How to Set Your Team Up for Success with Apollo

Video 1: Settings Pt. 1

Hey everybody, Josh Garrison here. And in these videos, I'm going to show you how to set your sales team up for success with Apollo. So if you're a sales manager, SDR manager, VP of sales, district manager, or a founder leading a sales team, these videos are for you.

If you don't have an account, you can go to Apollo.io, create one, hit 'sign up for free' or buy one of our various plans, but I'm going to assume you have an account already. And we're going to go ahead and just dive into the platform.

Now, Apollo is a very robust tool. There's a lot you can do, from prospecting to engagement to automation to enrichment. And we're going to touch on most of those things in these videos.

But I want to start in the top right hand corner at the settings wheel. What we're going to do is we're actually going to set up a framework or a structure for our team so that when they log into Apollo for the first time, everything is ready to go and there's not too much confusion for them. They can start being productive.

The first thing I want to show you before I do anything else is the territories feature. When I was leading sales teams, one of the things that was always frustrating to me is I'd set them up with a tool like Apollo and we'd log in and then we do our prospecting and what we find is that we had done duplicate work, some of us had prospected the same people and that was a waste of time and we couldn't really figure it out until we went to add them to a sequence or something like that.

So what we're going to do now is we're going to create some territories or some guardrails for our team so that when they log in for the very first time, they can immediately start prospecting and don't have to worry about stepping on each other's toes. Now, if you don't have a big team, if everybody's kind of going from the same pool, maybe you don't need to do this. But even if you have just three or four reps, I would still set this up so that everybody has their own swim lane.

So I'm going to go ahead and just hit 'new territory'. And I'll just say "SDR 1", I'm going to assign this to my colleague Vance Maximus. And then what I'm gonna do is hit 'add filters'.

Territories—a little bit of a misnomer. Yes, we can set location-based criteria for a territory, but we could also set any other criteria from Apollo's targeting over 65 filters for a territory.

So for example, let's say I sell to two personas. Maybe one of the personas I sell to is VPs of sales. And the other persona I sell to is VP of marketing. I can set up a VP of sales territory. So maybe one person on my team only gets to focus on VPs of sales and the other person on my team is going to focus on VP of marketing, right? So what I just did was I created what's called a persona, which we can talk about a little bit later, and now I'm going to say, ‘okay, anybody with the title VP of sales, I'm going to save that’. And those are the people who are in this territory. So I ‘save’ that and now only Vance can prospect the people in that territory. Right?

I can create another territory. You can change this one. Let's call this ‘SDR 2’ and I can set this up to be my VP of marketing if I wanted to do that. Whatever you want to do, however your territories are broken down in your sales plan, you can recreate that here in Apollo. I know a lot of people have it set up by state, so you can have multiple states set up. Maybe it's the Midwest or the Northeast or the South, whatever. So that would be the first thing I do as a sales manager is come in here and I'd set up my territories and I would assign my territories to my team.

So let's talk about that. So I added Vance to ‘SDR 1’, that territory. Now what I'm going to do is come back into settings and I'm going to go to ‘users’. So this is where I'm going to manage who has access to Apollo. I can just come up here and I hit ‘new user’. So when I click this button, I get to put in their name, their title, their email, and then I have to manage their permission profiles. I'm just going to click on that.

Out of the box Apollo has some permission profiles for you, but I would strongly recommend that you come in and create some profiles for your team. This just allows you to control who gets to do what. So I'll go ahead and create a new profile, we'll call this ‘SDR’, and you'll see that this gives me a whole lot of things to choose from: Do I want them to be able to add and edit users? Do I want them to invite people to join, to manage billing, to manage profiles? Tons of little administrative settings over here on the left.

On the right hand side, we're going to be able to control their permissions with sequences and with emails.

So I would recommend you create at least two profiles to start. You want to have sort of your end user profile. You want to have your administrator profile. And then depending on the size of your team, maybe you want something in the middle for your sales managers.

One thing that I will call out is that if you want to put a restriction on your team—let's say we set up a territory and you can only prospect in your territory. We could set it up such that you can also only send emails to contacts that are owned by that user. And so what we'll get to in a little bit is we can set up an integration with our CRM and we'll be piping in the account ownership or the contact ownership so you really don't have people quote “stealing accounts”. That was a big thing when I was a sales rep. I was like, “Oh, that's my account. Why are you emailing them?” You can get ahead of a lot of that with just a couple settings over here.

For your manager profiles—a couple things I'll call out. ‘Can send emails from’—I would have this set as ‘other users’ or ‘all users’ for your managers in case you need to initiate a sequence or reply into a thread or something on behalf of a user (if they're on vacation or PTO or out on leave or whatever the case may be).

A couple other things that we could talk through here is ‘conversations’. This is essentially Apollo's version of something like Gong where we're recording the conversations and providing intelligence on that. If you have different teams, especially if you have non sales teams, but customer success or support teams, and you don't want everyone to be able to access every type of call, you can edit those permissions in the conversation setting.

So I'm going to go ahead and hit ‘save’. And then what you can do is if you had multiple users here, you could apply the permission profiles to those users. I can come in here and say, “Alright, Vance, I'm going to assign a user to you, a profile to you, and I'm going to go ahead and say you only have access to what I just showed you. So this is where you would change permissions.

Video 2: Settings Pt. 2

Now, coming back to this ‘users’ tab where we started, one thing I would call out is that if somebody does leave your company, it's really important that you come into Apollo and you deactivate them. You don't want to just reassign the same seat to someone else. There's only one type of seat in Apollo. We don't charge differently for like, admin or end user or something like that. If somebody leaves the company, deactivate their account, that will prevent them from getting access to your Apollo account.

You can also see if you have any users you've invited who haven't accepted their invite. So when you set your team up for the first time, this is something to keep an eye on.

So at this point, we've gone through users, we've gone through permission profiles and we've talked a little bit about territories. The other things that I would call out here is going to be the ‘manage plan’.

So this is where you can see your plan settings and your usage of your plan. So most of your plans are going to have a limit on email credits and a limit on mobile credits, you may also have a limit to the minutes available in our conversations tool and in our dialer, as well as our AI generated word usage, all of which we can talk about in future videos. This is where you can see your usage, you can see how many credits each of your team members are using, you can see their historical usage—so lots of great data available to you here.

You can also change your billing information and settings for your licenses in terms of who you allow to join your instance or whether or not you want to get notifications when new seats are added. Coming in here on a regular basis to check your credit usage would be useful.

The other thing that I would show you is that from the ‘users’ tab, I can go and click on each individual user and I can actually create a limit for them on the number of credits that they have so I can set each user up to only have 1000 email credits on a monthly basis or 500 mobile credits or 100 mobile credits—whatever those numbers are—however you want to allocate the credits you have for your team, you should come in here and allocate them for each of the users on your team as well.

The last thing I'll show you on this side over here is the ‘teams’ setting. This is an easy way to bucket your users so that you can find their performance later. So what I mean by that is we could come into the Apollo platform and we could run some analytics in the ‘analytics’ tab. If I wanted to see how my North America team was doing, or my West Coast team was doing versus my East Coast team, and do that very quickly, I would use the ‘teams’ feature in Apollo.

This doesn't have anything to do with permissions, or profiles, or anything like that. It's just a way of grouping your users up. So you can create a team over here, you can say West Coast. And then I can assign team members to that team. Something to keep in mind if you do use a lot of the analytics within the platform.

Okay, so that more or less covers the initial setup of Apollo. One thing I didn't call out that I will call out is if you haven't yet, go ahead and head to knowledge.apollo.io and bookmark this page. This is our Knowledge Base where everything Apollo-related is documented—how the platform works, any question you have—you can just come in here, you can type it, “what are credits?” for example, and here's some documentation around how the Apollo platform works. So as you're setting things up for your team, I would encourage you to come here first, and then if you're not able to get an answer, you can contact your rep or you can come into Apollo, hit this button in the bottom right hand corner and get help that way.

Video 3: 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 4: 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.

Video 8: Salesforce Integration Pt. 2

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 6: 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.

Video 7: Stages

Hey everybody, Josh Garrison here. And in this video, we're going to talk about stages, which are a helpful way for us to keep track of our relationship with our contacts, but also the foundation for powerful automations we'll be creating later. Let's dive into it.

So here I am back in Apollo. And in order to set up my stages, I'm going to hit on the settings wheel in the top right hand corner and go to contacts on the left hand side.

And you'll notice the first thing I have to do is choose a HubSpot contact field that I want to sync. Now, this is assuming I've set up a CRM integration that I want to use. You don't have to do that. You can use Apollo without connecting your CRM. But if you have a CRM, of course, we recommend that you do connect it for reasons that will become clear.

With HubSpot, I can only choose a contact field. If I have connected Salesforce, I'll have to choose either a field on the contact record in Salesforce or a field on the lead record, depending on which of those two record types I've chosen to sync with Apollo. For more on that, watch the video we have on the Salesforce integration.

I'm gonna go ahead and stick with the HubSpot example for now. So I've chosen to use the lead status field on the HubSpot contact record that I'm going to map to the Apollo stage.

Now let's talk about what a stage is. In Apollo, a stage is just a way for us to keep track of what our relationship is with the person that we're trying to contact.

So Apollo gives you nine stages out of the box. The first is ‘cold’, which means we haven't gotten in touch with them yet. Then ‘approaching’ means we're trying to get in touch with them. Somebody who's replied is obviously ‘replied’. ‘Interested’ should mean somebody has booked a meeting with you. ‘Not interested’ is self explanatory. And then ‘do not contact’ would be all the people who tell you, “Hey, please take me off of your list”.

Now, I do recommend that you create some additional stages. Because we can use these to build automations from later in order to create a stage, just hit this button that says ‘add stage’.

So one thing that I like to do when I'm prospecting, you're not just going to get people who say yes or no, right? You're going to get some people who say, “Hey, I could be interested in this, but not right now.” So I'd like to create a stage that's something like this: ‘Follow up in three months’ and I can create that stage.

Now, when you go through and map your stages between Apollo and your CRM, what you want to make sure you don't do is map two stages to one CRM field.

For example, I wouldn't want ‘cold’ to map to ‘new’ and ‘approaching’ to map to ‘new’. You want one stage to map to one field in your CRM or one pick list value in your CRM. You don't want to duplicate those—that will confuse the system. So you can go through here and whatever you have set up in your CRM, connect it as best you can: ‘cold’ would be ‘new’, ‘approaching’ would be ‘in progress’, ‘replied’ is ‘connected '. And then you don't have to connect all of these, right? ‘Follow up in three months’—I don't need to have a stage in my HubSpot CRM, but in this case, ‘bad timing’ exists already. So maybe I'll just go ahead and hit ‘bad timing’ and then I can hit ‘save’.

So what will happen is as I'm working leads in Apollo, the stage will get updated and that will reflect in the CRM with that lead status stage there.

Apollo can automatically create and map stages for you. If you click the ‘automatically create and map stages’ button and tell it which field to map to, we'll do our best to try and map those one-to-one. If you're curious about how it works, click on that button there in the overview, and it'll take you to the Knowledge Base article on how this works exactly.

But we're going to move on and we're going to go ahead and click on ‘triggers’. So triggers are some automations we can create, the first level of automation I would say, that utilize stages. So we don't have to manually be saying, click, click, click. Here's what the stage is. Apollo can do a lot of that heavy lifting for us. When a prospect is created, we'll automatically set the stage to ‘cold’. If we've sent them an email, the email lands in their inbox, it'll be ‘approaching’. If the email bounces, it'll be ‘bad data’. If they spam block us, then we could say, ‘do not contact’. If the prospect unsubscribed, we could say, ‘do not contact’. There's a variety of things that we could do. You can see that a lot of these map out of the box.

Now we can do the same thing for calls. So if we connect with somebody and we book a meeting with them, we'll change it to ‘interested’. And these are based on the dispositions of your calls that you make, which I'll show you how to set up in a second. So I highly recommend you go through and you map all of the stages to whatever trigger you want to have happen, right? If they didn't answer, then the stage would still be ‘approaching’. If we left them a voicemail, it would still be ‘approaching’. It's a bad number, it's going to be ‘bad data’. Spend the time to do that now because it's going to save you a lot of time later.

So I can hit ‘save’. Now I mentioned these are the call dispositions that you set up. If you just click on ‘calls’ here on the left, that's where you find those call dispositions are here. So you can set up whatever you want your reps or yourself to be marking. As you're making your calls, you can set that up here. Just click ‘add disposition’. Pretty straightforward.

Now I have mentioned a couple of times that I'm going to show you how to build some automations based on stages. That video will be called “Plays”. So if you're interested in that, take a look there.

And before we move on, I'm just going to show you one other thing with stages. So contacts have stages, but accounts can have stages as well. If you're using HubSpot, you want to pick a life cycle stage and do the exact same process that we did before with contacts.

And if you're using Salesforce, you have a couple options. You can ask Apollo to infer the right stage based on the opportunity, or you can just have it map one-to-one based on an account status field. And then you have to pick the field there.

This is the exact same process that we just went through with contacts, but obviously we have slightly different fields we need to choose. And then triggers can do the exact same thing. When a new account is created, you can set it to whatever status you want to have it set there. So highly recommend that you go through these.

And one thing I will note, if you have an existing client, you can map the account stage as ‘current client’ and then any of these statuses that you put here, your team will be warned when they try and reach out to somebody. So if they're a current client, we don't want to be prospecting them, right? If they continually mark you as spam, maybe you put them in the ‘avoid’ bucket, or maybe they're a competitor. So you can spend some time now to save your team time later in this section of the account stages configuration.

That's pretty much all I have for you with stages. So for now, that's it. Let's move on to the next thing.

Video 8: Search Pt. 1

Hey everybody. In this video, we're going to cover building lead lists and doing prospecting in the Apollo database of over 260 million people. Let's dive right in.

Okay. So now I'm in the Apollo platform and I'm going to build my first lead list. What I've done is I've gone along the top here and clicked on the ‘search’ tab, which is where I can query Apollo's database of over 260 million people to build a lead list for myself.

With that being said, on the left hand side, you'll notice that there are a bunch of filters that you can choose from. If you scroll to the very bottom, you can click ‘more filters’, and that will pull up all the filters in this view that I find a little easier to use.

Now, there are a ton of different filters in Apollo, over 65. For now, I'm going to focus on building a persona because that's going to save me a bunch of time. And in that process, we'll use some of these filters.

So to build a persona, I'm going to click on this ‘personas’ tab. And I can scroll to the very bottom of this list and I can create a new persona. So I'm going to hit ‘new persona’.

And what a persona is, is basically, it's a collection of filters that I've already applied and saved. So when I come back into Apollo later, I can save a bunch of time and not have to click, click, click, click, click and reapply all the filters for the people that I want to reach out to.

So in this example, I'm going to pretend that I'm selling SEO services to marketing agencies. So I'm going to build a persona called marketing agency owners. And now I can apply my filters. I'm going to choose a job title as a filter and I will say ‘owner’. It's a title I'm looking for. And I'll say ‘CEO’ is a title I'm looking for. And maybe a ‘co founder’ is a title that I'd be looking for as well.

And let's just add ‘founder’ for fun as well.

Now you'll notice in the titles section, I can get really fancy with this. I can do Boolean search. I can do whether we know the title or we don't know the title. And I can apply management level and the department that they use or that they're part of. But for our purposes, I'm just going to keep this really simple.

Now I'm going to go down to industry and keywords, uh, and you'll notice there are some advanced settings that I could apply here. Like I could say it's a CEO, not from a particular industry or just, we know the industry, but because our example is pretty straightforward, I'm going to scroll all the way down.

You'll notice this is in alphabetical order and I'm going to choose marketing and advertising. So again, I'm trying to sell to marketing agencies and I'm looking for the owner of various marketing companies.

Now I am going to apply an advanced setting—‘is not any of’—and I'll apply software. So I want marketing agencies. I don't want companies that sell marketing software.

Okay. Now location. I am in California, so I'm going to focus on California companies and you'll notice I have cut down my list already substantially from the hundreds of thousands to the tens of thousands, which is good. When it comes to building lists, we want to be as targeted as possible. This idea of spray and pray where we email as many people as we can as fast as we can… that's never going to work out for us in the medium or long term. So we're going to keep these lists super targeted.

Now I'm going to click on ‘employees’ and I'm going to choose the size of company. I want to apply to this persona for my example, I'll say it's between 20 and 100. It's big enough to be a real company, but small enough that it's not going to take months and months and months to potentially bring a deal in the door.

So now you'll notice I can start prospecting with my new persona, so I'll hit ‘done’.

Okay. So what I'm going to do now is I'm going to choose some of these people. To add to a list and from there to add to a sequence. But there are a couple of other things I might want to do. I'm going to hit that ‘more filters’ button and I'm going to scroll down to miscellaneous. There's a couple important filters that I recommend you guys take a look at.

The first one is ‘email status’. I only want to email people who have a verified email in Apollo, meaning Apollo is very confident that their email is real and that my email will land in that person's inbox assuming that I have good deliverability from my domain.

The next thing is this filter ‘date refreshed in Apollo’. I want to perpetually be reaching out to people who have up-to-date contact information. So I'm going to say that I only want to reach out to people whose information was refreshed in the last 90 days, and you'll notice that this has cut my filters down quite a bit to 92 records. So if I want to email more people than that, I can be a little bit more generous with this and I can say, you know, within 120 days. It'll be a little bit more, but for my purposes, I really only want to work about 100 leads today, so that's fine, and I'm gonna hit ‘apply filters’.

So now I have this list. All the people in this list meet the persona that I set up, and now I want to get these people's information and add them to a sequence eventually.

<u>Video 9: Search Pt. 2</u>

So I'm going to go ahead and select all 110 people. Now, if you're on a basic or a free plan, there is a limit to how many people you can select. It's 25. In this example, I'm using a custom plan so I can select as many people as I want. I think up to 10,000. So I'll select all 110 of these people. And I'm going to hit ‘save’, I'm going to walk you through a couple options we have in the ‘save list’.

The first is I could just add them to a sequence right away. We're going to talk about that in another video. So I'm going to skip it for now.

I could add them to a Salesforce campaign. If I had set up an integration with my Salesforce account.

I can assign an owner, so if I want to assign them to somebody else, like I'm a sales manager and I want to prospect on behalf of a teammate of mine, or I'm an AE and I want to do this on behalf of my SDR, I can do that.

But what I want to focus on is this ‘mobile numbers’ button. I'm going to go ahead and check the box that says, ‘try to find mobile numbers for newly prospected people’. So this is where Apollo will do its best to get a phone number for all the people that we're going to save. And this will make it easy for us to make calls to them, which I think is a very effective way to do outbound sales.

Now, lastly, I'll go back to the top where it says ‘add to lists’. I'm going to go ahead and create a list called ‘marketing agency owners’. This is just where all of the people I've prospected from that persona will live. So it makes it easy—saves me a few clicks if I want to add that list to a new sequence or exclude that list from a sequence or something like that later. I'll go ahead and hit confirm and now Apollo is going to get to work.

You'll notice in the top right hand corner, Apollo is adding these prospects to my save list, so I can go ahead and hit refresh.

And okay, so that took a minute, but I was able to save all of my people into that list. And you'll notice that if I click now on the ‘saved’ tab here, it shows me all the people that I have saved.

These are people I've spent a credit to find or I brought from my CRM. They're not net new to me, meaning that the people that I haven't saved before and I don't have their contact information. So I've saved all of these people. And I've added them to a list, which makes it easy for me if I come to my lists and I can choose ‘marketing agency owners’, all of those people are on that list, right?

So what I want to do with this list though, is I want to come back to my filters and I want to separate the people who have a phone number from the people who don't. So you'll notice when I go to filters, I scroll down to ‘miscellaneous’ and ‘phone status and confidence’. And it says “This filter will not return results when filtering net new people”. This means that to apply this filter, we first have to save the contacts that we're looking for to our Apollo instance. And now we can apply this filter. So I want to say they do have a mobile number and I'm going to go ahead and hit ‘apply’.

Okay. These people I'm going to add to a sequence that has phone calls associated with it. And everybody who's not on this list who we saved, but whose information isn't here, I'm going to add to a sequence that doesn't have phone calls in it, and we're going to do that next.

All right. So we just talked about building lead lists and doing your prospecting in the Apollo database, finding emails and phone numbers for people in your target audience.

I hope this was helpful and we'll see you in the next video.

Video 10: Build a Sequence

Hey everybody, Josh again. And in this video, I'm going to show you how to take the lead list that you built using the Chrome extension or the search part of the Apollo platform and add them to a sequence. So we can start getting in touch with people, sending calls and emails, building our pipeline and hopefully closing some deals. Let's dive in.

So you'll notice I'm in the Apollo platform and along the top, I have clicked on the ‘engage’ button. This is going to take me to all of the engagement features we have in Apollo—be it conversations, calls, tasks, playbooks, templates and a million other things—which we will get into in due time. But for now I'm going to go ahead and hit this big blue button on the right that says ‘new sequence’.

If you're new to tools like Apollo, a sequence is just a series of calls or emails or LinkedIn touches that we're going to use over a period of time to get in touch with people. We've made it easy for you to do this in Apollo. You can create a pre-built sequence using templates that we have written for you and created for you. And I recommend you come through here and read these and see what they do. But for the sake of teaching a man to fish, if you will, I am going to create a new sequence from scratch.

We did build a lead list for marketing agency owners, so I'm going to create a marketing agency owner sequence and I can set some permissions here—whether I want my team to be able to use it. I can also set a schedule if I don't want to be emailing people on the weekends or having a call task come due on the weekend. For example, I can choose the normal business hours schedule, or I can create a new schedule for whatever I want.

For now, I'm just going to keep this easy and hit ‘create’. And you'll notice that this has kicked us into the creation wizard for a sequence. I do have the ability to use AI in the creation flow, which I can talk about, but I want to show you how to do all of this manually before we get into that.

So I clicked ‘add a step’ (that's what we call each part of a sequence—a “step”) and I have a bunch of decisions I need to make now. What do I want to do first? Do I want to send a manual email to someone or call them or make a task for myself to do something else? Do I want to create a task for them in LinkedIn?

Anything that I want to do, I can choose here now. And I'm going to go ahead and choose ‘manual email’.

Now, this is going to give me an opportunity to do some research on everybody I add to the sequence and personalize the email I send to them, so, I like that. Now you're not always going to be able to create great personalization and you can use auto emails, which we'll do in a second, but for now I will go ahead and set this up to become due immediately after the contact is added to a sequence. I can assign priority to this task, which I'll assign as ‘high’ and I'll add a note for myself or anybody else who uses my sequence, which is to ‘add some personalization’ and I can hit continue.

So you'll notice right away that it kicks me into this situation where I can create my template and it's got this AI assistant on the right hand side. I'm going to go ahead and close the AI assistant for now. I can show you how that works later. But we're going to craft a template for our email so that when we get these tasks due, we only have to personalize them. We don't have to write a new email from scratch every time.

So remember in our example, I am selling SEO services to marketing agencies. So I'm going to write a subject line.

Now, before I go any further in this video, I'm not going to dive into the intricacies of copywriting, but we have done that in the past. If you go to the Apollo YouTube channel (just search “Apollo.io”) and come to our YouTube, you'll see that we have a 45, actually almost an hour long, webinar about mastering cold emails and how to use the AI features in Apollo. I dive into my favorite sequence structure for how to book meetings with email, and I highly recommend you give this a listen.

While I'm here, I can also show you another webinar on cold calling. Those are two key functions of a sequence: sending emails and making phone calls. So if that's something you struggle with, or you want to learn from people who are really good at it, I recommend you watch those webinars.

But back to the task at hand. So I'm in Apollo here and I need a subject line for my email. I'll go ahead and use a subject line example from the webinar. I did “12 top SEO rankings last q”. There's a lot of reasons why I did this, that I explained in that webinar, but this is essentially a good hook that someone is likely to click on to see what the rest of the word is. What q? What does “q” mean?

So now I have an opportunity to actually start crafting the email and I'll say: “Hi, {{first_name}}.” So you'll notice I just created some curly brackets. And I put ‘first name’ in it. We call this a dynamic variable, which you can find along the bottom of your screen.

There's a whole bunch of things you can see here: text formatting, links, images, files, raw HTML, templates. We can dive into that later, but a dynamic variable is a variable that we will pull from the information we have on somebody in Apollo. So you don't have to always, you know, type their first name. If I say {{first name}} in curly brackets, their first name will automatically be populated. I can do company as well, which will remove things like ‘inc’ or ‘LLC’ or something from the company name. Or I can choose unprocessed name if I want to include that. There's a ton of variables I can include based on where the prospect is, where they live and, and all the information that we have available to us in Apollo.

I can also create custom fields that I pull in from my CRM or from my product. And there's some advanced dynamic variables as well. These are primarily if/then statements. If you've ever done any programming, or if you really like math, this will look familiar to you. So, if we have a first name, we would use the first name. And if not, we would call them something else. These are advanced dynamic variables, and I've seen people get really, really fancy with this. I recommend you take a look at them, but for now we're gonna keep things simple. And we'll say:

“Hey {{first name}}, I help marketing agencies get their clients ranked in the top three spots on Google.”

And now I'm going to add some personalization, like this:

“I help marketing agencies get their clients ranked in the top three spots on Google.
{{!personalize}}”

So you'll notice that I just created a dynamic variable, but mine is in red, meaning that this variable will break. This is a reminder for me as the person sending this email to actually add some personalization here. And Apollo won't let me send that email until I fix it.

Okay. So I'm going to add a couple of things now.

“I help marketing agencies get their clients ranked in the top three spots on Google. Are you looking for any SEO help at this time?”

This is a really short, sweet, to-the-point email. And if I want to see what it would look like for a contact, I can choose somebody from my contacts list and you can see what that would look like. It would pull his name in instead of the first name.

So now I can go ahead and hit ‘save’. So I have created a manual email that will come due. As soon as I add someone to this sequence, now I have the option to add an A/B test, which I highly recommend that you do, especially if you're going to be emailing enough people to get good data here. So if you're just going to email, you know, 100 people and you'll never email more people than that in this sequence, probably not worth doing.

But if you are going to email, let's say, you know, the entirety of your 1000 person list that we built earlier, or the 1000 people in your persona that we built earlier, you should use an A/B test so you can start finding out what works better, what subject line works better, what body copy works better.

So I'll create an A/B test and I'll just change the subject line. I'll say, “SEO question for you”. And I can put, you know, the same copy that I put in the previous email in this email, and I can go ahead and hit ‘save’.

I'm going to add another step, and now I can start incorporating other things like phone calls, which I highly recommend that you do in my experience across hundreds of thousands of sends and 12 years of outbound sales.

What I found is that calls and emails work together. So if you're sending phone calls and leaving voicemails, the people that you're contacting that way are more likely to reply to your emails. And vice versa—you're sending emails, those people are more likely to answer your phone calls. So they work best in concert with each other.

So I can create a call task for myself for our purposes, and I'll say ‘immediately after the previous step’. And I'll leave a note: “leave a voicemail”.

So I can continue with this as many steps as I want. My personal recommendation is to space these things out. You know, it's fine to do a call and an email one day apart or on the same day.

But then you want to give yourself some time. For this example, I'm going to give an automatic email three days later, after my first email. Maybe I want to be even actually a little bit more spaced out than that, and I'd call five days after.

So I'm back in the email wizard here, and I can choose if I want this to have its own subject line, or if I want to reply to the previous thread, I'm going to go ahead and do ‘reply to the previous thread'. And I'll just say something like: “Hey {{first_name}}, Quick yes or no is fine. Are you looking for SEO help?” Go ahead and then save.

So now I've got a manual email on day one, a phone call where I'll leave a voicemail; five days later, I'll do an automatic email, and then I'll do a LinkedIn connection request—let's say one day after that.

I can keep adding steps to this as much as I want. But for now I'm actually going to go back to my ‘search’ tab and I'm going to add people to the sequence so you guys can see what that process looks like.

<u>Video 11: 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 12: 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.

Video 13: Apollo Analytics

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 14: 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 15: 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.

<u>Video 16: The Data Health Center</u>

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.