How to Enrich Your CRM and Create Automations With Apollo

Video 1: HubSpot Integration

Hey everybody, Josh Garrison here again. And in this video, we're going to cover integrating your HubSpot CRM with Apollo. If you have Salesforce, we have a different video covering integrating Salesforce. So with that said, let's dive right in.

We're going to go again to the top right hand corner of our screen to the settings wheel and on the left hand side of our screen, we're going to go to ‘integrations’.

Now we have a variety of integrations you can choose from, and if you scroll down and you haven't done this yet, you'll find Salesforce and HubSpot listed here. If you have a different CRM that isn't Salesforce or HubSpot, I do recommend that you take a look at our Zapier integration, which will allow you basically to get data from your CRM to Apollo and vice versa without having a direct connection. That said, we do support HubSpot and Salesforce right out of the box. And in this instance, I've already connected my HubSpot account. So I'm going to go ahead and click into that.

If you haven't connected your account yet, it's pretty straightforward. Just hit ‘link account’. It'll prompt you to log into HubSpot. You will need to have proper permissions in HubSpot to allow an integration, and then it will land you on this page.

Once you get to this page, there's a few things I'd like to walk you through. The first is record visibility. This just allows you to decide whether you want your users to search for your HubSpot records in Apollo, or whether you want them to go into HubSpot to do a search for the contacts.

In your HubSpot instance, if you scroll down, you have the ability to force a sync between HubSpot and Apollo, where you can pull all of your HubSpot contacts into Apollo or all of your HubSpot companies into Apollo. You would want to do this manually if, for example, you had come in for the first time and you configure this push setting, which we'll talk about now.

So push settings are the ability to push data from Apollo to HubSpot. So it will push any newly created contact to your CRM and then update them whenever a field in Apollo changes. So let's say your team is doing prospecting in Apollo. They build a list. They add that list to a sequence. When they save that person to their list and use a credit to get their contact information—if you were to enable this—this would save them to HubSpot.

One thing you will want to keep in mind is that HubSpot charges you based on the number of marketable contacts in your HubSpot database. So if you don't turn on some kind of filter in HubSpot or a workflow to mark all of the people pushed this way from Apollo to HubSpot, you could start seeing your cost for HubSpot increasing if they're being marked by default as marketable—something to keep in mind.

If you were to enable this, this would not retro actively push contacts from Apollo to HubSpot. In order to do that, you need to come in and initiate a sync manually. So we're going to go ahead for our purposes and leave ‘push contacts’ off. And instead, we're only going to create contacts in HubSpot if they reach certain stages in Apollo, which I'll cover in a second. Basically, this is a way for us to control our integration a little bit more. And for example, instead of pushing people to our HubSpot instance as soon as we prospect them, we would only push them to our HubSpot instance once we book a meeting with them, or once they reply to our email and say that they're interested. We have a little bit more granularity if we use this route.

Now we also have the ability to push accounts into our CRM and I'm actually going to show you how to do that. So I came into my HubSpot instance and I clicked on the settings wheel from here. I'm going to scroll on the left hand side to ‘properties’ and now I'm in the contact properties.

So what I'm going to do now is create a property. I think out of the box HubSpot gives you original source, but that's not a customizable field as far as I know. I think you can add options in the pick list, but I'm just going to go ahead and create one. This is an object contact. The group is going to be under contact information. The label will be ‘source’ and I'll say “where did we get this?” And we can then hit ‘next’. This is a field type. It does need to be a ‘text’ field. If we go back into Apollo, you'll see that: “must be a text field and not read only”.

So we hit ‘next’ and we can set any kind of limits that we want or whatever we want to do there and we can create this.

So now when I go back into my Apollo instance, I'm going to choose a source and you'll see this is the field. So I have the source field here. I have the source field here. I can connect that, and Apollo is going to be the source. So if I am pushing records from Apollo into HubSpot, I can now see that it came from Apollo. And I can go ahead and hit ‘save’.

Now I can go ahead and repeat that exact same process for accounts if I wanted to, but I would come back into HubSpot, and instead of creating a contact property, obviously now I'm going to be creating a company property. Accounts in Apollo is synonymous with companies in HubSpot.

Before we move on to talk about stages, I do want to cover some of our mappings. So we have stages here and I'm saving those for its own video because there's a lot you can do with stages. But what's important to note are the default fields and the custom fields.

So there are default fields in Apollo and fields that you have on the contact record in HubSpot and we have to decide how we want those two things to play with each other. We auto populate as many of these as we can for you, like first name and last name. But the setting you want to keep an eye on is over here on the right: ‘auto overwrite’ and ‘auto fill’. So if you want Apollo to auto overwrite the value, if what's in HubSpot is different than what's in Apollo, you can turn that on.

One thing to keep in mind is things that you manually edit will always have precedence over things that we update automatically. So if you manually change somebody's name, phone number, email address, something like that, we're not going to overwrite it. But in every other instance, what you select here is going to make the determination for you.

The other option is just to auto fill. So let's say you have a value in your CRM already, but you pull new contact information from Apollo. Do you want that to fill in? If it's missing in HubSpot, I recommend you go through these and any of the fields that you have by default, you can configure them here and then you can do the exact same thing for your custom fields.

So these are all the custom fields that I have created in Apollo and I have to map them to the contact fields that I want in HubSpot.

Video 2: Salesforce Integration Pt. 1

Hey everybody, Josh Garrison here again. And in this video, we're going to cover integrating your Salesforce account with the Apollo platform. Now, before I dive in and we configure the integration, there's a couple of things to keep in mind.

First and foremost, is that you're going to want to spend some time cleaning up your Salesforce account if you have a lot of duplicates, because Apollo will not do the work of de-duplicating Salesforce contacts for you. Any data quality issues you have in Salesforce in terms of duplicates and messy record types and all of that kind of stuff is going to reflect in Apollo. So before you turn this on, it might be worth keeping that in mind.

With that being said, to get to this page, just go to the settings wheel in the top right hand corner of your Apollo account and on the left hand side, scroll down to integrations. Now you are going to need some admin permissions in Salesforce to configure this integration, but assuming you have those, we'll just dive right into it.

You can find Salesforce from this list of available integrations. I have already connected my Salesforce account, but if you haven't, it's not very hard. You just hit ‘connect’. It's going to kick you over into Salesforce. You'll have to enter your password and then it will land you on this page.

This is where we can configure all of the various components of the integration with Salesforce and Apollo. First and foremost, we have our pulling records. This is where we can pull records from Salesforce into the Apollo platform. So you can see that listed right here. It's how information is downloaded from Salesforce. So if I click into this and go to ‘view’, I have a bunch of configurations that I can set up.

First and foremost is, do I want to show my contacts from Salesforce? By default, all of your Salesforce contacts and all your Salesforce leads are going to be pulled into Apollo. And it's not possible to disable this because we have to de-dupe the records against the ones we have in our database. What that means (I know I just said we're not going to do that for you)—this is talking about something different—what that means is when you come into Apollo and you go to ‘search’, we are immediately going to take all of the people in your Salesforce and we're going to add them to the ‘saved’ tab. So we're going to de-duplicate them against the entirety of the Apollo database.

We're going to do that by default, but you can hide your Salesforce contacts if for some reason you want to do that. You may want to do that if you have a wonky Salesforce setup and maybe only existing customers are in Salesforce and you want to not have those people be prospected or reached out to (something like that), but in general you're going to want to have this turned on.

Now we also have the ability to automatically match leads to accounts in Apollo. So the way Salesforce is set up, a lead converts to a contact and a contact is associated with an account. What this setting will allow us to do is infer the account in Salesforce with a lead. Okay. If you're interested to learn more about this, you can click on this little button, it's going to take you to the Knowledge Base and hopefully you will have bookmarked the Knowledge Base already.

So you'll already be familiar with this. Now you can also initiate a manual poll between Salesforce leads and contacts and your Apollo contacts. You might want to do this if let's say you've just done a webinar or something and you've manually loaded a bunch of people into Salesforce, but you want to enrich those contacts, or you want to email those contacts from Apollo, you might want to initiate a poll manually. Otherwise, it does happen every 15 minutes.

One thing I'll call out here is that Apollo doesn't have a distinction between leads and contacts like Salesforce does. So in a minute, we're gonna have to choose which of those two record types we really want to use as the foundation of our integration. Apollo just has contacts, Salesforce, you've got leads and contacts. So that's something to keep in mind. We can configure basically the exact same settings for accounts. Only this setting is a little different where we can infer missing data for Salesforce accounts with no name or no website. So basically this is just Apollo doing its best to fill in around the edges with your account information in Salesforce.

Now we also have the ability to pull opportunity records into Apollo, which you are likely going to want to do. And we can infer your account stages based on your Salesforce opportunities. We can also show those opportunities in Apollo. So in the Apollo platform, we do have this opportunities tab and you can show all of the open opportunities in Salesforce and the opportunities tab if you so desire.

Lastly is tasks, which is you basically can create tasks in Apollo from tasks in Salesforce. You might want to do this if you have, like, process builder or workflows set up in Salesforce that will create a task on an account. Let's say maybe you have a renewal workflow. When the account is three months from renewal, you create a task in Salesforce, but your team is working from Apollo, you can have that task created in Apollo.

So that is the pulling records from Salesforce. Now we're going to dive into pushing records from Apollo, where this is a little bit more involved.

<u>Video 3: Salesforce Integration Pt. 2</u>

We first have the ability to push new Apollo contacts to Salesforce. This is something that you should be careful about and intentional about when you create a new Apollo contact, meaning you go into the search tab and you actually save a record for a contact and get their contact information—we can push that. We have to decide how we want those to be treated in Salesforce.

So this is what I was mentioning earlier. Salesforce has contacts and leads, but we only have contacts. So you have to choose one or the other, depending on the implementation of your Salesforce, there's no right or wrong answer here. I would say for the most part, leads is probably the right record if you're pushing everybody in at the time that new contacts are created from Apollo.

Here's what I mean by that. The moment somebody goes and they save a record in Apollo, they are prospecting. If you're initiating that record as being pushed into Salesforce, that's most likely going to correspond to the lead record, but not always—you know better than I do.

If you don't want to have to mess with that too much, you still have to pick one or the other—leads or contacts—but what you can do is you can turn on this setting to 'only create contacts in Salesforce if at certain stages', which we'll talk about in the next video. But basically stages are a way for us to determine in Apollo what our relationship is with that lead. And I'll get to this in a second.

But a stage, these are all the stages that we've configured in our Apollo instance. So if we haven't reached out to someone yet, they're cold. If we've reached out to them already, but they haven't replied, then they're engaged. Things like that. So what we can do is we can configure this integration to only push people to Salesforce if they reach a certain stage in our Apollo workflow.

So maybe we don't want to push everybody that we haven't emailed yet, but as soon as we start working that lead, we want to push them in. And so we would turn this on and we would say, "Hey, if they're at the engage stage, push them into Salesforce", something like that.

Now we have to configure the source of the contacts that are pushed over from Salesforce. Salesforce does have a source field by default. And so by default, this is going to be Apollo.

Lastly, is this button: "push guessed emails into Salesfoce?" So as you know, more than likely when you're building a list in Apollo, you have the option of choosing the email status for the contacts that you're prospecting. You can choose ‘verified’, ‘guessed’, ‘user managed’, ‘new data available’—whatever you like, and some advanced filters as well for guessed emails.

So a guessed email is an email that Apollo is inferring based on the pattern of email address at that company. So Apollo often uses first name, last name @ apollo.io. My email: josh.garrison@apollo.io. So if one of my colleagues, we have their email on the Apollo platform, we will guess their colleagues based on that pattern. The downside potentially of pushing guessed emails into Salesforce is that not all of the guessed emails are going to be real because we are guessing. And then you may have incorrect contact information in your Salesforce. So turn this on with caution.

Now we can go to the accounts tab, and we're going to run through that exact same process. If we are pushing new accounts that we find and save from Apollo, which you can do here, go to ‘companies’. A company in Apollo is an account in Salesforce. So we can push new Apollo accounts to Salesforce, and we can similarly only do that at the certain stage if we want to do that.

Then we can also configure which Salesforce field we want to use for the account source, because accounts in Salesforce don't have a source by default. So if we wanted to, we could go into Salesforce and create a custom field. But in this instance, it's entirely up to you how you want to do this. And by default, it'll come from Apollo. Very similarly with opportunities, but this integration is a little bit more limited. It'll just pull that opportunity information into the opportunities tab. And then lastly, same for activities.

I highly recommend that you do turn on the sync of pushing records to Salesforce based on activity, because you're likely doing a lot of activity in Apollo. So we want to turn on the outgoing emails that we have sent from Apollo, from our Gmails and any replies to our Apollo emails from our Gmail—we want to push those into Salesforce as well, just so Salesforce remains that single source of truth.

We can do the same for notes, tasks, calls and meetings or calendar events. “Push all calendar events even if the participants don’t exist in Salesforce” by default is turned off. If you want to turn this on, consider that you may have a meeting with a group of people, for example, and some of those people in that meeting may not actually be at that buyer. They may not be at that account. They may not be even associated with the deal. Maybe it's a contractor, a consultant, a legal person, whomever. So you may end up with people you don't actually want in your Salesforce in your Salesforce. Keep that in mind.

<u>Video 4: Salesforce Integration Pt.3</u>

From here, we're going to just go back to the ‘Sales Integration Setup’ page. So we've covered the first two: ‘pull records’ and ‘push records’. So we're going to skip ‘stage and field mappings’ really quickly. And we're just going to talk through ‘Salesforce authentication settings’ and the ‘error log’.

The authentication settings just allow you to choose an admins credentials to be the team-wide sync account between Salesforce and Apollo. So you want to use the Salesforce administrators credentials for this. If you have set up the Salesforce feature assignment rules—which is similar, it's like their lean data, it's their routing rules for how leads get assigned in Salesforce, and you don't want to have to recreate that in Apollo—you can turn this on and that will just follow those rules whenever new contacts are added to Salesforce or leads are added to Salesforce from Apollo.

If you are deleting records from your CRM and you want that to reflect an Apollo, that's what ‘delete sync settings’ does. And the same with ‘merge sync settings’. So we'll merge any records that are merged in Salesforce. If you have five accounts in Salesforce, you merge to one, then we will merge them in Apollo.

Going back to the ‘error log’, periodically, there will be errors in the integration between Salesforce and Apollo. This is where you can see where those errors are and where you can resolve those errors.

You may run into errors for a variety of reasons. In this example, there may be no contact or lead in Salesforce. You may run into issues with API call limits or something like that. So this is where you can check those.

Okay. So before we move on to talk about stages, I do just want to cover field mappings really quickly, which is this section of the integration. Out of the box, there are fields in Salesforce that you may want to map with Apollo, especially as you consider, you're going to be pulling new contact information from Apollo into Salesforce, and maybe you already have existing records in Salesforce, you have to decide what you want to do there. If you want to overwrite the information—if the value in Salesforce is different from what's in Apollo—or if you want to auto fill the information.

Something that I'll call out here is if you manually edit information—that takes the cake. That's always the highest priority. So when we're configuring these mappings, we're really only talking about what happens if you haven't manually changed it. For example, if you're working a lead and they tell you that their email address has changed and you manually change that email address, we're not going to touch that.

But in any other instance, we can configure how we want these fields to be handled. So what you have here is the field in Apollo on the left. You get to choose which field you want to map to in Salesforce here on the right. And we'll auto populate as many of these as we can for you. And then we have to decide if we want to auto overwrite or auto fill. So if you're missing information in Salesforce, you pull a prospect in from Apollo—do you want us to automatically fill that information out?

I recommend you go through these. It's important that you have the main ones: phone number, name, email address, title, company—that kind of thing—configured. And then from here, we can do the same thing with our custom fields. So the default fields are what comes out of the box in Salesforce, the custom fields are the fields that you've created. As you can see here, these are all the custom fields that we have from Apollo, and we have to decide what we want to do with them with Salesforce. So that's what we could do with the default fields, but we can do the exact same thing with any custom fields that we've created in Apollo and custom fields that we've created in Salesforce.

You do not have to map one-to-one every field, right? So there can be fields in Apollo that you don't want mapped into Salesforce. And there can be fields in Salesforce that you don't want mapped to Apollo. With that being said, you can do the exact same thing for leads, for accounts and for opportunities.

Now we're going to talk about stages and how we can use those to deepen the integration between Salesforce or HubSpot and Apollo, and I'll see you in that video.

<u>Video 5: Plays Pt. 1</u>

Hey everybody, Josh again. And in this video, we're going to be covering plays, which is Apollo terminology for powerful automations we can make either just using Apollo data or integrating data from our CRM to address automation throughout the life cycle of our customers and prospects. It's one of my favorite topics, so let's get right into it.

All right, everybody. So here I am in Apollo and I'm not going to click on the settings wheel in the top right hand corner like we do in so many of these videos. Instead, I'm going to click on the 'play's button along the top, or you may see it along the side, depending on the UI that you have.

So plays, we have a lot of automations that we give you right out of the box that you can view by hitting 'all templates'. There's a few that we recommend right out of the gate: 'work companies researching your category', 'automatically hit no shows' and 'sequence for outdated contacts'. There's a lot that you can set up with templated automation right here.

But before we get into any of those I want to show you how to create a play from scratch and give you a couple example plays that I'd recommend that you set up and we can go from there.

So I'm gonna go ahead and hit 'create from scratch' on the bottom right hand corner. And now we're into the play creation wizard. So a couple things we have to decide right out of the gate. The first is, do we want to be targeting individual people or companies with this play?

Companies—obviously, you're going to be a little bit more limited on what you can do. You can't add a company to a sequence from a play. But you can create a task or an alert or something like that for your team. For this example, though, we are going to stick with people, which I think is probably the more common play type you're going to create.

I want to show you an example of how we can create a play to automatically add inbound leads to a sequence. This is one of the most powerful and highest-value things you can do with Apollo. Not only do you want to be building a pipeline by going outbound, but you also want to be reaching out to the people who are trying to get in touch with you from your website as quickly as possible. So we'll say 'inbound demo requesters' and 'this play automatically adds inbound leads to a sequence'.

Now we have to decide a configuration. Do we want to run this play on a particular date or schedule or when a specific event occurs? There's an appropriate time and place for either of these. So let's talk through it a little bit. If I was creating a play, for example, that was going to go add all of the people who had marked me as spam to a 'do not contact list' and then add all new people to replace those people into my sequences, I would want to do that maybe on a daily basis, for example. But if I want to work a lead that just requested to talk to me from my website, I want to do that as soon as possible. Not on a predetermined schedule.

We're going to go ahead with 'when a specific event occurs', and we're going to have to now select the event. We have a variety of options we can choose from. You have a lot of things that you can do based on their interaction with your email content.

So if they open an email, you can say, "Hey, create a task for my team to call them when they open the email". That would be a play that you could create. if they click on your email—which I don't recommend you track clicks for deliverability purposes, but you can do it. If they click on your email, you can do the same thing: add them to a call or send them a LinkedIn message. If they unsubscribe from your email, maybe you want to replace that contact with somebody else at the same company—lots of different options here.

In this example, we're going to say 'contact created', and then we can click 'advanced options'. So that will let us determine how often somebody should be able to be added to a play. So what that means is, let's say somebody comes to your website, fills out your 'contact me' form—they become a lead. And then they do the same thing six months from now. Should they be able to be added to the play every time? Or do you only want this to be eligible to somebody to happen one time? It's up to you to decide. In this example, I think every time is fine.

Now we're into filters. So this is where Apollo's plays differs from something like... Outreach's triggers or HubSpot workflows or process builder and Salesforce. Normally, you would expect to see some Boolean logic here, but because Apollo has the prospecting data of over 260 million people and many millions of companies, instead of adding Boolean logic, we can just add filters from the search tab in Apollo right in the play builder. So I'll go ahead and hit 'add filters'.

So what I have done here is, using my CRM integration, (which if you're curious about, watch the video on the CRM integrations) I have mapped my custom fields from my CRM into Apollo, and I have a few fields that I can use, like lead source. So as long as I have mapped a lead source field from my CRM to Apollo, I can select that from the custom field here.

And now because I want to create a play to automatically contact my inbound leads, I can just select ‘is any of’ inbound. This is something I'd set up in the past. So if a lead is an inbound lead, then they'll appear over here on the right. Look, that's me. I can go ahead and hit ‘save filters’.

So what I've done so far is I've said, “Hey, I'm going to create an automation for people who, when their contact is created and their status is inbound, then we have to choose something to do to them.”

Out-of-the-box plays will recommend that you create an alert to take an action. I'm going to turn that off and alert is, to me, not incredibly useful in this instance, instead, what we want to do is we want Apollo to actually do a lot of work for us. So we have to choose what we want it to do. We have to automate an action and there's a lot of different things we could choose from.

We can say do nothing. Wait, right? We could update a contact field, add to a list, remove from a list. But what I want to do is I want to add it to a sequence and the sequence I'm going to choose—I have to have already created the sequence. (We have a whole video on sequences. So take a look there.) I want to choose my inbound lead sequence.

And now I get to choose who do I want to send that email from? If I have lead routing set up in my CRM already and a contact owner is assigned at the moment somebody enters the CRM, then I can just send it from the owner.

But if I don't have that set up, then I can just round robin it between the people on my team. I can say, “Hey, round robin between me and Vance”. And I also have the ability to rotate the mailbox if I've connected multiple mailboxes from each of my users. But then I can just hit ‘save’.

And so I've now created a play that's going to automatically take my inbound leads as soon as they come into my CRM, they're going to go into a sequence. And all I have to do to turn that on is I have to hit ‘activate play’. Don't forget, that's an important part. Hit ‘activate play’.

<u>Video 6: Plays Pt. 2</u>

There's a lot more you can do with plays. And in a previous video about stages, I created this stage saying ‘follow up in three months’. So I'm going to show you another automation you can make. And then we'll talk a little bit about the template plays that we have.

So I'm going to go ahead and hit ‘create from scratch’ again, and I'm back to targeting people. This is my followup list.

So the context for this, if you didn't see the stages video, is that sometimes when we're going outbound or even if we're working inbound, we don't get a yes or no. What we hear from people is “I could be a good fit for this, but not right now”. So what I want to do is I want to work those leads. I don't want to just let those people fall out of my pipeline, right? I want to be following up with them in three months or in six months, but I don't want to have to keep that reminder in my brain. I don't want to have to have a long checklist of tasks to do. So instead, I'm just going to create an automation for it.

And what I'm going to say is when a specific event occurs, so when a contact is updated and the contact stage is ‘follow up in three months’, then—and we can now even say a previous value (so we could say if I was ‘approaching’, meaning I had emailed or called them, and then it went to ‘follow up in three months’)—now what I want to do is I want to ‘create a task’, or I want to add them to a sequence. So I'm going to duplicate my Apollo instance. I'm going to go into ‘engage’. I can create a new sequence from scratch and I'll say ‘follow up sequence’. All right. And what I'll do here is I'll add a step for a phone call, but instead of immediately adding somebody to the sequence, I'm going to choose 90 days. So three months after I mark them as ‘bad timing’ or ‘follow up in three months’, I can add them to a sequence automatically and I will get a task. And then I can edit this task a little bit to say “90 days ago, this person said they were interested, but not right now. Call them to check in” and then I can turn this sequence on.

Okay, so now if I go back to my plays builder, what I've just done is I've used that stage that I set up earlier (‘follow up in three months’) When somebody enters that stage, then we're going to add them to a sequence. And I think I'm going to have to refresh this page really quickly. And now I can add them to follow up sequence.

Okay, so I've already walked you through two plays that we can set up from scratch using a custom stage that we created or a custom field that we mapped in from our CRM. But we can also create plays based on just what exists in Apollo using Apollo's incredible prospecting data.

I'm going to show you one more because I'm conscious of time. I can spend an hour or more talking about this, but we're just going to hit ‘work companies researching your category’. What this does is it uses the buyer intent data that we have in the Apollo platform to add people to a list or to create a task for your team to go add people from that company into a sequence or, you know, otherwise into your prospecting. So we're going to go ahead and hit ‘create’.

Now this one is set up a little bit differently. This targets companies. And we already have our description pre-filled and it runs on a specific day or schedule that’s set up to run every day, once a day. And I'll set this up to run, you know, early in the morning, starting tomorrow or starting on Wednesday. I'll set this up to run at 5 a.m. So before any of my early bird SDRs get on and it's never going to end.

And what we're going to do is we can now hit ‘edit filters’, but it's already got some set up out of the box. It's going to choose an intent topic and it's going to choose an intent score and we can edit those filters even more.

So we're looking at company filters now, not people filters. But what we're looking for is if we scroll down we're saying, “Hey, if they have buyer intent for any one of these topics”—and we can edit what that intent is—we can say, “Hey, it's high score”, and then we hit ‘edit’ for the topic. There's something like 1600 topics we can choose from. And this example, I'm just gonna make one up. I had set up earlier ‘graphic design service providers’.

So what's actually happening here is we're looking for any company who, based on what they're doing on the internet, we think are interested in graphic design services.

So we can narrow those filters down because there's probably a lot of companies who meet that criteria. So I'm just going to narrow this down and I'm going to say, you know, give me companies who have between 50 and 100 employees. And this is basically saying there's too many people. This play will not be active until after eight o'clock in order to maximize company inclusion. Cool.

Now I can choose what to do with it, right? I can set up an alert if I want to, I could add these accounts to a list. I could say these companies are researching graphic design. And I can set a field for that if I want. I can assign an owner to it. I could say, “Hey, Vance, every morning I'm going to send you a new list of companies who are interested in graphic design”.

And then if I wanted to, I could even create a task and I can add more steps if I want to a play, right? I can add as many steps as I want, but I can set a task here for Vance and I can say, “Hey, go add three people from this account to a sequence”.

So that's a great example of automating part of the prospecting process, right? I don't always want to be coming into Apollo and doing prospecting manually. I want to automate that as much as possible. So I can take this even further. I can make another play and I could actually automate my prospecting entirely.

I can come in here to add filters and I can say, “Hey, we're gonna go ahead and target people” and I can just add whatever filtering I've done. If I've set up personas before, I can say, “show me the marketing agency owners (or whoever I've added into my persona) and on a specific date, let's say every day or every week, find people who meet that criteria for my persona.

And then what I'm going to do is first I'm going to add them to a list, and what that will do is that will use a credit to get their contact information. Right. And then I can add another step. First is to add them to the list. And the second thing I can do is I can add them to a sequence and using plays in this way, I can actually automate a lot of the manual work that I would otherwise be doing in Apollo or in any other tool.

I think this is the power of having the data and the engagement in the same platform. I can specify my prospecting criteria, and then I can add them to a sequence, or I can create a task. I can do whatever I want here.

So a ton of power that you can create with plays. There's just so much more you can do. You can chain plays together. Highly recommend you spend some time here figuring out what's right for you.

Otherwise, that's all I have for this video. I'll see you in the next one.

<u>Video 7: Apollo Analytics</u>

This is where you can get data on how all of your engagement and your emails and your phone calls and your LinkedIn messaging—you can see how all of that is performing so that you can optimize your outbound workflow. Let's dive in.

All right. So of course, here I am in Apollo and you'll notice that my UI may look a little different than yours, depending on when you're watching this, that's because I am showing you a live from the Apollo instance of Apollo.

What I'm going to do is I'm going to click on the left or along the top, depending, and I'm just going to click on analytics, which is underneath the ‘engage’ tab, and that's going to take me here to this reports page.

Now there's two things that we can look at. We can look at dashboards and we can look at reports. A dashboard is a collection of reports. So let's go ahead and start with reports and then we'll zoom out and we'll go to dashboards.

We do have some templates that you can use to build your reports, but I want to show you how to build them on your own. So we're just going to go ahead and click ‘create report’.

Now I want to see some email performance stats for a few of the account executives on my team. I can give my report a name and then I get to decide who has access to this. And what I'm going to do now is I'm going to add some filters really quickly. I'm going to hit ‘save’. So I've got my workspace saved here and then I can just hit ‘edit report’.

Okay. So first thing I have to do is decide what timeframe do I want to look at? And I'm interested in looking over the last 30 days. So I'll just leave it at that. Now I have to add some filters. I want to look at some users on my Apollo instance. So I'm going to drop their names here. I'm going to say Lindsay, Sarah, and David.

So this tells me what this report is actually going to query. Next, I have to actually, on the right hand side, decide what I want to be analyzing. So I'm interested in seeing how our emails are performing. I want to see the number of emails sent. And I want to see the percent that were delivered and the percent that bounced and the percent that were opened and the percent that replied with interest.

That's going to give me a pretty healthy amount of data to start. And now I have to choose how I want to visualize that. And I have a bunch of different options. I can do like a heat map, a pie graph, bar chart, line graph. I think a table makes the most sense for this query.

So I'm going to go ahead and hit ‘run’ and you'll, see here's my report over the last 30 days. We've had 4,600 emails sent. Most of them were delivered. A large percentage of them were opened and a healthy reply rate as well.

But let's say I want to dive a little bit deeper into the data. What I can do is on the right hand side, I can click on dimensions.

So metrics, these are hard numbers that we can pull things for, right? How many calls did you do? LinkedIn tasks? Number of accounts you called? That kind of thing. On the right, these are ways we can slice that data for you to make building reports and dashboards really easy.

So let's say, for example, I want to see how these things performed by day of the week. I can just choose day of week. I can hit ‘run’. And now this report comes back to me like this. This is kind of interesting, right? I'm noticing that my reply rate on Sundays is much, much lower than it is on every other day of the week by like a factor of four or five. So immediately I have something that I can take away from this.

So from here I can go to the settings tab, and now I can go to schedules and this can allow me to edit the schedules that my sequences will be sent on. And you'll notice, hey, some of these include Sunday. Well, the data is showing me that Sunday's probably not a good time to be emailing people. Let's go ahead and take that off so that Apollo will only send emails Monday through Saturday.

That's just one example of a report that you can build really quickly. I'll go ahead and hit ‘save and finish’. And now I'm going to have this report I can check at any time, and I can go back to reports now. And if I want, I can actually build a dashboard.

So now I'm going to go to dashboards and I'm going to hit ‘email engagement stats’. This is going to give me a variety of reports right out of the box. I can see which rep is sending the best emails. And if I want to change the date, I can just click over here. I can select a date range. Let's say from the beginning of June till now, and let's see who is actually sending the best emails.

It looks like Clara is sending the highest percentage of emails that got opened. I can scroll down. Hey, what sequences are most effective? What templates are most effective? What sequences have the most success? These are reports that were built for me by Apollo and I didn't have to do a whole lot to get this data.

So that's one of the things I really love about the engagement tab is how easy it is to use. I would encourage you to come in here and start building out reports and then creating custom dashboards. It's great to use some of the ones that we give you out of the gate, but it's also really helpful to just know what your team is doing and start building reports.

Video 8: Enrichment Pt. 1

Hey everybody, Josh Garrison here. And in this video, we're going to cover using Apollo to enrich either your CRM or a CSV. So let's dive right into it.

All right. So here I am at Apollo, and I'm just going to go ahead and click on the ‘enrich’ button along the top or along the left, depending on what your UI looks like.

And you'll see that we have a variety of options to choose from. I'm going to go ahead and start on the left hand side with CRM enrichment. You're just going to go ahead and click on ‘CRM enrichment’, and this is going to take you to this page. Now I've already covered integrating your CRM with Apollo. So if you haven't seen that video, go check those out.

The first thing we're going to do before we get into any of this is we're going to hit settings. There are some settings you'll need to configure that are pretty important. So there's a lot of really simple stuff that's similar to what we've covered already in the CRM integration videos, but what I want to call out here are a couple things.

First and foremost, Apollo probably has more phone numbers for each contact than you have in your CRM. So you need to make sure you have multiple phone number fields set up. If you don't have them set up, you can create custom fields in your CRM, and you can map those here.

I'll give you an example. We have mobile phone numbers. We also have corporate phone numbers. And there's not a corporate phone number field here, so I'll need to create a new phone number field if I want to map the corporate number and the direct number and the home number and the mobile number into my CRM.

The other thing that I want to call out is on the right hand side, we have to decide if we want Apollo to overwrite data that's in our CRM. So let's say we have their name in our CRM and Apollo thinks it's spelled differently. Do we want Apollo to overwrite what we have? Go through and decide yes or no for all of these fields.

And then also importantly, do we want Apollo to automatically fill the value in if your CRM doesn't have it? I think auto fill is by far the more popular choice here. So I'm going to say, “Hey, if I don't have a phone number and if I don't have a mobile phone, go ahead and autofill that”. And you'll notice that we can only set these up for fields that we have mapped. So it's worth spending some time to do this in the beginning. It's going to save you a lot of time later. You can go ahead and hit ‘submit’.

And now that we have configured how we want our CRM to integrate with Apollo for enrichment purposes, we can go back to the overview and into the CRM enrichment. So what this is going to show us here is all of the potential enrichments that we have.

Now, because my HubSpot account isn't real and doesn't have any real data in it, I'm going to pop over to my Salesforce account. So this is our integration set up with Salesforce. And you'll notice that I have 403 contacts that Apollo has new information for that's not in my CRM. And Apollo will tell us what that is.

There's this column here, new value from Apollo. For Remo, we have a new phone number for him. We have new cities and we have new companies and new titles and 403 in total and 354 on the account level. Often it's going to be new phone numbers or new shipping addresses and stuff like that.

There's a couple different ways that we can go about this. The first is we could just go ahead and enrich everything. We can just say, “Hey, we're gonna bypass any filters and enrich everything in the CRM with the 760 people we find in Apollo, do you want to do that?” So if you want to come in and force an enrichment of your whole CRM, you can do that. By far more common what you want to do is schedule an enrichment.

So I'm going to go ahead and hit ‘add new’. One thing that's very popular that Apollo can do for you is enrich when people change jobs. So you have somebody in your CRM, they work for company A, they change jobs, and now they work at company B. Do you want to push that into your CRM? We have to decide if we want to do that every Sunday, like on a weekly schedule or monthly on the last Sunday of the billing cycle.

And then we can set a credit limit. The maximum you can do are 6,000 weekly and 25,000 a month. I think you may be able to edit these updates based on your plan type. So if you have questions about how to get more, please contact a sales rep from Apollo.

But for now, I'll go ahead and say 100 and I'm gonna do it every week and I'll add a name and we're gonna say update job changes for personas. So that's when I get to choose my filter contacts. Maybe I don't want to do this for everyone that's in my CRM. Especially if I have a messy CRM, I don't necessarily want to be spending my credits on people that don't really matter to me. I don't have to come back in here and do this anymore. Every Sunday, this is gonna run for me and I can view that by clicking on the ‘data health center’, which is a part of the Apollo ‘home’ button. So I'll show you what that is.

So if I go to ‘home’, I can now go over here into ‘data health center’ and it's gonna run me through this little wizard here that says you can connect your CRM, map your CRM to us, set up your personas, and then Apollo will do a whole bunch of other stuff, which I'll show you guys in a different video. But I can see the job changes that I have set up here—those enrichments are going to run and I'll be able to see a summary of what was done from my data health center.

So that's how to set up the job change enrichment. I can set up another enrichment here if I wanted to set one up for people who don't have email addresses and I can automatically enrich that into my CRM. Those are the two that you can do automatically and then as I showed you before I can run an all enrichment as well if I wanted to do that.

The last thing I can do is I can use filters. So I can come over on the left and I can say, "Hey, for all of my contacts who are missing values in my CRM, let's enrich those people". I'll show you this example. I'll say for all of my contacts who are missing values in my CRM, I'm going to go ahead and select those. And then I can just enrich those selected. So I can set this up automatically or I can do this manually.

Video 9: Enrichment Pt. 2

Now, if I go back to 'enrich', we've covered briefly how to do this from your CRM. We can also do this with a CSV.

Now this is good timing for me because I just ran a webinar with a partner of ours, Census, and I got a CSV from them that I want to use to enrich some contact information.

So I'll come into my other instance and I'm going to do the exact same thing. I'm going to hit CSV enrichment. I'm going to select a CSV. Now I have to choose, am I enriching people or am I enriching companies? In this instance, I'm going to be enriching people. If I want to hit 'edit settings', I can choose the standard fields that I want to enrich and I can say like, yeah, give me their phone and maybe their LinkedIn URL and their title—whatever I want to get there and I can hit 'save settings'.

Now I need to select the CSV to enrich. So I have my CSV right here. These are my webinar registrants and I have something like 565 people in there. And so now I have to map the column header in my CSV to the field in Apollo. Then I could hit 'next'.

And now I get to choose what happens. Do I want to enrich with mobile numbers? And do I want to enrich with emails? In this instance, I say yes to both and I'm going to hit 'confirm'. And now my CSV is processing.

So this is a really great workflow to use. If you've come back from an event or a trade show, or you've run a webinar and you get leads that don't quite have all the data that you want, throw them into the CSV enrichment.

And as quick as that, we're already most of the way through as we're matching these records and improving the contact information that we have.

All right, now I'm just going to show you what that looks like when it finishes. This is what I got back from Apollo. So I can just wait until this is finished and I can hit 'download', which I got.

And now what I got from Apollo has a lot more information. I can just view the report. I can take all of these people and I can add them to a sequence. The world is your oyster.

Lastly is we do have the job change alerts. So I showed you how to set those up automatically. Some people don't want that to happen, though. They want to come in here and review the alerts that are coming in and then manually approve those. So you can do that just by clicking on the ‘job change alerts’ tab and coming through and reviewing all of the job changes that Apollo is recommending. And then if you want, you can just select all of the people on the page and then you can either export their data or you can update your existing contacts with the job change, or if you want to create a new contact from them, you can do that as well.

That's a quick overview of the ‘enrich’ tab in Apollo and the ways you can set up enrichment. That's all I have for you now. I'll see you in the next video.

Video 10: The Data Health Center

Hey everybody, Josh Garrison here. And in this video, I'm going to show you how to use Apollo's data health center.

This is an incredible feature primarily for two reasons. Number one, it lets you find your total addressable market really, really easily. And number two, it lets you keep an eye on the health or the quality of the data in your CRM.

Now we did cover enrichment and a separate video. This video has some overlap with that. So let's dive right into it and take a look at the data health center.

Okay, everybody. So from within my Apollo instance, I'm going to be in the ‘home’ button here, and I'm going to click on ‘data health center,’ and this is where things start to get interesting.

Now first I need to click on ‘dashboard settings’ and you'll see that I have a few things I can do. First I can and should have hopefully connected my CRM already. This is how we're going to be able to keep an eye on the quality and health of the data in our CRM, so if you haven't connected your CRM or you're not sure how to do that, check out the video we have on connecting HubSpot or Salesforce to Apollo.

But assuming we've done that already, there's a couple other things we can do. Number one is any personas that we've configured from within the search area of Apollo, we can choose to enable in the data health center or to not enable in the data health center.

So this is something that would be important for us if we wanted to know what the size of our total adjustable market is on an ongoing basis. I've already covered how to build personas in the videos we do on sequencing and searching. So take a look at those if you haven't already.

The second thing you can do is you can create account segments. So let's go ahead and 'create new account segments'. This is kind of like a persona, but for an account. So it'll let me say, for example, I only want to see accounts that have, you know, 100 to 200 employees and who are in my target industry, which for this example may be accounting. And then I can hit 'save segment'.

This is exactly like personas, but for accounts. So you can set both of those two things up. And then what you'll get is Apollo will tell you two things along the top. It's going to tell you the health of the data in your CRM. You'll notice that I have 64% of contacts in my CRM with an email. But 11.7% of them are missing an email and can be enriched. So I could immediately schedule that enrichment if I wanted to do that. And this will look familiar to you from the enrichment video that we did. Or I can just take a look at the contacts that Apollo is saying they have email addresses for and I can choose to update the ones that I've selected manually.

Now, if I go back to the data health center, I can see on the left hand side as well, how many people have changed jobs who are in my CRM. So in this instance, I have about 40% of contacts with accurate data and a little less than 1% of them can be enriched by Apollo right now. Same deal as the email addresses.

If I were to scroll down, this is where things start to get interesting on the sense of the total addressable market. What we'll see here is that I have 186,000 people in my total addressable market in my CRM. But 39.7 million, this is just an example, of course, but 39.7 million exist in the world as net new data. So if you're a founder or a sales leader or a marketing leader, and you're trying to bring a new product to market, let's say, in a market you haven't played in before, and you're not even sure how many people meet that criteria, how addressable that market is, this is where you can find that out really quickly. This is also where you can figure out, "hey, how many people could I possibly get into my CRM?", and start to do budgeting and planning in terms of how many people you'll be reaching out to on a daily or weekly basis, start to make some projections based on your historical performance—all of that becomes a lot easier because you know what you have versus what's available net new.

Now I can also filter down and clear out some of the personas if I want to get more granular with it. I can do the same thing with the account segments if I want to get more granular with that. But on the whole, that's the data health center—a super valuable and helpful part of the home button in Apollo.