

# Get Started with Insights, powered by InsideView

For Dynamics 365 and Dynamics CRM Administrators

1

**Install** as follows for easiest access and visibility

- Get the latest package of Insights from [AppSource](#) and download the Installation Guide for reference. If you have technical questions, contact [Microsoft Support](#).
- Install Insights in the upper right corner (default position).
- Add the Insights Dashboard Widget to the Sales Dashboard ([see instructions](#)).

2

**Implement** the following to maximize usage.

- Instruct/help your users to:
  - Set up [watchlists](#) so they will know when to call an account. At a minimum, add existing and targeted customers, and competitors. Need additional help? Attend one of the free training webinars, referenced below.
  - [Add their connections](#) to maximize opportunities for warm introductions. See also [How To Find Warm Introductions Into An Account](#).

3

**Train** your users to drive deeper adoption.

- Have all users attend the free training webinar, [Leveraging Sales Intelligence Inside of CRM](#), offered every 1st and 3rd Wednesday @ 9am PT.
- Encourage your users to watch our 3 - 4 minute [Quick-Tip Videos](#) to help them tackle daily challenges such as, “How to find juicy conversation starters,” “How to increase your chances for engagement,” and “How to find new companies not already in CRM.”
- Have more than 200 CRM users? [Contact us](#) for custom training.

