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HELP ARTICLE 1

Logging in to Apollo

Use this when: *you need to get into Apollo.*

1. Open Chrome and go to app.apollo.io.
2. Click **Log In** — not Sign up.
3. Login email: dawn@outreach.directcarealliance.com. Enter your password.
4. You land on the Apollo dashboard — you're in.

First time? Find the Apollo invite in your DCA inbox (check spam) to set your password. Anastasia uses this same login. Can't get in? Text Gwen at 512-787-7922.

HELP ARTICLE 2

Looking up a person by name

Use this when: *Tim or Gwen sends you a name to pull before a call.*

1. In the left rail, click the **Search icon** (magnifying glass) → in the **Prospect and enrich** menu, click **People**.
2. On the left, use the **Name** filter — type the name, press Enter. **(Not the big search bar at the top.)**
3. Check the Title and Company columns to confirm the right person, then click their name to open the profile.

Good to know: Searching is free. Revealing a contact's email or phone uses a credit — check with Gwen before you reveal one.

HELP ARTICLE 3

Looking up a company (and finding the right contact)

Use this when: *you have a company name, or a person won't show up by name.*

1. In the left rail, click the **Search icon** (magnifying glass) → in the **Prospect and enrich** menu, click **Companies**.
2. Type the company in **Search companies**, press Enter, and open it.
3. Click the **People** tab, then filter by job title to find the right decision-maker.

Tip: Company has multiple locations? Check the city/state on the profile to confirm you've got the right one.

HELP ARTICLE 4

When a search returns no results

Use this when: *a name or hospital won't come up — common with big systems like Methodist, HCA, or Baylor.*

Work through these in order:

- Switch to **Companies**, search the hospital there, open it, and browse the People tab.
- Add a **Location** filter on the left — type the city (e.g., Houston).
- Try a variation — “Methodist Health System,” “Methodist Healthcare” — with a state filter.
- Still nothing? **Text Gwen the name** — she'll pull it from her access or run a research request.

HELP ARTICLE 5

Working your weekly call list

Use this when: *it's Monday and Gwen has sent your warm leads.*

You get two tools — you don't need Apollo open to use them:

Prospect Log	Your call list for the week. Work down it and log each outcome in the Notes column.
Prospect Profile	One page per lead. Gwen fills the strategy; you read it before calling and add what you learn.

On the call

- Speak to their situation — don't read a script.
- Goal: **set a meeting with David**, not close.
- Verify the phone first — Apollo numbers are often outdated. If it's dead, text Gwen.

After the call

- Note the outcome (meeting set / not now / voicemail / retry) plus anything useful, and send it to Gwen.

HELP ARTICLE 6

Handling a reply

Use this when: *someone replies to an outreach email.*

Replies land in your outreach inbox: **dawn@outreach.directcarealliance.com**.

1. Reply personally, as yourself — no templates.

2. Forward it to Gwen (gwen@hazelpipercreative.com) the same day.
3. If they want to meet David, coordinate with Tim for a time.

Important: Never re-add someone who has replied to a sequence — that relationship is personal from this point on.

HELP ARTICLE 7

Getting help

Use this when: *you're stuck on anything.*

Anything Apollo, lookups, your call list	Gwen — gwen@hazelpipercreative.com · 512-787-7922
Strategy, who to call, billing	Tim — tkaufeldt@chartx.org
Warm conversations / meetings	David — dbalat@directcarealliance.com
Login or platform errors	Apollo Help Center → Chat (inside app.apollo.io)