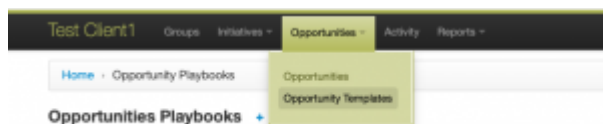
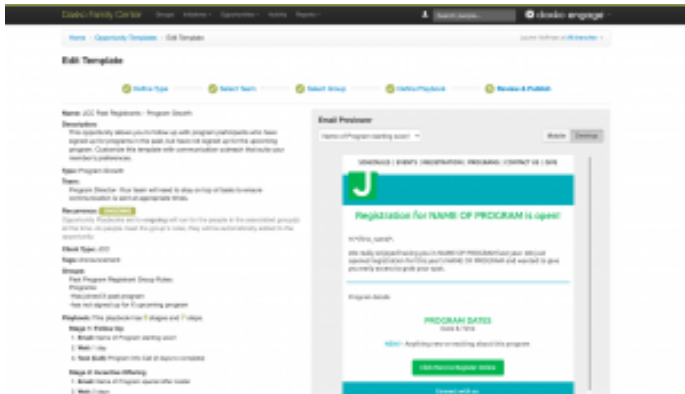


# Daxko Engage Release: Opportunity Playbook Templates and More

## Lead Management | Opportunity Playbook Templates

We are thrilled to deliver these highly requested Opportunity Playbook Templates for Lead Management! Choose from a variety of templates for each Growth Area and prepare to engage with more Leads as we quickly approach the new year. We will be adding more templates to this section in the future so please keep an eye out! Find these Opportunity Templates in the Opportunity Tab dropdown menu.





## Conversica Integration | Lead Status Updates and More!

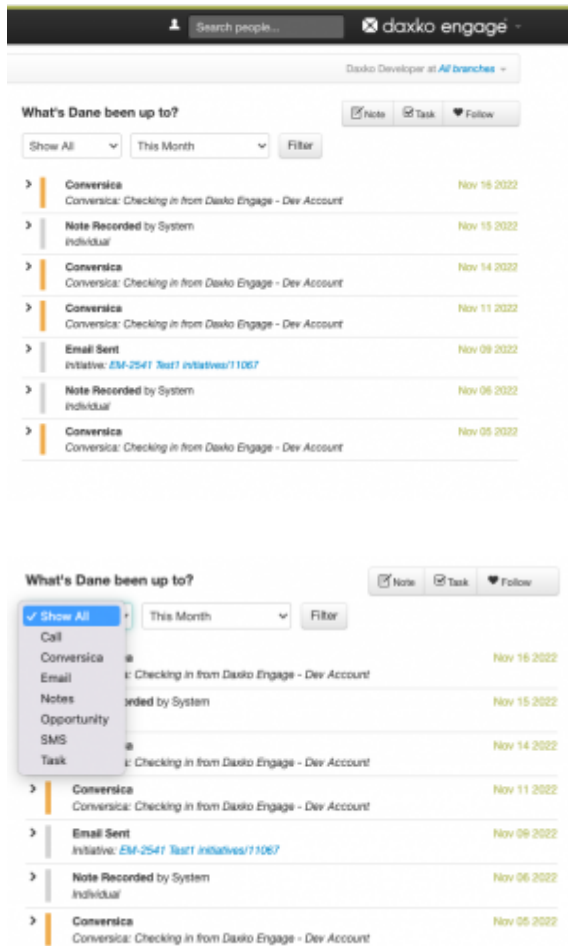
Our integration with Conversica just got more exciting! What's new? Engage now displays the Lead Status and conversation details from Conversica to provide a more streamlined workflow. Assigned Users receive an automatic task for Hot Leads and other actionable status updates. View a full transcript of the Engagement Assistant right there in the Prospect/Member Profile activity history. [Read this Full User Guide](#) to learn more.



## Activity History | Updated UI

The look of the activity history on the Prospect/Member Profile page has been updated. Activities are now organized by color, can be expanded for more details, and can be filtered.

**Communication color codes:** Orange is a response from a member; Light Gray is communication that does not require a response; Dark Gray indicates the member is awaiting a response from your team.



These updates will be available for all associations using Daxko Engage on **Wednesday, November 30**. Please contact [support@daxko.com](mailto:support@daxko.com) if you have any questions.

Interested in learning more about Lead Management and/or Conversica for Daxko Engage? Please contact [sales@daxko.com](mailto:sales@daxko.com) for more details.

## Project Thrive: “Ask the Expert” Sessions



The Daxko Team is offering a new webinar series called **Project Thrive**. During

our “Ask the Expert” sessions, our team of product experts hold office hours to cover the basics of Daxko solutions AND give you time to ask questions. We’ll be offering new “Ask the Expert” sessions every week, so stay tuned for more...

Check out upcoming and past sessions [here](#).