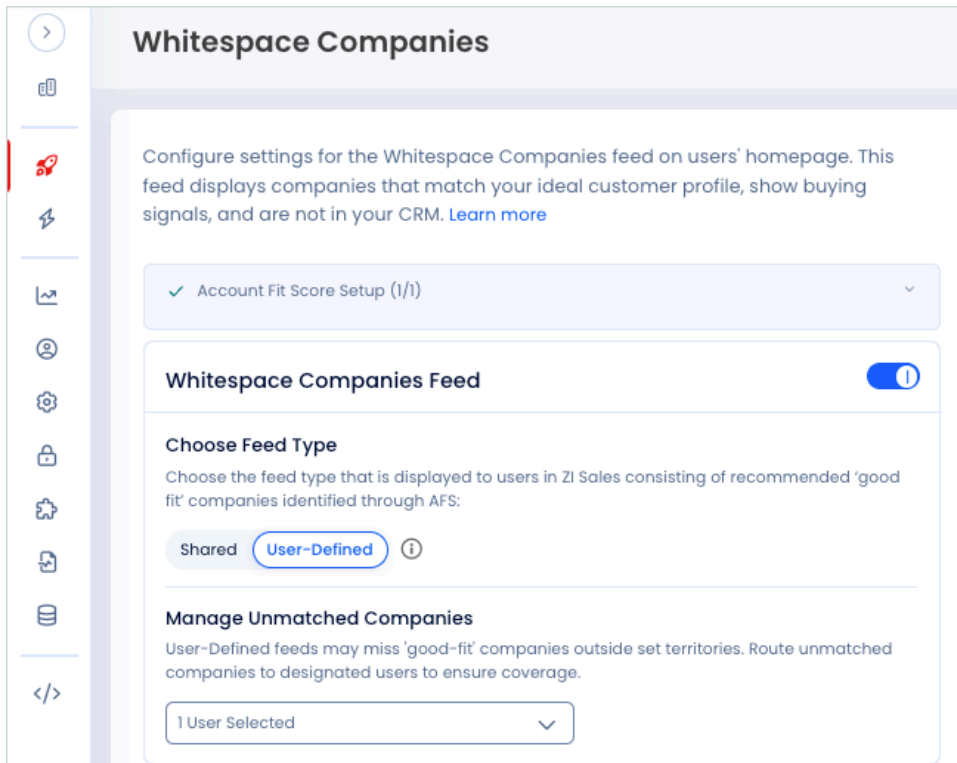
Configure and manage Whitespace Companies settings from a centralized location in the Admin Portal

Previously housed within the Target Accounts settings, **Whitespace Companies** now has its own tab, making it easier for administrators to locate and manage these important settings including:

- The ability to choose from a **Shared** or **User-Defined** feed for your organization. See [Personalize Your Territory Settings to Customize Your Whitespace Companies Feed](#) for details on the new User-Defined option)
- A method for managing unmatched companies (if using the User-Defined feed type)
- Easy access to Account Fit Score setup (recommended to drive the most relevant results)

This update streamlines the administration of Whitespace Companies — those valuable prospects that match your ideal customer profile and show buying signals but aren't yet in your CRM.

The new dedicated tab provides better visibility and more focused access to these configuration options, helping administrators more effectively manage how their users discover and interact with potential new business opportunities.



How It Works (for Admins)

1. From the Admin Portal, click **Set Up > Whitespace Companies**.
2. Configure your desired settings for how Whitespace Companies are identified and displayed to your users.

Personalize Your Territory Settings to Customize Your Whitespace Companies Feed

Define your own territory preferences to receive targeted company updates based on industry, location, size, and revenue criteria

We're introducing **user-defined Territory Preferences**, a new feature that allows individual sellers to customize their **Recommended Whitespace Companies** feed based on their specific territory parameters. This enhancement helps individual sellers ensure that they receive updates only for companies that match their self-defined market segment.

Each seller can precisely define their target market using multiple criteria including industry (and sub-industry), geography, company headcount, and revenue ranges. Sellers can either use our intuitive natural language interface to set these parameters, or leverage compatible filter values from existing Saved Searches to quickly define their territory.

How It Works (for Admins)

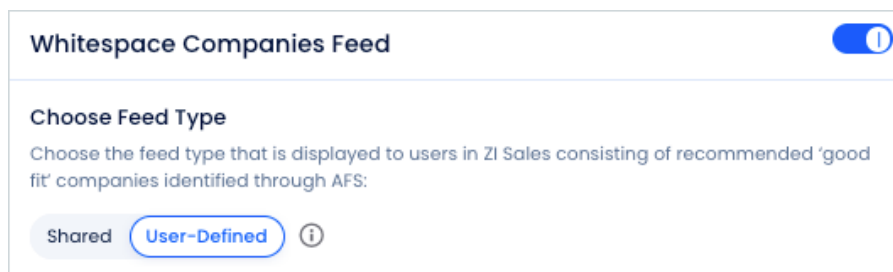
An admin must first enable the **Recommended Whitespace Companies** feed to be **User-Defined**.

Important: For existing organizations, once an admin transitions from **Shared** to **User-Defined**, users will no longer get updates to the shared feed until they each set up their own territory preferences.

1. Navigate to **Admin Portal > Set Up > Whitespace Companies**.

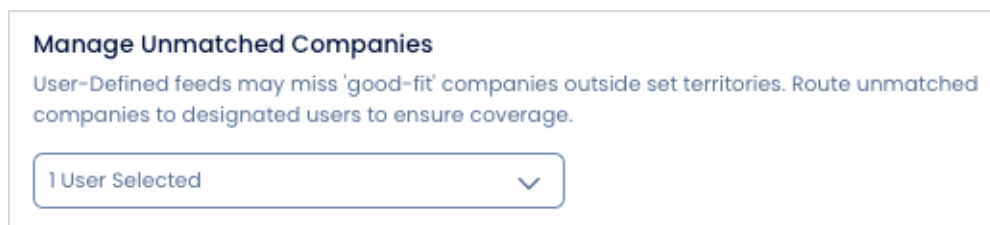
Note: The relevance of Whitespace Companies is greatly improved when your organization's Account Fit Score is defined. For convenience, the Whitespace Companies page includes a link to your Account Fit Score setup. If it's not yet set up, you can easily navigate to do so from here.

2. Change the **Select feed type** setting from **Shared** to **User-Defined**.



The screenshot shows a settings panel titled "Whitespace Companies Feed" with a toggle switch in the top right corner that is turned on. Below the title is a section "Choose Feed Type" with a descriptive text: "Choose the feed type that is displayed to users in ZI Sales consisting of recommended 'good fit' companies identified through AFS:". There are two buttons: "Shared" and "User-Defined". The "User-Defined" button is highlighted with a blue border and a blue background, and it has an information icon (i) to its right.

3. Optional: Designate one or more users as "catchall" recipients for company updates that don't match any users' defined territories but may be of interest to your organization.

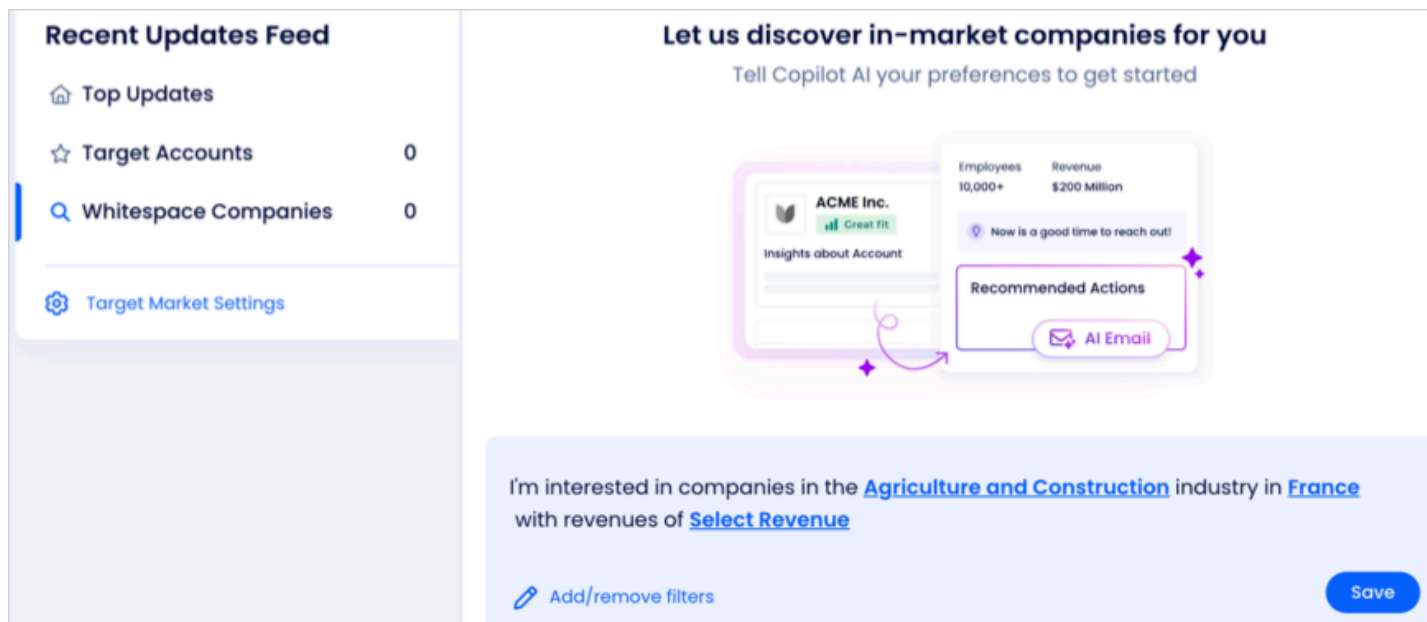


The screenshot shows a section titled "Manage Unmatched Companies" with a descriptive text: "User-Defined feeds may miss 'good-fit' companies outside set territories. Route unmatched companies to designated users to ensure coverage." Below the text is a dropdown menu that currently displays "1 User Selected" and has a downward arrow icon on the right.

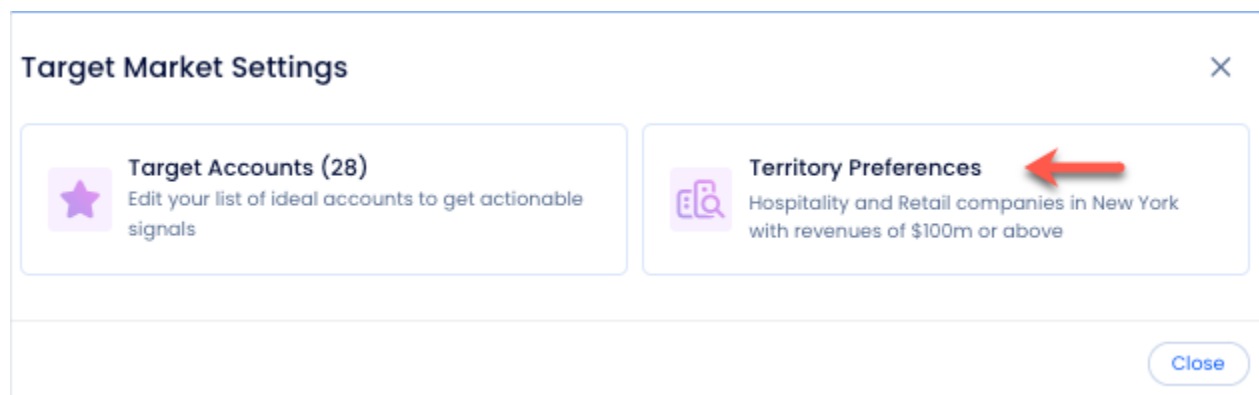
How It Works (for Users)

Once an admin has enabled the User-Defined feed option, each seller can define their feed and territory preferences.

1. Click on the **Whitespace Companies** feed option.

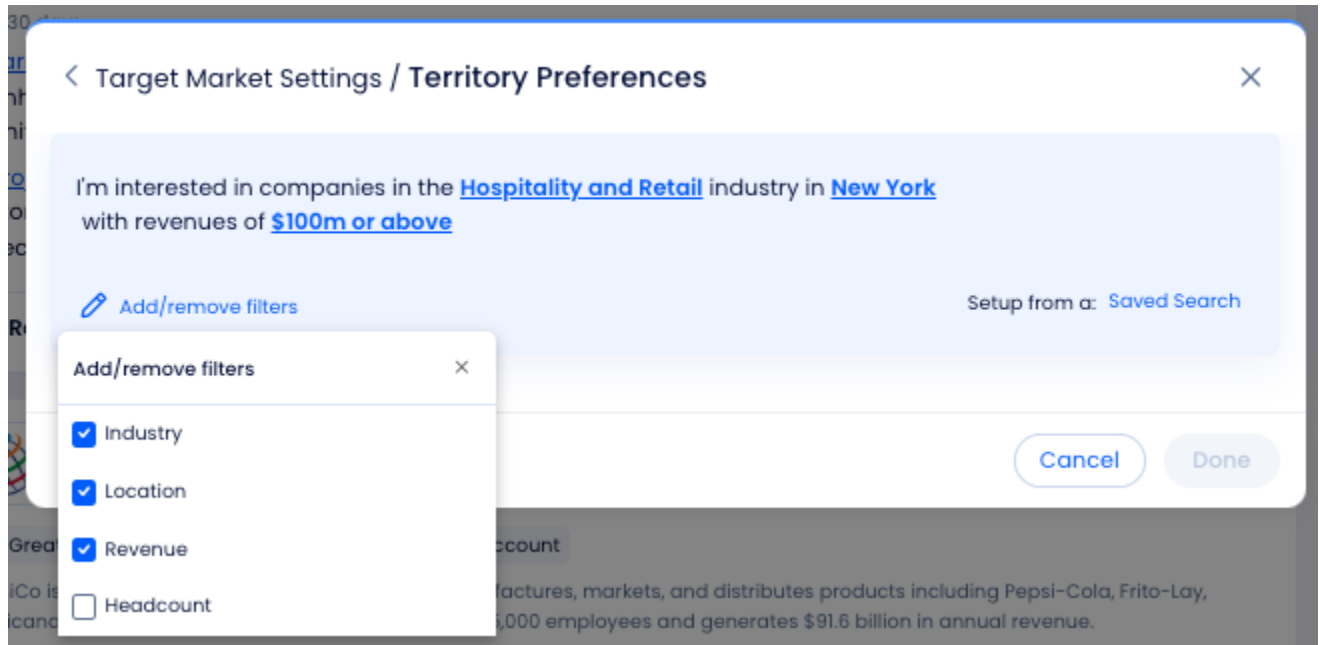


2. Select the relevant settings and values and click **Save**.
3. If you have already set up a Saved Search with compatible values, you can import those values.
4. If you want to make periodic updates to your filter, you can do so from the Copilot homepage, locate the **Recent Updates Feed** on the left side.
5. Click **Target Market Settings**.



6. Select **Territory Preferences**.
7. Define your territory using one of two methods:

- Use the natural language interface to specify industry, location, headcount, and revenue criteria.
- Select an existing Saved Search that represents your territory parameters.



Note: After setting your Territory Preferences, updates to your homepage feed will reflect your new settings within 24 hours.

Generate Your Account Fit Score from Microsoft Dynamics

Leverage Microsoft Dynamics data to identify ideal customer profiles and fuel Account Fit Score.

Copilot's **Account Fit Score (AFS)** uses predictive AI modeling to assess the compatibility of potential accounts with your ideal customer profile. AFS guides sellers to focus on accounts with the highest propensity to buy, ensuring they work from a prioritized list of target accounts for increased conversion and closed-won deals.

What's New?

- You can now generate your AFS score from Microsoft Dynamics.
- AFS scores will refresh automatically every 90 days, saving time and eliminating manual efforts.
- You can easily switch between **Dynamics**, **Salesforce**, **HubSpot**, or **CSV** as your data source, giving you more control and flexibility

 **ZoomInfo** Dismiss

 Ask Copilot

 Great Account Fit  Company in Hubspot  Target Account

ZoomInfo is a comprehensive business intelligence platform that provides data and insights on over 200 million people and 11 million companies worldwide. The company has 3,516 employees and reported \$1.24 billion in revenue.

 **Competitive risk**

Last 7 days

- [Website visits](#): Recent activity has been detected on important pages on your websites and domains.
- [Competitive Alert](#): Actively researched competitor - LiveVox

Last 30 days

- [Partnership](#): ZoomInfo has announced an expanded partnership with Salesloft to enable customers to purchase Salesloft's revenue orchestration platform, allowing for access to a new integration. [Source](#)

Show 1 more ▾

Recommended Play: Engaged contact at Prospect departs Why?
 Find other engaged contacts at ZoomInfo See Engaged Contacts

Show 1 more step in play ▾



Learn more

- For admins, connect the [Microsoft Dynamics integration](#) and confirm that Advanced Sync is enabled. Then, see [How to Configure Account Fit Score in the Admin Portal](#)
- For users, see [Account Fit Score \(AFS\) Explained](#) for how the AFS scoring system works, where you'll see indicators in the UI, and how you can leverage it to target the right accounts



Mobile App

Enhanced Mobile AI Chat with Personalized Conversation Starters

Access AI-powered conversation prompts tailored to your company research needs directly from the ZoomInfo Mobile App

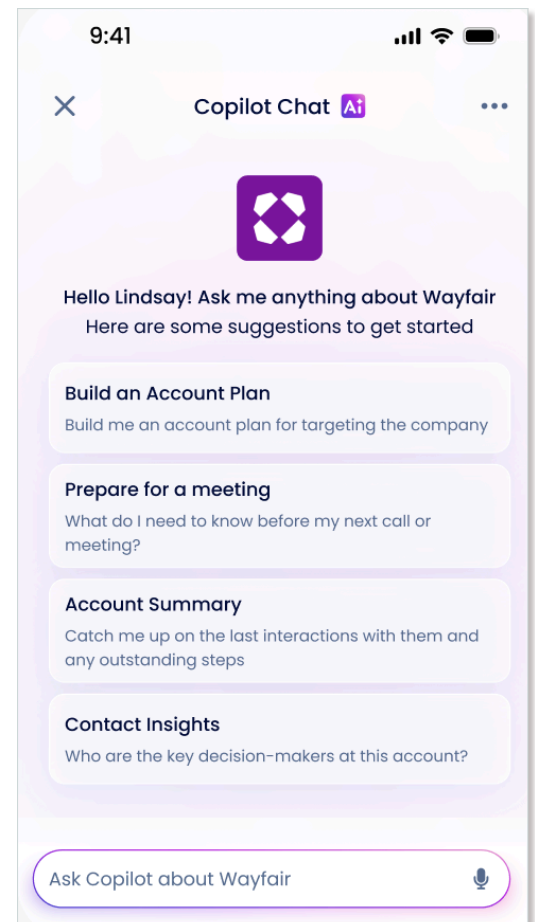
We've enhanced the **ZoomInfo Mobile App's AI Chat** interface to provide a more personalized and intuitive experience when researching companies, similar to our web app experience.

When starting a new company-focused conversation with our AI Copilot, you'll now see a personalized greeting and four pre-built conversation starters designed to help you quickly access the insights you need.

These intelligent conversation starters help streamline your account research by offering quick access to common business intelligence needs, from building comprehensive account plans to preparing for important meetings. While these suggested prompts provide structured starting points, you maintain the flexibility to ask any custom questions about the company you're researching.



Learn more [Overview of the ZoomInfo Mobile App](#)



Jan 22, 2025 ZoomInfo Copilot Release

Highlights

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[AI Emailer and Dialer](#)

[Show Talking Points Before and During a Dialer Call](#)

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[CSV Upload Enhancements for Defining Account Fit Score](#)

ZoomInfo Sales Release Updates

Be sure to check out the [ZoomInfo Sales Release Notes](#) for new features and improvements to ZoomInfo Sales that also apply to ZoomInfo Copilot.



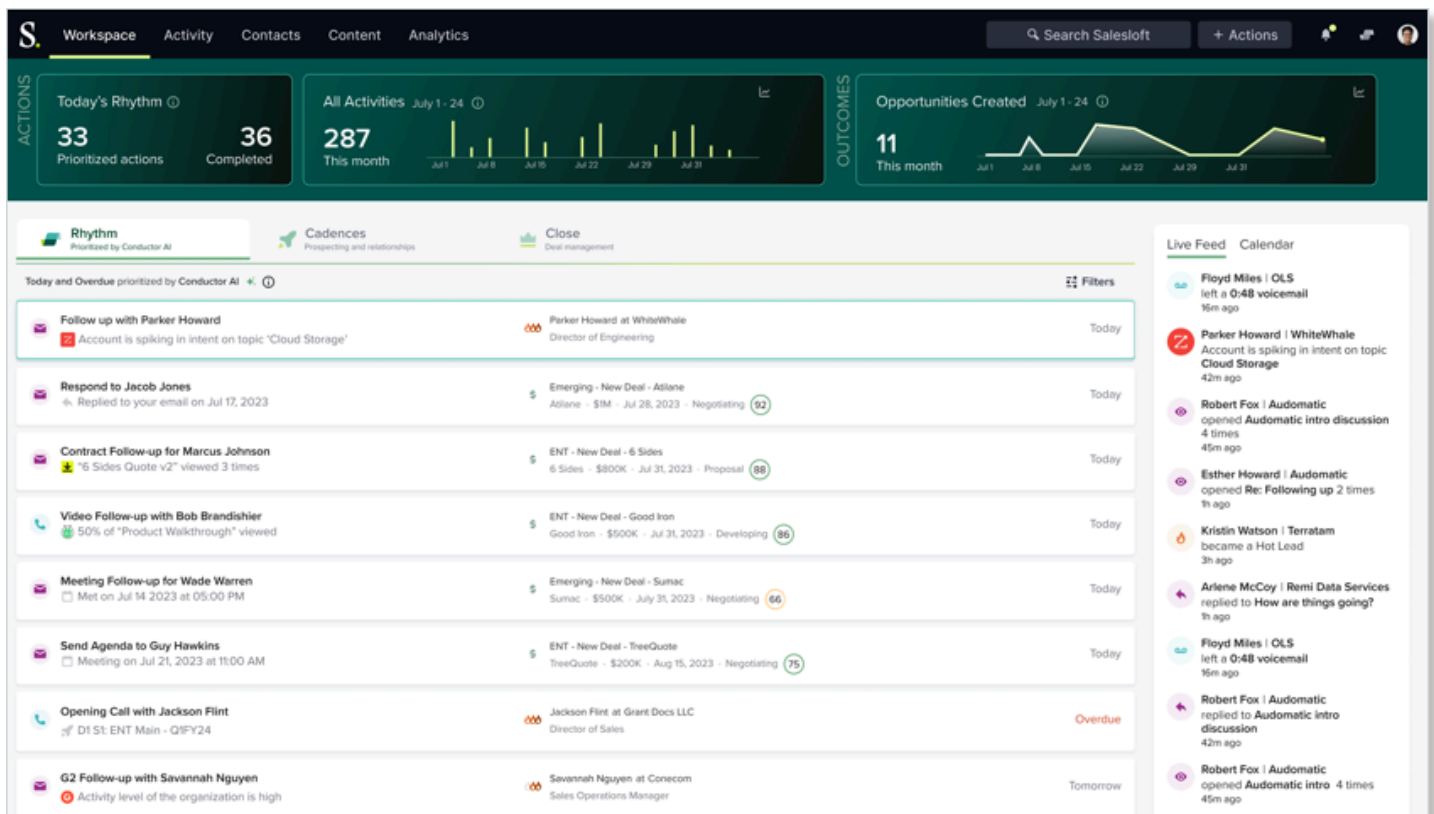
Signals

New Signals Trigger in Workflows Automates Lead Actions in Salesloft Rhythm

Automatically discover and export high-intent leads to Salesloft Rhythm when new buying signals are detected on target accounts

We're excited to introduce a new **Signals** trigger for Workflows that streamlines the process of acting on valuable buyer intent signals. This powerful automation enables sales teams to automatically discover and export contacts to Salesloft Rhythm whenever new signals are detected on their target or whitespace accounts - specifically the Account Level Intent Spike signal. Additional buying signals will be available in subsequent releases.

The Signals trigger eliminates the need to switch between platforms, allowing sellers to seamlessly follow up on high-intent leads directly within Salesloft. When new signals are detected, the Workflow automatically discovers relevant contacts at the account and exports them to Salesloft Rhythm, ensuring sales teams can engage prospects faster and more efficiently.



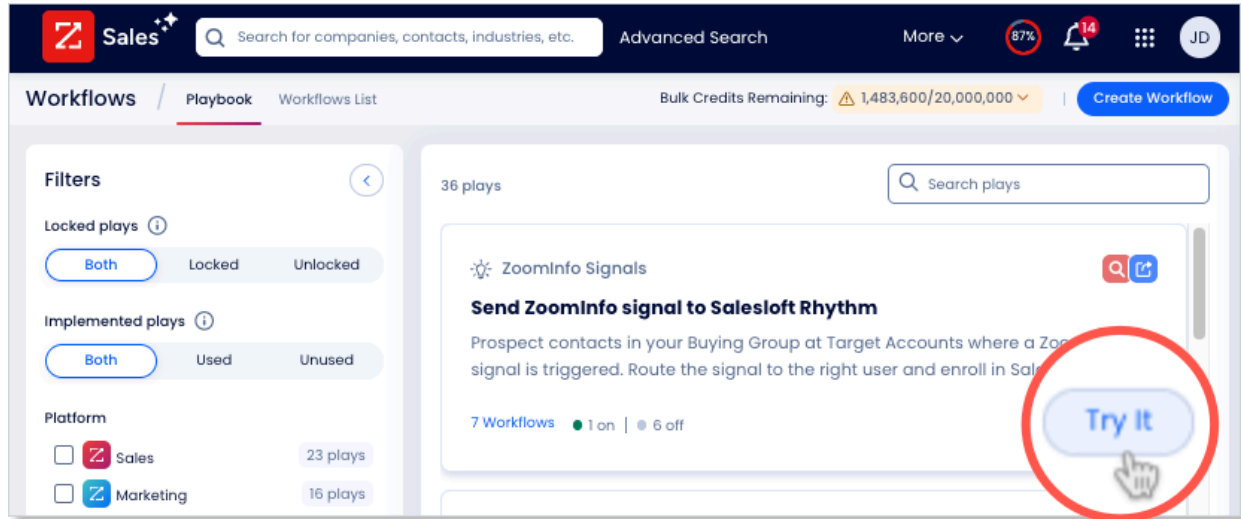
Who Gets It

This feature is available exclusively for Copilot Enterprise package users with Salesloft Rhythm integration.

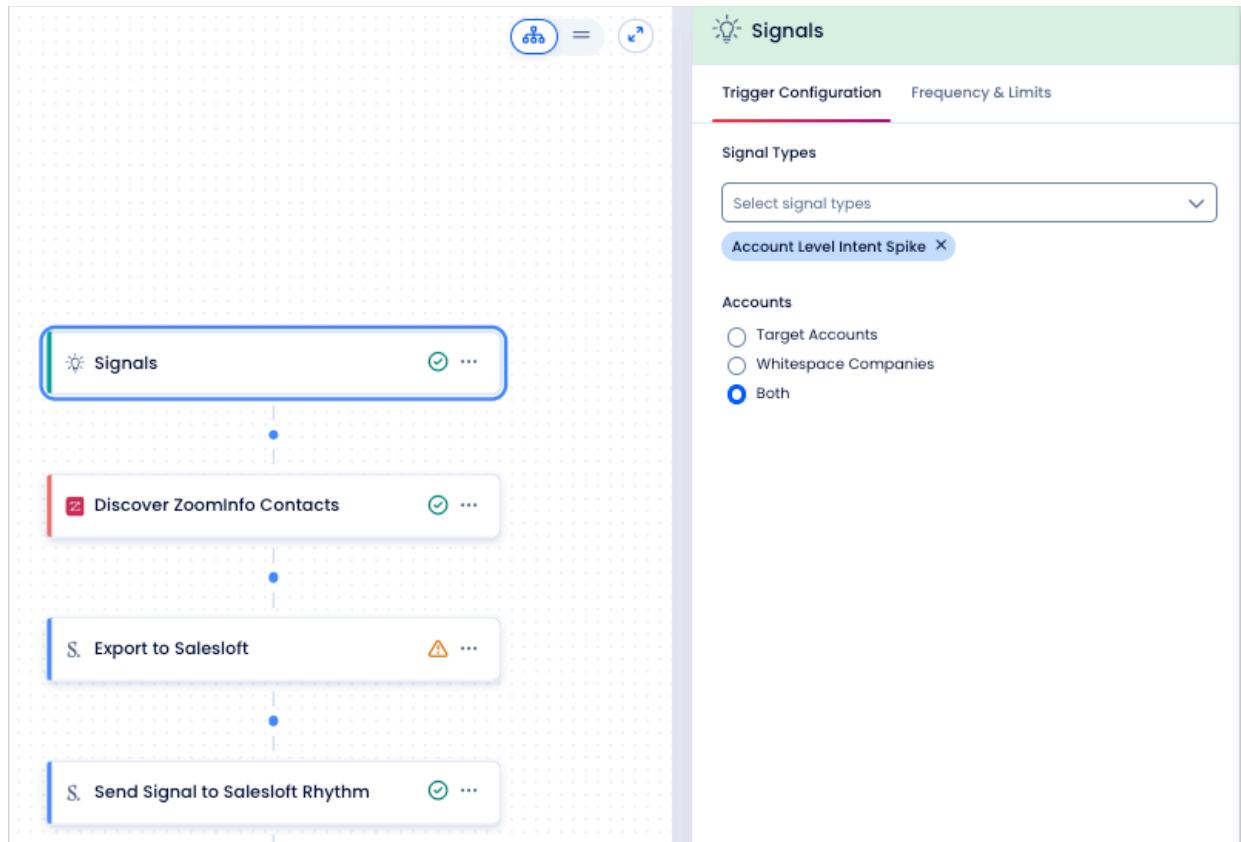
How It Works

For Workflows users:

1. Navigate to Workflows in ZoomInfo Copilot.
2. Select the **Send ZoomInfo signal to Salesloft Rhythm** play from the Playbook.



Note: Alternatively, click **Create Workflow** and select **Signals** as the trigger type to build a Workflow from scratch.



3. Configure the Signals criteria for Target Accounts, Whitespace Companies, or both.

Note: The **Frequency & Limits** indicates a frequency of **Immediately**. However, Account Level Intent signals are collected every 24 hours.

4. Set up the Workflow actions:

- Discover ZoomInfo Contacts
- Export to Salesloft
- Send Signal to Salesloft Rhythm

Note: Accounts and People must already exist in Salesloft in order to add them to a Rhythm. Include an **Export to Salesloft** step before sending the signal if the records may not already be in Salesloft.

5. Activate the Workflow to begin automated monitoring and exports.

For Salesloft admins:

A Salesloft admin will need to navigate to **Settings > Plays** and [enable the ZoomInfo Play](#).

For Salesloft users:

1. Ensure that the ZoomInfo integration is enabled by navigating to **Settings > Integrations** in Salesloft.

See this [Salesloft article](#) for more information about managing Salesloft integrations.

2. Enable the ZoomInfo Play by navigating to **Settings > Plays**.

3. Click **Discover Plays** and select the ZoomInfo Play you would like to configure and enable.

See this [Salesloft article](#) for more information about configuring Plays here.

4. Salesloft will automatically create and assign ZoomInfo Plays according to your configuration.

5. Each Play is prioritized in real-time in the assigned user's Rhythm Focus Zone.

6. Click the Play to engage with prospects directly through the Salesloft platform, all in the flow of your existing engagement efforts!



Learn more

[How to Send ZoomInfo Signals to Salesloft Rhythm](#)

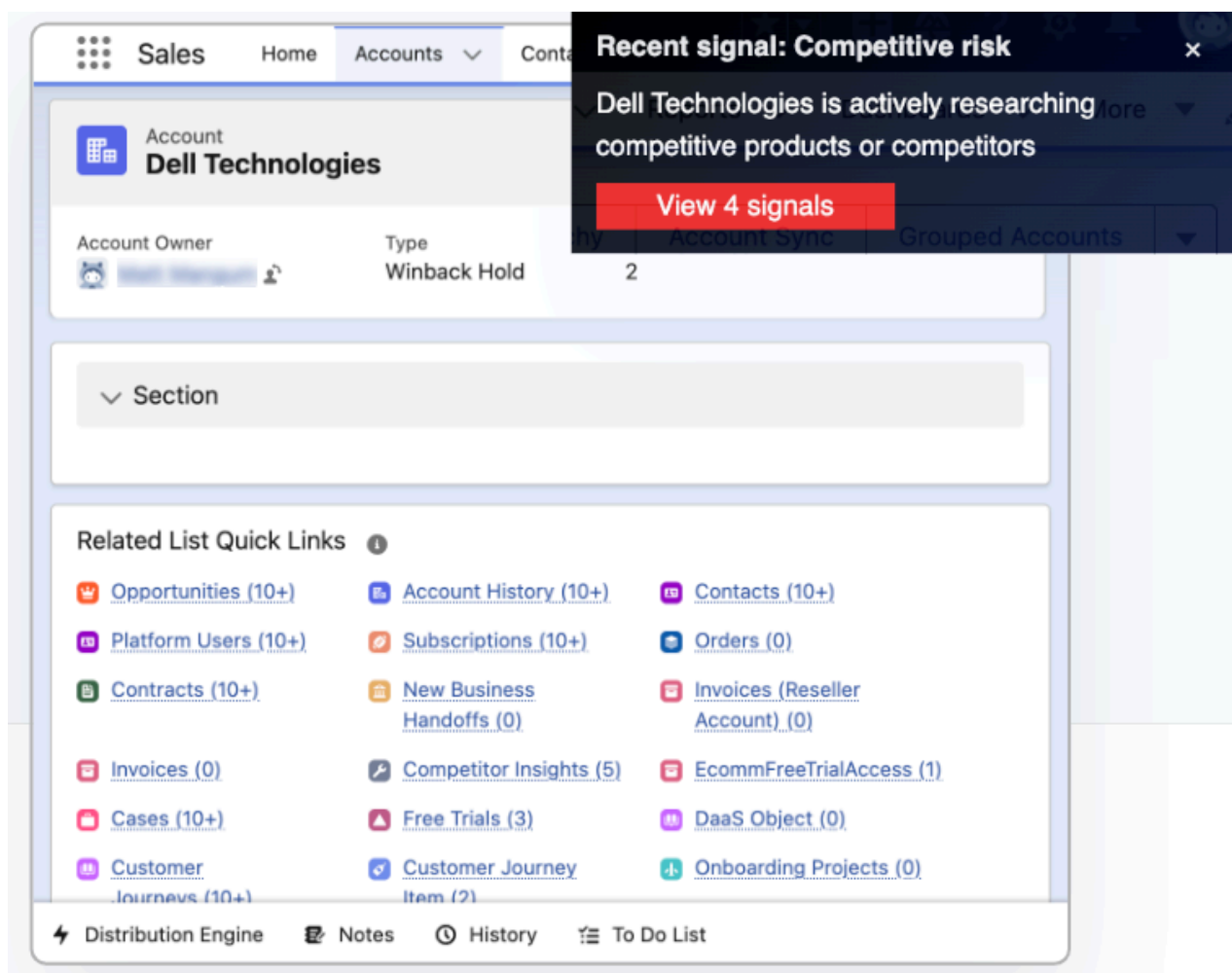
[Salesloft Integration Guide](#)

Copilot Signal Notifications Available in Salesforce and HubSpot Using Chrome Extension

Access real-time buying signals directly within your CRM workflow through the ZoomInfo Chrome Extension

We're excited to announce that ZoomInfo Copilot Signals are now seamlessly integrated into your CRM workflow through the Chrome Extension. This enhancement delivers critical buying signals directly where you work, ensuring you never miss important account updates while working in Salesforce or HubSpot.

The new notification feature automatically surfaces relevant account signals from the past seven days while you're viewing specific accounts in your CRM. These timely notifications appear even when the Chrome Extension is collapsed, keeping you informed of important account activities without disrupting your workflow.



How It Works

1. Install and pin the ZoomInfo Chrome Extension in your browser if you haven't already done so.
2. Navigate to any account page within Salesforce or HubSpot.
3. The Chrome Extension will automatically detect the account you're viewing and display relevant Copilot Signal notifications from the past 7 days.
4. Click on any notification to open the company profile in the Chrome Extension and view detailed signal information.
5. Take immediate action based on the signals directly from your CRM.

Note: No additional configuration is required for this feature. The Chrome Extension will automatically detect and display relevant signals when you're viewing accounts in supported CRM platforms.

'Won Deal In Similar Account' Insight

Leverage insights from recently won deals to target similar prospects more effectively

We've introduced a new account-level signal that helps sales teams identify and prioritize prospect accounts that share key characteristics with recently won deals. This feature enables sales representatives to capitalize on successful sales patterns and apply winning strategies to similar prospective accounts.

The signal automatically appears on accounts that match attributes of companies where deals were recently closed-won.

The screenshot shows a SmartSheet account page. At the top, there's a header with the SmartSheet logo, a 'Dismiss' button, and three tabs: 'Great Account Fit', 'Account in CRM', and 'Target Account'. Below the header, a brief description of SmartSheet is provided: 'SmartSheet is a fast-growing SaaS collaborative work management platform, with over \$700 million in revenue and 3,000+ employees.' A green lightbulb icon indicates a signal: 'Now is a good time to reach out'. Below this, it says 'Past week' and lists a 'Won Deal in Similar Account': 'Your colleague, Liz [redacted] won a deal with Asana + more'. A 'Show 2 more' link is present. At the bottom, a 'Recommended Play' section suggests: 'Examine insights from a won deal for guidance Why?'. It includes two actionable items: 'View the Account Summary' and 'Contact Opportunity Owner: Liz [redacted]'.

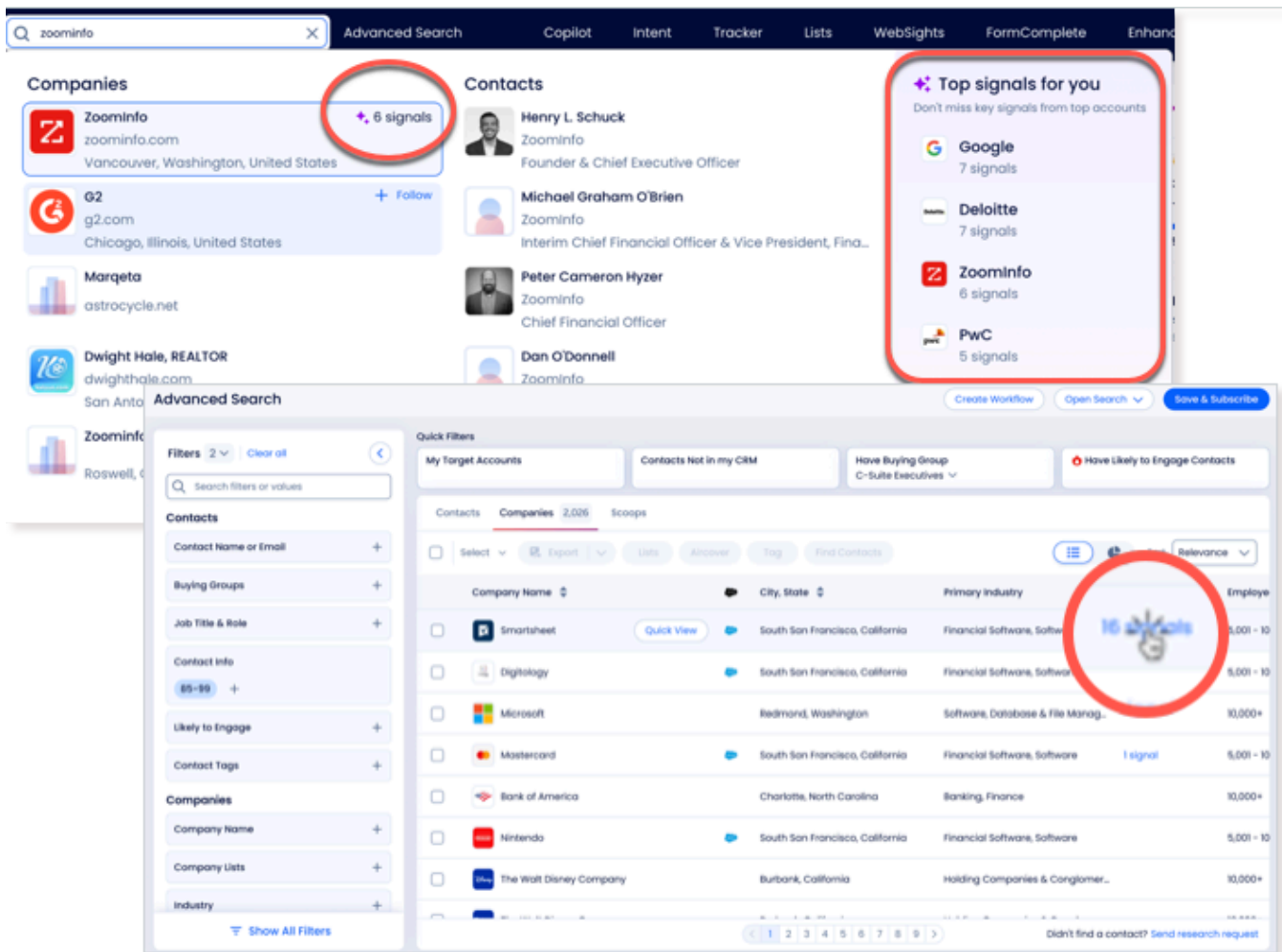
Homepage and Search

Discover Copilot Signals While Searching

Frontline sellers can now effortlessly identify accounts with signals directly within Quick and Advanced Search

This update ensures you can focus efforts efficiently and engage with top opportunities faster.

- **Discover Signals Quickly:** Instantly find accounts with signals in both Quick and Advanced Search, streamlining your workflow.
- **Expanded Target Account Options:** Easily add companies to your Target Account list when no signals are found, keeping you focused on relevant leads.
- **Prioritize Strategic Outreach:** By seeing which accounts have signals right within search results, you can prioritize high-potential accounts, engage at the right moment, and accelerate deal closing.



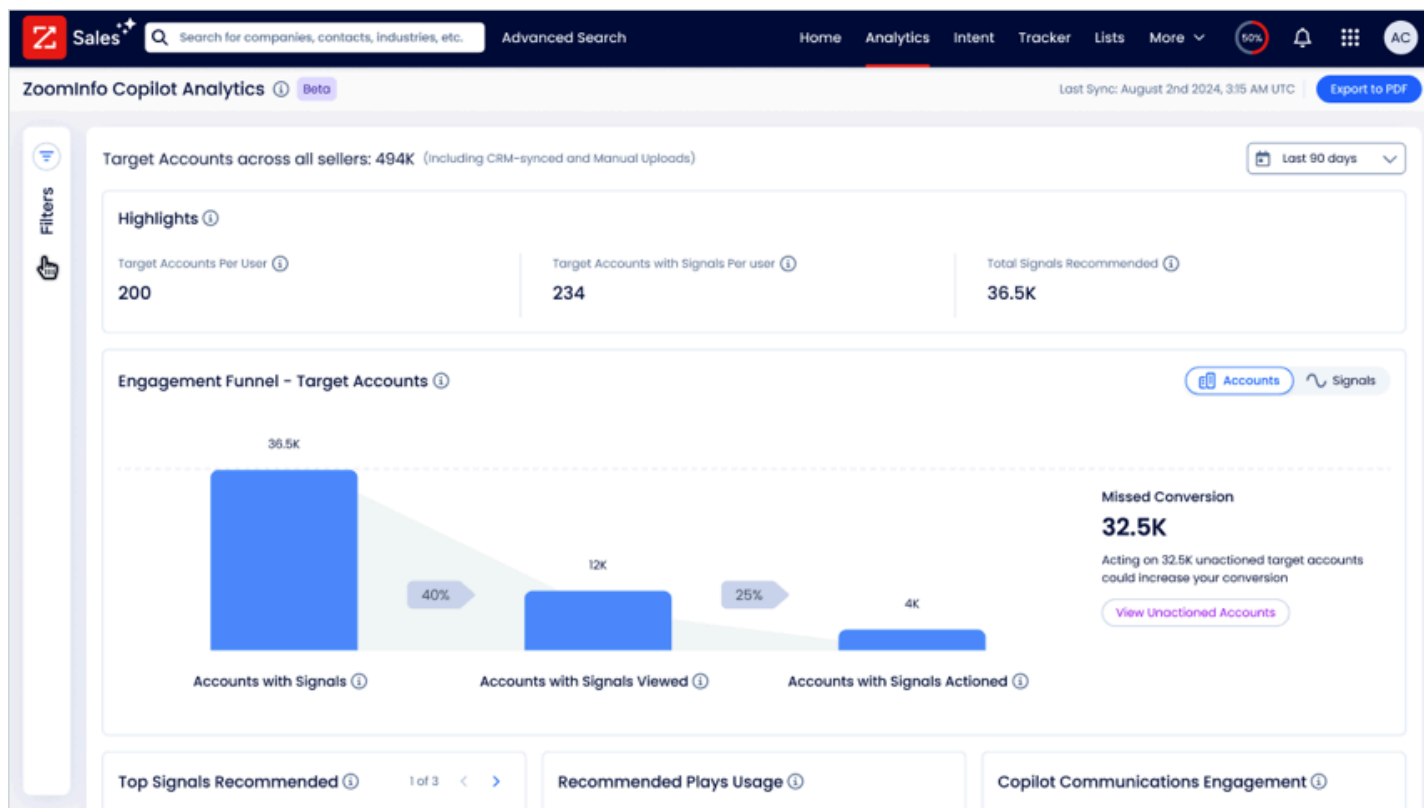
Copilot Engagement Dashboard Now Available to Individual Sellers

Access personalized engagement metrics and performance insights directly from the Copilot dashboard to optimize your sales activities

We've expanded access to the Copilot Engagement Dashboard, previously available only to admins and sales development managers, to include individual sellers. This enhancement gives sellers direct visibility into their own performance metrics and engagement data, enabling them to make more informed decisions and align their activities with team objectives.

The dashboard provides detailed insights into signal conversion rates, engagement metrics, and performance trends, allowing sellers to:

- Monitor personal performance metrics and track progress toward goals
- Analyze signal engagement and conversion rates to optimize follow-up strategies
- Make data-driven decisions about prioritizing sales activities



Learn more [Overview: Engagement Dashboard for Sales Managers](#)

Enhanced Visibility Controls for Copilot Analytics

Control who can view individual and team performance data in the Copilot Engagement dashboard

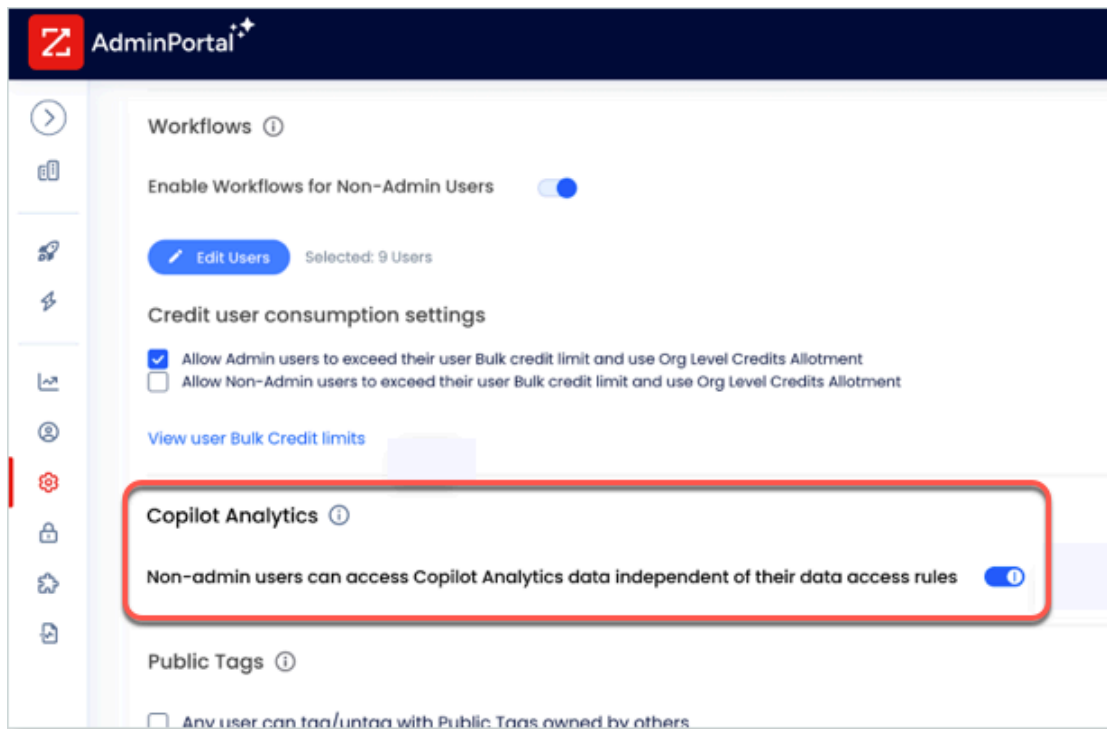
We've enhanced the Copilot Engagement dashboard with more flexible visibility controls, allowing organizations to better manage access to performance analytics. This update gives administrators granular control over who can view individual and team performance data, enabling them to align analytics visibility with their organization's privacy and management requirements.

By default, all users can view team-wide Copilot engagement data. Administrators now have the option to restrict visibility so that sellers see only their individual performance metrics, while managers maintain visibility of their team's data. This flexibility helps organizations maintain appropriate data access levels while still enabling performance tracking and management.

How It Works (for Admins)

To control this setting:

1. From the Admin Portal **Settings Menu**, select **Configuration > General Settings**.
2. Scroll to the **Copilot Analytics** section and turn the toggle on or off depending on your organization's preference.



Note: Administrators retain full access to all Copilot engagement data through the Admin Portal, regardless of visibility settings.



Learn more [Overview: Engagement Dashboard for Sales Managers](#)



AI-Powered Pre-Meeting Briefs for Copilot Enterprise

Comprehensive meeting briefs delivered to your inbox before scheduled meetings

In this release, we've introduced **Pre-Meeting Briefs**, an AI-powered feature that automatically compiles and delivers essential account information to your inbox before your meeting, helping you prepare for customer conversations more effectively.

By combining data from multiple sources including AI Summaries, calendar events, and past meeting transcripts (currently supported for Gong and Chorus customers), Pre-Meeting Briefs centralize key meeting participant details, past conversations, potential account opportunities, and account information in one place for you to review before a meeting.

This eliminates time-consuming manual research and ensures you have all the critical information you need to help you better understand your customer before you engage with them.

How It Works: AI-Powered Pre-Meeting Briefs are automatically generated and emailed to you before a meeting. No additional configuration is required.

Who Gets It: AI-Powered Pre-Meeting Briefs are available to organizations with Copilot Enterprise.

Pre-Meeting Brief

Here is a comprehensive meeting brief to help you prepare for the upcoming meeting with Smartsheet Inc:

Company Overview

- **Smartsheet:** Founded in 2005 and headquartered in Bellevue, Washington, Smartsheet is a cloud-based work management and collaboration platform that enables organizations to plan, capture, manage, automate, and report on work across the business.
- **Industry:** Smartsheet operates in the software and information technology services industry, providing tools for project management, workflow automation, and team collaboration.
- **Financials:** Smartsheet reported revenue of \$1.001 billion and has 3,341 employees.
- **Recent Events:** Smartsheet has been focused on modernizing its platform, launching new pricing and packaging models, and expanding its enterprise customer base. The company is also exploring AI-powered capabilities to drive user productivity.

Key Personnel

- **Mark Mader:** President and Chief Executive Officer
- **Praerit Garg:** President, Product & Innovation
- **Stephen Branstetter:** Chief Operating Officer
- **Thor Sanderson:** Enablement Senior Manager, Sales Technology (Key Contact)
- **Jessie Hammett:** Program Manager, Systems & Tools (Key Contact)

Potential Opportunities

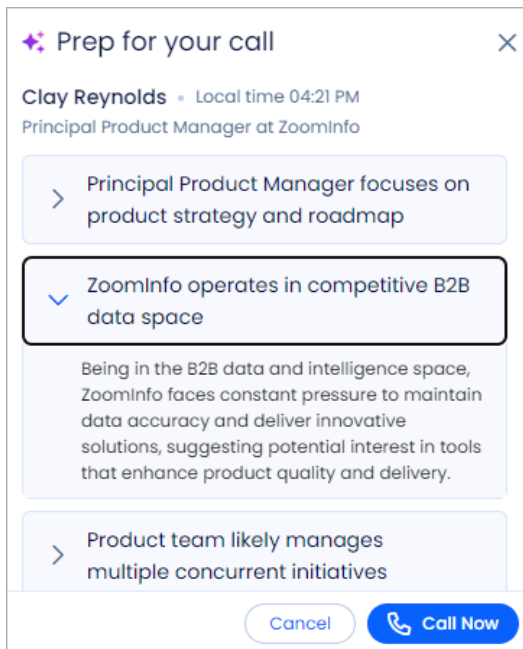
- **Platform Integration:** Smartsheet is looking to enhance its integration capabilities with other sales and marketing tools, such as Salesforce, Marketo, and Outreach. ZoomInfo's data intelligence and automation offerings could be valuable in this area.
- **AI-Powered Features:** Smartsheet is investing in AI-driven tools to improve user productivity and reduce support costs. ZoomInfo's Copilot AI capabilities may be of interest to help Smartsheet further develop its own AI-powered features.

AI Emailer and Dialer

Show Talking Points Before and During a Dialer Call

Adjustments to when we show talking points

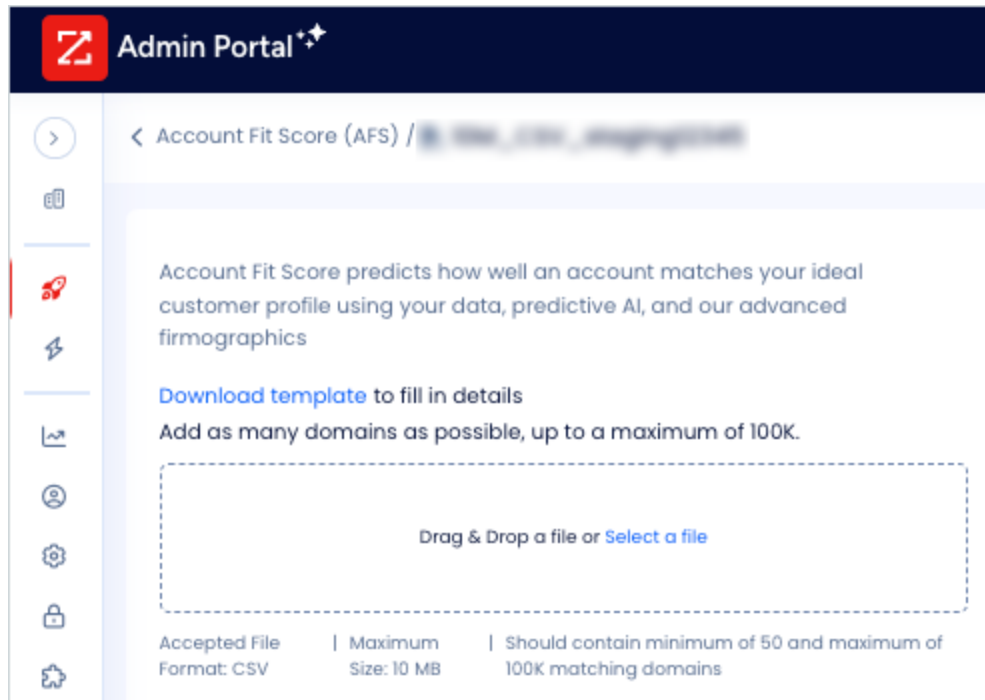
In our December 3, 2024 release notes we introduced AI-Generated Talking Points in ZoomInfo Copilot Dialer. As part of that release, Talking Points would display during the call only. With this release Talking Points are available to you before the call begins, giving you the opportunity to review the key insights before dialing.



Target Accounts and Account Fit Score

CSV Upload Enhancements for Defining Account Fit Score

Simplified process for setting up Account Fit Score (AFS) through CSV uploads



Adaptive CSV Mapping

You can now upload CSV files containing domain information regardless of column structure or naming convention, eliminating the need for manual reformatting and reducing setup time.

Previously, the CSV upload process required strict adherence to a specific template with a single column for domain names. Now, the system intelligently identifies domain information from your CSV files by recognizing common column headers such as "url," "domain," "website," or "domain name." Any additional columns in your file are automatically filtered out, streamlining the upload process.

Now, you can simply click **Select a file** and choose any CSV file containing domain information - the column header can use variations of common terms like "url," "domain," "website," or "domain name."

Smaller Account Lists

With this update, we've also reduced the minimum number of accounts needed in your CSV file from 100 down to 50 accounts.

This helps smaller or more specialized organizations to leverage the same sophisticated scoring system using a smaller number of accounts that larger enterprises use to optimize their go-to-market strategy.



Learn more [Account Fit Score Explained](#)

