How to Use AI Power-ups to Accelerate Prospecting: Transcript

Lesson 1: Intro to AI Power-ups

This course covers how to use AI Power-ups to turbocharge your selling in Apollo.

Power-ups are AI-powered insights into both people and companies that can accelerate research you'd normally be doing on prospects or help you personalize your outbound messaging.

AI and automation are changing the face of sales — and it's easy to see why. Apollo customers that leverage AI Power-ups and automations book 47% more meetings.

Power-ups use Apollo data and external data, along with AI, to uncover and reveal the most important details about your prospects. These insights are generated using one of three AI models:

AI Search Engine: Best for researching and prospecting leads at scale, delivering quick insights on people or companies you can use to improve your targeting.

AI Text Generator: Best for targeting, categorizing, or summarizing both Apollo data and information from other AI Power-ups.

AI Copywriter: Best for generating messaging using the information you've acquired inside Apollo. Use it to create personalized emails, ad hoc LinkedIn messages, or scripts and notes for upcoming meetings and pitches.

AI Power-ups are extremely powerful, but they're also really easy to use. You can write your own custom prompts using any of the three AI engines, or you can use Apollo's prebuilt Power-ups, available in your account right now.

This course will get you ready to start using AI Power-ups in your sales process. Over the next three videos, we're going to:

1. Improve your targeting by using a Power-up to research your leads and get the information you need to truly understand if a prospect is a good fit.
2. Personalize your outreach by researching your top leads and summarizing the findings on the record, just like you would if you were conducting the research yourself.
3. Generate messaging by leveraging AI to research and craft highly personalized emails.

So, let’s get to it. Let’s use an AI Power-up together!

Lesson 2: Improving your targeting

Let’s start things off by getting a power-up to research our leads for us.

Apollo has a lot of data, but oftentimes, there are additional details, data, something that we need that we’ve gotta go find manually or that we wish we had that would allow us to better understand our leads or to prioritize or identify the right ones.

So that’s what we’re gonna do in this video. We’re gonna improve our targeting. The first thing we’re gonna do is we’re gonna hop into Apollo together and update our AI Content Center. That’s where we can give Apollo details to understand what we sell, what we do, what we bring to the table.

Then we’re gonna go grab ten of our saved leads and put them into a list. Those are gonna be the ones that we run our AI Power-up on. And then we’re gonna select a power-up from the "Built by Apollo" templates in the "Improve Your Targeting" category.

So hop into your Apollo account with me. Let’s do this together, and pause if you need more time.

So I’m at the home screen. Hopefully, you are too. The first thing we’re gonna do is go set up our AI Content Center.

First, you’ll click **Settings** at the bottom left.There’s a lot of settings in Apollo. You can find anything you’re looking for just by going to the search box. In this case, you could just type “Content,” and you’ll see **AI Content Center** there.

Now this is where you put in information about your company, your product, your value prop, customer pain points, even your competitors. You preload this all in here to help inform the AI so it can do a better job of finding the right leads, identifying information, generating messaging.

You’ll see there’s a number of fields here. Do the best you can to put them in there. I’ve already filled most of it out. If you wanna start with what it can pull from your website, just hit the dropdown right here and pop in your company website.

Once it looks good, let’s hit **Save**, and we’ll go back to the home screen.

Now we’re gonna run this Power-up on just ten leads to get started. We’re gonna go grab some new ones and put them into a list so it’s really easy to see what those Power-ups are generating.

First, you’ll click **People** on the side. If you already got a few leads you wanna use that are saved, that’s great. I’m gonna grab some new ones using a persona I’ve created. Let’s put those leads into a list so it’s easy to find everything we’ve done in this course.

So let’s go load up our list where we’ve got ten leads we’re gonna use for this Power-up.

Go up to that top-right button that says **Power-ups**, and you'll see two options there: **View Templates** or **Run Your Custom AI Prompt**. Of course, you can write your own, copy it over from another platform.

Well, let's go **View Templates**. And then we're gonna do an "Improve Your Targeting" template here. You'll see a few different options available from Apollo. Now these are a great way to simplify or remove work that you normally have to go do manually.

In my case, I'm gonna do "Assign as B2B or B2C." I really only go outbound for B2B opportunities. I'll take B2C if it's inbound, but not gonna go outbound for it. So I'm gonna use that one. But review all of them, see which one's gonna be best for you.

Once you hit **Try It**, you'll see this pop-up where it's gonna show you the engine it's gonna be using — in this case, AI text generator — and you'll see the full prompt it's using as well.

If you scroll down, you'll see all the field settings. **Field Name** is what it's gonna auto-assign to that field. If you wanna change it, you can pop it in there. I'm gonna simplify it.

And then you can choose the **Field Type**: single-line text, multiline, or pick list. In this case, I'm just gonna go with pick list. That's what it defaulted to because there's only really a couple options.

Below that, you'll see how you wanna save the field: global or private. Global, of course, all the users on your account can see it. Private, just you.

Once it looks good, let's hit **Save and Run**.

Once our Power-up is done running, you'll notice that there's a new field added to the data on these records.

It'll be the name that you gave it when you ran the Power-up, and you'll see that it has broken down those ten leads — B2B or B2C. Now that is a field on the record, so you can use that as a dynamic variable in your emails or sequences should that information be useful there.

And, of course, you can use it to set up multi-branch workflows as well.

So now we’ve got our AI Content Center updated, and we’ve run our first Power-up. But I’d like to remove some additional work from my plan. That’s what we’re gonna do in the next video.

We’re gonna use a Power-up to go research our leads, summarize everything it’s finding, take those notes, and put them on the records so we can personalize our outreach.

Lesson 3: Researching leads

So we just used a Power-up to go get new data — new information about our leads. Now, I'm going to use a Power-up to research my leads in a much deeper way.

I’m going to use a Power-up to track down details about the contact or company and then summarize it and put it on the record for us. In my case, it’s going to let me spend more time on the leads where I have more information to use, and I’m actually going to automate how to handle the ones where I don’t. So in this video, we’re going to go back to our list. We’re going to use one of the built by Apollo templated Power-ups in the Personalize Your Outreach category. Then, I’ll show you how I’m using my Power-ups in my automations. I’m going to use the details that come from the research we’re about to do to automate which leads go into which sequence. So hop into your Apollo account, and let’s do this together.

Let’s go back to the leads we were just using in the last video, and we’ll run another Power-up on them. This time, instead of going to get data, we’re going to have it research those contacts.

Click the Power-up button at the top right and select **Start with a Template**. This time, we’re going to do Personalize Your Outreach. This is where a Power-up goes and deep researches your contacts or companies and grabs that information and puts it on the record. In this case, I’m going to do Summarize Professional Posts.

If they’re posting a lot, if they’re active on LinkedIn, I’d like to put those into a sequence where I’m manually writing that first email and using that information. If they're not, then I'm going to put them into a different sequence where it's going to start with an automated email. So there are quite a few options here. Choose the one that's going to get the information most useful for you. Again, I'm going to do Summarize Professional Posts.

Now you'll see the breakdown, the configuration of that Power-up. On mine, it's got two steps. It's not only going to go look to see if they are posting and grab those posts, but it's also going to summarize them for me, collate all that information together.

To the left, you'll see a preview window where it's going to show you the results for a couple of your leads to see if this is what you want it to do. In this case, for this lead, it shows **No posts found in the last two months**. That's exactly what I want it to do. If that person's not posting, let me know about it. If everything looks good, let's run this on the leads.

Once your Power-up is activated, it's going to create those new fields at the end of the list. If you want to move them to the front, prioritize them more, click **View Options**, and I'm going to move the new fields that were just created to the top.

As you can see, it's gone to see if they've been posting. Some of these have none; some of them have quite a few posts. Then here's the full summary. It can be a little bit condensed, tighter, hard to see in the search results screen, but all this information is stored in Custom Fields on the contact. Just click on somebody's name, and at the top of the screen, you'll notice it has a breakdown of the contact — what sequences, deals, conversations, or meetings you've had with that person — and Custom Fields. Click **Custom Fields**, and you'll see all the custom fields associated with that record and the details within.

So I'm going to pop over to a workflow I've already got created. I'm just going to do a quick edit to show you how you can do this.

I'm going to add a **True/False Branch**. This is a workflow that is grabbing leads from that list and putting them into a sequence. Now I'm going to break it up.

Click on the **True/False Branch**. It's going to look for the ones with LinkedIn activity.

Now hit **Add Filters** to tell it how to break these leads up, and you'll notice that **Custom Fields** — the ones created by yourself or Power-ups — are available as a filtering mechanism.

I can say find all the ones that have posts on LinkedIn. In this case, it's six of the ten, and drop those into a sequence that I'll treat differently than the ones that don't.

Now I've got a Power-up not only getting me that information but allowing me to set up Workflows that are really going to save me a lot of time.

We've seen how Power-ups can help us with our targeting and our research, but let's take things a step further. How about a Power-up that takes all the data, reviews it, and generates highly personalized, amazing emails for our prospects? That's what we're going to do in the next video.

Lesson 4: Generating personalized emails

So now we've had Power-ups go get new data and attach it to our lead records. Then it researched them as well — the contacts and companies.

But Power-ups can do a lot more.

Power-ups can take the Apollo data, the new data, and everything you put in the AI content center — those details about what you sell, your company, and the type of customers you're looking for — and write amazing personalized emails for us as well.

I've been able to remove the leads I don't want to focus on right now. I've also had it look to see if any of these contacts are active on LinkedIn. The ones that are, I'm going to treat a little differently. I want to start with manual posting in my sequence. But the ones that aren't, I want to have the Power-up write an amazing personalized email using all that information.

So let's finish strong. We're going to go back into Apollo. We're going to go to our list of leads — the ones we're using for Power-ups. We'll select another built-by-Apollo Power-up in the "Generate a Message" category. Then I'll hop into my sequences to show you how I'm going to use that Power-up to send great personalized, automated emails to the right leads.

So you hop into your Apollo account. I'm going to hop into mine. Let's do it together.

Time for us to do our third and final Power-up for this course. Feel free to use the leads we've been using all along for this course. If you want to grab ten new ones, though, this would be a good time to do that. I'm going to keep using the ones I put into my list.

Let's go up to that Power-up button. We're going to start with a template. Next, you'll click **Generate Message**. You'll see multiple options created by Apollo. Now, these are multi-step Power-ups. Whatever they say they're going to do, they'll go get that information, use it along with the Apollo data, and generate fantastic personalized emails. You'll notice you can have it research their professional posts, job openings, and what's happening at the company — then integrate that into what it's writing about.

I'm going to **Write an email based on company priorities** right here. You'll notice it's got four steps: it'll identify the company's priorities, research that account, write the personalized email, and even write a personalized subject line.

Once again, you'll be able to see a preview for all four steps with a couple of your leads right here to the left of the breakdown.

It might take a moment to populate that preview, especially when it's multiple steps. But once you check things out and it looks good, let's hit **Save and Run**.

That'll start your Power-up cascading through all the steps involved with that Power-up, and it'll start generating that information right on the record. Once your Power-up is done, you'll see that information start to populate in new fields created on those records — in this case, four of them for that one Power-up.

It was using the information on the record plus what we put into the AI content center to:

- Identify priority indicators (whether a company would be a good fit or not).
- Research the company.
- Put together a personalized email.
- Write a personalized subject line based on the information it found.

Now I'm going to pop over to a sequence I've already created for these types of leads. I've got step one with a manual email. I had a template in there. Normally, I'd personalize it from there, but I'm going to edit this one.

Of course, all that information from your Power-ups is stored on the record. That means you can use them as dynamic variables.

So I'm going to leave this manual email for now as I'm just getting started with Power-ups. I want to hit send. I want to read these and check them out before they go out. I'm still going to place the dynamic variables in here.

You'll notice that it will populate some of the recently created fields right at the bottom here, such as **Write a Personalized Subject Line**. I'll pop that in there. Then I'm going to pop in my personalized email dynamic variable as well.

Of course, you can find all your dynamic variables — including the ones created by your Power-ups — by hitting the **Add Dynamic Variables** button. You'll see **Recently Created** right at the top, or you can scroll down or search for any others you might be looking for.

Now, the preview window here is showing a broken variable. It's in red. That means it can't find that information because I haven't selected a contact. You can hit the drop-down here. Just type the name of any of the leads from your list, and you'll see it pull up the personalized email from your Power-up right in the preview window.

Congrats! That's the end of this course.

You've seen how to use Power-ups to improve your targeting, research your leads, and generate amazing personalized messaging as well. But with Power-ups and custom prompting, there's no limit to what you can do to improve your sales process.

So thank you for joining me. Good luck, and happy selling!