

# How to create a Heat Map report for only specific Individuals within a Company

Note: Rather than running a Heat Map for an entire Company and all of the Contacts you know, you can choose specific Individuals from the Company that you would like to include in a Heat Map report.

12 Steps [View most recent version](#) 

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Created by	Creation Date	Last Updated
Steve Tyndall	Aug 07, 2024	Aug 07, 2024

**STEP 1****Click on Add**

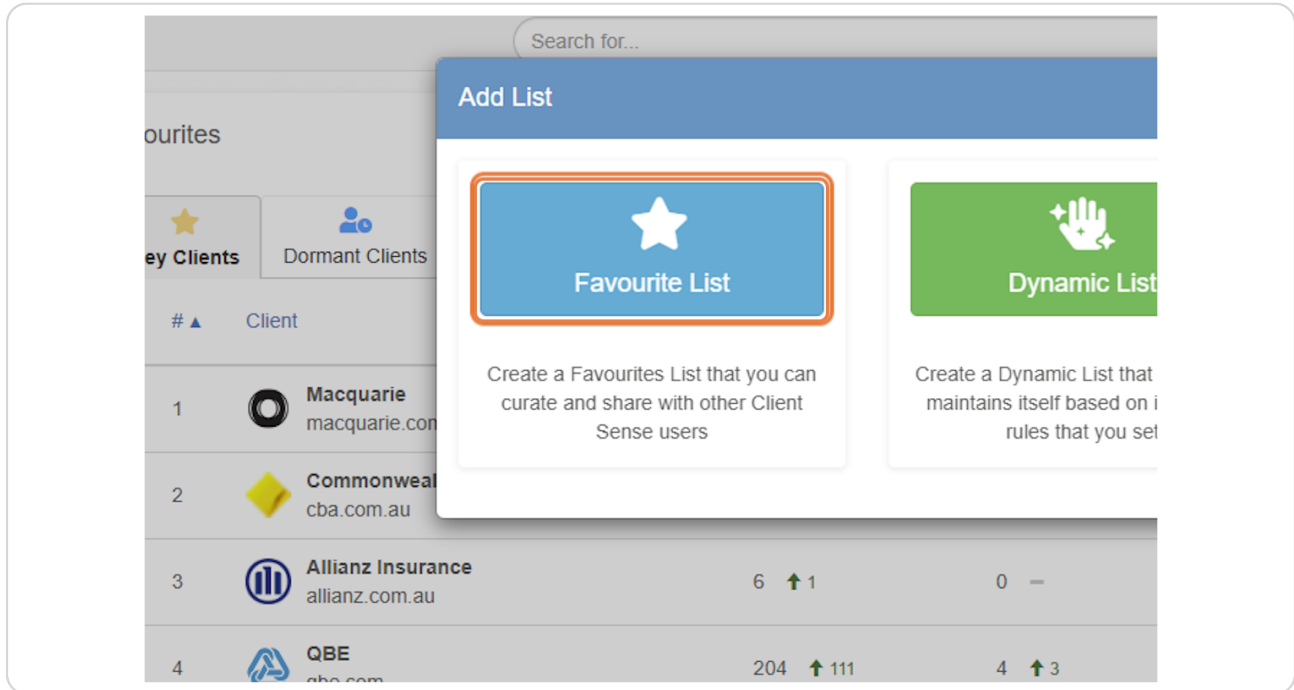
This will allow you to create a list we can use to define who we would like to target as those we want included from the Company

<div><div></div></div> <div>lunch</div>	<div><div></div></div> <div>Lunch event</div>	<div><div></div></div> <div>Event List</div>	<div><div></div></div> <div>Add</div>
Meetings	Last contact	Industry	
1 <div>↓</div> 5	3 hours	Financial Services	
1 <div>—</div>	Now	Banking	

## STEP 2

### Select Favourite List

Note: A Dynamic List can be used to automatically add Individuals or Companies to a list based on certain criteria. A Dynamic List can be used to then create a Heat Map report also, but for the benefit of this example, we will use a static Favourite (or Favorite) list.



### STEP 3

#### Give this a name

In our example we will call this Key Individuals

The screenshot shows the 'Add Tab' dialog box in the Client Sense application. The 'Name' field is highlighted with an orange border and contains the text 'Key Individuals'. Below the name field, there is an 'Icon' field with the value 'fas fa-star' and a 'Clear' button. The 'Colour' field shows a blue color swatch with the hex code '#043CA5'. The 'Share' field is set to 'OFF'. The 'Columns' section shows 'Available columns' as 57 and 'Selected columns' as 0. There are also 'Filter columns' input fields for both available and selected columns.

### STEP 4

#### Click on Save

The screenshot shows the bottom of the 'Add Tab' dialog box. The 'Close' and 'Save' buttons are visible. The 'Save' button is highlighted with an orange border, indicating it should be clicked to save the new tab.

## STEP 5

### Search for the Company

In our example, we will look for Macquarie

The screenshot shows the Client Sense search interface. At the top, there is a search bar with the text 'macq' entered. Below the search bar, there are tabs for 'Organisations', 'Individuals', 'Employees', and 'Details'. The 'Organisations' tab is selected. Below the tabs, there is a row of icons for 'Client Clients', 'Targets', 'Enquiries', 'Referrers', 'Employment Lunch', 'Lunch event', 'Event List', 'Key Individuals', and 'Add'. Below this row, there is a table with columns: 'Emails', 'Meetings', 'Last contact', and 'Industry'. The table lists several companies, including Macquarie, Commonwealth Bank, Allianz Insurance, QBE, Bank of Queensland, and Allianz. The Macquarie entry is highlighted.

	Emails	Meetings	Last contact	Industry
Macquarie macquarie.com	212 ↓ 126	1 ↓ 5	3 hours	Financial Services
Commonwealth Bank cba.com.au	51 ↓ 42	1 —	Now	Banking
Allianz Insurance allianz.com.au	6 ↑ 1	0 —	4 hours	Insurance
QBE qbe.com	204 ↑ 111	4 ↑ 3	11 mins	Insurance
Bank of Queensland boq.com.au	22 ↓ 2	0 —	3 hours	Banking
Allianz allianz.com	26 ↓ 28	0 —	2 hours	Real Estate
QBE qbe.com.au	148 ↓ 29	8 ↑ 7	1 hour	Real Estate

## STEP 6

### Click on the Company name





















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#	Client	Emails	Meetings	Last contact
1	Macquarie macquarie.com	212 ↓ 126	1 ↓ 5	3 hours
2	Commonwealth Bank cba.com.au	51 ↓ 42	1 —	Now
3	Allianz Insurance allianz.com.au	6 ↑ 1	0 —	4 hours
4	QBE qbe.com	204 ↑ 111	4 ↑ 3	11 mins
5	Bank of Queensland boq.com.au	22 ↓ 2	0 —	3 hours

## STEP 7

**Click on the Favourites button for those Individuals you would like to include in your Heat Map report**

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ast	Meetings	Name	Title	Location	
hours	5	<b>Chris Smith</b> chris.smith@macquarie.com	National Business Manager	Sydney, NSW	   
hours	0	<b>Tony Stevens</b> tony.stevens@macquarie.com	Head of Legal Operations	Sydney, NSW	   
days	0	<b>Mary Clark</b> mary.clark@macquarie.com	Financial Controller	Sydney, NSW	   
hours	0	<b>Brydee Platt</b> brydee.platt@macquarie.com	Relationship Manager	Sydney, NSW	   
2 days	0	<b>Anthony Hawkins</b> anthony.hawkins@macquarie.com	Corporate Banking Specialist	Melbourne, VIC	   

>>

Show all

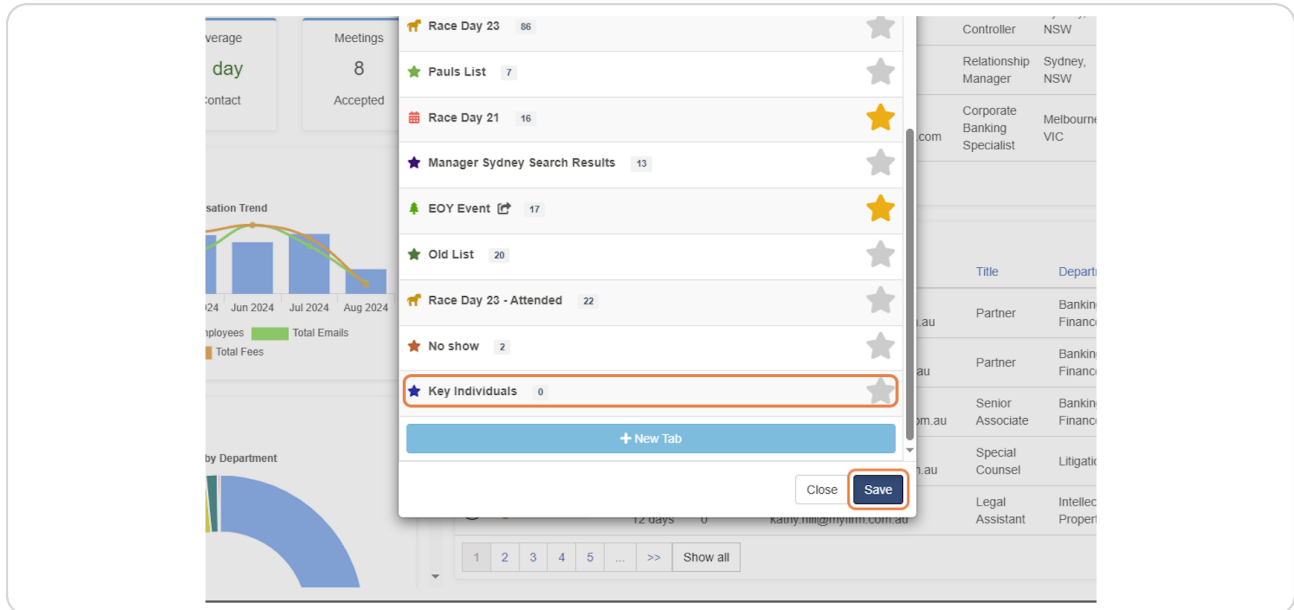
26

## STEP 8

### Choose your List

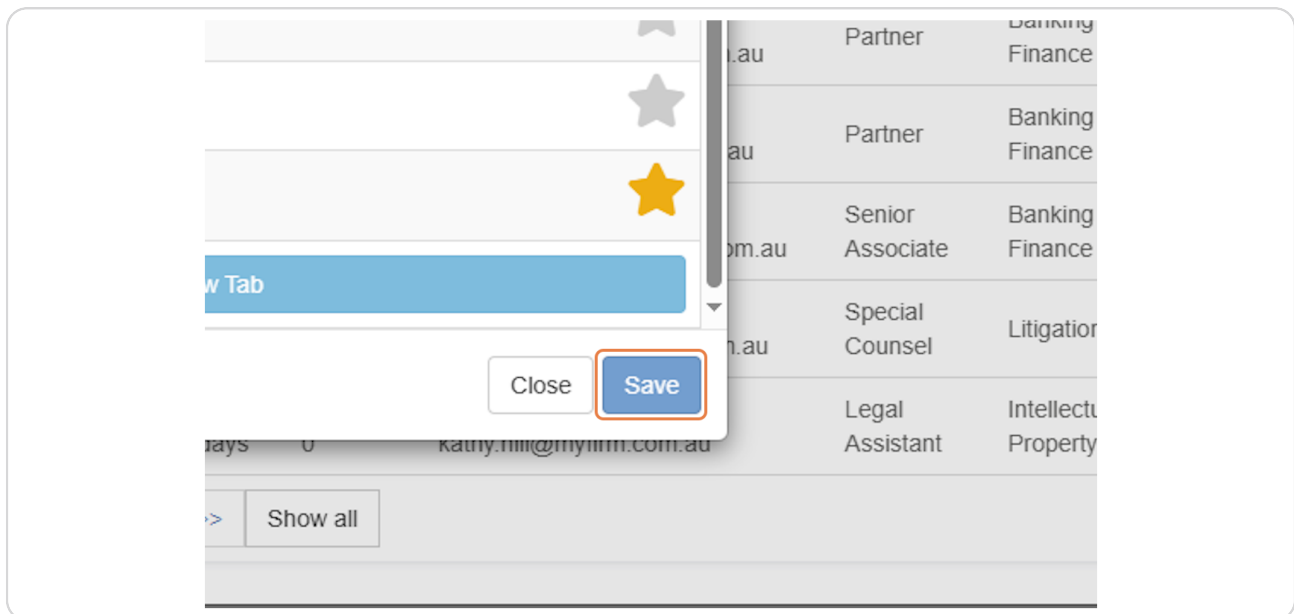
In our example we will choose the Key Individuals list we created

Repeat this process for as many Individuals you would like to include



## STEP 9

### Click on Save



STEP 10

Click on the X

This will close the 360° Company view will return you to the main Favourites screen

X

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Title

Location

arie.com

National Business Manager

Sydney, NSW

in

quarie.com

Head of Legal Operations

Sydney, NSW

in

arie.com

Financial Controller

Sydney, NSW

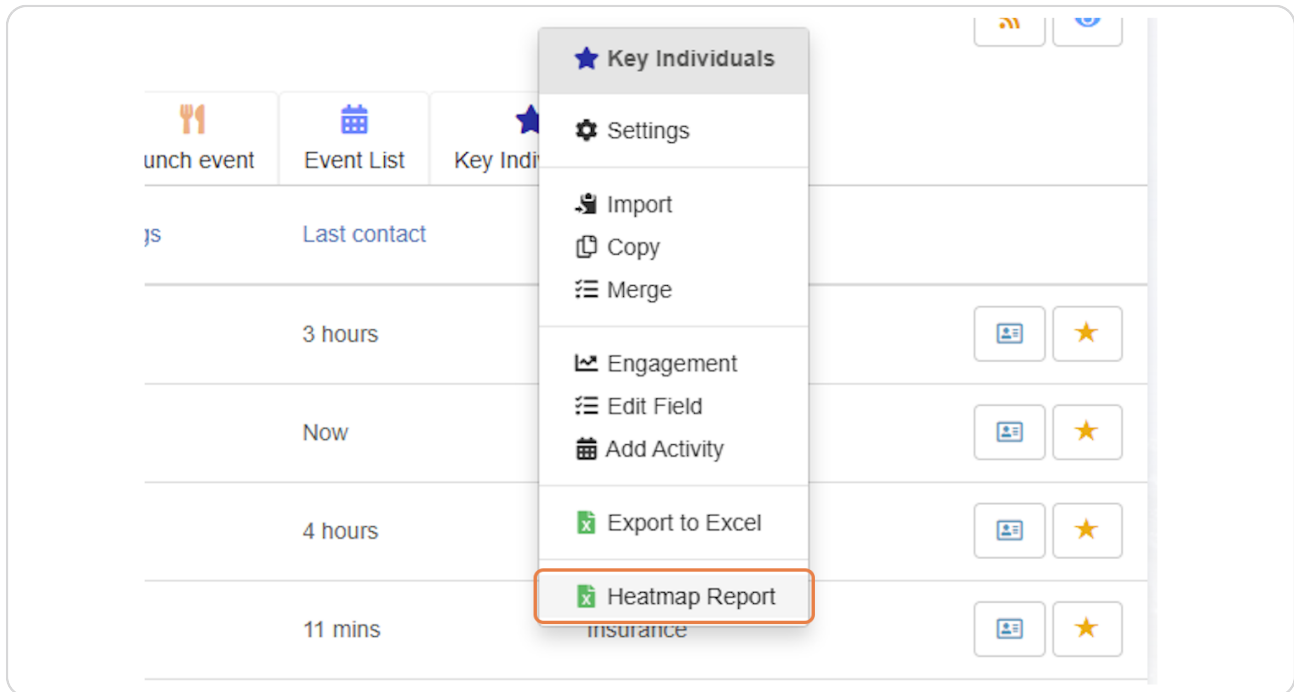
in



## STEP 11

### Right-click your List and choose Heatmap Report

In this example, using your mouse, you will right click the Key Individuals tab and select Heatmap Report.




## STEP 12


### Click on Export

Selecting a different date range changes the Employees that will appear, depending on if they have had contact in the timeframe specified.

### Key Individuals

**Period**

**Start**  

**End**  

**Format**

**Export Type**

Export preview (top 100 results)

