

Walk in knowing what we are building and why.

This is a 45-minute working session, not a training. You will leave with your own list of accounts in Apollo, a Monday workflow primed for your book, and a sequence ready to send the first email. Carlton and CS leadership co-signed the rollout. Your job is to bring the accounts you own and the personas you most want to reach.

THE PRINCIPLE: Crawl before walk before run. Manual gates on every send until the team earns the right to remove them. Nothing fires automatically on day one.

WHAT IS CHANGING FOR YOU

- A single place to find **new contacts** at the accounts you already own
- A weekly Monday queue of approved-or-decline candidates, capped at 10 to 25 contacts
- Email and phone enrichment built in, no manual lookup
- A **persona-branched sequence** with manual send gates on first touch
- Salesforce stays the source of truth; Apollo pulls from it

WHAT IS NOT CHANGING

- You still own your accounts. The CSM owner field gates everything
- You still decide when an email leaves your inbox
- Active platform users are filtered out, so no risk of contacting existing customers
- AI assistant stays off until the team is comfortable with the basics
- Salesforce remains the system of record for account context

WEDNESDAY 5/20 SESSION FLOW

45 minutes, hands-on, live builds in your own Apollo account.

PART 01 · 10 MIN

Orientation

Log in, find your accounts using the CSM owner filter, see your book in Apollo.

PART 02 · 15 MIN

List Build

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

PART 03 · 12 MIN

Workflow + Sequence

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

PART 04 · 8 MIN

Q&A; + Next Week

What is the cadence of the pilot, how do we measure, when does it go to the full team.

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 that you want multithread into this week
- Bring 1 question you want answered live