How to Win More Deals With Apollo

Video 1: Settings

Hey everybody. I'm Josh Garrison. And today I'm going to be showing you how to find leads and book meetings with Apollo.

There's a couple of things I want to do before we dive in.

The first is I want to take you to our Knowledge Base. Go ahead and go to knowledge.apollo.io. This is the Apollo Knowledge Base where everything Apollo-related is documented. If you have a question about how to do something, a question about how to use a credit or something, you can find that in the Knowledge Base. I'm going to recommend you bookmark this because you'll be coming back to it later.

With that being said, if you haven't already, go ahead and create an Apollo account at Apollo.io where you can sign up for free.

Now I am going to walk us through some features and capabilities that are only included in some of our paid plans.

Most of what we'll talk about today will be included in the professional plan. Those are things like using our dialer, manual tasks, call recordings, that kind of thing. We do have free plans, basic, professional, custom, and everything in between. I encourage you to check these out and decide what's right for you.

But with that being said, once we've created our Apollo account, we're going to dive right into Apollo. Now, before we start building our lead lists and sending emails, I'm going to come to the top right hand corner where there's the settings wheel. Click on settings because there's a few things we need to do now to set ourselves up for success later.

We'll just talk through how the settings are laid out briefly. You'll notice on the left, there's a lot of different buttons you can click here. Apollo is a very powerful tool and over the course of these videos, we will get into some of these things. But for right now, I want to focus on the three tabs along the top, your general settings, your mailbox settings, and your voice settings.

So the first thing we're going to do is make sure that our name and last name and all of that is correct. But assuming it is, we're going to come into our email settings. Now I want to show you a couple of things here. The first is how 'enable click tracking' is turned off. Don't turn this on. My recommendation would be to leave this off because tracking your clicks is harmful to your email deliverability.

You'll notice that 'open tracking' is turned on. That can be very useful. We'll talk about that in a bit.

And you'll also notice that by default ‘append the following opt out message after my signature in sequences’ is turned off. I'm going to go ahead and turn that on. What this does is it puts a very small link at the bottom of your emails. When you send an email to somebody that lets them opt out from receiving future emails from you without having to mark you as spam or reply to your email. I have tested this across hundreds of thousands of deliveries. And in my experience, having this turned on results in fewer spam reports. So this is better for you in the long term.

With that done, we're going to go ahead and click the ‘manage mailboxes’ button. Now, if you haven't connected your email to Apollo, go ahead and do that. Now you can click ‘link mailbox’. It'll pull up this wizard where you can enter your email account and accept the terms of service. And it'll walk you through linking your email to Apollo.

You'll notice that I have two emails connected to Apollo. You can connect multiple mailboxes (up to five) and you would want to do that to allow yourself to send more emails. Let's walk through that.

Now I'm going to go ahead and click on one of my mailboxes and you'll notice that there are some settings here that we need to configure.

Now, by default, as of today, the Apollo sending limit setting is set to 400. That's way too many. Even though Google and Outlook will tell you that you can send something like 2,000 emails a day, what they don't tell you is that there are rules around who you can send those emails to. And since we'll be sending emails out to primarily people we've never communicated with before, we're going to knock this way down to 100.

Now, there's also a setting for the minimum delay between emails. I'm going to go ahead and kick that up to the maximum, which is 90. And there's another setting for the maximum number of emails to send per hour. You'll notice if there's a 90-second delay between emails, this shouldn't be higher than something like 45. But don't check my math. I didn't major in math.

Lastly, I want to talk through your email signature. A lot of the time companies will provide you with an email signature that has an image of your logo in the signature. That can actually be harmful for your email deliverability. So we're going to keep our email signature entirely text-based. It'll just have my name and a phone number. And it is okay, I think, to include a link to your company's website, but that's about it. I really don't like to have more of my signature because I want to keep my emails landing in the inbox.

Now, if you're looking at this and you're thinking that's just not enough emails for me. Again, you can link multiple mailboxes to Apollo using this ‘link mailbox’ button.

If you ever have questions about email deliverability, we have some great resources in the knowledge base around that. We also have some resources on our YouTube channel. Just come into YouTube and search apollo.io. We have a webinar about deliverability that you can find here under ‘videos’. And it's right here, *Mastering Email Deliverability: How to Avoid the Spam Folder*. We go into depth about this topic.

Now, with that said, we're going to come back into Apollo. And we're going to click on the voice box. This is where we can configure a phone number to call from in Apollo. We're going to need that in a few minutes, so let's go ahead and do it.

Now I'm going to click ‘set up phone number’, and now I get to pick what country code or area code in the U.S. I want to call from.

One thing I will call out is if you want to make phone calls to international numbers, meaning outside of the United States, you are going to need a custom plan, international dialing and local presence, call transcriptions. All of those come with the Apollo custom plan. If you'd like a custom plan, you can come to our website and hit ‘talk to sales’.

So that being said, I am in the San Francisco Bay area. So I'm going to search for a phone number with the San Francisco area code. Here it is. I'll hit ‘select’ and now I have this phone number. I can make calls using the Apollo platform.

I can also configure a couple other things here. So outgoing calls. I can choose to make a call directly from my browser. If I have a headset connected to my computer, that's a good option. Or if I'm on the go and I want to make calls from my cell phone, I can create a bridge where I'll put in my phone number. And when I make a call from Apollo, it will call my phone. And that phone will then connect to the person I'm calling. For my purposes, I'll just leave it as VOIP. And I can do the same thing for incoming calls. If it's a bridge, my personal cell phone will ring. And then I can take the call there. Or if I'm at my computer, it'll just come in via my browser. I like to set incoming calls via a bridge to come to my phone.

So again, I'll just make up a phone number here, and if this was my phone number, anytime somebody called me back from, let's say a voicemail I left them using Apollo, my cell phone would ring. Highly recommend you set that up.

Now you will notice that there is a box to check for ‘record all voice calls’, depending on where you live, there are different laws around the legality of that. So I recommend you do some investigation and check that or uncheck that as needed.

Now I'm going to go ahead and hit ‘save settings’. And I can come back to my general settings again.

There's a lot here. So if you want to investigate this, I recommend that you do. But now we are going to pop into Apollo and we can actually get started finding leads that we're then going to add to a sequence of calls and emails to put meetings on our calendar.

All right. So we've talked about how to configure your settings in Apollo to set yourself up for success in the long term. And now we're going to dive into the platform and start doing all those other things that you came here to do.

Let's get into it.

Video 2: 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.

Video 3: Search Pt. 2

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 4: Building 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.

Video 5: The Google Chrome Extension

In this video, we're going to talk about the Apollo Chrome extension, because we're not always going to do our prospecting in the Apollo platform. So if we want to take Apollo with us, we get the extension.

I'm just going to do a quick Google search for Apollo Chrome extension, and it's going to bring up this lovely result: “Apollo.io: Find B2B contact info for free”. This will take me to the Chrome web store where I can see Apollo has great ratings and over 400,000 users. So I'm going to go ahead and hit ‘add to Chrome’ and ‘add extension’. This will take you straight to the Knowledge Base article about the Chrome extension. If you want to learn more about every little feature within the extension and how it works, I highly recommend you read this article in depth.

Now that I have the extension installed, I am going to hop into LinkedIn, which is one of the places you'll get the most value from the Chrome extension—one of the most common use cases. You'll notice now there's this little yellow friend on the left hand side of my screen, and when I click to expand it, this becomes a bigger tab.

So when I go to somebody's profile, like my buddy Dan, who works at Apollo, this is going to pull up Dan's information and a bunch of information about his company. It'll show me what the company does and how many employees there are. There's services that they offer and along the bottom a whole lot more. All of this is available in the Apollo platform, but it's also available in the extension. So I can see what software they use, when they got funding, if they were a startup, who they're hiring right now, who else works there, a lot of really valuable information, as well as any activities that I have associated here or any tasks that I have that need to happen in LinkedIn.

So for now, I'm going to go back into the Apollo platform to start adding people to a sequence. But if you're in LinkedIn and you're doing prospecting and you're searching for people, like let's say Akash or whomever, you don't have to go straight into Apollo to work this lead. You can find them on LinkedIn, you can add them, do a sequence, you can try and get their mobile number. You can do a lot of that work you would otherwise do in Apollo straight from the Chrome extension.

The other thing I want to talk about with the Chrome extension is something that I really enjoy. It's called Apollo Everywhere. So you're not always going to be in LinkedIn. Sometimes you're gonna be out cruising the web or you're gonna go from LinkedIn into somebody's website.

In this case, let's pretend that I'm heading over to the Oracle site. Now, if I enable in the Chrome extension this little tab that says ‘Apollo Everywhere’, it gives me the opportunity when I'm on somebody's website to pull up the Chrome extension and see a bunch of information about that company. I can see whatever insights we have—like available technologies, hiring, funding—and any employees who work there as well.

So if I'm in my normal course of business, you know, maybe I find an account that I'm really interested in on LinkedIn or from Apollo, I can just go to the website, pull up the Chrome extension, now I can look for who I'm trying to sell to—let's say in this example, it's VP of Marketing—and I can find them right here. I don't even have to go into the Apollo platform if I don't want to, though it can take me straight to it. I can just go straight from the Chrome extension and I can add them to a sequence.

It's that easy. It's that straightforward. And that's one of the reasons I love the Apollo Chrome extension.

Alright. So we just covered how to use the Apollo Chrome extension to do your prospecting and to initiate people into a sequence from wherever you are on the internet. Hope it was helpful. Now we're going to be on to the next video.

<u>Video 6: 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 7: 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.