



Tips for Prospecting in Insightful

Whether you are preparing for a campaign or simply looking to identify new potential prospects for your organization, the news holds a wealth of information that can help you on your journey. Here is how to identify new prospects using Insightful.

1. Set up interests and follow them

Steps to create an interest:

- Select Home > My Interests
- Find the **Add/Edit Interests** button. Click on it.
- In the window that opens, click into the first empty text box.
- Type in one of the below interest combinations or your own (note: you don't have to create a perfect query, Insightful will do that for you. Reach out to your Customer Service Representative if you ever need additional adjustments to your Interest news feed.)

Geography or Focus Area	Boolean indicator	Topical search	Purpose
Your state, region or metro area	AND	C-suite appointments	Surface individuals in your community moving into high-ranking roles, which may indicate wealth accumulation
		Donations / major gifts	Find individuals already engaging in philanthropy
		Individuals joining boards	Keep up with leaders in your community
		IPOs, M&As, stock transfers	Capture indicators of wealth in your community
		Awards and honors	Identify individuals making waves in the community
		Future high-net-worth individuals	Find young movers and entrepreneurs who may become major donors
Focus area	AND	Philanthropy / major gifts	Find individuals and corporations giving to your area of interest

EXAMPLES:

Dallas-Ft. Worth AND future high-net-worth individuals

Children's health AND major gifts

Steps to follow an Interest:

- On the Home > My Interests page, highlight the interest
- Click **Follow**
- You will receive an email alert when new articles match your interest