

APOLLO x EXTREME REACH - CSM PILOT

A weekly rhythm for finding new contacts at the accounts your CSMs already own.

Kickoff session · Wed, May 20 · 45 minutes · 6 CSM reps

PREPARED BY

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REFERENCE

5/14 call with Carlton Barker

WHY THIS, WHY NOW

The CS team needs help finding the right people.

You already know your accounts. What is hard is finding new contacts at those accounts to multithread into.

This pilot puts Apollo on top of your existing Salesforce ownership so you can:

- See your own book filtered by CSM owner
- Find marketing, ops, sales, or creative personas at those accounts
- Skip anyone who is already an Extreme Reach platform user
- Drop the right contacts into a sequence with manual send gates

THE PRINCIPLE

Crawl, walk, run.

WEEK 1 TO 2 · CRAWL

Get comfortable. Manual list building. No workflows. No AI.

WEEK 3 TO 5 · WALK

Add the Monday workflow. Manual approval queue. Manual first send.

WEEK 6 AND BEYOND · RUN

Auto-send for sequences you trust. AI assistant on. CI keywords live.

Nothing fires automatically on day one. You stay in control of every send.

THE WEEKLY LOOP

Six steps, one cadence.

- 01 List building, per CSM** : your own 15 to 20 accounts, persona sub-lists

- 02 Find new contacts** : at those accounts, filtered by persona

- 03 Custom field gating** : CSM owner + active-user fields filter the right way

- 04 Monday workflow** : Apollo surfaces 10 to 25 contacts for your approval

- 05 Enrichment + sequence drop** : manual email step on first touch

- 06 CI keyword tagging** : phase two: call signals auto-update Salesforce

THE TWO FIELDS THAT MAKE IT WORK

CSM Owner. Active Platform User.

CSM Owner

Your Salesforce custom field, synced to Apollo. Without it, every rep sees every account. With it, you filter to the 15 to 20 accounts you actually own.

HARD DEADLINE

Synced to Apollo before Wed 5/20

Active Platform User

Pendo-driven flag for existing XR users. Apollo filters them out, so CS never accidentally reaches out to a current customer.

IN PROGRESS

PII review with Becky

WEDNESDAY 5/20 SESSION FLOW

45 minutes. Hands-on. Live builds.

PART 01 - 10 MIN

Orientation

Log in. Find your accounts using the CSM owner filter. See your book in Apollo for the first time.

PART 03 - 12 MIN

Workflow + Sequence

Set up the Monday approval workflow. Walk through the persona-branched sequence template.

PART 02 - 15 MIN

List Build

Each rep builds a marketing or ops persona list against their own accounts, live, in the platform.

PART 04 - 8 MIN

Q&A + Next Week

Pilot cadence, success metrics, decision criteria for full CS team rollout.

PRE-KICKOFF CHECKLIST

Before you walk in.

- Have your Apollo login ready (Becky sends the activation link by Mon 5/18)
- Pick the persona you most want to reach first: marketing, ops, sales, or creative
- Have 3 to 5 of your accounts top of mind for multithreading this week
- Bring 1 question you want answered live

See you Wednesday.