

Running a Heat Map report for key Individuals across different Companies

17 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
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Click on Add

This will create a list we can use to store these Individuals and then trigger the Heat Map

Q

Lunch

Lunch event

Event List

Add

Meetings

Last contact

Industry

1 ↓ 5

3 hours

Financial Services

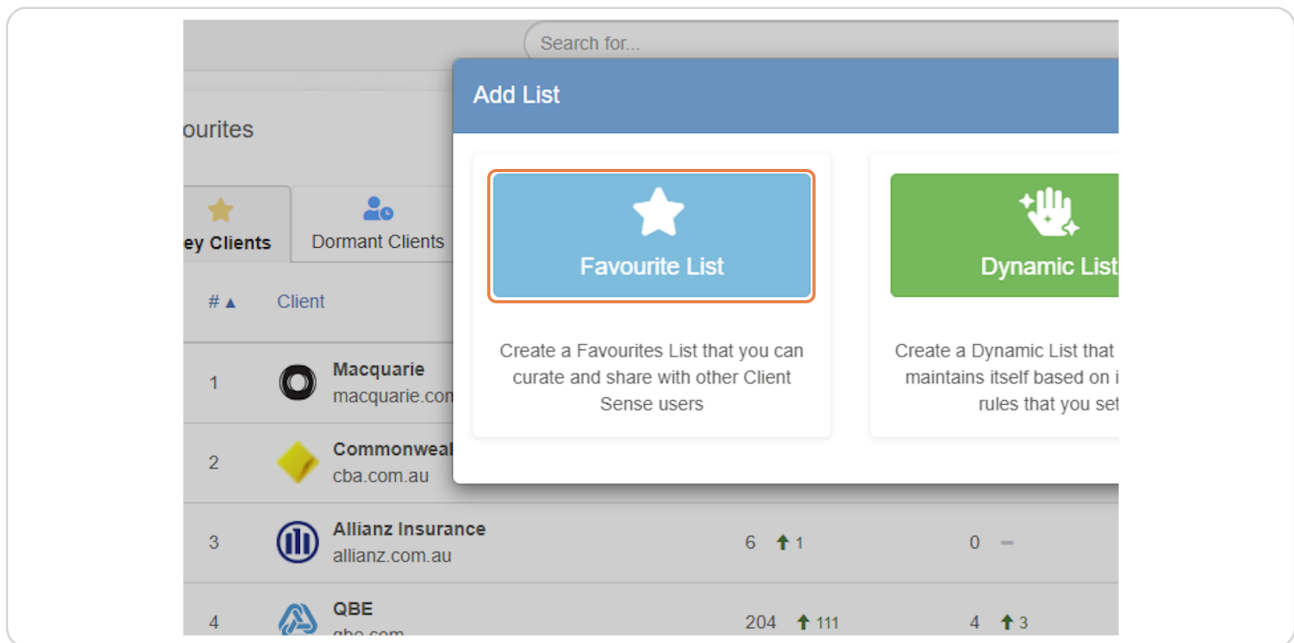
1 —

Now

Banking

STEP 2

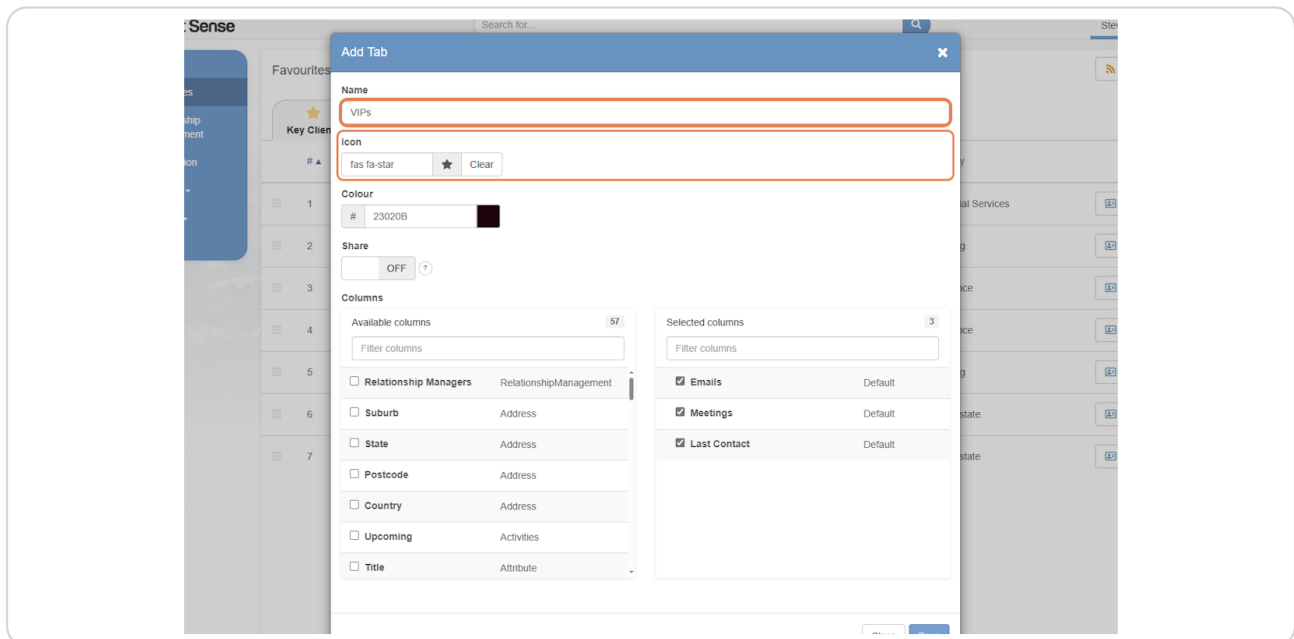
Click on Favourite List



STEP 3

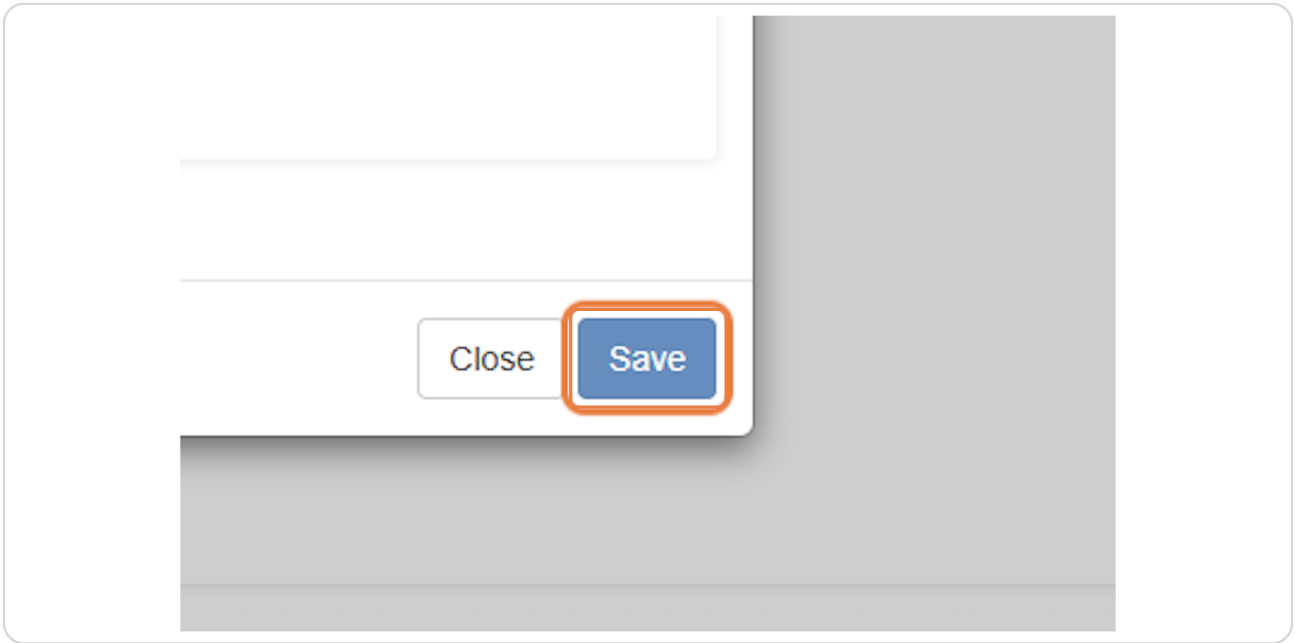
Type "VIPs"

In this example we will call the list 'VIPs'.



STEP 4

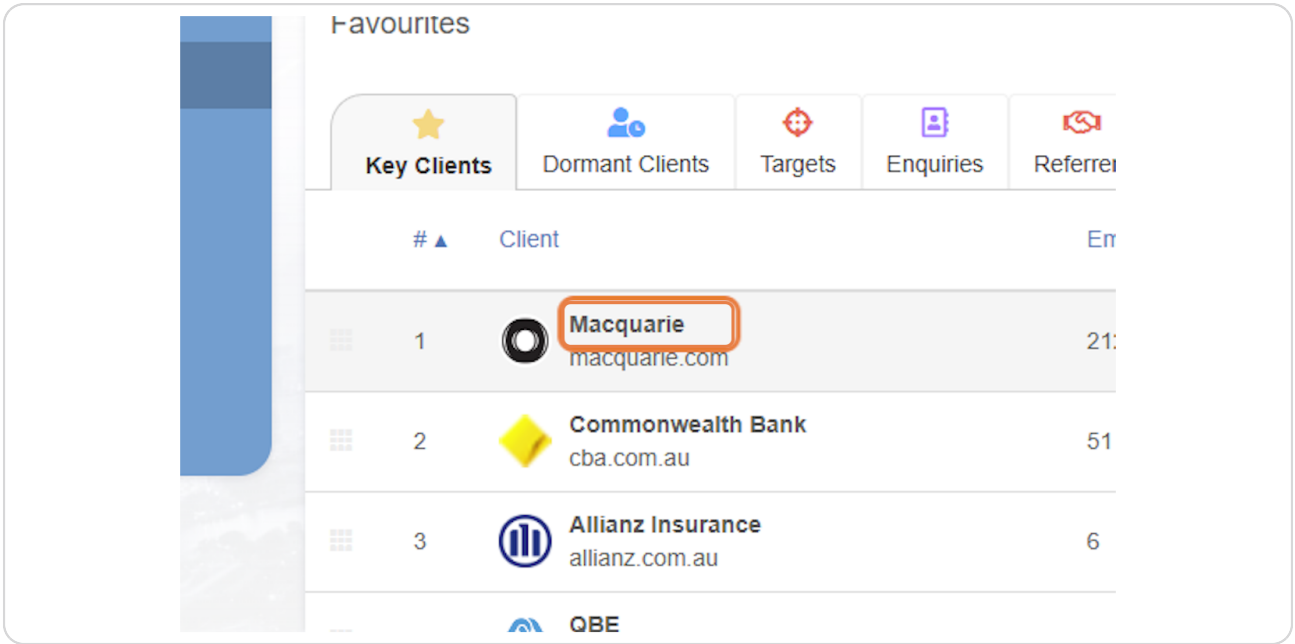
Click on Save



STEP 5

Start finding the people you would like to add

In this case there are people from Macquarie that we know we want to add



STEP 6

Click on Add to favourites

For each VIP you would like to add, click the start button shown

A screenshot of a web application showing a list of VIPs. The list has columns for 'ast', 'Meetings', 'Name', 'Title', and 'Location'. The first row is for Chris Smith, a National Business Manager in Sydney, NSW. A star icon in the right-hand action menu for this row is highlighted with an orange box. Below the list is a '>> Show all' button.

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

STEP 7

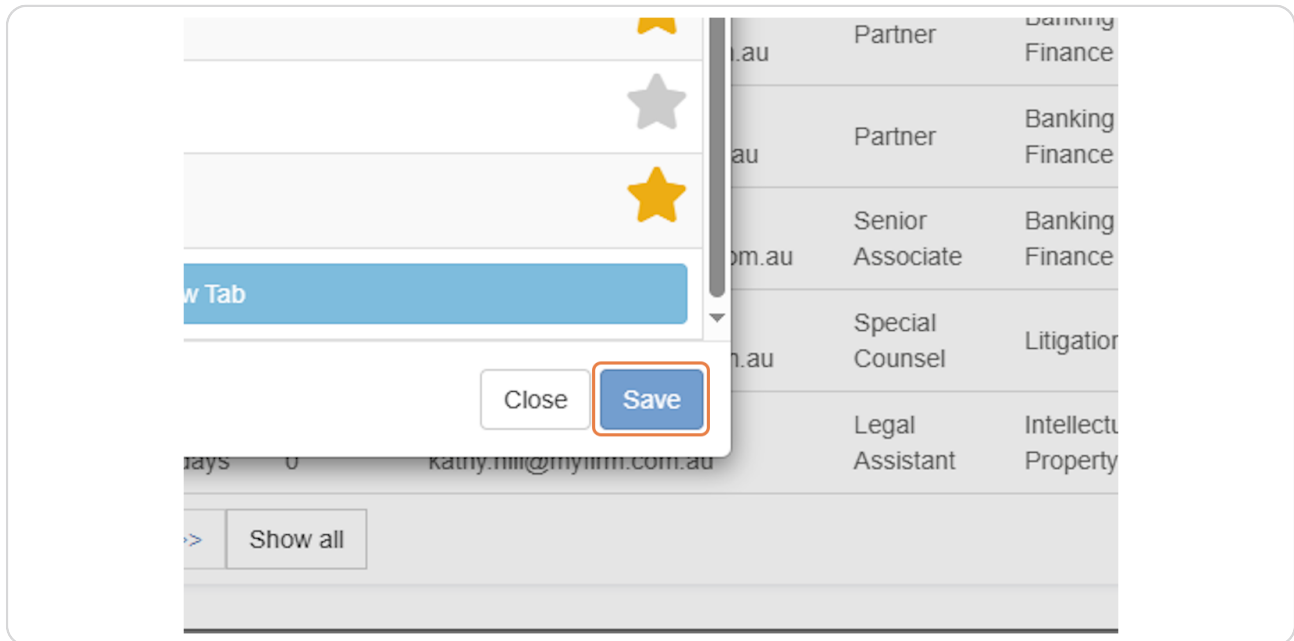
Click VIPs

Here we select the list we added earlier

A screenshot of a dashboard interface. On the left, there are charts for 'Average day', 'Contact', 'Position Trend', and 'by Department'. On the right, a sidebar lists various items, including 'Race Day 23', 'Pauls List', 'Race Day 21', 'Manager Sydney Search Results', 'EOY Event', 'Old List', 'Race Day 23 - Attended', 'No show', and 'VIPs'. The 'VIPs' item, which has a star icon, is highlighted with an orange box. Below the list is a '+ New Tab' button and 'Close' and 'Save' buttons.

STEP 8

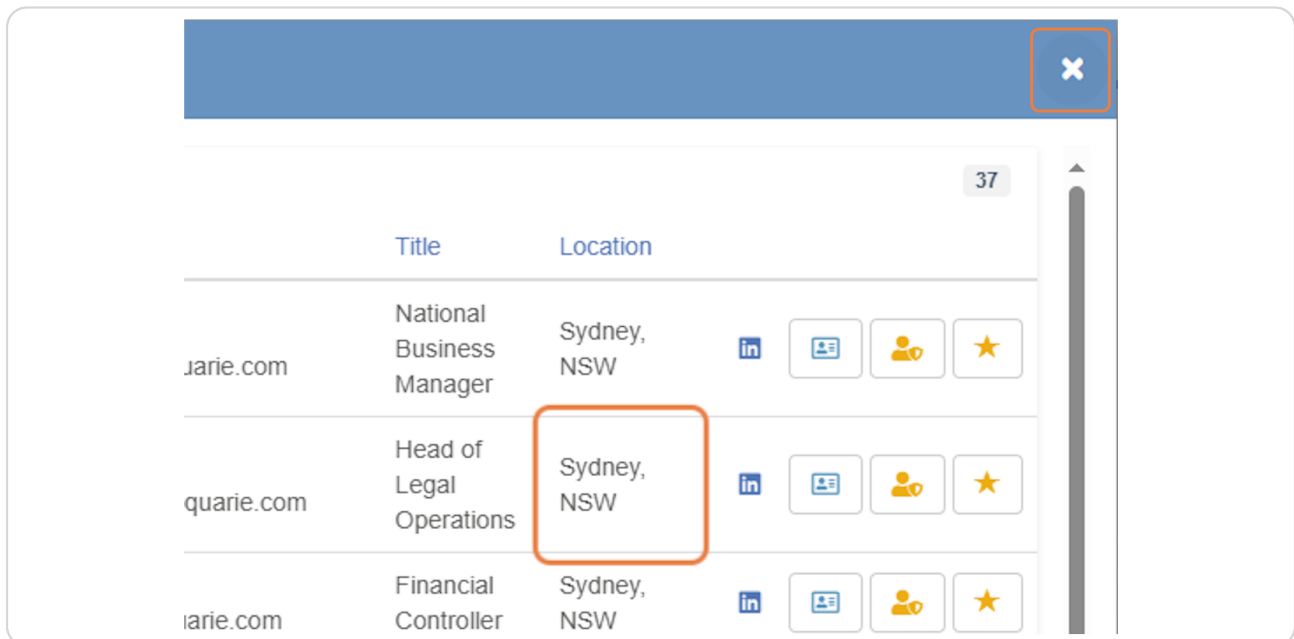
Click on Save



STEP 9

Click on X

Close the Company 360° View screen by clicking X



STEP 10

Search for Individuals

If you know the name of the Individuals you would like to add, you can search for them in the search bar by first selecting 'Individuals'

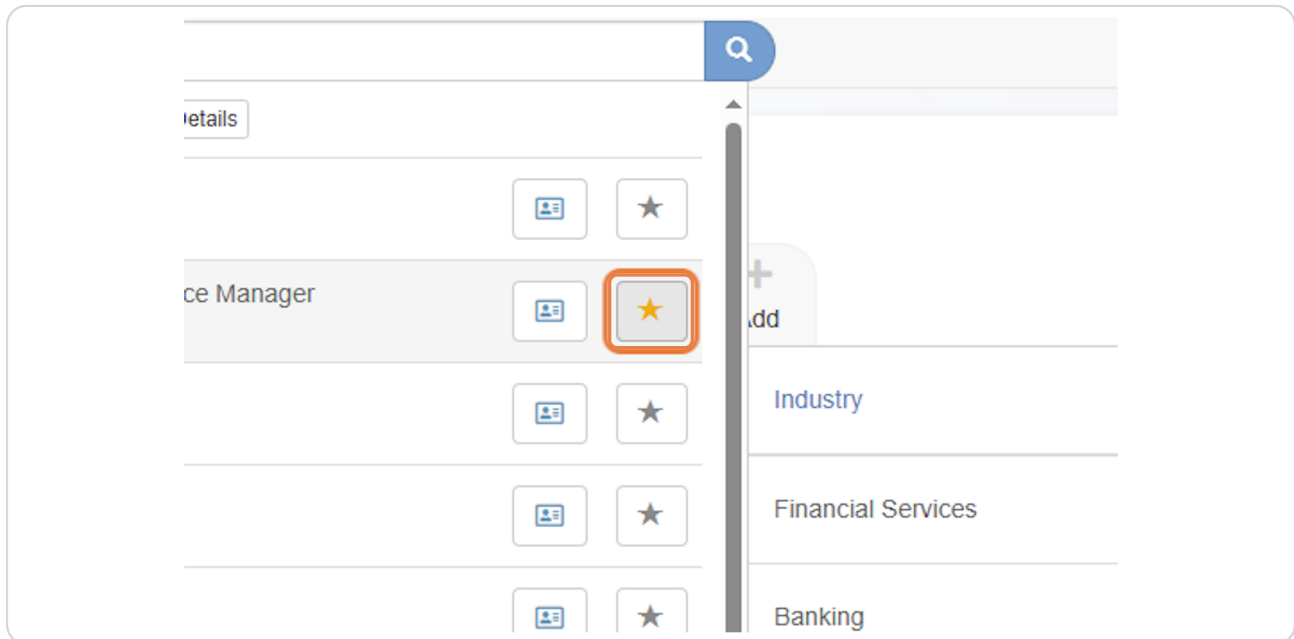
The screenshot shows the Client Sense interface. At the top, a search bar contains the text 'jennifer'. Below the search bar, a dropdown menu is open, showing four options: 'Organisations', 'Individuals', 'Employees', and 'Details'. The 'Individuals' option is highlighted with a red box. Below the dropdown, there is a row of tabs: 'Clients', 'Dormant Clients', 'Targets', 'Enquiries', 'Referrers', 'Employment Lunch', 'Lunch event', 'Event List', 'VIPs', and 'Add'. The 'Clients' tab is selected. Below the tabs, there is a table with columns: 'Client', 'Emails', 'Meetings', 'Last contact', and 'Industry'. The table lists several clients, including Macquarie, Commonwealth Bank, Allianz Insurance, QBE, Bank of Queensland, Colliers, and CBRE. The 'Emails' column shows the number of emails and a trend indicator (up or down arrow). The 'Meetings' column shows the number of meetings and a trend indicator. The 'Last contact' column shows the time since the last contact. The 'Industry' column shows the client's industry.

Client	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
Colliers colliers.com	26 ↓ 28	0 —	2 hours	Real Estate
CBRE cbre.com.au	148 ↓ 29	8 ↑ 7	1 hour	Real Estate

STEP 11

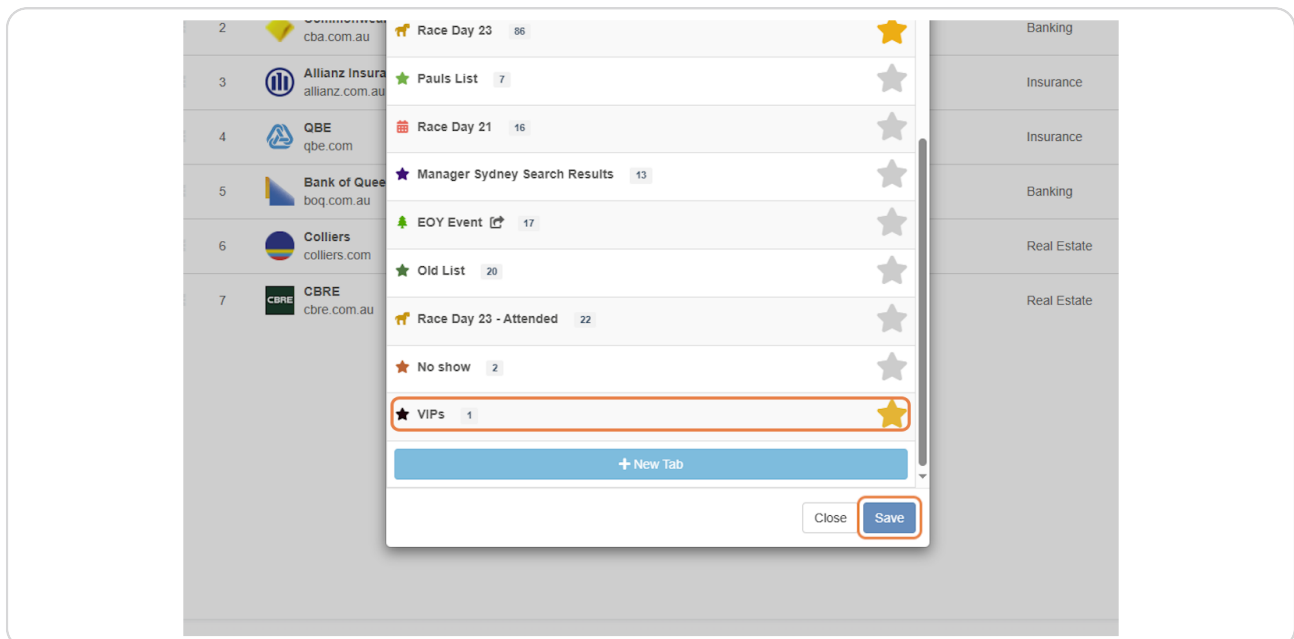
Click on the Favourite button

Directly from the Search results, you can click on the star button



STEP 12

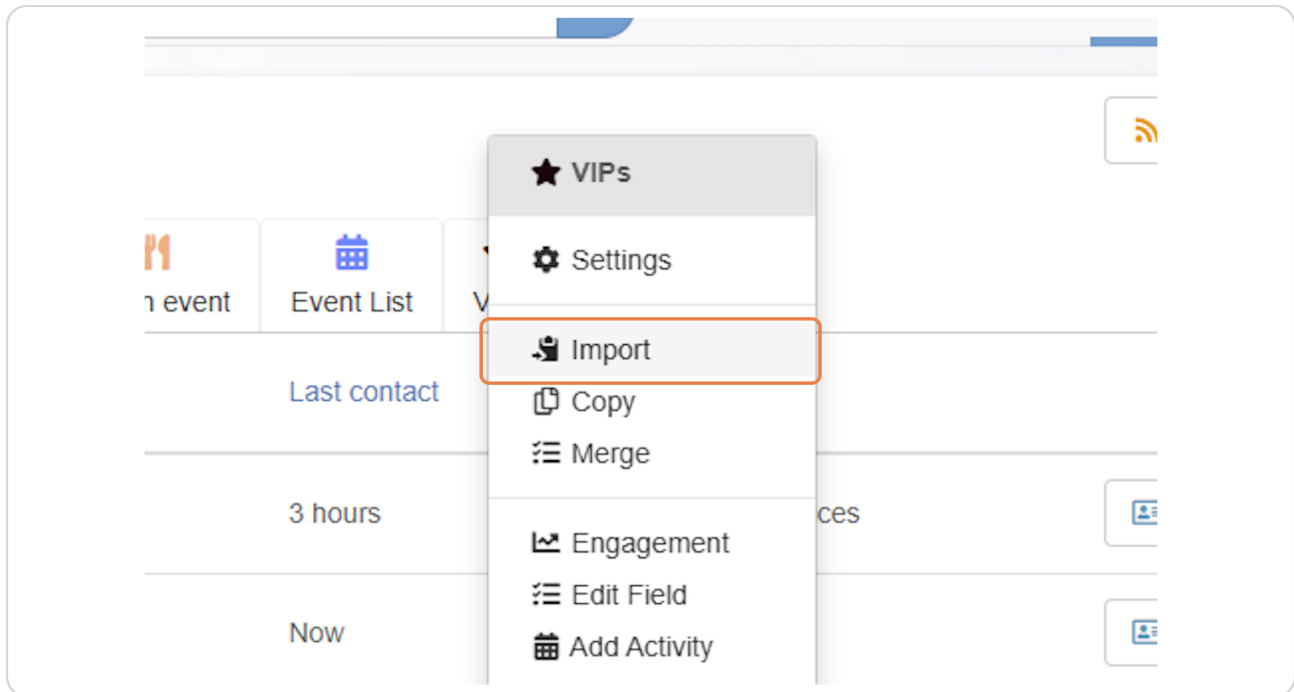
Again select the VIPs list



STEP 13

Rick-click VIPs to Import a List

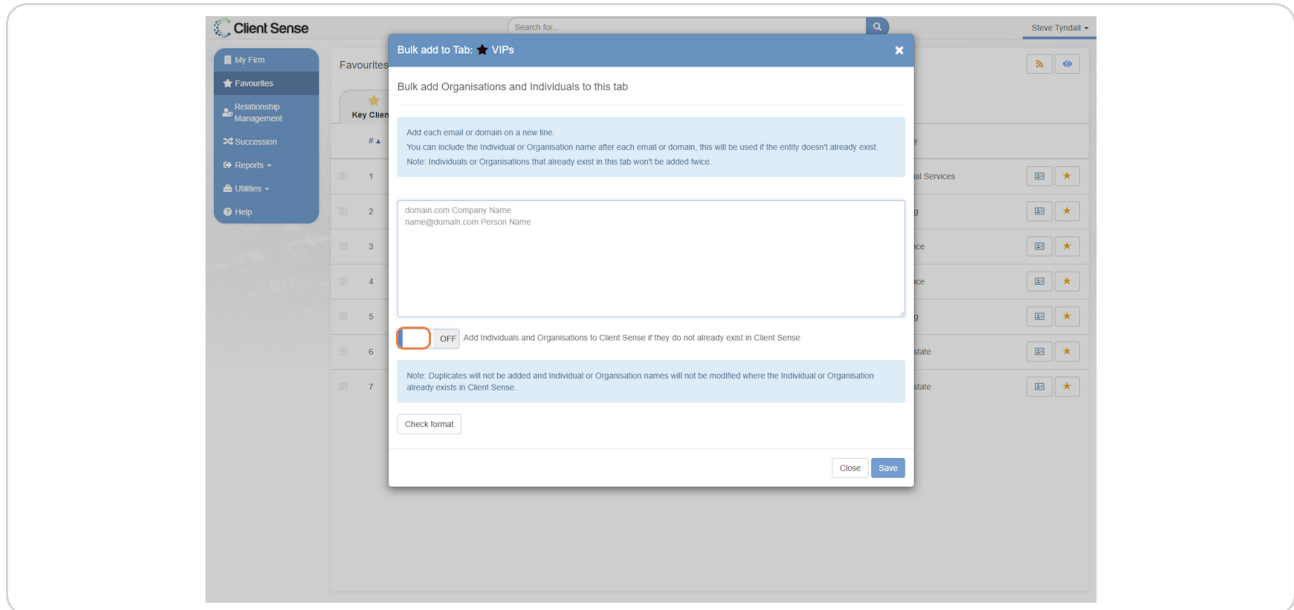
Optionally, you can also import a list of names directly if you have an existing list of email addresses. This can remove the need for unnecessary searching or duplicate effort.



STEP 14

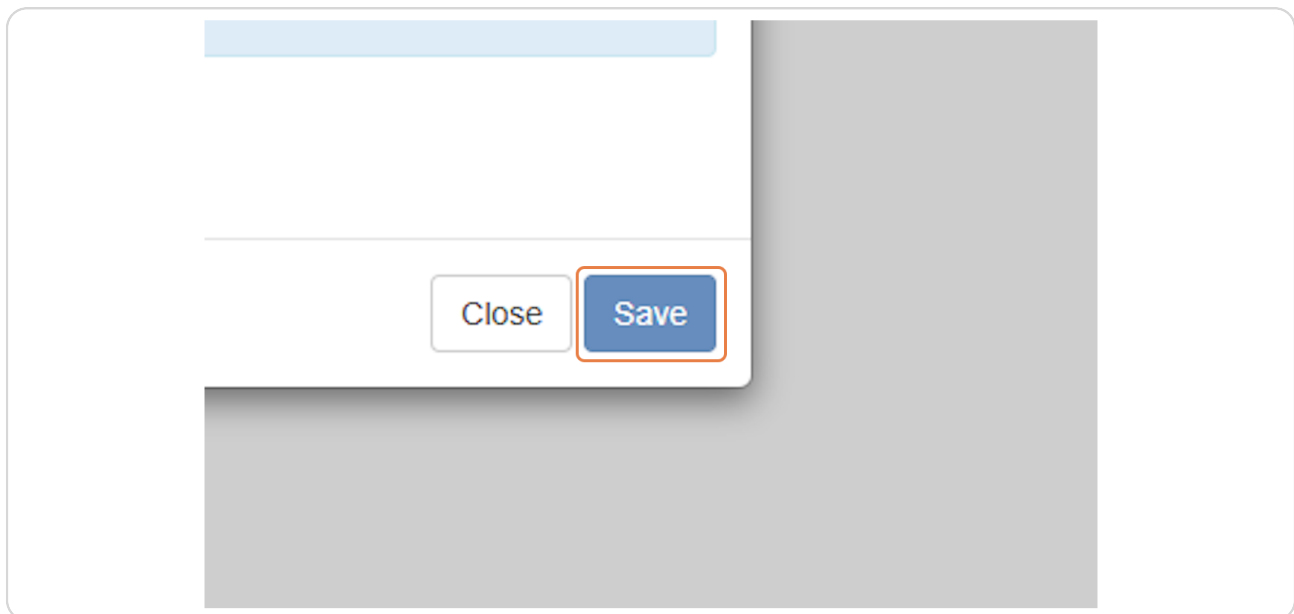
Importing a list

This allows you to bring Individuals into your list in bulk. You can also choose to bring them into Client Sense even if there has been no prior communication by using this toggle option.



STEP 15

Click on Save



STEP 16

Generate the Heatmap Report

Right-click on the VIP's favourite list and choose Heatmap Report

The screenshot shows a software interface with a table and a right-click context menu. The table has columns for 'ch', 'Lunch event', 'Event List', and 'VIP'. The 'VIP' column contains a list of items, each with a number, a status icon, and a time duration. The context menu is open over the 'VIP' column, showing options: Settings, Import, Copy, Merge, Engagement, Edit Field, Add Activity, Export to Excel, and Heatmap Report. The 'Heatmap Report' option is highlighted with an orange border.

ch	Lunch event	Event List	VIP
	Meetings	Last contact	
1	↓ 5	3 hours	
1	—	Now	
0	—	4 hours	
4	↑ 3	11 mins	
0	—	3 hours	Banking

STEP 17

Click on Export

Note: you can add or remove from this list in the future before running another Heatmap report.

