

QCL Apollo + LinkedIn Operator Runbook v13.2

Preflight, import settings, signoff gates and rollback plan

Metric	Value
version	v13.2
public_url	https://quantumfinancelabs.com/qcl.html#apollo-operator-runbook
source_contact_rows	15
source_account_rows	15
source_field_map_rows	14
runbook_steps	16
preflight_checks	12
import_settings	11
signoff_gates	9
rollback_rows	8
linkedin_sop_rows	6
external_actions	0

Step	Instruction	Gate
Confirm authority	Owner confirms this is the correct Apollo workspace, user permission profile and list name.	Do not open upload flow without approval.
Open contact pack	Use qcl_apollo_contact_import_ready_hold_v13.1.csv as the contact import candidate data.	Do not modify source rows unless logged.
Verify minimum fields	Confirm Company Name and Company Website are present; Apollo docs require at least one of each.	Do not create or link LinkedIn contacts.
Create or confirm custom fields	If mapping QCL fields, create matching custom contact fields before upload.	No upload if custom fields are missing and mapping is required.
Decide enrichment policy	Default is waterfall enrichment OFF until owner explicitly approves credit/data use.	No enrichment without approval.
Set list name	Use QCL AQCC 2027 Speaker Faculty HOLD v13.1 unless owner chooses a different list name.	List name must include HOLD until outreach is approved.
Map columns	Map First Name, Last Name, Title, Company Name, Company Website, Owner, Stage, and Company Website.	Do not create or update fields.
Duplicate handling	Prefer skip/update decision from owner before import; do not overwrite existing records.	No default approval.

Gate	Approval
Upload contacts	Approve exact contact CSV and list name.
Upload accounts	Approve whether account import happens before contact import.
Map custom fields	Approve creating/mapping QCL custom fields in Apollo.
Use enrichment	Approve waterfall enrichment and credit/data usage.
Handle duplicates	Choose skip, update or merge behavior.
Manual LinkedIn review	Approve human review scope; no automation.