

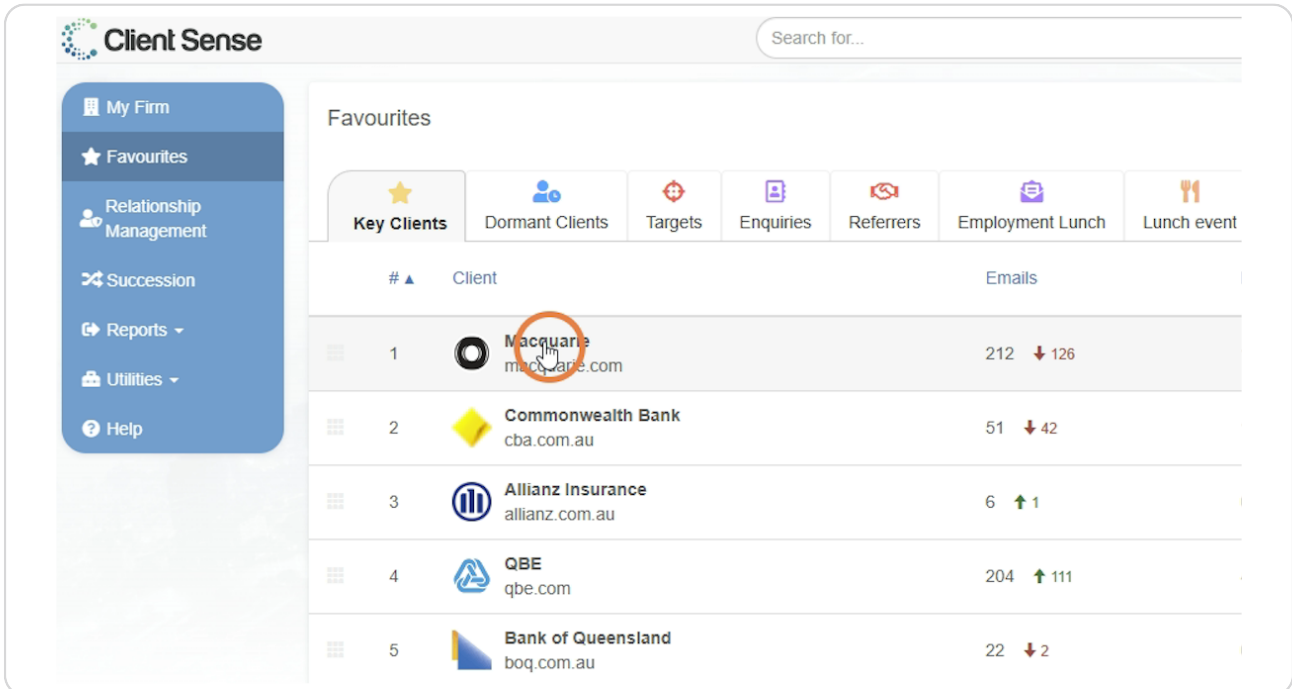
Creating a Heat Map Report at a Company Level

7 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
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STEP 1**Click on the name of the Company**

Click on the name of the Company you would like to run the Heat Map, Gap Analysis / White Space report for. You can click on the Company name from a Favourite List you already have or from a search in the Search Bar.



The screenshot shows the Client Sense interface. On the left is a sidebar with navigation options: My Firm, Favourites, Relationship Management, Succession, Reports, Utilities, and Help. The main area is titled 'Favourites' and contains a tabbed interface with 'Key Clients' selected. Below the tabs is a table of client data. The first row, 'Macquarie', is highlighted with an orange circle around its name. The table columns are '#', 'Client', and 'Emails'.

#	Client	Emails
1	Macquarie macquarie.com	212 ↓ 126
2	Commonwealth Bank cba.com.au	51 ↓ 42
3	Allianz Insurance allianz.com.au	6 ↑ 1
4	QBE qbe.com	204 ↑ 111
5	Bank of Queensland boq.com.au	22 ↓ 2

STEP 2

Click the Export button

The screenshot shows the Macquarie dashboard interface. At the top, there's a blue header with "Macquarie - macquarie.com". Below it, there's a "Metrics" tab and a "Filter" button. A toolbar contains several icons, with the "Export" icon (a green square with a white arrow) circled in orange. The main content area displays two summary cards: "macquarie.com" with 37 Individuals and "myfirm.com.au" with 26 Employees. Below these are three cards for "Last Contact" (3 hours), "Average Contact" (1 day), and "Meetings Accepted" (8). On the right, there's a table titled "Individuals" with columns for "View", "Comms Strength", "Last", and "Meetings". The table lists five individuals with their respective communication strength percentages and last contact times. At the bottom, there's a "Trend" section and an "Employees" section.

STEP 3

Click the Heat Map option

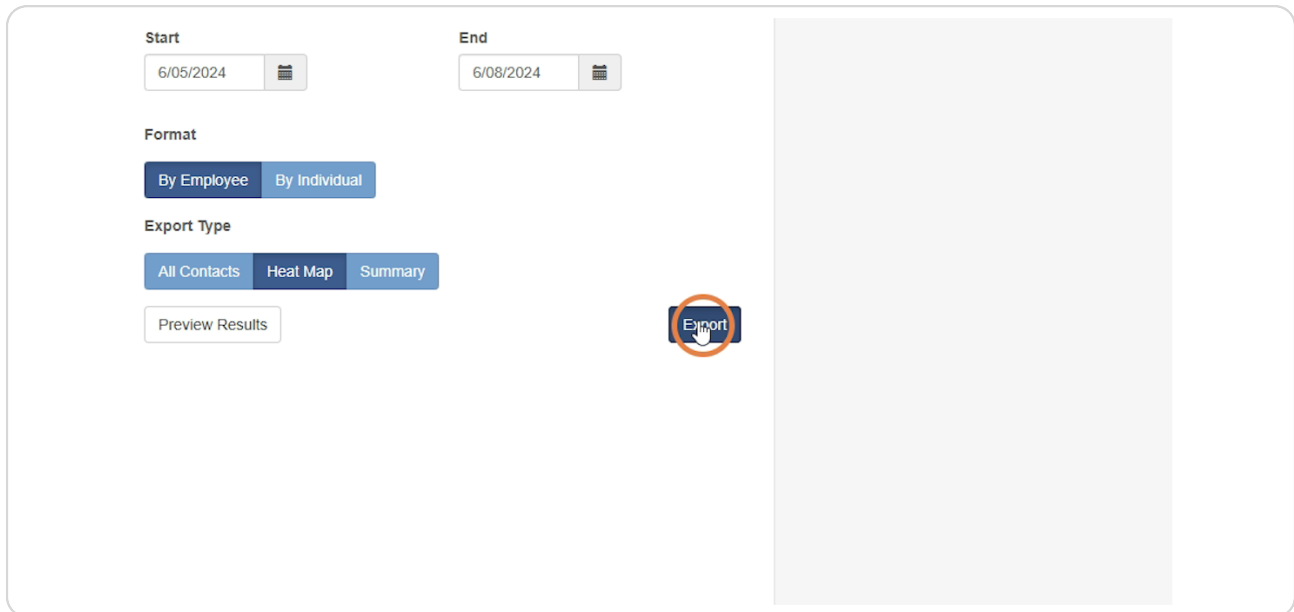
Note: You can also choose to alter the date range at this stage. This will alter who appears in the list of Employees and Individuals based on if they have had contacts within the time period selected or not.

The screenshot shows the Macquarie export options screen. On the left, there's a "Macquarie" header. Below it, there's a "Period" section with "Start" and "End" date pickers, both set to 6/05/2024 and 6/08/2024 respectively. There's also a "Format" section with two buttons: "By Employee" and "By Individual". Below this, there's a text box that says "Export a heat map of individuals and employees by email and activity count". At the bottom, there's a row of three buttons: "All Contacts", "Heat Map" (circled in orange), and "Summary". Below these buttons are two more buttons: "Preview Results" and "Export". On the right side of the screen, there's a large grey box labeled "Export preview (top 100 results)".

STEP 4

Click Export

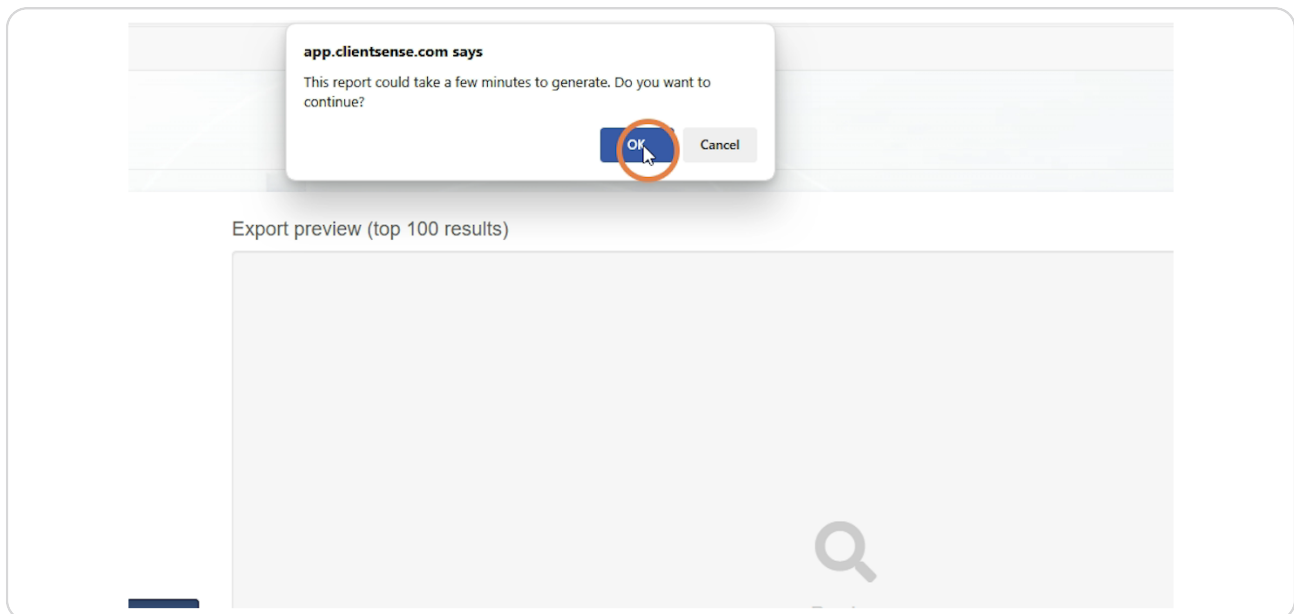
Note: You can also change Format from 'By Employee' which will show the Employees down the left of the export, to 'By Individual' which will show the Employees up to top and will show Individuals from the external Company down the left.



The screenshot shows the export configuration interface. It includes fields for 'Start' (6/05/2024) and 'End' (6/08/2024), both with calendar icons. Below these are 'Format' buttons for 'By Employee' and 'By Individual'. Under 'Export Type', there are buttons for 'All Contacts', 'Heat Map', and 'Summary'. A 'Preview Results' button is located below the 'Export Type' buttons. To the right of the 'Preview Results' button is a blue 'Export' button with a white hand icon, which is circled in orange. A large, empty light gray rectangular area is on the right side of the interface.

STEP 5

Click Ok

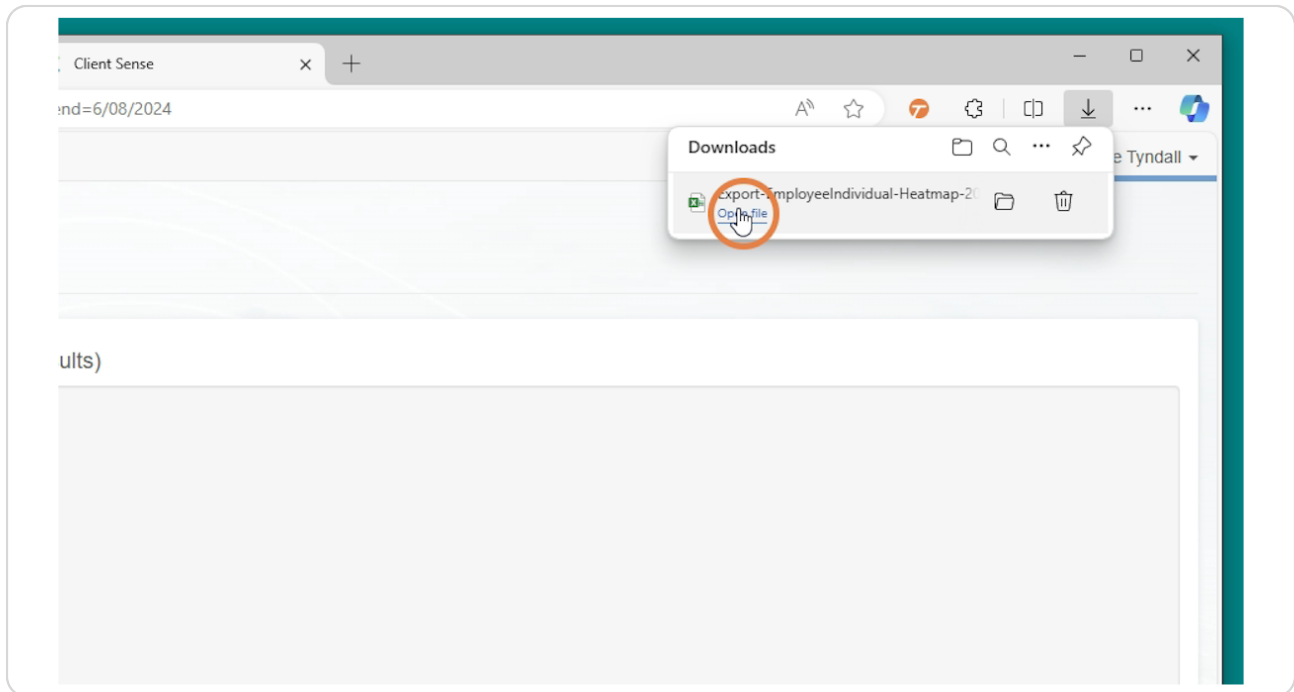


The screenshot shows the export preview interface. A modal dialog box is displayed in the center, titled 'app.clientsense.com says'. The message inside the dialog reads: 'This report could take a few minutes to generate. Do you want to continue?'. There are two buttons in the dialog: 'OK' (blue with a white hand icon) and 'Cancel' (gray). The 'OK' button is circled in orange. Below the dialog, the text 'Export preview (top 100 results)' is visible. Below this text is a large, empty light gray rectangular area. A magnifying glass icon is located in the bottom right corner of this area.

STEP 6

Open the downloaded Excel file

Depending on your PC settings, this might show in your Browser as below or may be found in your 'Downloads' folder.



Microsoft Excel

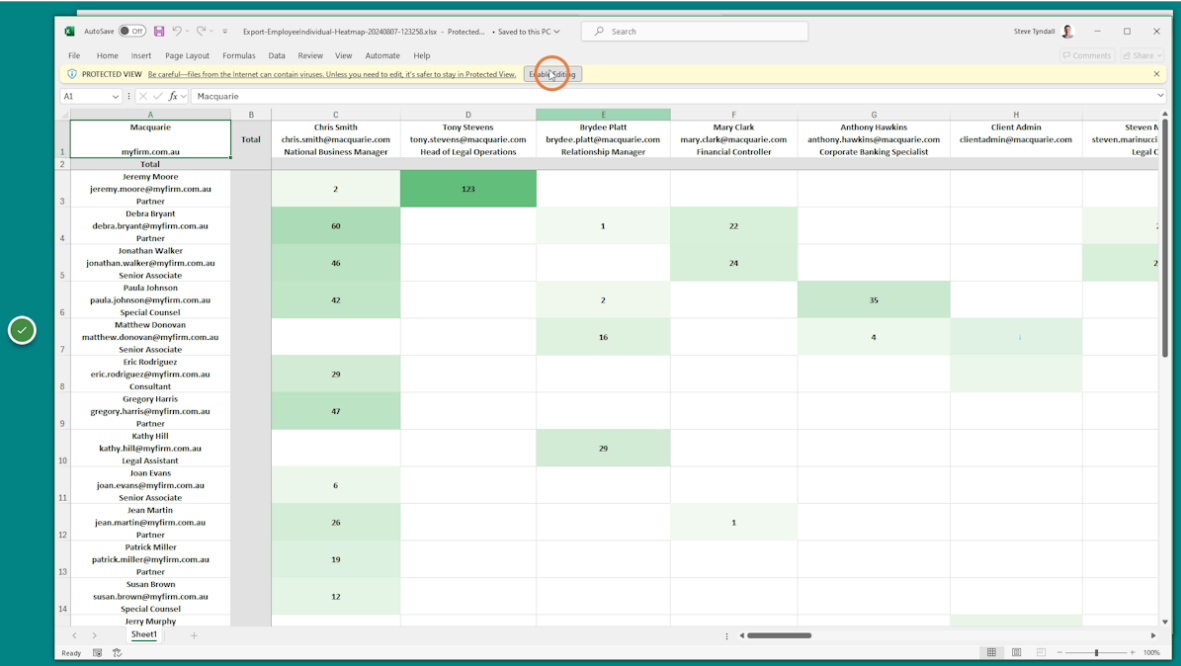
1 Step

STEP 7

Click Enable Editing

This allows you to alter and save the Heat Map file

Note: You can delete Columns or Rows if you would like to hide certain Individuals or Employees from the Report.



	A	B	C	D	E	F	G	H	I
	Macquarie	Total	Chris Smith chris.smith@macquarie.com National Business Manager	Tony Stevens tony.stevens@macquarie.com Head of Legal Operations	Brydee Platt brydee.platt@macquarie.com Relationship Manager	Mary Clark mary.clark@macquarie.com Financial Controller	Anthony Hawkins anthony.hawkins@macquarie.com Corporate Banking Specialist	Client Admin clientadmin@macquarie.com	Steven K steven.marucci@macquarie.com Legal Counsel
1	Macquarie								
2	Jeremy Moore jeremy.moore@myfirm.com.au Partner		2	123					
3	Debra Bryant debra.bryant@myfirm.com.au Partner		60		1	22			
4	Jonathan Walker jonathan.walker@myfirm.com.au Senior Associate		46			24			2
5	Paula Johnson paula.johnson@myfirm.com.au Special Counsel		42		2		35		
6	Matthew Donovan matthew.donovan@myfirm.com.au Senior Associate				16		4		
7	Eric Rodriguez eric.rodriguez@myfirm.com.au Consultant		29						
8	Gregory Harris gregory.harris@myfirm.com.au Partner		47						
9	Kathy Hill kathy.hill@myfirm.com.au Legal Assistant				29				
10	Joan Evans joan.evans@myfirm.com.au Senior Associate		6						
11	Joan Martin joan.martin@myfirm.com.au Partner		26			1			
12	Patrick Miller patrick.miller@myfirm.com.au Partner		19						
13	Susan Brown susan.brown@myfirm.com.au Special Counsel		12						
14	Jerry Murphy								

