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Overview

What is Insights for Microsoft Dynamics CRM Online?
Insights for Microsoft Dynamics CRM Online helps you find more leads, win more deals and grow and retain your accounts. Insights infuses your Microsoft Dynamics CRM Online system with essential company and contact data, business insights and selling triggers, and exposure to your largest referral network. The information in Insights is constantly updated from 30,000 financial, media, and social sources and validated with data science technology to ensure you have the most accurate, validated, and complete data set.

Insights is designed to help you perform key sales tasks, including:

- Preparing for sales calls.
- Qualifying leads and finding connections to key executives at target companies.
- Monitoring prospects and executives to get regular notification emails with important selling triggers.

Insights is included with all Microsoft Dynamics CRM Online Professional and Enterprise licenses in the U.S. and Canada at no additional charge.

**Note**: It is not available for Basic or Essentials licenses.

Once installed, you can access Insights from inside your CRM system in the account, lead, contact, and opportunity records. This provides contextual information based what you are looking at inside of CRM Online. You can also access Insights through a standalone web application for a broader set of capabilities.
Selling Triggers and News

As you spend time learning about a target account, it’s extremely important to understand what is happening with that company. Current events and news are essential in this process, as they help you identify the right time to call, new opportunities, and the right message to say when you reach out. The information about companies is gathered by search agent technology that will scan over 30,000 web, news, and social sources to extract and categorize current events about all of the companies you are interested in.

Insights uses the following 18 predefined categories of 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

Referral Network

In addition to business trigger events and news, it’s important to find connections you have to your prospect and customer accounts. Insights lets you leverage your business and social networks within one platform to create your largest referral network. Our no-invitation model lets you connect to executives through people you know, board members, and reference customers. Use connections to start a conversation with as many decision makers as you want.
How to Access Insights

You can access Insights within CRM Online and on a standalone web application. Within CRM Online, you can access Insights from the following entities: Accounts, Leads, Contacts, and Opportunities.

**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.
4. **Insights** for this company will display on the right side of the window just below the **Contacts** area.

**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.
4. **Insights** for this company will display on the right side of the window just below the **Contacts** area.

**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.
4. **Insights** for this company will display on the right side of the window just below the **Contacts** area.

**Opportunities**

1. On the navigation bar, click **Microsoft Dynamics CRM**.
2. Click **Sales** and then click **Opportunities**.
3. Open an opportunity.
4. **Insights** for this company will display on the right side of the window just below the **Contacts** area.

Insights provides contextual information within CRM Online. However, there are additional capabilities that exist on the standalone web version. This includes searching for a company or
individual in the Insights database, managing alerts, and selling trigger categories and leveraging your referral network. The standalone interface is accessible from CRM Online throughout different areas of Insights, including clicking **New Window** in the upper-right corner of the Insights frame.

Research Accounts (CRM)

Use Insights to learn more about 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.

Company Details

➢ **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. Open the account.
4. **Insights** for this company will display on the right side of the window just below the **Contacts** area.
5. Click **New Window** in the upper-right corner of the Insights frame.

*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. Open the lead.
4. **Insights** for this company will display on the right side of the window just below the **Contacts** area.
5. Click **New Window** in the upper-right corner of the Insights frame.
Insights area

The Insights area consists of four tabs. Each tab gives you a different perspective and information about a company.

1. News
2. Data
3. People
4. Buzz

News

The News tab displays the news articles and search agent results that are related to the company. You can also view the SEC filings for Public companies.

On the News tab, you can:

- Read and share news about important business events.
- Read the latest news articles on the company.
- Find conversation starters.
- Track the company by adding it to your Watchlist.
- Modify search agents (English only).
- Sync the company's details to your Microsoft Dynamics CRM Online system.
- View SEC filings for public companies.
Data

The Data tab gives you three ways to view information about a company:

1. Overview
2. Research
3. Social Profiles

Data > Overview

The Overview tab displays basic information related to the company.

On the Overview tab you can:

- Get relevant contact information for the company.
- See revenue, number of employees, industry, type of ownership, Equifax ID and more.
Data > Research

The Research tab gives you the option of viewing four areas:

1. Industry Information
2. Financials
3. Jobs
4. Similar Accounts

Note: Clicking any of the above will open the web standalone version.

Data > Research > Industry Information

The Industry Information tab displays the industry information for that company, including its challenges, trends, size, and structure. When you click Industry Information, it will open the information in the standalone web application rather than inside CRM Online.

On the Industry Information 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 to help start relevant conversations

Data > Research > Financials

The Financials tab displays the annual and quarterly data from the company's income statement. This tab is available only for Public companies. Clicking here will take you to the standalone web application.

On the Financials tab, you can:

- View the company’s Annual and Quarterly Income Statement.
Data > Research > Jobs
The Jobs tab displays current job openings at the company that are listed on SimplyHired. Click a job title to view the complete job profile. When you click Jobs, it will open the information in the standalone web application rather than inside CRM Online. On the Jobs tab, you can:

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

Data > Research > Similar Accounts
The Similar Accounts tab displays the list of competitors for the company. When you click Similar Accounts, it will open the information in the standalone web application rather than inside CRM Online. On the Similar Accounts tab, you can:

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

Data > Social Profiles
The Social Profiles tab displays the company’s Facebook, Twitter and blog profiles, visible within CRM Online.

On the Social Profiles tab, you can:

- View the company’s social profiles on Twitter and Facebook.
- View the company’s blog.
- Like the company’s Facebook page.
- Follow the company’s Twitter profile.
- Report incorrect information.
People
The People tab displays a list of key decision-makers at the company, including your connections to them, if any. On the People tab, you can:

- Search for key executives and decision-makers working for the company.
- View your connections to key decision-makers at the company.
- Navigate to an executive’s Person Details page.
- Add a person to the list of executives at the company.
- Add a person to your Watchlist.
- Filter the view by Functions and Levels.
Buzz

The **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.
- Engage directly via Twitter (reply, re-Tweet) and Facebook (Like and Post) **Note:** You must authenticate to your personal Twitter and Facebook accounts. Insights will include a sign-in view if this has not been completed.

---

**Insights**

**NEWS** | **DATA** | **PEOPLE** | **BUZZ**
--- | --- | --- | ---
All | Company Posts | Other Posts

- **Huge Deal for Building Designer software and services!**
  Our team has signed a deal with the state government for our building designer software, including a 3-year licensing and ...
  Jan 30, 2013 8:36 PM UTC

- **We are very excited...**
  Northwind Trackers is very excited to welcome our new CEO. Abel Onggeran! Abel brings a wealth of experience with him. We are ...
  Sep 29, 2012 1:25 PM UTC

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Research People (CRM)

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 of 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 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.
4. Locate the Insights section on the right side of the window below the Contacts area and click New Window in the upper-right corner of the Insights frame.

From Company Details
1. In Insights, navigate to a Company Details page.
2. Click People.
3. Browse through the list of executives or use the search box to search for executives by 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.
- Sync the information to Microsoft Dynamics CRM Online.
- 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.
Research Accounts, People, and News (Standalone Web Application)

Search for a Company, Person or News

Use the search box at the top of the Insights standalone window 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, Doing Business As (DBA) name, Aliases, City, State, Country, Region, Ticker, Company description
- **People**: First name, Last name, Employer
- **News**: Article Title, Body of the Article

**Notes:**

- 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**

1. Click New Window in the upper-right corner of the Insights frame.

2. In the Search for a Company Person or News box, type a few letters to narrow your search, and then click Lookup.

**Tip:**

- When you start typing something into the search box, you'll see a 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.
Watchlists

Watchlists allow you to keep track of a personalized list of companies and people to get alerts about current news updates and business and sales triggers.

Watchlists include news from various information sources including social media and traditional media. Once a company is added to your Watchlist, you can view recent news in the Activity Stream and receive them by email.

There are two types of Watchlists available in Insights:

- **Frequently Viewed**: Insights will automatically track the companies and 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.

  ➤ View your Watchlists
  1. Navigate to Insights.
  2. On the lower-right corner of the Insights frame, click Settings, then click Watchlists. This will take you to the standalone web application.
The Watchlists window displays.

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. In the lower-right corner of the Insights frame click **Settings ⚙**, then click **Watchlists**.
3. Click **Frequently Viewed**.
4. Click **Edit Rules**.
5. To set up your preference on when to add a company or person to the Watchlist, click in the **views** and **days** fields to select 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, respectively.

6. To set up your preference on when to remove a company or a person from the Watchlist, click in the **Remove** field and select the number of days.
7. Click **Save**.
Rename your Custom Watchlist

Important: You cannot rename the Frequently Viewed Watchlist.

Note: The name of the Watchlist will also be the subject line of the email you receive.

➢ Rename your custom Watchlist

1. Navigate to Insights.
2. In the lower-right corner of the Insights frame, click Settings, then click Watchlists.
3. Do one of the following:
   ➢ On the Watchlists page, point to Watchlists and click Watchlist.
   -OR-
   ➢ Click the Watchlist tab.
4. Click Edit 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:

1. In the standalone web application, enter the name of the company or the person you are looking for in the search box.
   ➢ Add a company: In the Company section of the search results, locate the company you are looking for, click Follow and choose Watchlist.
     -OR-
   ➢ Add a person: In the People section of the search results, locate the person you are looking for, click Follow and choose Watchlist.
From a company or person details page
- On the details page of the company or person you want to follow, click Follow and choose Watchlist.

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. In the lower-right corner of the Insights frame, click Settings ☰, then click Watchlists.
3. Do one of the following:
   - On the Watchlists page, point to Watchlists and 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 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 Office Excel. Follow these steps to do so:

1. Navigate to Insights.
2. On the lower-right-hand corner of the Insights frame, click Settings ☰, then 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. In the lower-right corner of the Insights frame, click Settings , then click Watchlists.
4. Under the Alert Me section, select the frequency.
5. In the Email Format field, select your preferred email format.
6. Click Close.

Stay Informed

Insights displays the latest news updates for the companies on your Watchlists. By default, results from all the 18 predefined 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. In the lower-right corner of the Insights frame, click Settings , then click Watchlists or Connections.
  3. Click Activity Stream.

- **Select the type of events you want to see**
  1. Navigate to Insights.
  2. In the lower-right corner of the Insights frame, click Settings , then click Watchlists or Connections.
  3. Click Activity Stream.
  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 application you would like to use to share the article.

Get Referrals

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 the People 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

This section describes how to set up your Connections so you can see how you’re connected 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 Microsoft Outlook to identify connections and find referrals to a company or specific person through the people you know.

- **Colleagues’ Connections:** Ask your colleagues to enter their connection information in the same way, so you can leverage your colleagues’ connections to your target.
 Navigate to the Connection Settings page
1. Navigate to Insights.
2. In the lower-right corner of the Insights frame, click Settings, then 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 Work History.
   - 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 Education 🏛️.
   - 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 Reference Customers 📊.
   - 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 People you know 📚.
   - 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 all the Facebook friends who are
   added to your connections. Click Close.
5. To remove a connection, click x 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 People you know.
   - 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 tab, 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 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 tab, under Outlook, click Add Contacts.
11. Click Browse and select the Excel file that has your contacts.
12. Click Upload. To remove any person from the list, click the Close button (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 Resolve Matches next to the connection.

- **Resolve multiple matches**
  1. Click Resolve Matches.
  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. **Insights** for this company will display on the right side of the window just below the **Contacts** area.

4. Click **New Window** in the upper-right corner of the Insights frame.

5. On the **Company Details** page, under **Connections**, click **View All**.

6. 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 for an introduction from someone who knows the person you are trying to reach. 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.

3. **Note:** The **Ask for Referral** button is not available for the connections whose email address is not present in the Insights database.

4. Enter your request. You can use the message provided or customize it.
   a. **Tip:** You might want to provide the referrer with recent news to use as a conversation starter. If you know the referrer well, you might get the person to include a positive comment about you.

5. 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**.