



Case Study: Solving CRM & ZoomInfo Data Integrity Challenges

Overview

Modern revenue teams rely heavily on platforms like ZoomInfo and CRM systems to power sales and account management workflows. While these platforms provide robust integrations and extensive field mapping options, organizations often encounter broader operational issues related to data integrity, duplicate management, inconsistent formatting, and account reconciliation across systems.

The Challenge

A growing organization needed to reconcile large volumes of ZoomInfo account data with its CRM platform. Although ZoomInfo offers excellent support and flexible mapping capabilities, the organization faced challenges that extended beyond standard implementation workflows.

Inconsistent website formatting, duplicate records, fragmented account ownership, and manual reconciliation processes created inefficiencies and impacted CRM reporting quality. The organization required a custom operational solution designed specifically for its data environment and business processes.

The Solution

Intent Engine Marketing developed a custom reconciliation and matching workflow tailored to the client's operational needs.

The solution standardized website domains, validated account relationships, and applied deterministic matching logic to identify existing CRM accounts before new records entered the system. Rather than relying on broad fuzzy matching, the workflow emphasized consistency, auditability, and scalable account validation.

The result was a structured and repeatable process that improved CRM hygiene, reduced duplicate account creation, and streamlined operational workflows.

Business Impact

The custom solution significantly reduced manual reconciliation effort while improving CRM data quality and operational scalability.

Key outcomes included:

- Reduced duplicate account creation
- Improved CRM reporting accuracy
- Faster account reconciliation workflows

- Better ownership and account mapping consistency
- Scalable data validation processes

Why Custom Solutions Matter

Platforms like ZoomInfo and modern CRM systems are extremely powerful and provide excellent native functionality and support resources. However, many organizations eventually encounter operational edge cases and data integrity issues that require more specialized solutioning.

While ZoomInfo's support teams are highly knowledgeable, they are naturally limited by standard operating procedures and platform scope. Custom workflows, reconciliation logic, and operational exceptions often require hands-on technical expertise to fully resolve.

Intent Engine Marketing helps organizations bridge that gap by designing practical, scalable custom solutions tailored to real-world operational needs.

Let's Talk

If your organization is struggling with CRM data integrity, duplicate management, account reconciliation, or ZoomInfo integration challenges, Intent Engine Marketing can help.

We specialize in building practical operational solutions that improve data quality, streamline workflows, and help revenue teams scale more efficiently.

Set up a call with our team to discuss your current challenges and explore what a tailored solution could look like for your business.