CRM Insights

User's Guide

Microsoft Dynamics CRM

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First Steps

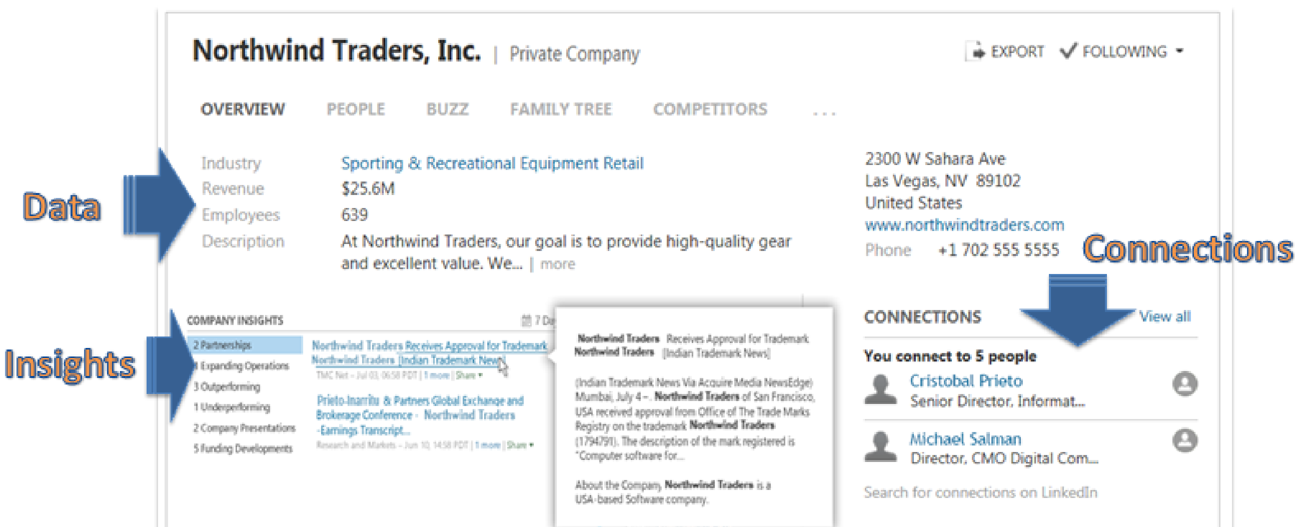
What is Insights?

Insights is designed to help your organization reduce the time spent on account research and win more deals. At its core, Insights is a robust sales intelligence system that provides real-time contact data, news alerts, and company insights.

Insights infuses your Microsoft Dynamics CRM system with essential data, insights, and connections. The information in Insights is constantly updated from 30,000 financial, media, and social sources. Insights contains 50 million company and contact profiles.

Insights enables you to effectively perform your sales tasks, including:

- Research your target accounts and prepare for calls.
- Qualify leads and find connections to key executives at your target company.
- Monitor target companies and key executives to get regular notification emails about them.



Navigate to Insights

You can access Insights from the following entities in Microsoft Dynamics CRM Online: Accounts, Leads, Contacts and Opportunities. Insights is included with your Microsoft Dynamics CRM Online Professional license at no additional charge.

Accounts

1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears in the navigation bar.
2. Click the work area name, and then click **Accounts**.
3. Open an account and scroll down.

Leads

1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the navigation bar.
2. Click the work area name, and then click **Leads**.
3. Open a lead and scroll down.

Contacts

1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the navigation bar.
2. Click the work area name, and then click **Contacts**.
3. Open a contact and scroll down.

Opportunities

1. On the navigation bar, click **Microsoft Dynamics CRM**.
2. Click **Sales** and then click **Opportunities**.
3. Open an opportunity and scroll down.

Insights Agents

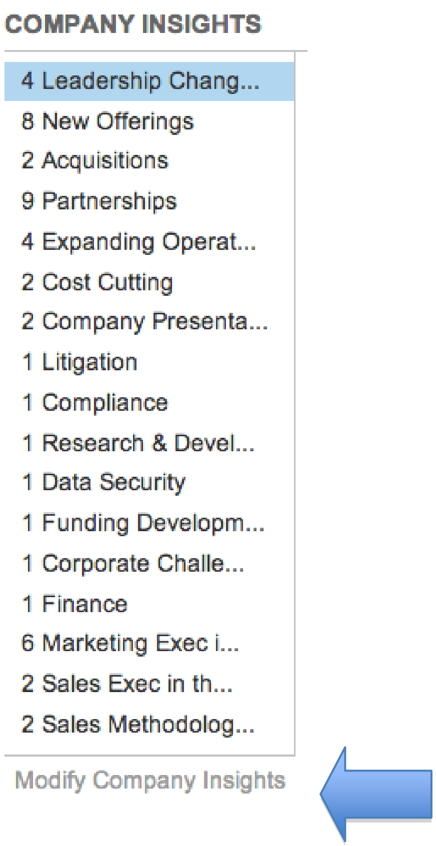
When you're researching a target account, perhaps the most valuable information to know is the current events at the company—what's happening right now. This information is provided by Insights' Agents. Agents are search "robots" that retrieve news articles and current events about companies and people of interest to you. Agents monitor and gather important business events, such as Leadership Changes and Expanding Operations, from various news sources including social media and traditional editorials. Using these agent results, you can identify business opportunities with your target companies and find conversation starters which can help you better prepare to approach your target.

To present focused sales intelligence, Insights uses the following 18 predefined searches for common sales triggers and significant company events:

- Leadership Changes
- New Offerings
- Acquisitions
- Partnerships
- Expanding Operations
- Cost Cutting
- Out Performing
- Under Performing
- Company Presentation
- Litigation
- Compliance
- Research and Development
- Data Security
- Funding Developments
- Bankruptcy and Restructuring
- Real Estate: Deals
- Real Estate: Construction
- Corporate Challenges

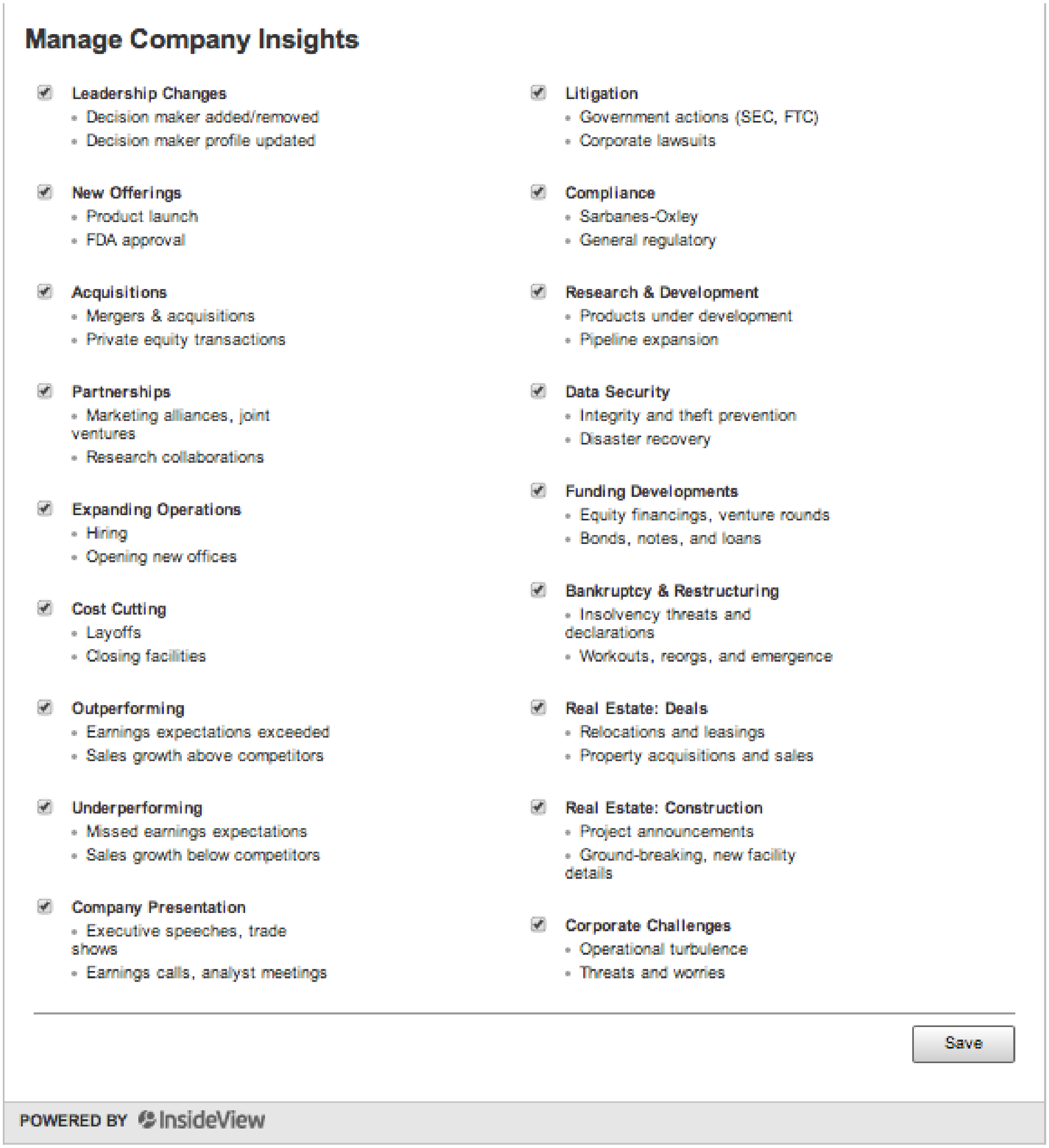
Modify Agents

You can modify the agents based on the events that are of particular interest to you.



- ### **Navigate to an account**

1. Underneath the list of Smart Agents, click on **Modify Agents**.
2. To disable any **Agents**, unselect the checkbox next to the agent(s) you do not wish to see, then click on the **Apply Changes** button at the bottom of the screen.



Tip:

- You only need to modify your agents once; all changes you make to the agents will apply universally to all companies you view.
- You can modify the agents at any time.

Search for a Company, Person or News

Use the search box at the top of the Insights screen to find companies, people or news. For every search string, the resulting company, people and news results are displayed in separate sections on the **Search results** page.

Insights searches the following fields in each record type:

- **Company:** Company name, DBA name, Aliases, City, State, Country, Region, Ticker, Company description
- **People:** First name, Last name, Employer
- **News:** Article Title, Body of the Article

  Note:

  - If there are multiple keywords in the search string, all the words in the string need to be present in the news article for it to be qualified as a search result.
  - Only news items from the last 30 days are displayed in the search results.

➢ Search for a text string

3. In the top right corner of the Insights frame, point to **More** and click **Watchlists**.
4. In the **Search for a Company Person or News** box, type a few letters to narrow your search, and then click the Lookup icon 🔍 .

Tip:

- When you start typing something into the search box, you'll see a dropdown menu with suggestions. Insights uses the keywords you enter to guess what you're searching. If you see what you're looking for in these suggestions, click it to save time searching.
- Use an asterisk (*) as a wildcard if the text you're looking for is not at the beginning of a field. For example, to find all records that contain the word "advanced", enter ***advanced**.

By default, three search results are displayed for each section (Companies, People, and News). To view more search results for a particular section, click **More** under the section.

Research Accounts

Use Insights to research your target companies and plan effective sales strategies. Insights provides comprehensive and up-to-the-minute information about companies so you can identify the best time and method to approach them. In Insights, all the information pertaining to a company, whether it is a lead or an account, is displayed on a unique details page.

➢ Navigate to the details page of a company

From Accounts

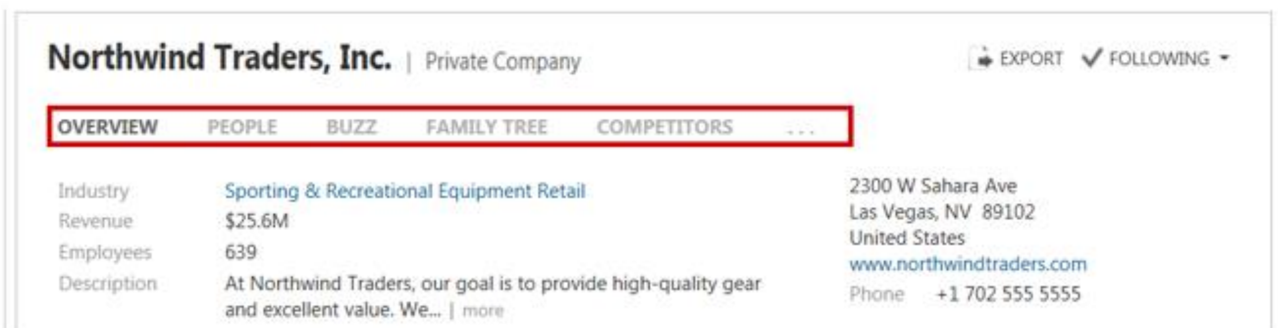
1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the navigation bar.
2. Click the work area name, and then click **Accounts**.
3. To view the Insights of a company, open the account and scroll down.

From Leads

1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the navigation bar.
2. Click the work area name, and then click **Leads**.
3. To view the Insights of a company, open the lead and scroll down.

Company Details

On a company details page, you can view all the information related to the company that can help you qualify it as a lead or prospect.



Using company details, you can:

- View your connections to key executives at the company.
- View the latest business events at the company.
- Find conversation starters.
- Get relevant contact information for the company.
- Track the company by adding it to your Watchlist.

A company details page consists of the following tabs:

Overview tab

Provides a summary of the company-specific information including the latest news results related to the company and the names of employees you connect to at the company.

On the Overview tab, you can:

- Add the company to your Watchlist.
- See how many people you connect to at the company.
- Read and share news about important business events.
- Export the company's details to your Microsoft Dynamics CRM.

People tab

Displays a list of key executives at the company, including your connections, if any.

On the People tab, you can:

- Search for executives working for the company.
- View your connections to employees at the company.
- Add a person to your Watchlist.
- Navigate to an executive’s **Person Details** page.
- Add a person to the list of executives at the company.

Buzz tab

Displays the latest blog, Facebook posts, and Tweets made from the company's official accounts as well as the posts and tweets made by others about the company. From this tab, you can also open the company’s Facebook page or follow it on Twitter.

On the Buzz tab, you can:

- Review latest posts and Tweets by and about the company.
- Review the traffic on the company’s website using the Site Analytics widget.
- Follow the company's Twitter profile.

Family Tree tab

Displays a list of all the subsidiary and parent companies of the selected company. You can point to a company in the family tree list to view its details.

On the Family Tree tab, you can:

- Browse through the list of companies in the family tree.
- View the list of acquisitions made by the company.

- Go to the details page of a company in the family tree.

Competitors tab

Displays the list of competitors for the company.

On the Competitors tab, you can:

- Review the list of competitors.
- View a brief summary of each competitor.
- Add those companies to your Watchlist.

More: All News

Displays the news articles that are related to the company. You can also view the SEC filings for Public companies here.

On the All News tab, you can:

- Read the latest news articles on the company.
- Search for keyword-related news about the company.
- View SEC filings for public companies.

More: Jobs

Displays current job openings at the company that are listed on SimplyHired. Click a job title to view the complete job profile.

On the Jobs tab, you can:

- View the job openings at the company by keywords and location.
- View details of each job opening.

More: Financials

Displays the annual and quarterly data from the company's income statement. This tab is available only for Public companies.

On the Financials tab, you can:

- View the company's Annual and Quarterly Income Statement.

More: Industry Profile

Displays the industry information for that company, including its challenges, trends, size and structure.

On the Industry Profile tab, you can:

- Get a quick overview of the industry.
- Learn about the challenges faced in the industry.
- Learn about the industry trends.
- Learn about the size and structure of the industry.
- Get Call Prep questions.

Research People

Insights enables you to sell more effectively by helping you find the right people, identify your mutual connections, and learn more about them so you can quickly and easily establish rapport and build credibility.

Using Insights you can:

- Discover connections to key people within your target accounts through your connections as well as your team's connections.
- Learn about your prospects and customers through 360 degree profiles and real-time updates from LinkedIn, Twitter, Blogs, and other social media.
- Follow key people at top prospects and get alerted when they change jobs, get promoted, have a social update or are in the news.

Executive Details

In Insights, all the information related to a person, whether they are a lead or a contact, is displayed on a unique details page.

➢ Navigate to a person's details page

From Leads

1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the navigation bar.
2. Click the work area name, and then click **Leads**.
3. To view the Insights of a person, open the lead and scroll down.

From Contacts

1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the navigation bar.
2. Click the work area name, and then click **Contacts**.
3. Open a contact and scroll down.

From company details

1. In Insights, navigate to a company details page.
2. Click the **People** tab.
3. Browse through the list of executives on the tab or search for executives by their name, and click a record.

Once you've located a person who fits your desired sales profile, you can dive more deeply into their details to see recent news mentions and social media activity, as well as background information such as college attended and previous employers.

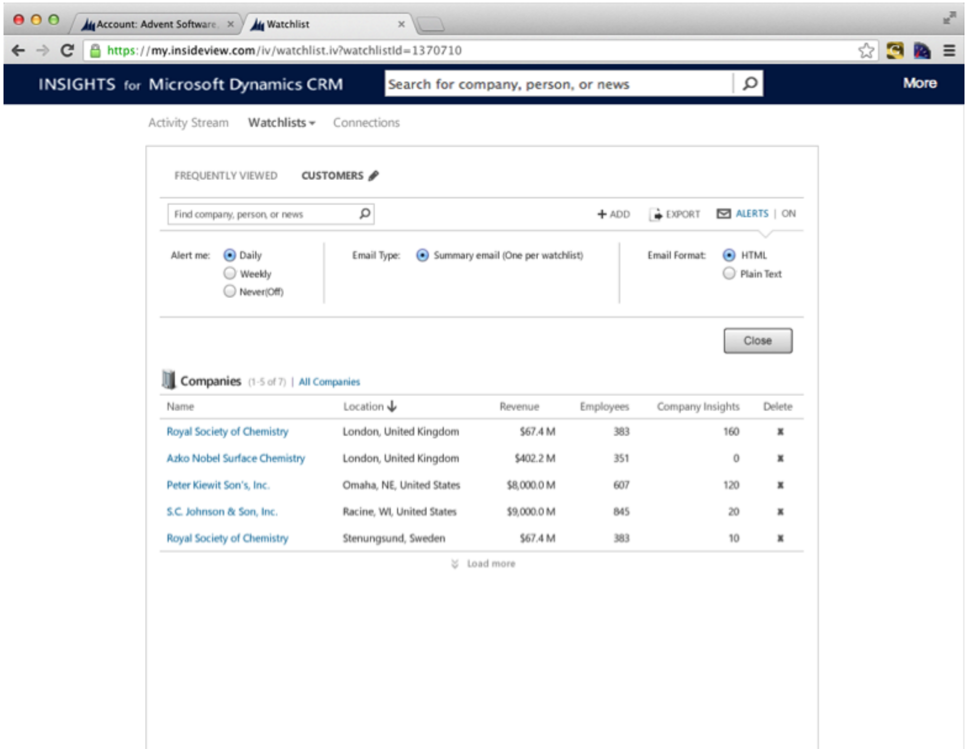
You can use the Insights contact record to:

- View all the contact information, including email address and phone number, as well as employment and education details.
- Export the information to Microsoft Dynamics CRM.
- View your connections to the person.
- Add the person to your Watchlist.
- Go to the person's LinkedIn profile.
- View news articles related to the person.
- Follow the person on Twitter.
- View the Google search results for the person.
- Report incorrect information about the person.

Watchlists

Watchlists allow you to keep track of a personalized list of companies and people to follow their news updates for relevant business opportunities.

Watchlists use agents to gather news from various information sources including social media and traditional media. Once a company is added to your watchlist, you can view its recent agent results in the Activity Stream and receive them by email.



There are two types of Watchlists available in Insights:

- **Frequently Viewed:** Automatically tracks the companies or people you view most frequently. You can modify the frequency rules for this watchlist.
- **Custom Watchlist:** You can manually add up to 200 companies and/or people to this watchlist.

Manage your Frequently Viewed watchlist

The Frequently Viewed watchlist is a list of companies and people you view frequently. While companies and people are added to this Watchlist automatically, you can control the rules for how this happens.

➢ Edit the rules of your Frequently Viewed watchlist

1. Navigate to Insights.
2. On the upper right-hand corner of the Insights frame, point to **More**, and click **Watchlists**.
3. Click **Edit Rules**.

4. To set up your preference on when to add a company or person to the watchlist, in the **Add** drop-down lists, enter the number of views and days respectively.

   For example, if you want all the companies and people you viewed more than three times in the last seven days to be added to your Frequently Viewed watchlist, select 3 and 7 from the lists respectively.

5. To set up your preference on when to remove a company or a person from the watchlist, in the **Remove** drop-down list, enter the number of days.
6. Click **Save**.

Rename your Custom Watchlist

Important: You cannot rename the Frequently Viewed watchlist.

➢ Rename the custom Watchlist (note: the name of the Watchlist will also be the subject line of the email you receive)

1. Navigate to Insights.
2. On the upper right-hand corner of the Insights frame, point to **More**, and click **Watchlists**.
3. Do one of the following:
   - On the **Watchlists** page, point to **Watchlists** and from the drop-down list click **Watchlist**.

   -OR-

   - Click the **Watchlist** tab.
4. Click the **Edit** icon next to the watchlist name.
5. In the **Watchlist Details** dialog box, type a name for the watchlist and click **Save**.

Select Companies or People to Follow

You can add companies and people to your custom watchlist in the following ways:

From Insights search results

1. In the Insights search box, enter the name of the company or the person you are looking for.
2. Do one of the following depending on whether you want to add a company or a person to your watchlist:
   - In the Company section of the search results, locate the company you are looking for, point to the **Location** field of the company, and from the drop-down list click **Watchlist**.

     -OR-

   - In the People section of the search results, locate the person you are looking for, point to the **Title** of the person and from the drop-down list click **Watchlist**.

From a company or person details page

- On the details page of the company or person you want to follow, click **Follow**.

From the Watchlist page

You can add companies to your Watchlist directly from the **Watchlist** page. Follow the steps below to do so:

1. Navigate to Insights.
2. On the upper right-hand corner of the Insights frame, point to **More** , and click **Watchlists**.
3. Do one of the following:
   - On the **Watchlists** page, point to **Watchlists** and from the drop-down list click **Watchlist**.

     -OR-
   - Click the **Watchlist** tab.
4. Click **Add** + ADD.
5. In the **Enter your Companies** box, enter the names of the companies that you want to add.

   Tip: You can copy and paste the names of the companies if you have them in a list.
6. To limit your search to a specific geographical location, click the **Location** drop-down and select the location.
7. Click **Search**.
8. From the search results, select the companies you want to follow and then at the bottom of the page click **Add to Watchlist**.

Export a Watchlist

You can export the list of companies or people on your Watchlists to Microsoft Excel. Follow these steps to do so:

1. Navigate to Insights.
2. On the upper right-hand corner of the Insights frame, point to **More**, and click **Watchlists**.
3. Open the watchlist from which you want to export the data.
4. Point to **Export**, and depending on whether you want to export the company or people records, click **Company** or **People**.
5. Save or open the file.

Change Email Alert Settings

Insights sends you regular email alerts with news updates for companies on your Watchlists. By default you will receive a daily summary email. However, you can change the frequency of the email or stop receiving it.

1. Navigate to Insights.
2. On the upper right-hand corner of the Insights frame, point to **More** , and click **Watchlists**.
3. The Frequently Viewed Watchlist opens by default. Choose which Watchlist you want to change. On the watchlist toolbar, click **Alerts**.
4. Under the **Alert Me** section, select the frequency.
5. In the **Email Format** field, select your preferred email format.
6. Click **Close**.

Get the latest information for companies and people you care about

Insights Activity Stream displays the latest news updates for the companies on your Watchlists. Activity Stream uses Insights Agents to retrieve the information.

By default, results from all the 18 predefined agent searches are displayed for all the companies on both your Watchlists. However, you can confine your search to only the events you want to see and focus only on the companies in a single watchlist.

➢ Navigate to the Activity Stream

1. Navigate to Insights.
2. On the upper-right corner of the Insights frame, point to **More** , and click **Watchlists** or **Connections**.
3. Click **Activity Stream**.

➢ Select the type of events you want to see

1. Navigate to the Insights frame.
2. On the upper-right corner of the Insights frame, point to **More** , and click **Watchlists** or **Connections**.
3. Click **Activity Stream**.
4. On the **Activity Stream** page, below **Company Insights**, click **More**.
5. From the expanded list of events, click an option you want to see the results for.

Share news articles

You can easily share news articles with customer, prospects or colleagues via email, Twitter, Facebook, Yammer, or LinkedIn.

➢ **Share articles**

1. On the **Activity Stream** page, navigate to the article title.
2. Click the icon for the application you would like to use to share the article.

Get an Introduction Through Your Connections

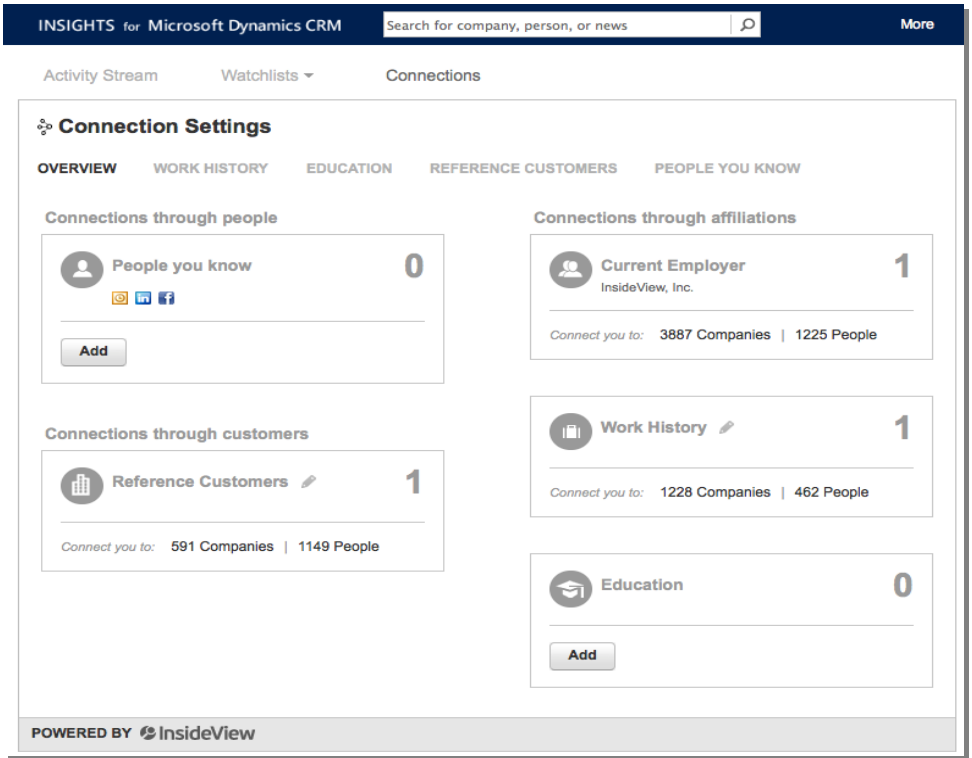
Insights helps you expand your referral network significantly and get warm introductions to your prospects by providing a single platform for you to leverage all your existing social and professional contacts. Once you add your contacts to Insights, you can use your Connections to find something in your respective backgrounds that you have in common with your contact, such as having worked at the same company or attended the same school. There are many ways to leverage Insights Connections including:

- **Finding decision makers:** Use connection filters to identify people you connect to in your target company. This increases the probability of engagement and creates potential opportunities.
- **Asking for referrals**: Once you identify a prospect, ask your connections for a referral. This will increase the chances of a faster response.
- **Starting conversations:** Use the information provided by Insights to identify important conversation starters and gain familiarity with the prospect.

Set Up Connections

Use Insights Connections to identify ways to connect to target companies and people through the following connection categories:

- **Work History**: Enter the companies you worked for to identify connections and find referrals to your prospects through your previous employers and co-workers.
- **Education**: Enter the names of all the colleges and universities you have attended to find referrals through your fellow alumni.
- **Reference Accounts**: Enter the names of companies you have done business with to identify employees at those companies who connect you to your target.
- **Personal Connections**: Import your contacts from LinkedIn, Facebook and Outlook to identify connections and find referrals to a company or specific person through the people you know.



➢ Navigate to the Connection Settings page

1. Navigate to Insights.
2. On the upper-right corner of the Insights frame, point to More, and click **Connections**.

➢ Add the companies you have worked for to your Connections

1. On the **Connection Settings** page, do one of the following:
   - On the **Overview** tab, click the **Work History** icon.

-OR-

   - Click the **Work History** tab.
2. On the Work History tab, enter information in the following boxes:
   - **Company**

     Start typing the name of your company and select the complete name from the list of suggestions.
   - **Job Title**
   - **Duration**

3. Click **Add**.

➢ Add your colleges or universities

1. On the **Connection Settings** page, do one of the following:
   - On the **Overview** tab, click the **Education** icon.

     -OR-
   - Click the **Education** tab.
2. On the Education tab, enter information in the following boxes:
   - **School Name**

     Start typing the name of your college or university and select the complete name from the list of suggestions.
   - **Degree**
   - **Duration**
3. Click **Add**.

➢ Add your personal reference customers

1. On the **Connection Settings** page, do one of the following:
   - On the **Overview** tab, click the **Reference Customers** icon

     -OR-
   - Click the **Reference Customers** tab.
2. In the **Enter your Companies** box, enter the list of companies you want to add.

   Note: You can enter the names of multiple companies by copying and pasting from a list you already have.
3. Click **Search.**
4. From the search results, select the checkboxes for the companies that you want to add, and then click **Add Reference Customers**.

➢ Add your Facebook friends

1. On the **Connection Settings** page, do one of the following:
   - On the **Overview** tab, click the **People you know** icon.

     -OR-
   - Click the **People you know** tab.

2. On the **People you know** tab, under Facebook, click **Add Friends**.
3. On the Facebook login page, enter your Facebook username and password.

   Note: You will only have to do this the first time.

4. When the import is completed, you can see the names of the all the Facebook friends who are added to your connections. Click **Close**.
5. To remove a connection, click the **x** icon next to the name of the person.

➢ Add your LinkedIn contacts

1. On the **Connection Settings** page, do one of the following:
   - On the **Overview** tab, click the **People you know** icon.

     -OR-

   - Click the **People you know** tab.
2. On the **People you know** tab, in the LinkedIn box, click **Connections**.
3. In the **Add LinkedIn Connections** pop-up window, click the link in step 1.
4. If needed, log in to your LinkedIn account.
5. On the **Export LinkedIn Connections** page, select the **Microsoft Outlook.csv** file type.
6. Click **Export**.
7. If prompted, complete the security verification check and click **Continue**. Save the exported file.
8. On the **People you know t**ab, under **LinkedIn**, click **Add Connections**.
9. Click **Browse** and select the Excel file that has your contacts.
10. Click **Upload**.

➢ Add your Outlook contacts

1. In Microsoft Outlook, click **File**, click **Options**, and then click **Advanced**.
2. Under the Export section, click **Export**.
3. In the Import and Export wizard, click **Export to a file** and click **Next**.
4. Under **Create a file of type**, click **Comma Separate Values**.
5. Under **Select folder to export from**, select **Contacts** and then click **Next**.
6. In the **Export to File** dialog box, click **Browse**, and select a destination folder for the file.
7. In the **File name** box, enter a name for the file, and then click **OK**.
8. Click **Next**, and then click **Finish**.

9. To import your Outlook contacts to Insights, navigate to the **Connection Settings** page, and click the **People you know** tab.
10. On the **People you know t**ab, under Outlook, click **Add Contacts**.
11. Click **Browse** and select the Microsoft Excel file that has your contacts.
12. Click **Upload**. To remove any person from the list, click the close icon **x** next to the person's name.

Resolve Multiple Matches

If Insights detects multiple potential matches to a personal connection you added, you'll see the Resolve Matches icon next to the connection.

➢ Resolve multiple matches

1. Click the **Resolve Matches** icon .
2. In the **Resolve Matches** dialog box, review the details of matching records, and double click the right record.

Connections and Privacy

Insights was designed with privacy concerns in mind. When you add your contacts from LinkedIn, Facebook or Outlook to your connections, Insights searches for their records in the Insights database. If any of the contacts you add do not exist in the Insights database, they become your private connections. Your private connections are not added to the Insights database and cannot be accessed by anyone outside your organization at any time. Your team members can view the names and titles of your private connections on the People tab of the company they work for, but cannot access the contact details.

Important:

- The names of your Private Connections will be in grey font and not linked to any contact detail page.
- Contact details of Private Connections are only visible to you.
- Only you can add the person to the database.

Note: Once you add a Private Connection to the database, that contact will be available to all Insights users. It will also link to a contact detail page.

Find Connections

In Insights, all your connection information is displayed on a **Connection Details** page. These connections are determined based on the previous employers, education, personal and reference account details that you have entered while setting up your connections.

You can use connection details to:

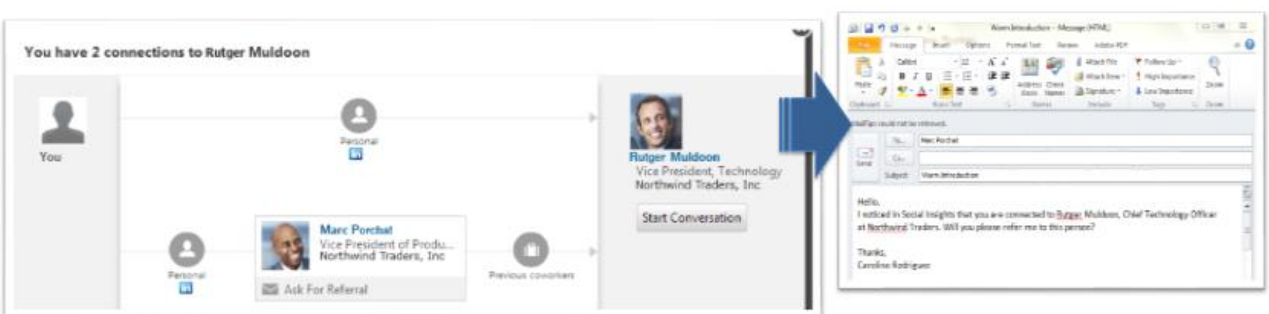
- **Identify your direct connections to a prospect-** the person could be your coworker, previous coworker, working for your customer, or a personal connection.
- **Identify mutual connections with the prospect-** see your connections who are connected to your target.

➢ View your connection details with an executive at a company

1. On the navigation bar, click **Microsoft Dynamics CRM**. Then select a work area: **Sales**, **Service**, or **Marketing**. The work area name appears on the navigation bar.
2. Click the work area name, and then click **Accounts** or **Leads**.
3. Open an account or lead and scroll down to **Insights**.
4. On the **Company Details** page, under **Connections,** click **View All**.
5. To view your connection details to a specific person, click the blue **Connections** number to the right of the person’s name.

Send Referral Requests

Insights enables you to ask someone who knows the person you are trying to reach to introduce you to that person. You can send referral requests to your connections through the **Connection Details** page.



1. Navigate to the **Connection Details** page for the prospect.
2. On the **Connection Details** page, choose your preferred referral from the list and click **Ask for Referral**. An Outlook message opens with the email address of the connection in the **To** field.
   - **Note: The Ask for Referral** button is not available for the connections whose email address is not present in the Insights database.
3. Enter your request. You can use the message provided or customize it.

   Tip: You might want to provide the referrer with recent news you find in the Insights Agent results to use as a conversation starter. If you know the referrer well, you might get the person to include a positive comment about you.

4. Click **Send**.

Find Conversation Starters

You can find important conversation starters when reaching out to your prospect or customers on the **Start Conversation** page.

Using the information on the page, you can:

- **Name drop a mutual connection**: Review your common connections to gain familiarity with the prospect.
- **Reply to a company tweet**: View and reply to the latest tweets of your prospect's company.
- **Start a conversation about a compelling event**: Read the latest news articles about the company or prospect, and the latest blog posts of the company. You can also email the links to the news items or blog posts, or share them on your Facebook, Twitter or LinkedIn profiles.
- **Contact the prospect**: Write an email to the prospect. You can also use the phone number listed on the page to reach your prospect.

To access the **Start Conversation** page, on the **Connection Details** page, below the profile picture of the prospect, click **Start Conversation**.