How to Find Leads and Book Meetings 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.

<u>Video 3: 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 4: 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.

Video 5: 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.

<u>Video 6: Workflows Pt. 1</u>

All right, everybody. So in this video, I'm going to string it all together. I'm going to find somebody using our search tool and our database. I'm going to add them to a sequence of phone calls and emails. I'm going to work through those call and email tasks, and I'm going to show you how the whole thing fits into one workflow. Let's dive in.

Okay. So I've just come back to the search tab and now I have searched for myself. Here's my name. And look, there I am. I'm going to go ahead and select myself. And then I can hit ‘sequence’ and ‘add to existing sequence’. And now I can just type in the name of our sequence, ‘marketing agency owner’, and from here, I have some choices to make.

I can choose to auto-assign this email between any number of mailboxes. I connected to Apollo to send it out as fast as possible. This matters because sometimes my mailboxes will be at their sending limit. Remember I set a 100 emails a day for each mailbox. So if I want it to go out as quickly as I can, Apollo will just choose which one has some open sends for the day and it'll send the email out. I'm just gonna go ahead and send this from the mailbox that I have connected and I'm gonna hit ‘confirm’.

Now, Apollo's gonna warn me. Apollo tries not to prospect Apollo people, but I'm gonna say do it anyway and I'm gonna hit ‘save people’.

Now, if I come back to ‘engage’ and I go to ‘marketing agency owner’, you'll notice that I have to activate my sequence. So I'm going to go ahead and do that now and hit ‘activate’. As soon as I hit ‘activate’ things start moving.

Now, if I have a Salesforce account, I can map my stages in Apollo to Salesforce, which is something that we'll cover in a different video. But all you need to know is basically this keeps Apollo and Salesforce synced up, so that if a deal progresses in Salesforce, it'll pull those people out of Apollo. And we can create all kinds of automation for that if we want. But I just want to focus on showing you guys exactly how this is going to work.

So I created this sequence, right? And I added myself to it, but now I actually have to do the work associated with that sequence, and I can do that a couple of different ways. The first way is from within this sequence, I can click on ‘tasks’ and you'll see that I have a task here, but the more likely way you're going to do this is by coming to ‘home’.

You'll notice that if I scroll down, I have this ‘tasks’ button and I can click ‘tasks’ and I have a bunch of tasks due for myself, including some emails.

So now I want to find the tasks that I just created for myself, right? So I can sort these tasks by clicking ‘task status’ by due date descending, and this should have exactly what I was hoping for this manual email do for me today.

And there's a note, ‘add some personalization’. So I clicked on this button and it's got me here in the sequence. And my template that I created is right here.

Okay, so I can now edit this any way that I want to and go ahead and send that email out either on a schedule or I can send it out right away if I want to.

So I'm going to add some personalization here. Now I highly encourage you guys to go above and beyond when personalizing your emails. Do it in a meaningful way. I like to go to somebody's LinkedIn. I like to go to their company website. I like to understand who is my customer's customer. What did they care about? And try and find things that are going to resonate with them to put in the email. I don't want to do things like, “Hey Josh. Notice you have 3,000 followers”. Or “I noticed you do this or that”. I want to say something meaningful.

So I'll do my best to do that here: “Hey Josh, I help marketing agencies get their clients ranked in the top three spots on Google. Loved your episode on the predictable revenue podcast last year. Are you looking for any SEO help at this time?”

So, you know, this is a tried and true method. It's called flattery. Showing somebody that I went and I researched them and I like something that they made. That's a really good way to get a response from somebody. And I'm going to go ahead and send this email now.

I'm going to click this dropdown button and hit ‘send’ now.

Now you'll remember that when I created my sequence, I had an email first—a manual email that I personalized. And then the second thing I had was a phone call. So that email has now been sent and now I have a phone call task I have to make, I have to call myself.

So I'll show you how to do that. We're going to come back to the ‘home’ tab and right back to where we were. Scroll down. We're in ‘tasks’. And now we can see we have 12 calls to do. And here I am. If I click on the task, this little bar is going to pop out on the right hand side and I have this big blue button that I can call myself with.

So I'm going to go ahead and hit ‘call’. The call would happen and then I would select what kind of call this was, whether this was a prospecting call or something else. And you can set these call purposes up to customize them if you want. And then I would select a disposition, which again is something that you can customize.

In this instance, I left myself a really nice voicemail. Now, when you are leaving a voicemail, I would recommend keeping it short and sweet and very familiar. In this example I'd say, “Hey Josh, this is Josh. Just giving you a call from Apollo. Give me a call back.” Now I am ready to log my call.

So I've gone ahead and sent myself an email, I made myself a phone call, and now if I go back to my sequence what will happen next is in five days another email will automatically go out from Apollo. And you'll notice that there I am—I'm active in this sequence. Now, a few days after that, there will be a LinkedIn connection request that I can complete via the Chrome extension.

<u>Video 7: Workflows Pt. 2</u>

What I'm actually going to do now is I'm going to rearrange the order of these steps so I can bring the LinkedIn connection request to the next step. And the way I did that, if you want to see that again, I just clicked on this little hamburger menu or I guess sandwich menu, and I just clicked and dragged this step up and it'll give me a dialogue: “Do you want to move it from 4 to 2?” No I want to move from 4 to 3 and I can hit ‘yes’.

So what this will do, you'll see I'm no longer active in the automatic email. I'm now active in the LinkedIn connection request step. And to complete that step, I can just come to LinkedIn and the Chrome extension will load on the side and I can click this and I can go to ‘tasks’. There's one task due today and it's me. But Apollo actually automatically sent that connection request on my behalf because I'm connected to myself (this broke), but what would happen otherwise is Apollo would automatically send that connection request for me.

Now, something to keep in mind is that there is a limit to the number of connection requests that you can send in this fashion on LinkedIn or in any fashion on LinkedIn. So be judicious with the number of connection requests that you're sending. And instead of using a connection request, you can change this and you can make this anything you want, right? It can be a message, a profile view, a post interaction. I tend to find that the most effective way to start a relationship on LinkedIn is actually to comment on a post of theirs or to comment on a comment they made on someone else's post to actually start a conversation. That tends to be the most authentic way that I've found to connect with people on LinkedIn.

But at this point we have kind of gone through everything you need to know for how to add people to a sequence. As you start adding more and more people to the sequence, you should get more and more replies.

And the one thing I do want to call out is in the previous video we built a list. And some of the people on our list we had phone numbers for, and some of the people we didn't have phone numbers for. This sequence we built requires a phone number. So what we can do now is we can duplicate this sequence by going to ‘more actions’ and clicking ‘clone’.

And what I'm going to do now is I'm going to duplicate this, but I'm going to delete the phone call steps. Because now I can add all of the people who I don't have a phone number for to this sequence. So I can go ahead and turn it on, but I'm going to just go through and delete the phone step.

And so you'll remember that now I can go into ‘search’. And now that I'm in ‘search’, I can just come over here and I can select lists. I can say that I want people from the list I made—marketing agency owners. And I can scroll down to ‘more filters’ and I can go to ‘phone status/confidence’. So now I can apply this filter and I want to say ‘yes’, give me everybody from that list who has a phone number and whose number is a mobile number.

So you'll notice there are 110 people with a phone number. That's the whole list. We have a number for everybody, but we don't have a mobile number for everybody. We have a work number or corporate number or home number or something else. And if I'm doing cold calls, I really want to call people with a mobile number and whose number is valid so that I have 74 of those. So I'm going to take those people, these 74, and I'm going to add them to the sequence with the call step, right? So I'm going to select all of them and now I can ‘add them to existing sequence’ and ‘marketing agency owner’, the one with calls. And I can hit ‘add now’. That's going to add all 74 people to the sequence.

So now this has given me a dialogue and you'll see this a lot: “Do you want to add the following contacts from your other sequences? Click each checkbox to add a group of contacts.” So I can add a couple of people from the same company and I can add somebody with a verified email. I just want to go ahead and sequence the people that I had selected.

But remember, I had 110 people on my list total. So, what I can do now is I can come back to ‘more filters’ and I can look for some people who I've already added to the sequence.

So, I'll get rid of the mobile number and what I'm going to look for is ‘sequence’, and I'm going to say ‘exclude contacts in any sequences above’, and I'm going to say ‘marketing agency owner’. So I just added everybody with a mobile number into my call sequence. And now I'm going to make sure that I only get people who are *not* in that sequence. And I'm going to hit ‘apply now’. This gives me the remaining 39 people.

So I can go ahead and select all of those people. I'm going to add them to a sequence with no phone calls. And in this way, I built myself a 110-person list, I got everybody with a phone number and I put them in a sequence with calls, I got everybody with no phone number and put them in a sequence without calls, and *now* I can just work from my ‘home’ control center and work through my tasks methodically every day over the next couple of days until I've exhausted that list.

Then I can come back to the search and repeat the process again: I can apply my persona cause I already built that and I can just, you know, find new people. Apollo is constantly updating its database of new people and I can continue this process.

Okay. So even though we've covered a lot of ground in these videos in terms of how to use Apollo, we've still barely scratched the surface. There's just a lot that this platform can do. So don't forget to go to knowledge.apollo.io to check out the Knowledge Base, to click around in the platform and to head to Apollo.io and click on the ‘resources’ tab where we're constantly producing new content like this to help you get more from the Apollo platform.

I'm Josh Garrison. Thank you for spending your time with me today, and I'll see you next time.