ZoomInfo ↔ HubSpot Batch Enrichment Playbook

(Manual Round-Trip, Generic Version)

Audience: RevOps / Marketing Ops / CRM admins

 Objective: Enrich missing company and contact data in HubSpot by exporting lists, enriching them in ZoomInfo via bulk Enhance/ListMatch, and re-importing the updates **without** creating duplicates by matching on HubSpot Record ID.

0) Scope & Definitions

Phase 1 – Companies (firmographics)

 Goal: Fill in missing company-level fields such as:

- NAICS Code
- Industry
- Employee count
- Annual revenue
- Website domain
- HQ address (Street, City, State/Region, Postal code, Country/Region)

Phase 2 – Contacts (role & reachability)

 Goal: Fill in missing contact-level fields such as:

- Job title (primary target)
- Optional: work phone / direct dial
- Optional: mobile phone
- Optional: LinkedIn URL

Restrictions: Focus on contacts with **business email domains** (exclude free webmail like gmail.com).

System of Record:

- HubSpot is the system of record.
- ZoomInfo is a temporary enrichment processor; its output is accepted selectively and only for targeted fields.

Core principle:

All imports back into HubSpot **must match on the HubSpot Record ID** (Company ID / Contact ID) so records are updated in place rather than creating duplicates or mismatches.

1) Prerequisites

- **HubSpot**
  - User with access to:
    - Lists (to build active lists of Companies/Contacts)
    - Export (to export lists with Record ID)
    - Import (to update records from CSV)
  - Ability to export the **Record ID** property for Companies and Contacts.
- **ZoomInfo**
  - Active ZoomInfo account with access to:
    - **Lists → Upload Lists**
    - **Enhance** and/or **ListMatch** functionality
  - Visibility into enrichment credit usage.
- **Credits & Planning**
  - Confirm you have enough credits to cover the expected **number of enriched (matched) records**.
  - Decide whether you will:
    - Enrich companies only,
    - Enrich contacts only, or
    - Run both in parallel.
- **Pilot run**
  - Before full scale, create a small test:
    - e.g., **~200 Companies + ~200 Contacts**
    - Run through the entire process end-to-end.

- Validate:
  - Match rate
  - Field mapping
  - Data quality & overwrite behavior

2) Build the HubSpot Lists

You'll create **active lists** so they continually reflect records that meet "missing data" criteria until you're done.

A) Companies to Enrich (Active List)

Purpose: Identify companies missing **any** key firmographic field.

Build an active list for Companies with logic like:

- Use **OR** between these groups:
  - NAICS Code is unknown
  - Industry is unknown
  - Number of employees is unknown
  - Annual revenue is unknown
  - Company domain name is unknown
  - Street address is unknown
  - City is unknown
  - State/Region is unknown
  - Postal code is unknown
  - Country/Region is unknown

Notes:

- This gives you a "catch-all" list of companies missing at least one critical firmographic attribute.
- ZoomInfo matching works best with **domain + company name + location**, so even partial data is valuable.

B) Contacts to Enrich (Active List)

Purpose: Identify contacts missing job title but with a business email.

Build an active list for Contacts with logic like:

- Use **AND** between these groups:
    - o Email is known
    - o Job title is unknown
    - o Email domain **does not contain exactly** any major personal email domains, for example:
        - ▪ gmail.com
        - ▪ yahoo.com
        - ▪ hotmail.com
        - ▪ outlook.com
        - ▪ aol.com
        - ▪ icloud.com
        - ▪ comcast.net
        - ▪ att.net
        - ▪ verizon.net

Notes:

- Use a dedicated **Email domain** property (not just "Email contains") when available to precisely exclude personal domains.
- You can expand or shrink the personal domain list based on your market.

3) Export from HubSpot (Round-Trip Fields)

Export the two lists (Companies and Contacts) as **separate CSV files**.

Companies – Required & Recommended Columns

Required for round-trip:

- **Company ID** (HubSpot Record ID)

Recommended:

- Company name
- Company domain name
- Street address
- City
- State/Region
- Postal code
- Country/Region
- Industry
- NAICS Code
- Number of employees
- Annual revenue

Even if some of these are empty, export them so you can compare **before vs after** enrichment.

Contacts – Required & Recommended Columns

Required for round-trip:

- **Contact ID** (HubSpot Record ID)

Recommended:

- Email (preferably business domains only, per your list logic)
- First name
- Last name
- Job title (currently empty)
- Associated Company ID (if you use it)
- Company domain (optional but helpful for QA and cross-checking)

Tips:

- Keep column headers simple and descriptive.
- **Do not rename** the standard Record ID columns in HubSpot; leave them exactly as exported.
- Avoid special characters in column names to reduce mapping friction in ZoomInfo.

4) Prepare the CSVs for ZoomInfo

Create one CSV per object, for example:

- `companies_to_enrich.csv`
- `contacts_to_enrich.csv`

Key practices:

- Leave the **HubSpot ID** columns as-is (Company ID, Contact ID). These will flow through ZoomInfo and come back unchanged.
- (Optional) Add a helper column such as:
    - `source_batch` with a value like YYYY-MM-DD-companies-v1 or YYYY-MM-DD-contacts-v1.
    - This makes it easier to track what batch a record came from and what was run when.

5) ZoomInfo – Bulk Enrichment Setup

A) Navigate & Create Job

1. In ZoomInfo, go to **Lists → Upload Lists**.
2. Choose **List Type**:
    a. Companies (for your company CSV), or
    b. Contacts (for your contact CSV).
3. Choose **Enhance** (or **ListMatch**, depending on tenant naming).
    a. Both flows typically let you upload a CSV and map fields.
4. Upload your CSV file.
5. Name the list clearly (e.g., "HubSpot Companies to Enrich – Batch 01").
6. Add a short description, referencing the `source_batch` if you added it.

B) Field Mapping (Critical Step)

Companies – Matching & Pass-Through

Map at least:

- Company name → ZoomInfo's **Company Name**
- Company domain name → ZoomInfo's **Website / Domain** (best primary anchor when present)
- Address fields:
    - Street address → Street
    - City → City
    - State/Region → State
    - Postal code → Postal code
    - Country/Region → Country

Also **pass through**:

- Company ID (HubSpot) → ZoomInfo **External ID / CRM ID / Custom text field**
    - The goal is simply to preserve this field in the output.

Contacts – Matching & Pass-Through

Map at least:

- Email → ZoomInfo **Email** (primary match key)
- First name → First Name (secondary)
- Last name → Last Name (secondary)

Pass through:

- Contact ID (HubSpot) → ZoomInfo **External ID / CRM ID / Custom text field**

Goal:

No matter what ZoomInfo calls it, ensure the HubSpot IDs are **kept intact** in the ZoomInfo output. They are your anchor to update HubSpot records safely.

C) Configure Output & Matching Options

Select the enrichment fields you want returned:

- **Companies:**
    - NAICS Code
    - Primary Industry
    - Employee count
    - Annual revenue
    - Website/Domain
    - Full HQ address
    - Optional: Tech stack, company type, etc.
- **Contacts:**
    - Job Title (primary target)
    - Optional: Direct Dial, Mobile Phone, LinkedIn URL

If ZoomInfo provides options, configure:

- **Match threshold / quality level** (e.g., high-confidence matches only).
- **Do not create net-new records** (you only want enrichments to **existing HubSpot records**).

Start the Enhance/ListMatch job when mapping looks correct.

6) Run, Monitor, Credits & Time

Batch Sizing

For large datasets, process them in **chunks** (e.g., ~25k rows per file):

- Improves speed and stability.
- Easier to re-run a failed batch.
- Lets you pause after each batch to assess match rates and quality.

Credit Planning (Generic Logic)

Most ZoomInfo contracts charge roughly **1 enrichment credit per successfully matched record** (check your specific terms).

Approximate planning approach:

- **Company credits** ≈ `# of company rows uploaded × expected match rate`
- **Contact credits** ≈ `# of contact rows uploaded × expected match rate`

Example (just to illustrate math, not tied to any specific environment):

- If you upload 50,000 companies and expect a 90% match rate:
    - ~45,000 company credits used.
- If you upload 40,000 contacts and expect an 90% match rate:
    - ~36,000 contact credits used.

Total credits ≈ sum of those matched records.

Time Expectations

- Typical same-day completion for batches in the tens of thousands under normal load.
- Run batches sequentially when you want closer control over credits and data quality.
- Monitor job progress within ZoomInfo and keep a simple log (batch name, start time, end time, match rate, credits consumed).

Pro Tips

- Always start with the **small pilot batch** (~200 rows/object) to:
    - Confirm match rates.
    - Check that job titles & firmographics look reasonable.
    - Verify the HubSpot IDs are returning properly.
- Track credits as you go; if quality dips below your standard, pause and troubleshoot before running further batches.

7) Export the Enriched Results from ZoomInfo

Once a job completes:

1. Open the list/job in ZoomInfo.
2. Use **Export / Download CSV**.
3. Include:
    a. All enrichment fields you requested.
    b. The pass-through **HubSpot Company ID / Contact ID**.
    c. Optional source_batch (for audit).

Save with clear names, such as:

- companies_enriched_from_zi_batch01.csv
- contacts_enriched_from_zi_batch01.csv

8) Import Back Into HubSpot (Update in Place)

A) Companies – HubSpot Import

1. In HubSpot, go to **Imports → Start an import → One file → Companies**.
2. Choose **Update existing records** (not create new).
3. Upload your companies_enriched_from_zi_*.csv.

On the mapping screen:

- Map your file's **Company ID** column → HubSpot **Company ID (Record ID)**.
- Map enrichment fields:
    o NAICS Code → NAICS Code
    o Industry → Industry
    o Employee count → Number of employees
    o Annual revenue → Annual revenue
    o Website/Domain → Company domain name
    o Address fields → corresponding address properties

Review a few sample rows in the mapping step to confirm:

- Record ID is recognized as the unique match key.
- Other fields are mapping to the intended properties.

Name the import with a clear batch label and run it.

B) Contacts – HubSpot Import

1. In HubSpot, go to **Imports → Start an import → One file → Contacts**.
2. Choose **Update existing records**.
3. Upload your `contacts_enriched_from_zi_*.csv`.

On the mapping screen:

- Map your file's **Contact ID** column → HubSpot **Contact ID (Record ID)**.
- Map enrichment fields:
    - Job Title → Job title
    - Optional: Direct Phone → Phone (or a dedicated Direct Dial custom property)
    - Optional: Mobile Phone → Mobile phone number
    - Optional: LinkedIn URL → your chosen LinkedIn property

Again, validate the sample rows and then run the import.

Critical: Mapping the HubSpot **Record ID** is what ensures HubSpot **updates the correct records** rather than creating duplicates.

9) Quality Assurance & Rollback

Backups

Before each import batch:

- Export a backup snapshot from HubSpot for the records you're about to update, including:
    - Record ID (Company or Contact)
    - All fields you plan to overwrite (e.g., Industry, NAICS Code, Job Title)

Label the backup with the same batch naming convention and store it somewhere safe.

Spot Checks

After each import:

- Manually open 10–20 records across different segments (regions, industries, etc.) and verify:
    - Values look correct and reasonable.
    - Associations (e.g., Company ↔ Contacts) remain intact.
    - Critical fields weren't overwritten with clearly incorrect values.

Reporting

Create simple reports or dashboards to track:

- % of companies with Industry filled.
- % of companies with NAICS Code filled.
- % of companies with employees & revenue populated.
- % of contacts with Job Title populated.

Compare before vs. after to validate the lift from enrichment.

Rollback Plan

If you discover major issues:

- Use the **pre-import backup** CSV:
    - Import again with **Update existing** and map fields back to their original values using Record ID as the match key.
- You can roll back only specific fields (e.g., Industry) if needed.

10) Field Mapping Reference (HubSpot ↔ ZoomInfo)

Companies (Common Mapping)

ZoomInfo Field	HubSpot Property
Company Name	Company name

Website / Domain	Company domain name
Primary Industry	Industry
NAICS Code	NAICS Code
Employee Count	Number of employees
Annual Revenue	Annual revenue
Street	Street address
City	City
State/Region	State/Region
Postal Code	Postal code
Country	Country/Region

Contacts (Common Mapping)

ZoomInfo Field	HubSpot Property
Email	Email
Job Title	Job title
Direct Phone	Phone (or custom "Direct dial" property)
Mobile Phone	Mobile phone number
LinkedIn URL	LinkedIn profile / LinkedIn URL property

Adjust for any additional custom properties you maintain in your HubSpot portal.

11) Governance & Safety Nets

- **Overwrite policy:**
  - For an initial pass, you may allow enrichment to **overwrite** existing values for targeted fields.
  - For subsequent runs, consider a "complete only if empty" approach or a review layer for sensitive fields (e.g., Industry, Revenue).
- **Compliance:**
  - Enrichment must **not override** subscription/opt-out status.
  - Ensure your usage of contact and firmographic data complies with applicable regulations (e.g., GDPR, CCPA) and your own privacy policy.
- **Documentation:**

- o Maintain a simple log of:
  - Batch IDs / names
  - File names
  - Dates run
  - Match rates
  - Credits used
  - Any issues encountered

This log becomes invaluable when troubleshooting or repeating the process later.

Appendix A – Runbook Checklist

Before You Start

- Confirm ZoomInfo access and enrichment/ListMatch permissions.
- Confirm available enrichment credits.
- Build & validate the two HubSpot active lists:
  - o Companies missing firmographics.
  - o Contacts with business email & missing job title.
- Export CSVs including **Record ID** columns.
- Prepare a ~200-row pilot sample for Companies and Contacts.

ZoomInfo Enrichment

- Upload CSV → Select Companies/Contacts → Choose Enhance/ListMatch.
- Map keys:
  - o Companies: Name, Domain, Address + Company ID as External/CRM ID.
  - o Contacts: Email, First/Last name + Contact ID as External/CRM ID.
- Select enrichment fields (company and contact fields).
- Run pilot job → validate output (match rate, data quality, IDs preserved).
- Run full batches (ideally ≤25k rows each), monitoring credits and match rates for every batch.

Re-Import to HubSpot

- Export enriched CSVs from ZoomInfo including HubSpot IDs.
- Create backup exports from HubSpot (with Record ID + target fields).
- Import Companies:
  - o Choose "Update existing records".

- - Map Company ID → Company ID (Record ID).
  - Map enriched company fields.
- Import Contacts:
  - Choose "Update existing records".
  - Map Contact ID → Contact ID (Record ID).
  - Map Job Title and any optional contact fields.
- Perform QA spot checks on enriched records.
- Update reports/dashboards to show before/after completeness.
- Archive files and log batch details (names, dates, match rates, credits used).