Apollo.io

Quick Start Guide

Learn how to effectively prospect, engage, and manage your sales workflows with Apollo.io and move your business forward.

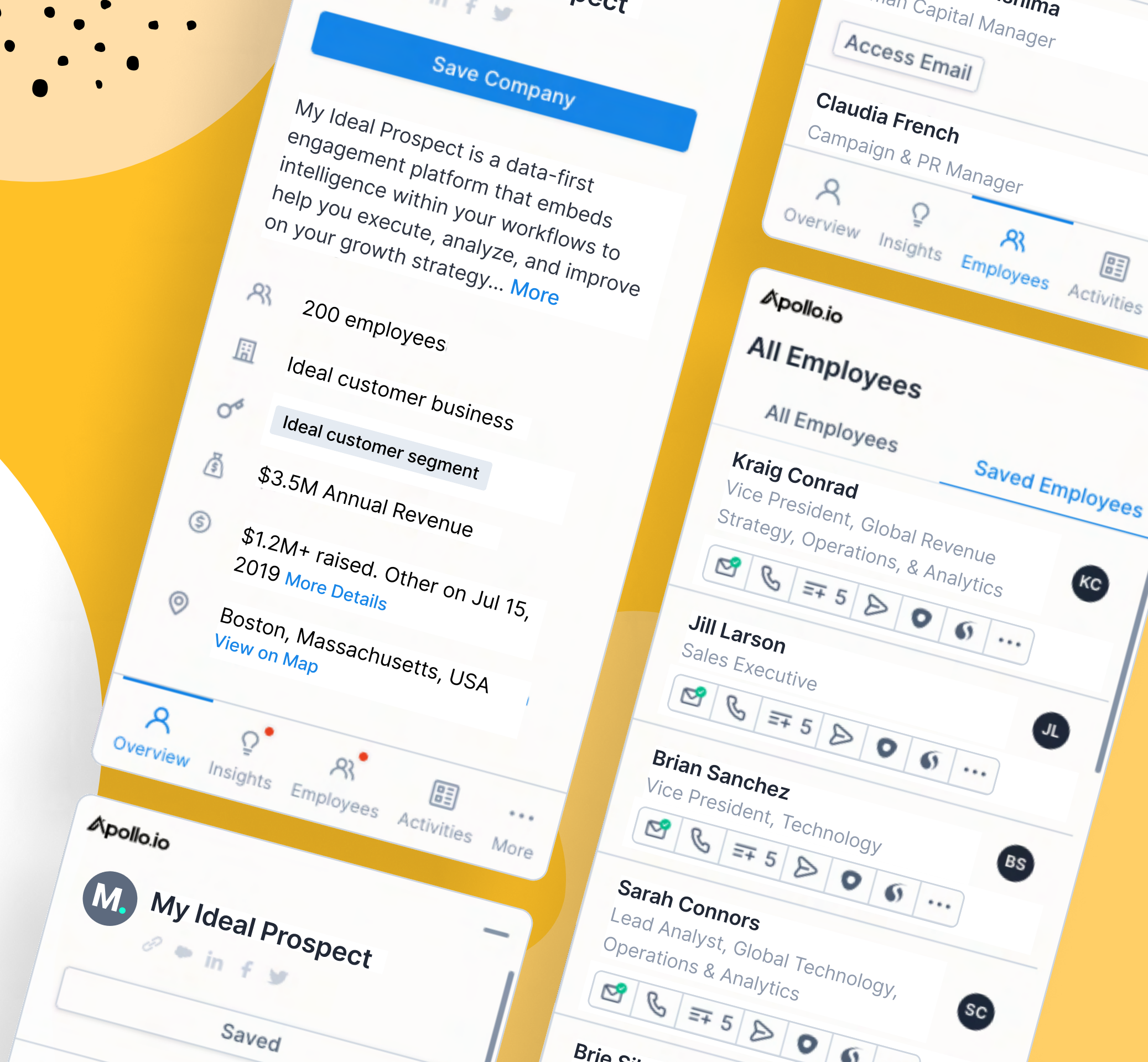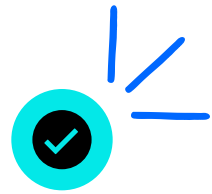
Save Company

My Ideal Prospect is a data-first engagement platform that embeds intelligence within your workflows to help you execute, analyze, and improve on your growth strategy... More

200 employees

Ideal customer business

Ideal customer segment

$3.5M Annual Revenue

$1.2M+ raised. Other on Jul 15, 2019 More Details

Boston, Massachusetts, USA
View on Map

Overview   Insights   Employees   Activities   More

Apollo.io

M. My Ideal Prospect

Saved

Access Email

Claudia French
Campaign & PR Manager

Overview   Insights   Employees   Activities

Apollo.io

All Employees

All Employees   Saved Employees

Kraig Conrad
Vice President, Global Revenue
Strategy, Operations, & Analytics   KC

5

Jill Larson
Sales Executive   JL

5

Brian Sanchez
Vice President, Technology   BS

5

Sarah Connors
Lead Analyst, Global Technology,
Operations & Analytics   SC

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The Getting Started Checklist

Whether you're starting out with a free plan or paid plan, this checklist will ensure you start your Apollo journey on the right foot and have a successful experience with our platform.

find help!

Visit the Knowledge Base to find detailed instructions on each of the items in this checklist. And, if you're on a custom plan, attend your onboarding training for hands-on help!

Day 1

As soon as you sign up for Apollo, you'll want to complete these checklist items to start your experience on the right foot:

- [ ] Link your mailbox to send emails from your email through Apollo
- [ ] Create your email signature
- [ ] Set up the Apollo dialer (in-browser phone dialer)
- [ ] Download the Apollo.io Chrome Extension

Week 1

Once you've made your way through the first-day tasks, spend the rest of your first week in Apollo on these important to-dos:

- [ ] Set up your integrations
- [ ] Connect and sync your CRM to update data across platforms
- [ ] Import any of your CSV lists (if applicable) to enrich your contacts
- [ ] Set up and manage your account settings to set email sending limits, map out your stages (sales cycle phases), and much more
- [ ] Set up your tracking subdomain to avoid SPAM filters
- [ ] Sync opportunities from Salesforce or create opportunities
- [ ] View standard analytics and build custom reports
- [ ] Follow us on social media to discover helpful sales content and other product news

Month 1

The items below are important to mark off of your task list. However, no rush! Spend the next month focusing on these tasks in Apollo:

- [ ] Set up your custom API integrations
- [ ] Attend an Apollo product update event
- [ ] Create automated emails with sequences
- [ ] Run sequence diagnostics to improve email deliverability
- [ ] Automate prospecting activities with rules engine
- [ ] Create reports

What is Prospecting?

An overview of finding buyers with Apollo's B2B Database

When we talk about prospecting, we're referring to the first step in the sales process in which you identify potential buyers – people who fit the description of your typical customer and who you plan to contact with the goal of converting to a paying customer.

Prospecting can be difficult and time-consuming. However, with the right strategies and tools, your prospecting efforts can set your company on the path to incredible revenue growth and success.

Filters

People   Companies   Lists   Saved Searches

Company +

Location +

Employees +

Industries —

Include:

Computer Software

Technologies +

Revenue +

Funding +

Job Postings +

Stage +

Total (156K)

insight!

Name	Job Title	Company			
☐ Wade Warren	CRO	Google	✉	☎	in
☑ Jen Nguyen	Director of Sales	Woody	✉	☎	in
☐ Cody Fisher	CMO	Systematics	✉		
☐ Robert Fox	CRO	Google	✉		
☐ Jacob Jones	EVP Sales	Risen Inc.	✉	☎	in
☐ Kristin Watson	VP Sales	Pride West	✉	☎	in

💡 Jen Nguyen was a customer of yours when they worked at Walmart.

Watch the Demo Video →

Apollo's Prospecting Features

You'll find tons of helpful solutions within the Apollo platform, but when it comes to prospecting, here's what to start with:
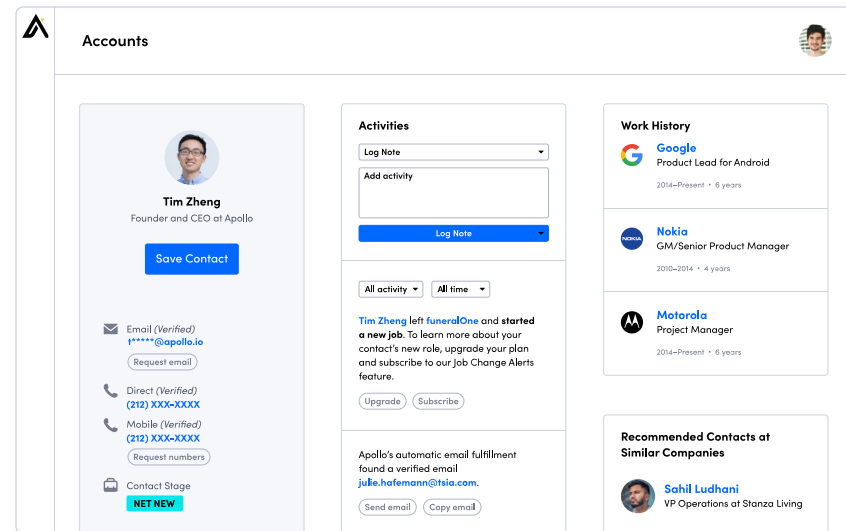
Database Search

Access comprehensive and accurate data on over 250 million contacts and 60 million companies in Apollo B2B Database. We use a combination of proprietary sources and third-party vendors to refresh data and maintain the most accurate database in the market.

The Apollo database includes a built-in proprietary verification system to ensure data accuracy, and we constantly review and improve data extraction and data processing methods to consistently verify, enrich, and update contact and company data.

Apollo has a seven-step automated verification process to validate emails in our database. These steps include comparing data against multiple sources, cross-checking against bounced emails, and much more.

Learn how →
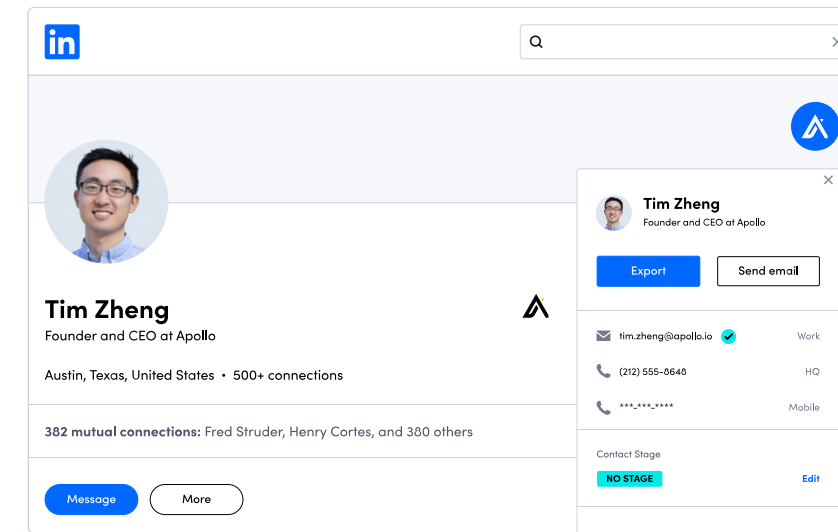
Chrome Extension

Apollo's Chrome Extension unlocks Apollo functionality in the tools you use every day including LinkedIn, Gmail, Salesforce, and many company websites. You can find verified emails, phone numbers, and actionable data insights like technologies, funding, and hiring directly within the Chrome Extension.

Learn how →

Apollo's Prospecting Features

You'll find tons of helpful solutions within the Apollo platform, but when it comes to prospecting, here's what to start with:
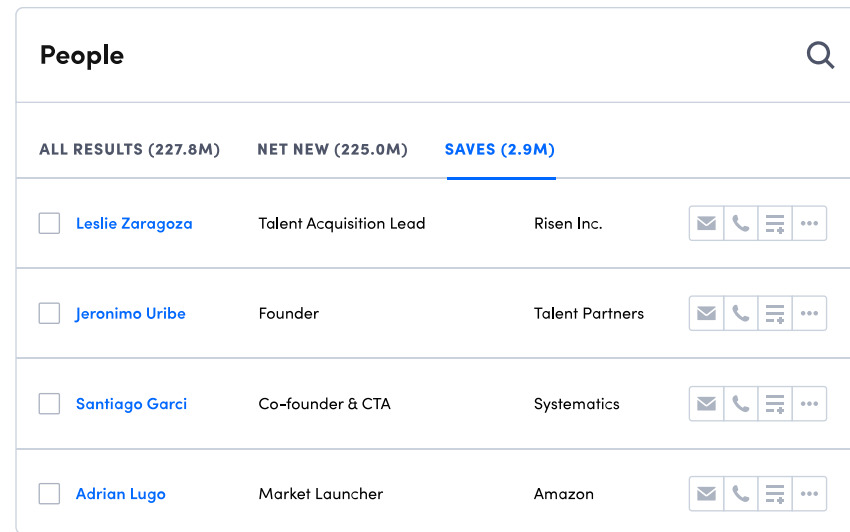
Lists

To stay organized in your prospecting efforts, you can create lists based on the groupings of companies and people you've searched for. These prospect lists will help you better manage your contacts once you're ready to reach out. Creating lists in Apollo is as easy as applying filters to a search, selecting contacts or companies, and then adding to an existing list or creating a new one.

Learn how →
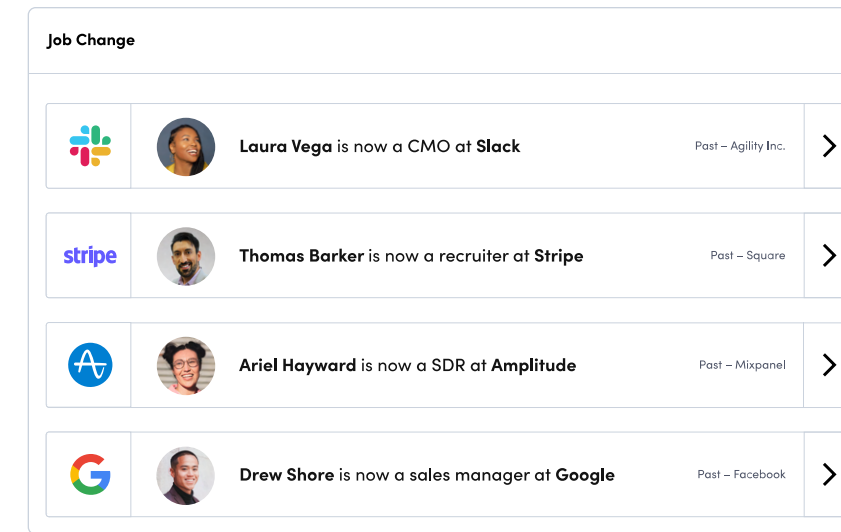
Job Change Alerts

Apollo monitors and tracks people across our entire database when they change companies and jobs. These are high-value leads who are more likely to engage and buy.

You can easily find a list of people who recently changed jobs and moved companies in our Database Search or in the Chrome Extension and use this opportunity to engage and personalize your outreach. You can also automatically sync job changes via enrichment to CRM.
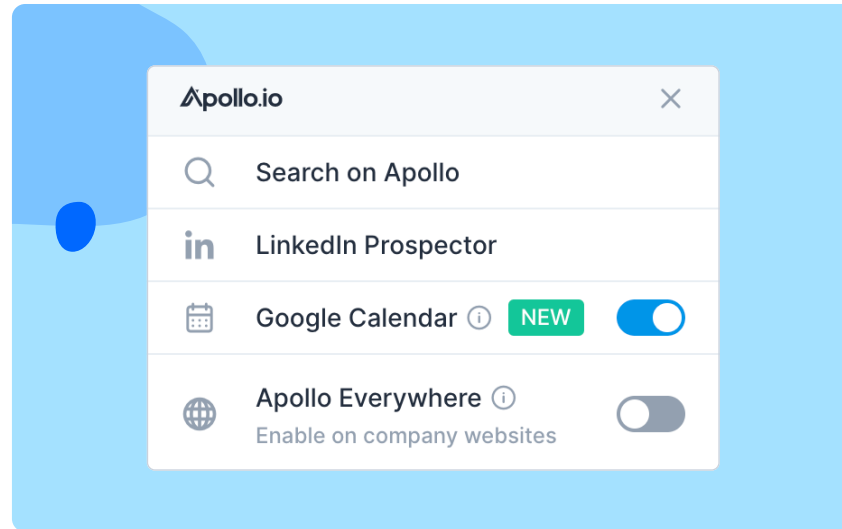
**Learn how** →

Bonus Tips for Prospecting Success
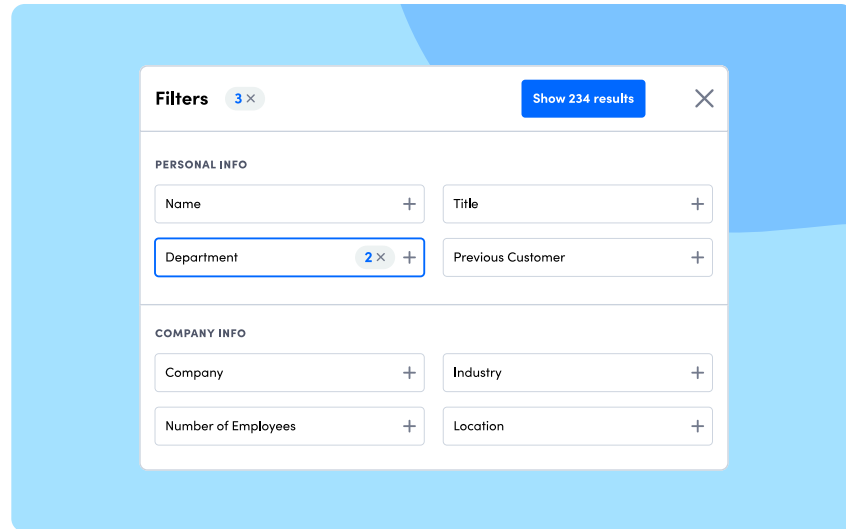
Tip #1 - Create Personas

Use the Persona feature to filter through contacts in Apollo based on their job title, management level, industry, location, and the number of employees.

Tip #2 - Sync Google Calendar

Simplify your pre-meeting research by integrating Apollo directly into your Gmail and Google Calendar with the Chrome Extension.
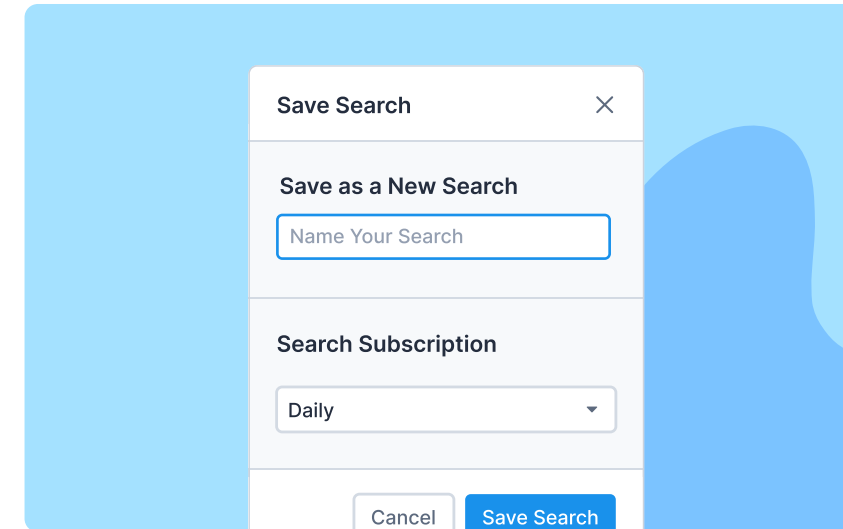
Tip #3 - Subscribe to alerts

If you're searching for new contacts that fit the same criteria of contacts in past lead lists, use the saved search feature to reuse previous lists. You can also subscribe to get email alerts when new records match your saved search criteria.
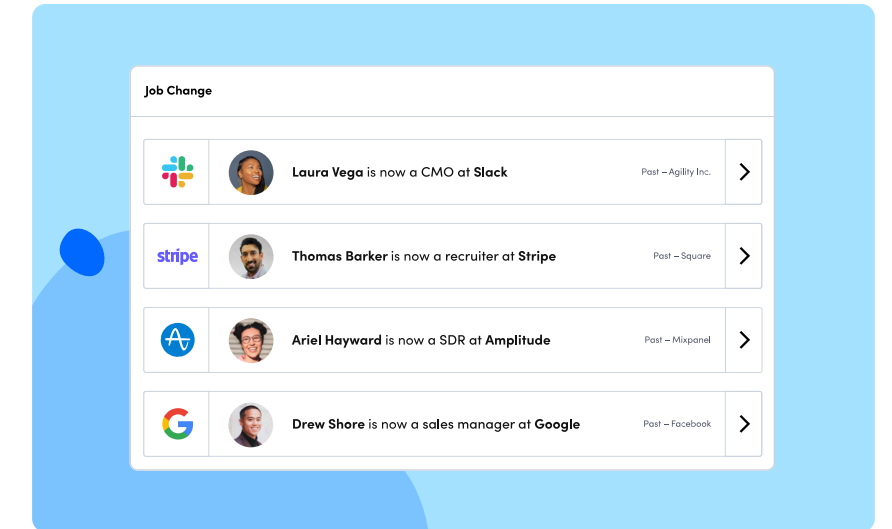
Tip #4 - See recommendations

Go to the recommendations view in Apollo to discover helpful insights, including news regarding companies you're prospecting and other recommendations relevant to your searches.

What is Engagement?

An overview of connecting with every contact with Apollo's Engagement Suite

Engagement refers to any action you take to connect with your contacts. This includes emailing, cold calling, setting meetings, and other outbound sales activities.

While the number of touchpoints or channels for outreach may differ by industry, company size, or persona, the basics of sales engagement remain the same.

With the right strategy and tools in place, engaging with your target audience becomes simple and painless.

Sequences

productivity

1				Schedule task in 0 minutes		
●	A. New Thread	{{company}} <> Apollo Hi {{first_name}}, I was wondering — would it be of any value if...	60.1% Open	15.4% Reply	3.6% Meeting
●	B. New Thread	{{company}} <> Apollo Hi {{first_name}}, Hope you're having a great summer. I wanted to...	72.3% Open	16.5% Reply	4.2%
●	C. New Thread	{{company}} <> Apollo Hi {{first_name}}, I was wondering if you would be interested in...	52.4% Open	17.8% Reply	

+ Add A/B Test

⚙ Automate your outreach for greater efficiency.

2	Deliver email in 10 minutes
3	Schedule call if no reply in 1 hour
4	Deliver email 2 minutes after voicemail

Watch the Demo Video →

Apollo's Engagement Features

You'll find tons of helpful solutions within the Apollo platform, but when it comes to engagement, here's what to start with:
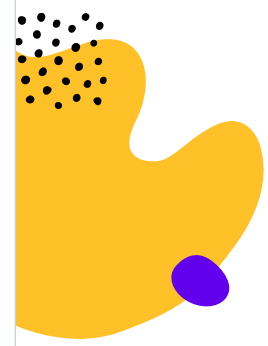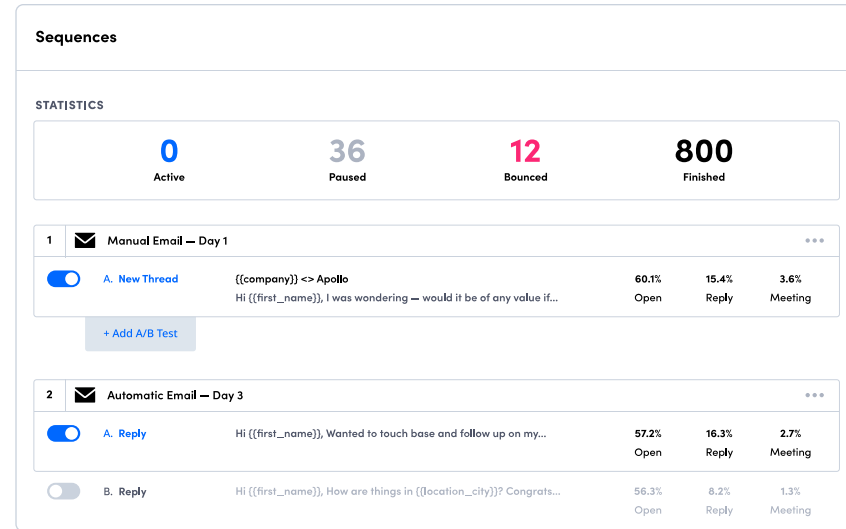

Sequences

The most helpful engagement feature within Apollo is the ability to create sequences. Use sequences to create customizable, multi-step touchpoints with automatic or manual emails, phone calls, LinkedIn messaging, and more. To make your sequences efficient and effective, you can apply templates to streamline email outreach and use snippets or videos to personalize your messaging.

Also, within sequences is the ability to A/B test email messaging and track metrics like delivered, opened, replied, and bounced rates to optimize your engagement strategy and maximize results.

Learn how →
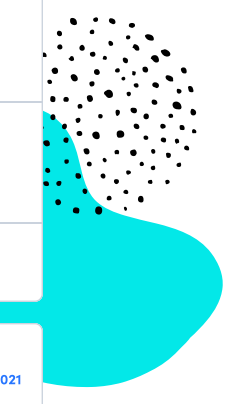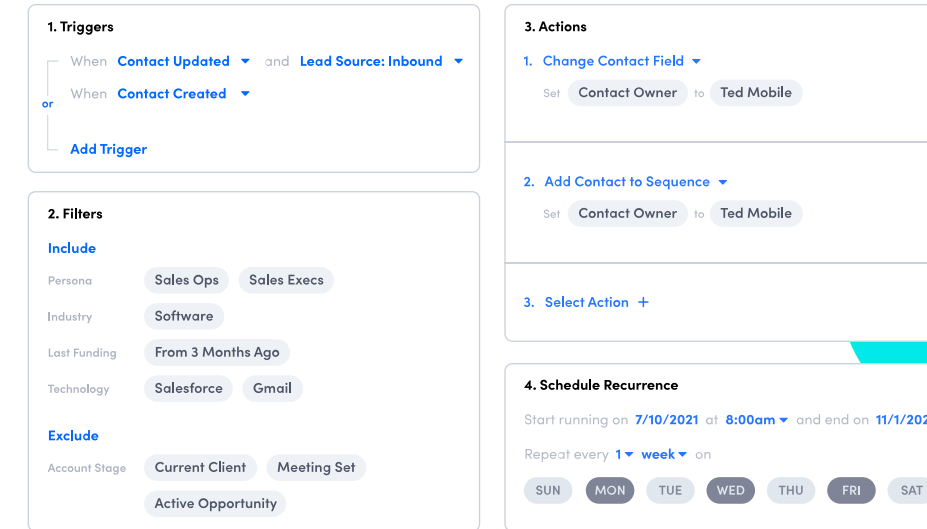
Task Management

Create tasks to get notified when to make calls, send emails, connect on LinkedIn, and other important action items in your outbound strategy. With task management in Apollo you can stay on top of these manual touchpoints to drive more connections with your prospects so potential customers never slip through the cracks. You can assign priorities to your tasks to help manage your day and assign tasks to yourself or other team members.

Learn how →

Apollo's Engagement Features

You'll find tons of helpful solutions within the Apollo platform, but when it comes to engagement, here's what to start with:
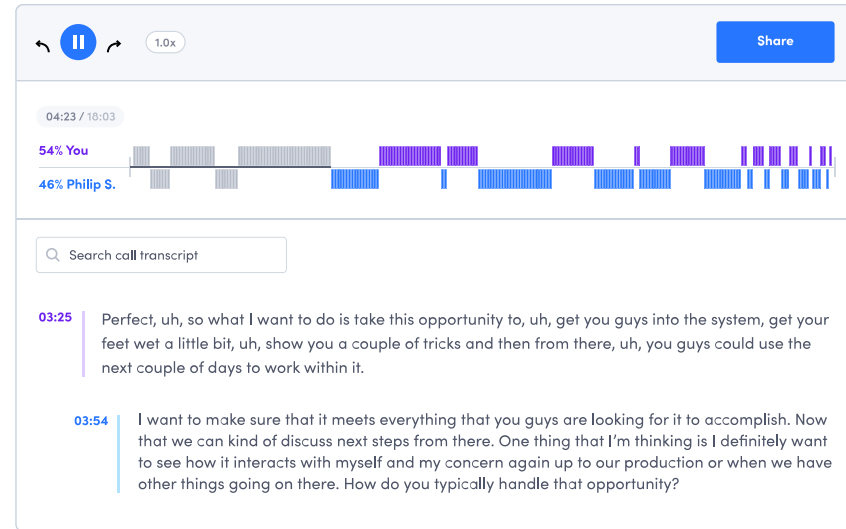

Dialer

Easily find and instantly call direct phone numbers with Apollo's click-to-call dialer. You can make and receive local and international calls, bridge to your phone, record calls, see transcripts, join active calls, and log calls to your CRM. If you do business internationally, you can set up international numbers and local area codes. We provide numbers in more than 50 countries for you to reach prospects globally.

If you're a manager you can use call transcripts or join active calls to simplify call tracking and enable real-time coaching.

Learn how →
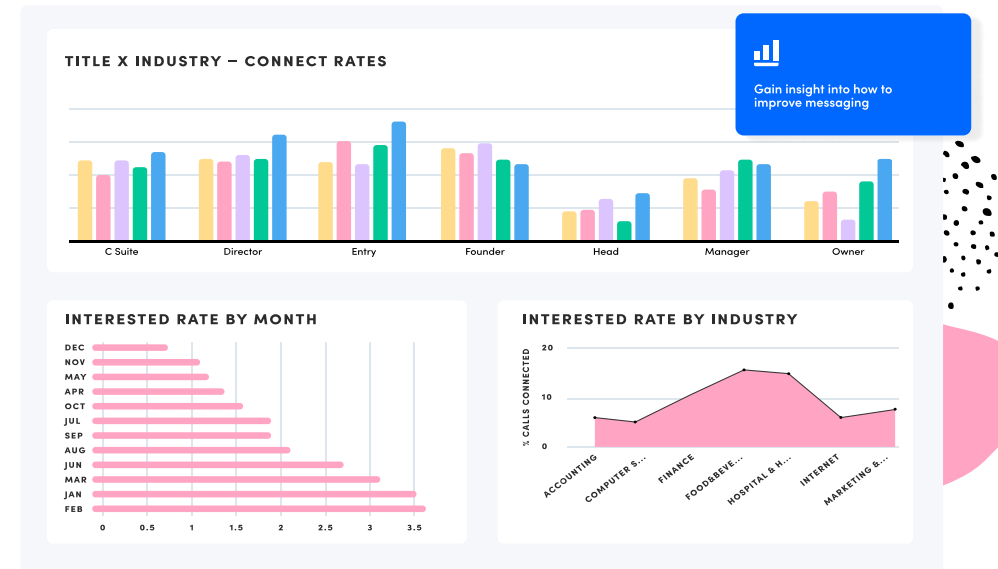
Sequence Analytics

By using Apollo across your sales engagement processes, you will gain a bird's eye view across how your outreach is landing across your pipeline, and you can zoom into specific portions of your sales flow for more granular insights.

Analytics are an essential single source of truth for you to identify where you're winning, to find new opportunities to improve.
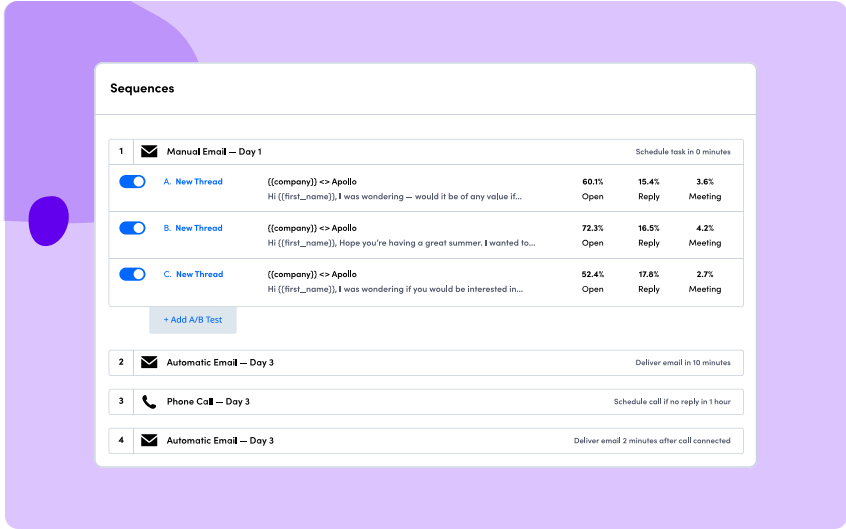
**Learn how** →

Bonus Tips for Engagement Success
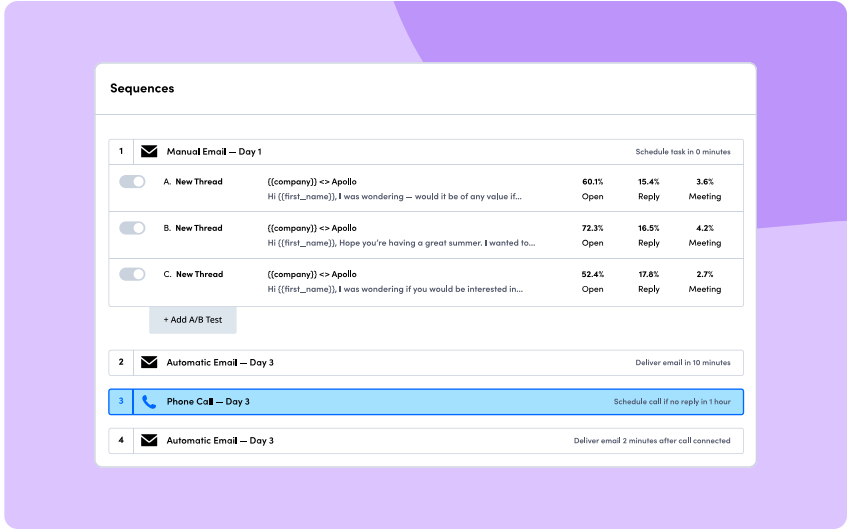
Tip #1 - Auto-create call task

In sequences, add a step for a phone call and Apollo will automatically add a task to call your prospect. You can then use a simple one-click dial straight from the Apollo platform.
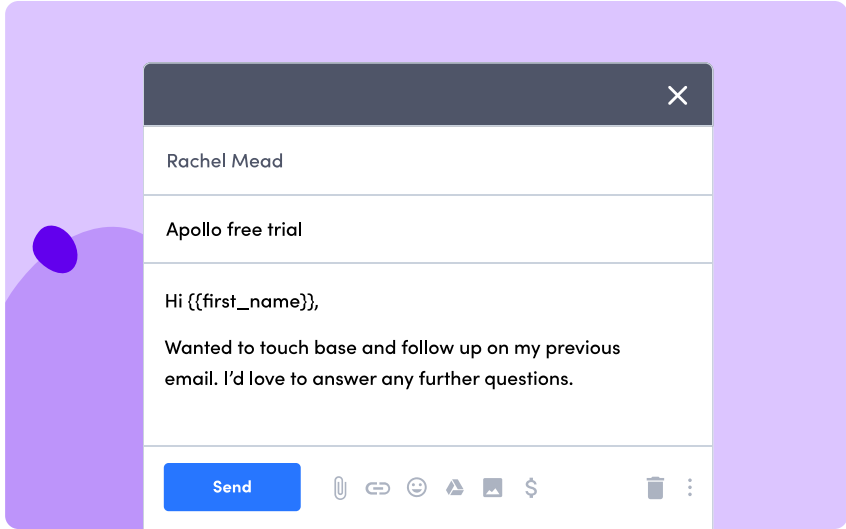
Tip #2 - A/B test emails

A/B test messages in your sequences to determine which message or subject line improves your email engagement metrics like opens and clicks.
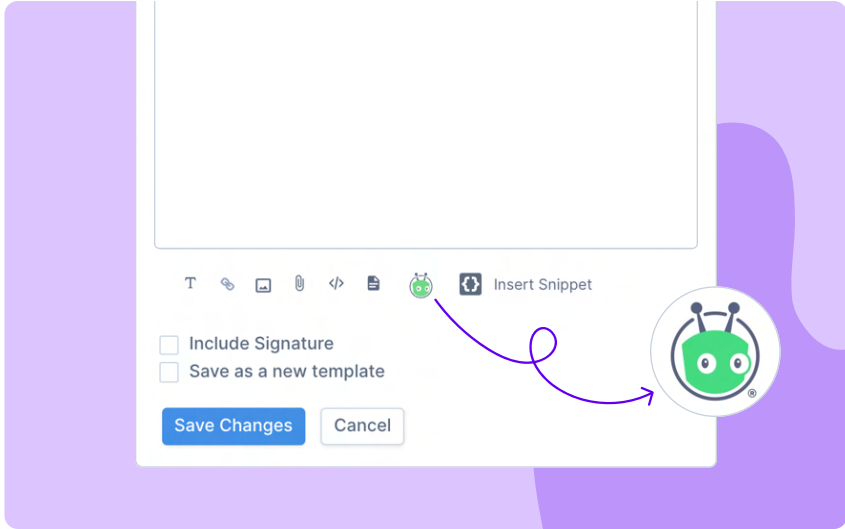
Tip #3 - Create engaging videos

Use the Vidyard Integration to send your prospects personalized videos in sequences and manual emails.

Tip #4 - Avoid email spam

To improve email delivery rates and avoid spam flagging, keep your paragraphs concise and remove unnecessary links from the body of your email and your signature.
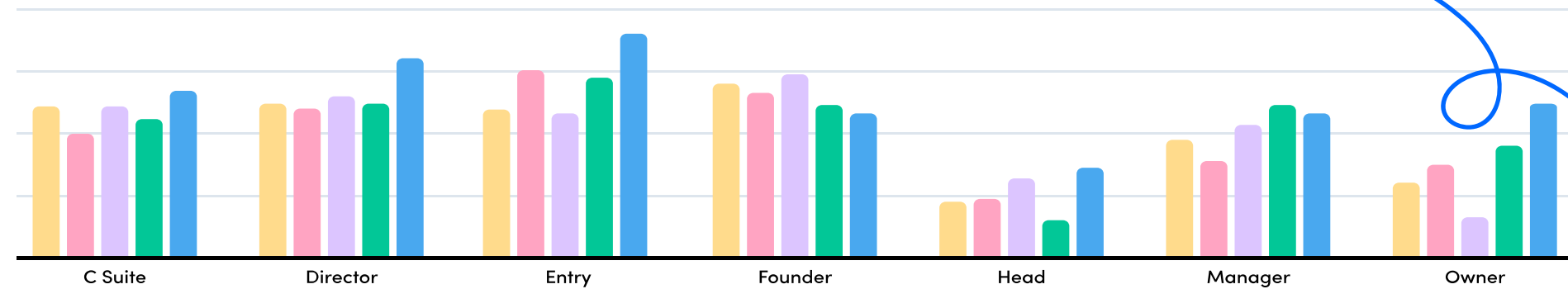
What is Workflow Management?

An overview to move your business forward with Apollo's Workflow Engine

A major benefit of using Apollo is the ability to streamline your workflow. When we talk about workflow management, we're referring to steps taken within Apollo to either automate you work or connect separated actions or systems for efficiency.
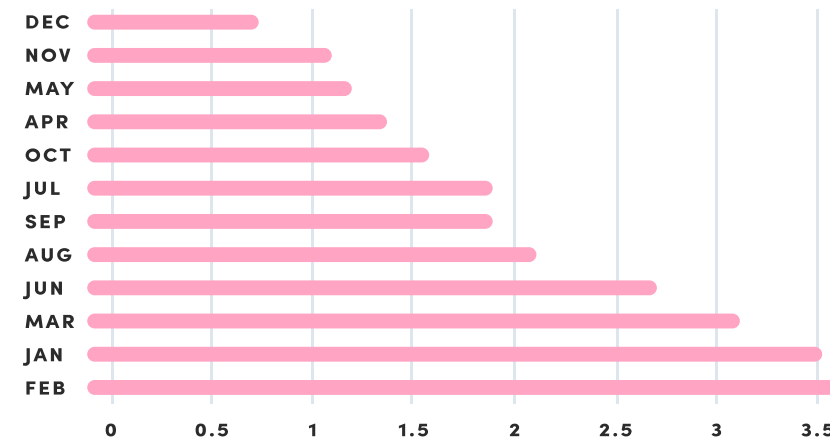
Proper workflow management allows you to work through administrative tasks quickly so you can spend more time establishing relationships and selling. By leveraging Apollo, you can move deals forward intelligently.
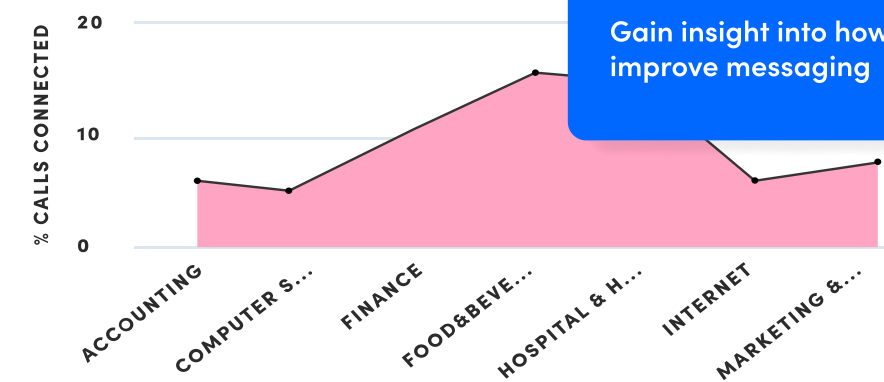
Watch the Demo Video →

TITLE X INDUSTRY — CONNECT RATES

C Suite · Director · Entry · Founder · Head · Manager · Owner

insight!

INTERESTED RATE BY MONTH

DEC · NOV · MAY · APR · OCT · JUL · SEP · AUG · JUN · MAR · JAN · FEB

0 · 0.5 · 1 · 1.5 · 2 · 2.5 · 3 · 3.5

INTERESTED RATE BY INDUS

% CALLS CONNECTED

20 · 10 · 0

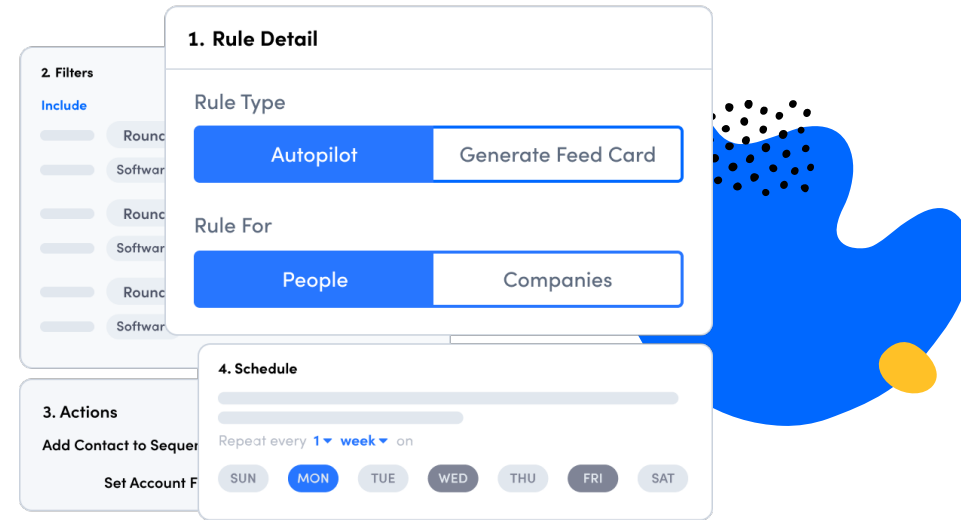ACCOUNTING · COMPUTER S… · FINANCE · FOOD&BEVE… · HOSPITAL & H… · INTERNET · MARKETING &…

Gain insight into how to improve messaging

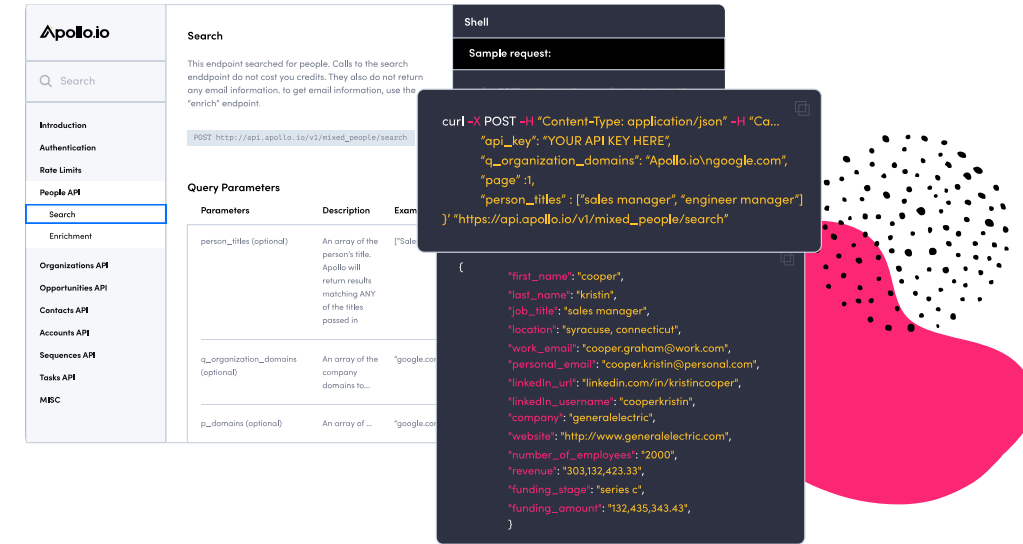# Apollo's Workflow Features

You'll find tons of helpful solutions within the Apollo platform, but when it comes to workflow management, here's what to start with:

Rules Engine

Use Apollo's rules engine to automate your manual prospecting and lead engagement efforts. You can quickly create rules and automate steps like adding or removing contacts from sequences and lists or creating tasks for your team. You can apply a rule either to a contact or an account and have the rule triggered based on an event or on a recurring schedule.

Learn how →

API

One of the best ways to streamline your workflow is to connect your systems to Apollo data. With Apollo's API you can connect CRMs and other third-party software to our platform. Once connected, programmatically search the Apollo database, update contacts or accounts in Apollo, or enrich data in any systems.

Learn how →

Apollo's Workflow Features

You'll find tons of helpful solutions within the Apollo platform, but when it comes to workflow management, here's what to start with:
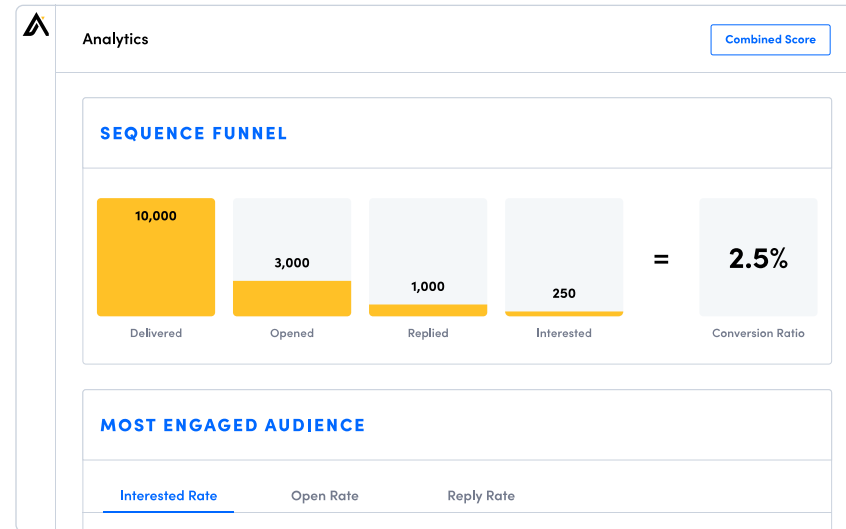

Analytics

In order to ensure your workflows are running efficiently, it's important to monitor results. Apollo analytics provides actionable data so you can identify gaps and optimize strategy.

Track your results with prebuilt visualization reports or slice and dice the data as you like by building custom reports with the many metrics and dimensions available. Pull insightful and actionable reports together into a dashboard and keep track of your and your team's progress.

When you send emails in Apollo, you can track open, click, and response rates. You can access this data from within a sequence, from a contact's profile page, or from the analytics page. Create reports that are private to you or make them public to your team.
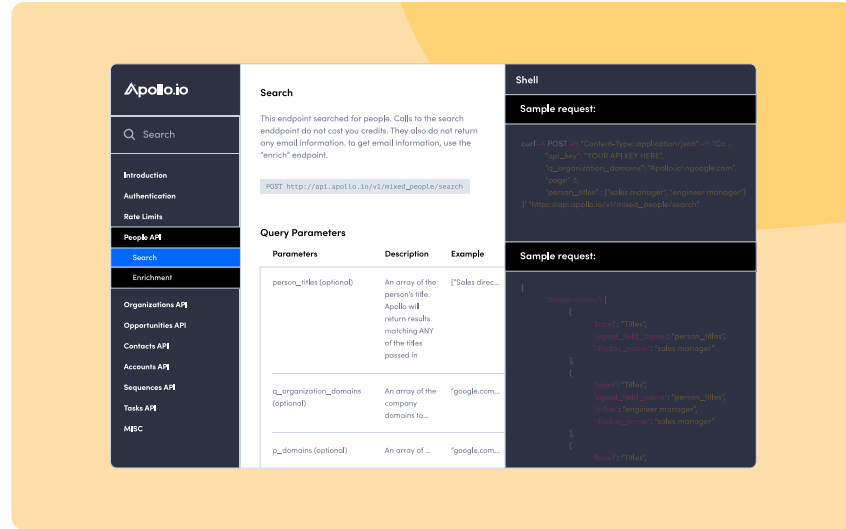
Learn how →
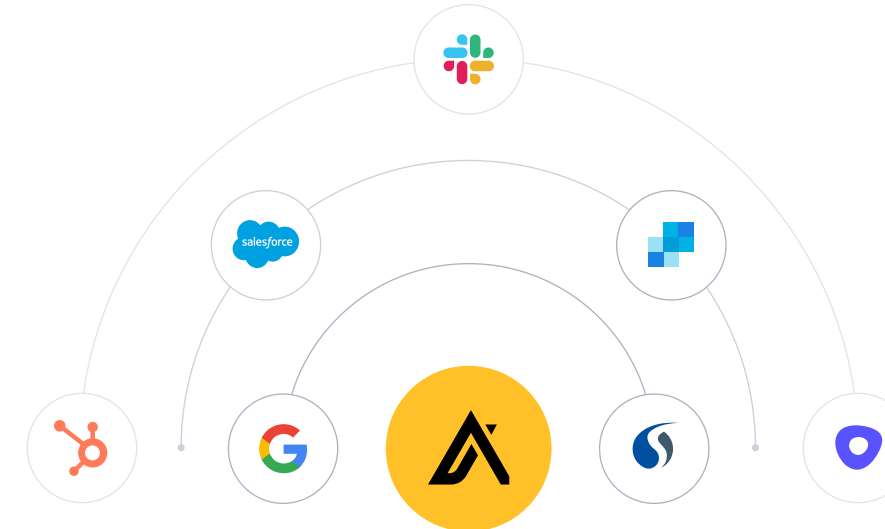
Integrations

Apollo seamlessly integrates with major platforms like Salesforce, Hubspot, Gmail, Outreach, and other sales platforms to keep your data and activities in sync. You can also build custom integrations using our open API or any Zapier-supported apps such as Slack, Pipedrive, and others.
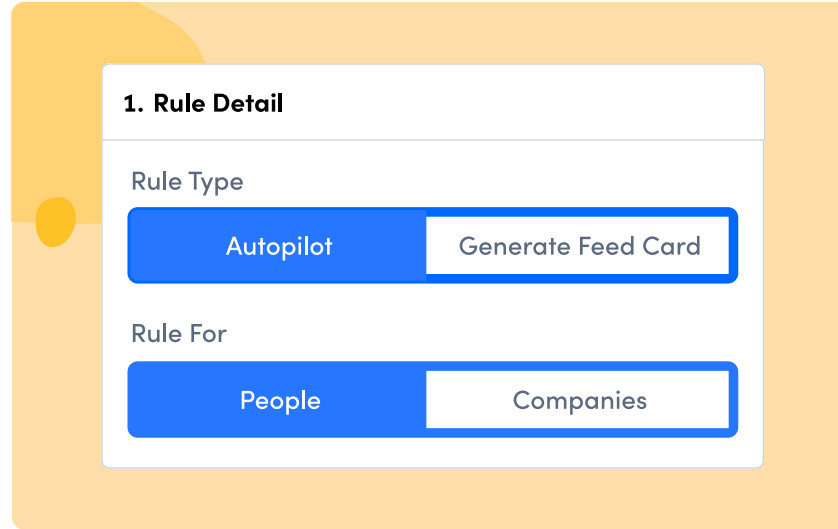
Learn how →

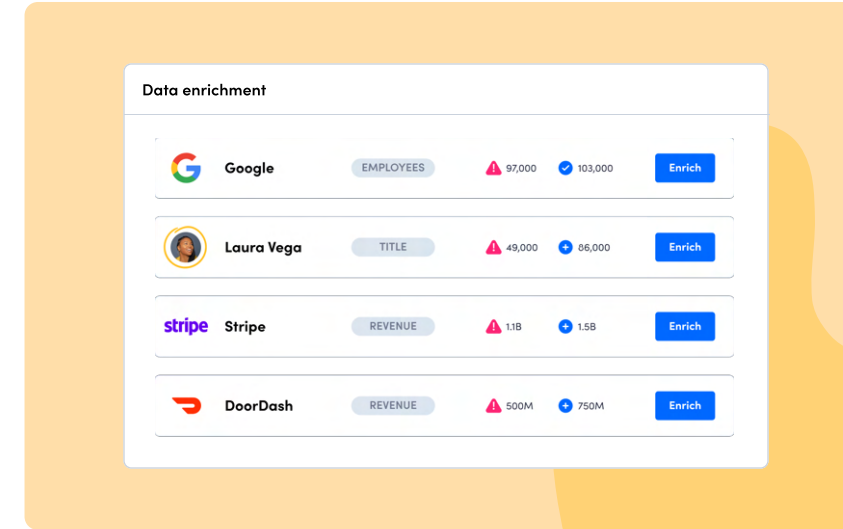# Bonus Tips for Workflow Management Success

Tip #1 - Leverage the API

View the API quick start guide in the developer portal to begin auto-enriching your CRM or other software applications with Apollo's accurate data.
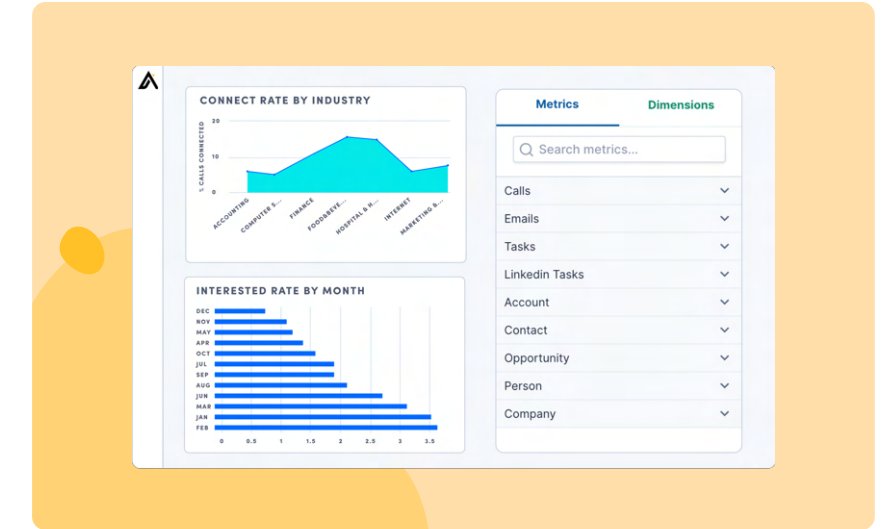
Tip #2 - Organize rules

Within rules engine, you can create folders dedicated to keep your rules systematic and organized.

Tip #3 - Enrich your CRM

Automatically update, cleanse, and enrich your Salesforce or HubSpot CRM data with data from Apollo. This way, you ensure your contact and company data is correct and rich.

Tip #4 - Build custom reports

When creating a custom report, use metrics and dimensions to visualize your data in whatever format works best for you. Add as many metrics and dimensions you need in each report.

Additional Help Resources

We're here for you! We want your first moments with Apollo to be as smooth as possible. If you get stuck as you're getting started, don't worry. You can access these resources for additional help.

The Apollo Knowledge Base

The online Knowledge Base is a free resource full of FAQs, how-to videos, and helpful articles to walk you through each and every Apollo feature.

Customer Support

You can chat with our highly-rated customer support team any time via the chat box that appears at the bottom of your screen when logged into Apollo.

Hands-On Assistance

If you're on a custom Apollo plan, you'll have access to a dedicated account manager and a training specialist to assist with any questions throughout onboarding and beyond.