Resource Kit

How to Outbound Using Website Visitor Data

How to set up website visitor tracking in Apollo

Does someone else help you manage your website?

- [ ] Tell them you need to add a Javascript snippet to your website
- [ ] Send them this doc
- [ ] They will need access to or work with you in your Apollo settings

Configuring this on your own?

1. Add the website domain you want to track to Apollo.

- [ ] Head to your Prospecting - Website Visitors settings (https://app.apollo.io/#/settings/websites).
- [ ] Add the website domain that you want to track
- [ ] To set intent criteria for specific pages, open the Advanced Intent Settings. The "Website Intent" High, Medium, and Low scores for Website Visitors will take these criteria into account — in addition to visit frequency and trends.

2. Next, you'll add the Apollo code snippet to your website.

→ If you're using Google Tag Manager, follow the instructions laid out here.

→ If you're adding the snippet directly into your website:

- [ ] First, find where you can add custom code across your site or on certain pages.

  Here are the relevant docs for popular website builders:

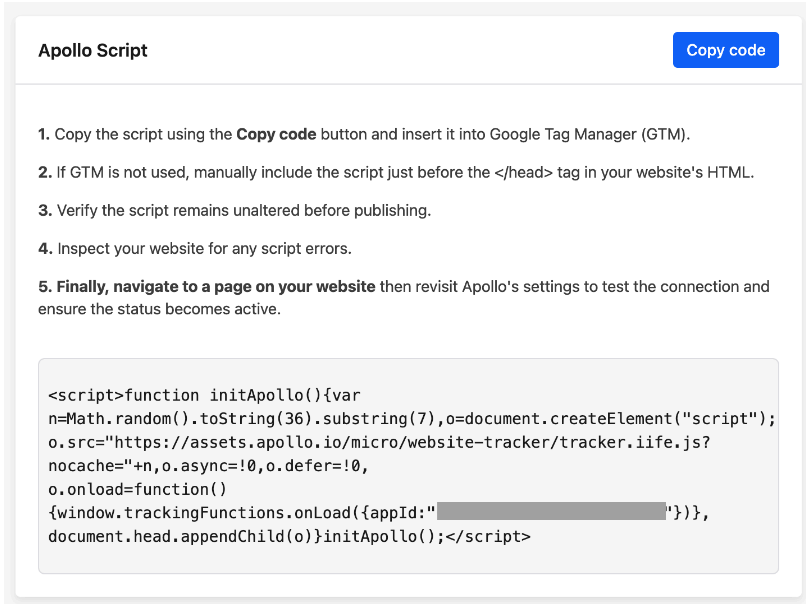
  - Webflow
  - Wix
  - Wordpress.com
  - Squarespace

  Searching for "custom code" in your website builder's help docs will help yield the relevant instructions. (NOTE! You may need to check the plan you're on to see if adding custom code is available.)

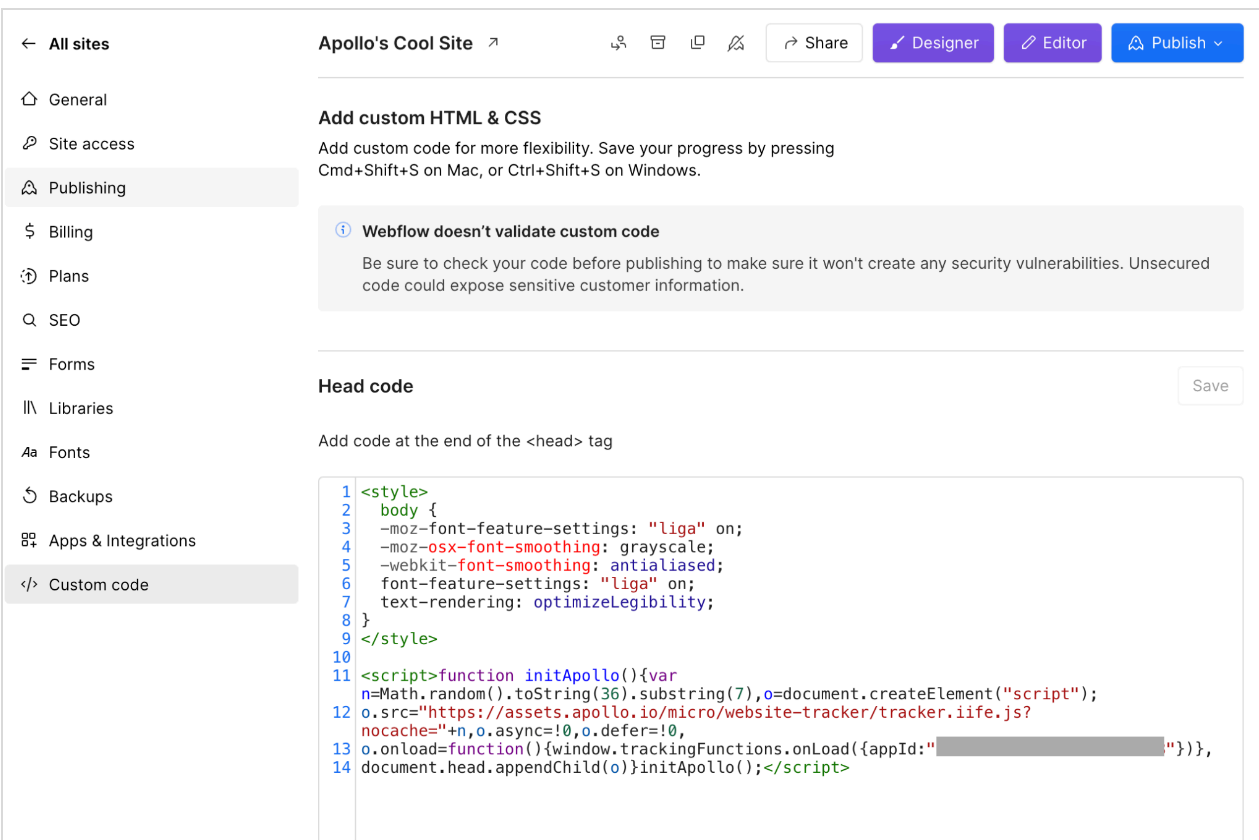
  You'll probably have the option to add custom code across all pages or choose specific pages to add the code to. The snippet has to be included for every page that you want to track.

  Whichever you choose, you'll be adding the Apollo code snippet to the "Head" code section.

- [ ] Copy the Apollo script by hitting the “Copy code” button [in your settings](#).



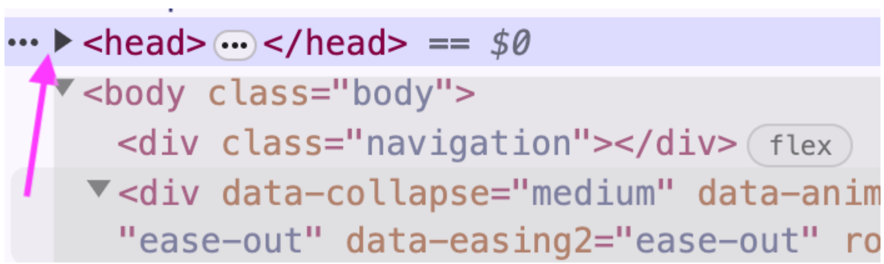
- [ ] Paste the script into the correct spot for your website builder. Save and publish your changes. Here’s an example of what this looks like in Webflow:



3. Test the Connection

- [ ] Go back to your [Website visitor settings page]() now to [click "Test connection"](). You may need to reload the page.
- [ ] Remember: If your connection is successful, **it can take up to 24 hours** for data to reflect in Apollo. So don't worry if you don't see anything immediately.
- [ ] **A troubleshooting tip**: check whether the Apollo code snippet is showing up on your page correctly by going to your website / a page you're tracking.

  In the Chrome browser, for instance, you can do this by going to Developer Mode (View › Developer › Inspect Elements). Toggle open the line with <head>

  Scroll down to where you see <script> tags and check whether you see something like "[https://assets.apollo.io/micro/website-tracker/tracker.iife.js]()" present before </head>.
- [ ] Please [get in touch with our support team]() if you run into any issues!

Using website visitor data in Apollo

- [ ] [How to use website visitor data]()
  - [ ] [Filter companies by website visitor data]()
  - [ ] [View website visitor activity snapshot]() (per company)
  - [ ] [View website visitor dashboard]()
  - [ ] [Build Plays using website visitor data]()
    - [ ] [How to create a Play in Apollo]()
    - [ ] [How to set up and use the Slack-Apollo integration]()
  - [ ] [Sort companies by visit dates and number of visitors]()

How to automatically send website visitors to a sequence (or alert a rep)

Here are step-by-step instructions for the Plays shown in the webinar.

Method 1

This method chains together two Apollo Plays: (1) add companies visiting site to account list + (2) add the right prospects from those companies to sequence.

Play - Part 1. Add website visitors to an account list

- [ ] Create a new play (If you are unable to save changes from this link, it's because you don't have permission to create a play.)
- [ ] For the **WHEN** step: Set the play to run "Based on a date or schedule" and choose your settings for frequency and when to start/end.
- [ ] For the **IF** step:
  - [ ] Choose the "Companies" target, then add your relevant "Website Visitors" filters.
  - [ ] Add more company filters (like location, # Employees, territories, stage, etc.). We recommend this step if you get a lot of traffic and/or have specific qualification and routing needs.
  - [ ] Hit "Save filters"
- [ ] For the **THEN** step:
  - [ ] Click "Add to account lists". Select an account list for your site visitors (or create a new list by typing in a new list name and hitting enter)
  - [ ] (Optional) Click "Add action" to also notify your team about these visiting companies. Set up an alert to send via Slack, email, and/or Apollo's control center.
- [ ] **For the Settings step:**
  - [ ] (If you need to control for credit usage) Set a limit for the number of companies processed
  - [ ] Choose how often the same companies should be added.
- [ ] Name your Play
- [ ] Save your changes.

Play - Part 2. Add prospects from visiting companies to a sequence

- ☐ [Create a new play] (If you are unable to save changes from this link, it's because you don't have [permission] to create a play.)
- ☐ For the **WHEN** step: Set the play to run "Based on a date or schedule" and choose your settings for frequency and when to start/end.
- ☐ For the **IF** step:
    - ☐ Choose the "People" target. Then click "Add filters" to see your People filters.
    - ☐ Under "Lists", click over to "Companies" and find the list you went people to in Play #1.
    - ☐ Add more people filters (like Persona, job titles, etc.) to pull only the relevant contacts from those visiting companies.
    - ☐ Click "Save filters"
- ☐ For the **THEN** step:
    - ☐ Click "Add contacts to sequence"
      Select the relevant sequence to send people to and set who those emails are sending from.
    - ☐ (Optional) Click "Add action" to notify your team about which prospects are getting added to the sequence
        - ☐ Set up an alert to send via [Slack], email, and/or Apollo's control center.
- ☐ For the **Settings** step:
    - ☐ (If you need to control for credit usage) Set a limit for the number of people processed
    - ☐ Choose how often the same person should be added to the sequence (likely "Only once")
- ☐ Name your Play
- ☐ Save your changes

Method 2

This method is only available if you are in the beta for Account-Based Plays. If you have this feature available to you, you can reduce the amount of setup required.

Add contacts from visiting companies directly to sequence

- [ ] Follow the steps in Play - Part 1 above until the "THEN" step.
- [ ] For the **THEN** step:
  If account-based plays are available to you, you'll see the option available under "Sequence automations" to "Add contacts to sequence".
  - [ ] From there, you can choose the sequence and sender settings.
  - [ ] Add additional Person filters to ensure you're only targeting relevant prospects at those companies. (See more detailed instructions here.)
- [ ] For the **Settings** step:
  - [ ] (If you need to control for credit usage) Set a limit for the number of companies and max people per account processed
  - [ ] Choose how often the same companies should be added to the sequence (likely "Only once")
  - [ ] Set approval to "Automatic" or "Manual"
- [ ] Name your Play
- [ ] Save your changes

Learn more about smarter outbound

- [ ] Learn about pivot filters in our webinar on How to Build Amazing Lead Lists.
- [ ] Brush up on how to create a messaging framework for your outreach.
- [ ] Level up your personalization game for your VIP prospects with this Master Class on How to Write Cold Emails Anyone Will Respond To
- [ ] PIck up ideas for different sequences for your leads, including one for VIPS like your high-fit website visitors.

How to get help & training on Apollo

- When logged into Apollo, click on the black circle with the question mark on the bottom right of the screen. From there you can find resources, submit a support ticket, or chat with our support team.
- Submit a support request here.
- Find your answers in the Apollo Knowledge Base
- Learn from our training library in Apollo Academy.

🍎 Need basic Apollo training? Join one of our daily live webinars. (Must have an Apollo account and log in to access.)