# Step-By-Step Guide to Research with Copy.ai

If you want to try Copy.ai for company research, here are the basic steps:

## 1. Export your target company list

First, export a list of the companies you need background on from your CRM or other database into a spreadsheet. This will serve as your input data for Copy.ai.

## 2. Write prompts for the info you need

Now comes the fun part - writing prompts to tell Copy.ai what to look for on each company.

Click Workflow and "+Add New Workflow" from your Copy.ai dashboard:
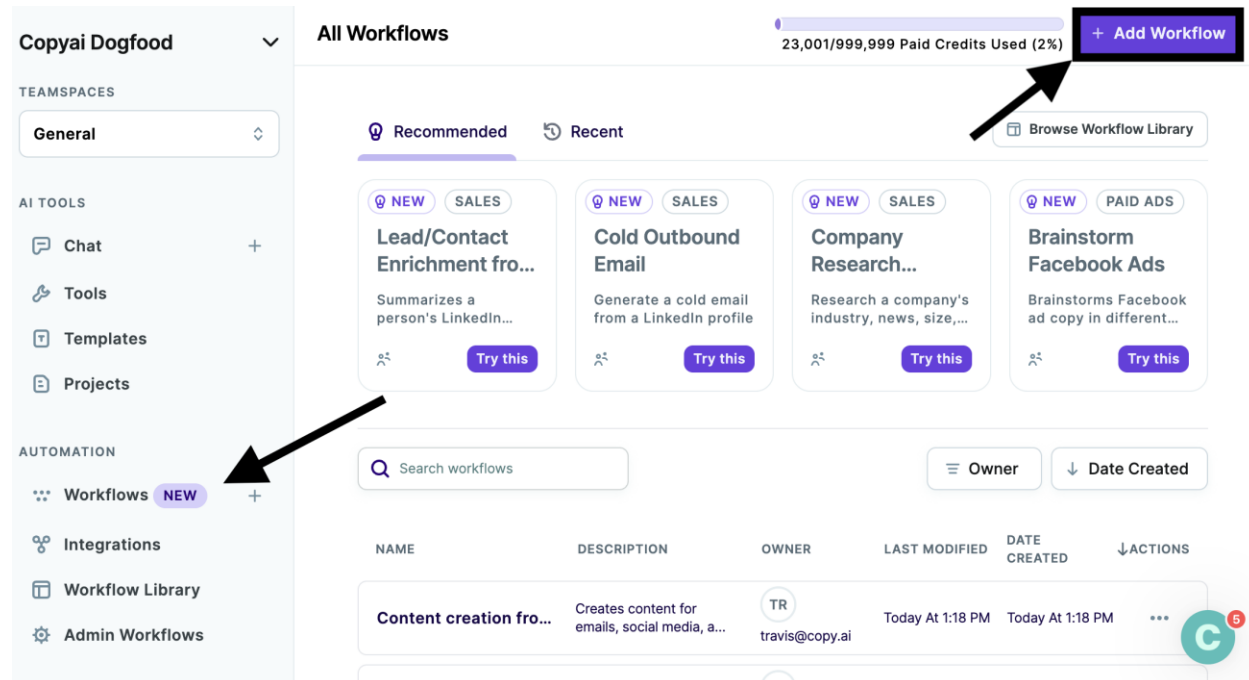


Write the following prompt as the input:

"Given a company name and URL, please provide a 2-3 paragraph company profile including:

- Brief background and history
- Founding date and founders
- Total funding raised
- Headquarters location
- Notable investors
- Executive leadership team and titles
- Recent news announcements (past 6 months)"

You can tailor the prompts to the specifics you need for your research at each step:



The more detailed your prompts, the better the results.

## Step 3. Publish your workflow and import your CSV file

You can upload your spreadsheet of companies directly from the Table View:

Mapping out the data is easy and intuitive! Just make sure the right rows are being seen as the input.

## 4. Review and export the summaries

Once you submit your prompts, Copy.ai will get to work automatically writing summaries for every company based on publicly available information online. This usually takes just seconds to complete.

You can then review each summary and make tweaks as needed. When you're happy with the results, export them as a CSV file.

Now you've got polished company profiles ready to drop into your CRM or share with colleagues!