



# Engaging with Your Community

Create effortless experiences

Crystal Montana & Brittini Young





## Communication



# Engaging with opt-outs

Where do we have opportunity?



# Engaging with Opt-Outs

Email Settings Email

Call, In-Person, & Mail  
Campaigns

Push Notifications



# Email Settings Email

## Continuing Communication



**Single-Parent Household Membership** 2058719

SETTINGS

RECORDS

RECENT

FINANCIAL

Downtown Center

Active for 6 years

\$85.00 monthly on the 1st (More Details)

Bank Account (ending in 1234)

Next Process is November 2024

Unscheduled

\$0.00

Balance Due

\$300.00

Adam Smith

Primary

42 years

Access Denied Membership information is under review. [View Report](#)

Update Email

X

Please enter, update or verify the current email address associated with the member's online account.

Email

asmith12@noemail.com

Contact Member

Email	Status	
asmith12@noemail.com	Unverified	<div>SEND EMAIL SETTINGS EMAIL</div> <div>SEND VERIFICATION EMAIL</div>

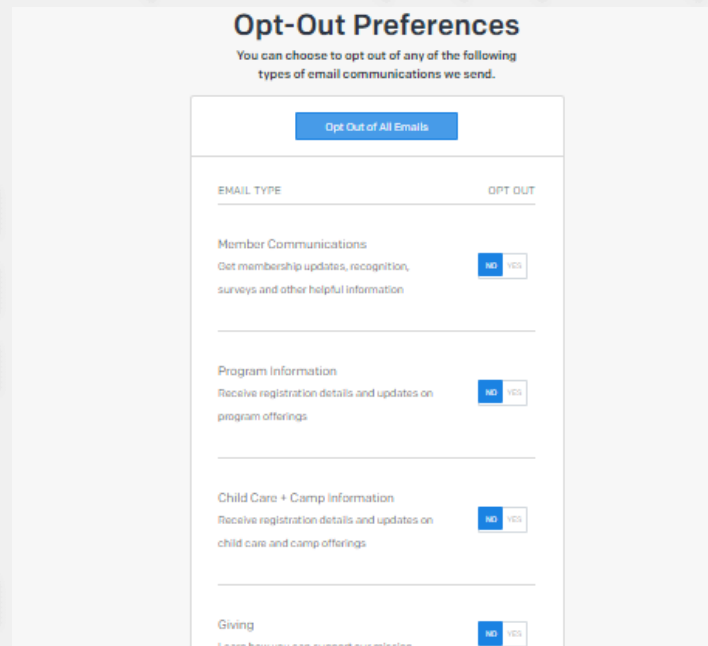
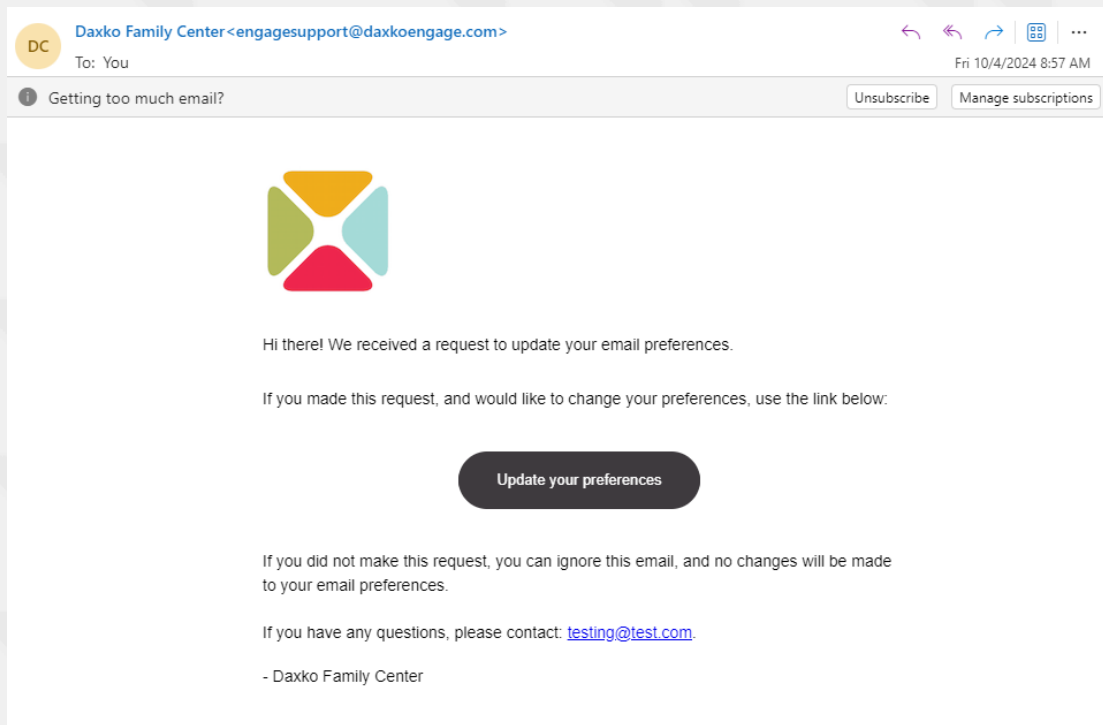
FYI. Email addresses that are "unverified" will receive a notification email in order to verify the email address on file.

NEVERMIND

SAVE & VERIFY

# Email Settings Email

## Continuing Communication



# Call, In-Person & Mail Campaigns

## Continuing Communication























Daxko Family Center Groups Initiatives Opportunities Activity **Reports** Search people... daxko engage

Home > Email Analytics > Unsubscribed Crystal Shrum at All branches

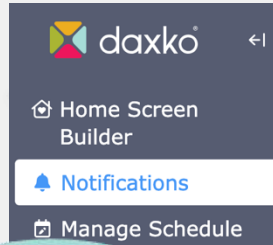
### Email Analytics - Unsubscribed Export

Showing 1-21 of 21

 <b>Olson, Cierra</b> Prospect	 <b>Twilight, Belle</b> Downtown Center Active Last seen on 2/23 DONOR VOL	 <b>Test, Michelle</b> Downtown Center Active	 <b>Petersen, Marqui</b> Downtown Center Active
 <b>Looney, Allison</b> Downtown Center Active Last seen on 6/20/2023	 <b>Martin, Jane</b> Downtown Center Active	 <b>Killings, Bianca</b> Fox Family Club Active	 <b>Nichols, Jeremiah</b> Downtown Center Inactive
 <b>Copeland, Elias</b> Homewood Family Center Inactive	 <b>Rutledge, Erin</b> Downtown Center Active	 <b>Marks, Amy</b> Downtown Center Inactive	 <b>Martin, Andy</b> Downtown Center Active
 <b>Jenner, Todd</b> Downtown Center Active DONOR	 <b>Shipman, Greg</b> Downtown Center Active	 <b>Stanton, Tom</b> Downtown Center Inactive	 <b>Robertson, Tim</b> Downtown Center Active
 <b>Mehta, Rajesh</b> Downtown Center	 <b>Sams, Chris</b> West Side Family Center	 <b>Ravinder Singh</b> ravi.singh@outlook.com	 <b>Neil Ruffini</b> neil.ruffini@clubautomation.c...

# Push Notifications

## Continuing Communication



## Audiences

⊕ ADD AUDIENCE

Title ▾ Type ▾			
Title	Type	Members	
Youth Soccer Coaches & Families	Manual	2	



# Analytics



# Analytics

How successful are your efforts?



Revenue Tracking

Email & Text Analytics

Heat Maps & Dashboards



# Revenue Tracking



Daxko Operations Custom Reports > Global Reports > Daxko Engage folder

Program Revenue Tied to Daxko Engage Initiatives

Date: Friday, October 4, 2024  
Time: 10:08:19 AM

Registration Date Between

6/1/2018

and

10/3/2024

Run

Run and Hide Parameters

This report shows any registrations for a program that were the result of clicking a link in an email from Daxko Engage.

Use this to report on program revenue that's been generated from emails in Daxko Engage.

(Program registration tracking began on June 13, 2018.)

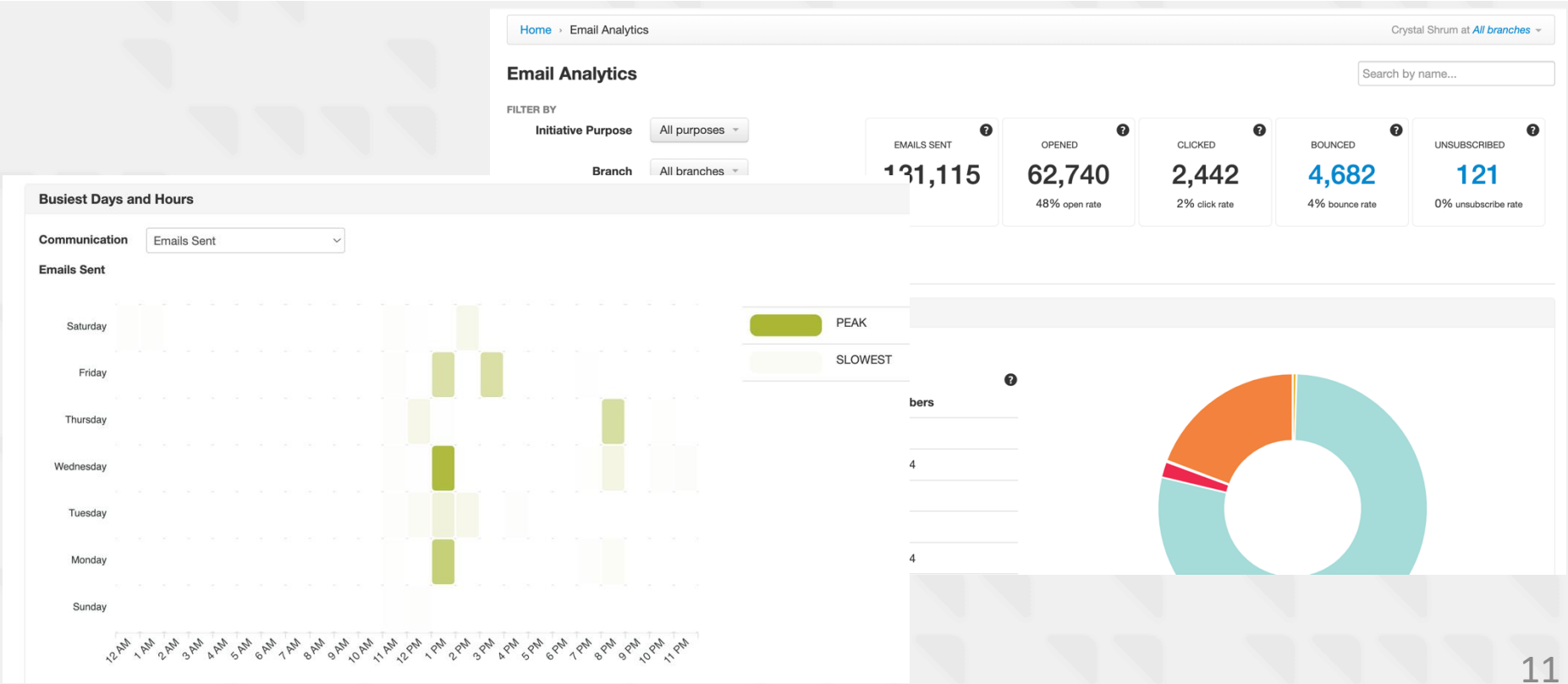
**Program Registrations tied to Daxko Engage**

Page 1 of 22

Campaign	Member ID	First Name	Last Name	Date Registered	Source	Description	Fee Amount	Amount Paid
Total Registrations: 2143								Total Program Revenue: \$133,465.18
Initiatives/143417								
Total Registrations: 4								Total Program Revenue: \$217.50
	0771879-03	David	Snellen	4/13/2022	Engage	(Whitaker Family YMCA at Hamburg Place) Ages 4-8 Baseball Skills - Ages 4-5 Baseball Skills - (05/03/22 - 06/21/22)	\$50.00	\$50.00
	060489294-01	Mary	Thompson	7/10/2023	Engage	(High Street YMCA) Pilates Reformer & Tower System - Level 2A - Level 2A Reformer & Tower - (08/30/23 - 10/25/23)	\$95.00	\$95.00
	060489294-01	Mary	Thompson	6/5/2023	Engage	(High Street YMCA) Pilates Reformer & Tower System- Level 2A 4Weeks - Level 2A Reformer & Tower - (08/02/23 - 08/23/23)	\$47.50	\$47.50
	070511395-01	Berthe	Kasongo	5/1/2023	Engage	(Whitaker Family YMCA at Hamburg Place) Ages 13   Teen & Adult- Swim Lessons 4 weeks - Levels 1-3 Water Acclimation, Movement & Stamina - (05/02/23 - 05/23/23)	\$25.00	\$25.00
Initiatives/145167								
Total Registrations: 1								Total Program Revenue: \$20.00
	04123522-08	Oleg	Romanivko	5/31/2023	Engage	(Carol Martin Gatton Beaumont YMCA) Kids Triathlon Clinics - Ages 6-8 Kids Tri Race Prep Clinic - (06/07/23 - 06/07/23)	\$20.00	\$20.00
Initiatives/145410								
Total Registrations: 6								Total Program Revenue: \$314.35
	08179092-03	Cole	Gilbert	9/23/2021	Engage	(Whitaker Family YMCA at Hamburg Place) Ages 4-5 Basketball League - Clippers - (10/30/21 - 12/18/21)	\$70.00	\$70.00
	08179092-04	Olivia	Gilbert	9/23/2021	Engage	(Whitaker Family YMCA at Hamburg Place) Ages 4-5 Basketball League - Clippers - (10/30/21 - 12/18/21)	\$70.00	\$70.00
	08173373-03	Brady	Mullins	9/23/2021	Engage	(Carol Martin Gatton Beaumont YMCA) Youth Fitness - Fall Youth Fitness - (09/07/21 - 12/17/21)	\$0.00	\$0.00
	080476263-04	John	Middleton	9/22/2021	Engage	(Whitaker Family YMCA at Hamburg Place) Ages 6-7 Basketball League - Clippers - (10/25/21 - 12/18/21)	\$70.00	\$34.35
	06133122-04	Nicholas	Fairbanks	9/25/2021	Engage	(Carol Martin Gatton Beaumont YMCA) Ages 6-7 Basketball League - Heat - (10/25/21 - 12/18/21)	\$70.00	\$70.00

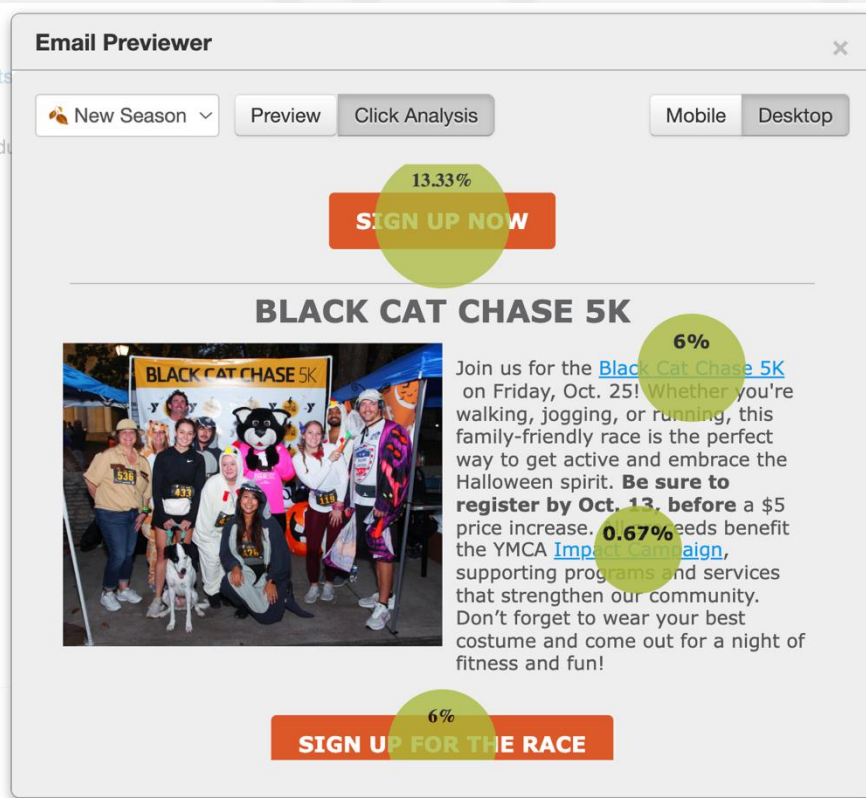
# Email & Text Analytics

Daxko Engage > Reports > Email Analytics, Text Analytics



# Heat Maps & Dashboards

Track your clicks



# Dashboards



## Daxko Engage > Reports > Dashboard

### New Joins Retention Graph ?

All branches ▾ All membership types ▾ 2024 ▾

k Sites

	Month 0	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
<b>Total 2024</b> 7030 units	99%	96%	91%	85%	79%	75%	69%	64%	58%	57%	0%	0%	0%
January 2024 992 units	99%	97%	93%	89%	83%	78%	72%	65%	58%	57%			
February 2024 714 units	99%	97%	93%	89%	85%	78%	68%	60%	59%				
March 2024 559 units	99%	96%	92%	87%	84%	77%	67%	65%					
April 2024 743 units	99%	95%	89%	85%	79%	72%	69%						
May 2024 699 units	99%	96%	91%	83%	72%	69%							
June 2024 1007 units	100%	95%	87%	78%	74%								
July 2024 869 units	99%	94%	89%	86%									
August 2024 754 units	99%	97%	95%										
September 2024 640 units	100%	99%											
October 2024 53 units	100%												

# Dashboards



Daxko Engage > Reports > Dashboard

## Engagement Trends

September ▾

2024 ▾

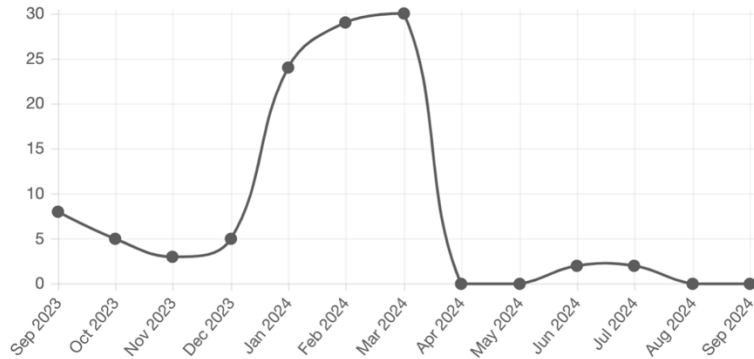
### Staff Engagement

September 2024

0

IN-PERSON CONVERSATIONS

#### In-person conversations



1,174

TOTAL TASKS COMPLETED

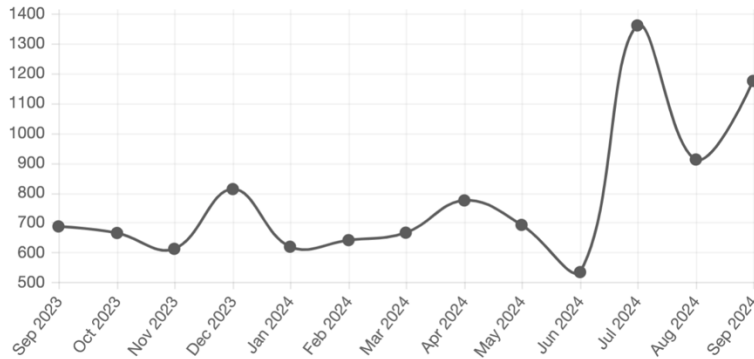
397

TASKS COMPLETED ON TIME

777

TASKS COMPLETED LATE

#### Total Tasks completed



# Dashboards

Daxko Engage > Reports > Dashboard

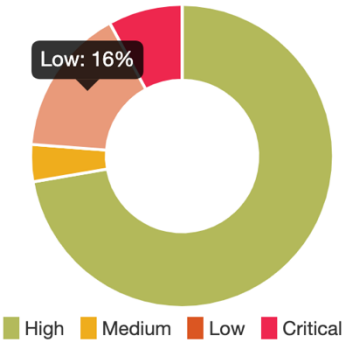


## Member Retention Indicator

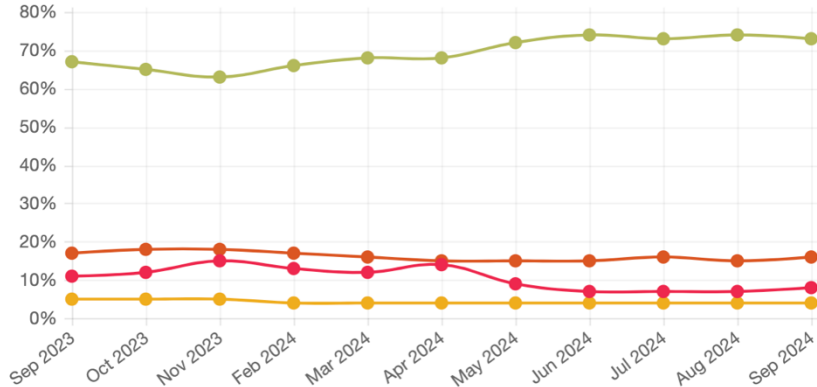
September 2024

36,487

TOTAL MEMBERS  
WITH RETENTION  
INDICATOR



## Member Retention Indicator





# Automation & Targeting



# Automation & Targeting

Easily Connect with the Right People



Group Rules

Prospect Forms & Rules

Tracking Satisfaction & Follow Up

Win-Back Campaigns &  
Promo Codes



# Group Rules

Stack rules to ensure maximum targeting



Daxko Family Center

Groups

Initiatives

Opportunities

Activity

Reports

Search people...

daxko engage

Go back

Add rule

Group rules

Custom

Member ID

Membership

Home Branch

Interests

Member Status

Unit Status

Membership Types

Recognition Flags

Termination Reasons

Unit Primary

Membership Sign Up

Daxko Indexes

Unit Retention Indicator

Member Retention Indicator

Registered For Program Packages

Select the branch(es) of your program, then type the name to search.

Branch

Pick branches...

Session start year

Pick years...

Program Tags

Pick tags...

Start typing to search

☒ Include people who registered for these program packages:

☐ Include people who registered and are on roster for these program packages:

☐ Include people who registered for these program packages within a time frame:

☐ Add Remaining Session Criteria

Select operator

#

remaining sessions.

Zero (0) remaining sessions would include people that have completed their last session from the program package.

# Prospect Forms

Daxko Operations > System Menu > Manage Forms



Interested in learning more about our facility?

## Contact Information

First Name \*

Last Name \*

Email \*

Phone \*

- ☐ Yes, I want to opt in to receive text messages. [Learn more](#)
- ☒ No, I do not want to opt in to receive text messages.

Branch of Interest

All Branches

SAVE

## STAY CURIOUS

Want to know more about how you can make an impact in the community? Fill out this simple form to learn how to get involved.

FIRST NAME

LAST NAME

PHONE

- ☐ Yes, I want to opt in to receive text messages. [Learn more](#)
- ☒ No, I do not want to opt in to receive text messages.

SUBMIT

# Prospect Group Rules



Daxko Engage > Groups > Create your own > Prospects

Daxko Family Center

GroupsInitiativesOpportunitiesActivityReports

Go back

Group rules

Prospects

Source

Date Created

Preferred Location

Source Form

Tour

Tour Guide

Tour Status

Demographics

Age

Gender Identity

Zip Code

Communication Preferences

Text

Source Form

☐ Tour

> ☐ Event

> ☐ Walk-In

☐ Member Guest

☐ Member Referral

> ☐ Phone Inquiry

☐ Program Participant

> ☐ Web Lead

☐ 2023 Community

☐ 92NY's Membership

☐ Be part of the best Y

☐ Downtown - Summer Volunteer 2022

☐ Downtown Center - Website Leads

☐ Membership Web Inquiry

☐ Need Volunteers

# Tracking Satisfaction



[Daxko Engage > Reports > Engagement Resources](#)

## Performance Reports

[2021 Performance Reports](#)

[2022 Performance Reports](#)

[2023 Performance Reports](#)

[2024 Performance Reports](#)

[August 2024 MNPS Report](#)

[July 2024 MNPS Report](#)

[June 2024 MNPS Report](#)

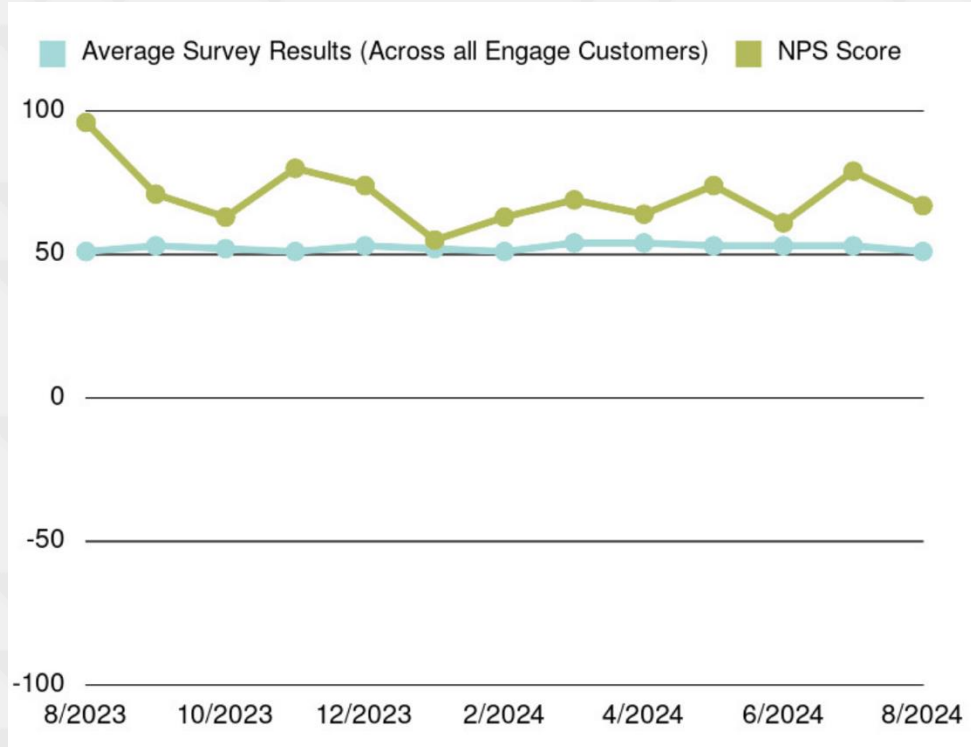
[May 2024 MNPS Report](#)

[April 2024 MNPS Report](#)

[March 2024 MNPS Report](#)

[February 2024 MNPS Report](#)

[January 2024 MNPS Report](#)

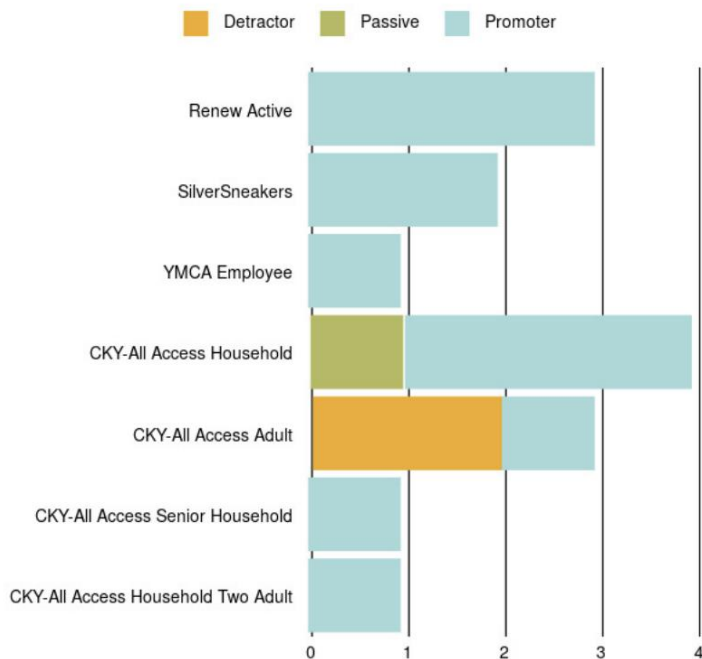


# Tracking Satisfaction

Daxko Engage > Reports > Engagement Resources



## NPS Category by Membership Type



# Following up with Members

Daxko Engage > Reports > Engagement Resources



## What's James been up to?

Note Task Follow

Show All

Last 90 days

Filter

- > **Email Sent** Oct 02 2024  
Initiative: [Household - Member News - Oct. 2, 2024](#)
- > **Email Sent** Sep 04 2024  
Initiative: [Household - Member News - September 4, 2024](#)
- ✓ **Note Recorded** by Membership NPS Aug 12 2024  
Individual  
Note: Score: 10; Comment: The Y offers so many options to fit anyone's needs. It's great if you are training for a race or just looking to workout. The pools offer great swim times for laps swimmers as well. Every time I go I am met by nice staff.
- > **Email Sent** Aug 12 2024  
Initiative: [Membership NPS Survey - High Street YMCA - Enabled: 9/1/2021](#)
- > **Email Sent** Aug 07 2024  
Initiative: [Household - Member News - Aug. 2024](#)
- > **Email Sent** Aug 01 2024  
Initiative: [High Street YMCA - MLC - Anniversary](#)

C.M. Gattton Beaumont MLC Day 21 Low Usage

DUE 10/5/2024

### Low Usage Check in Call

for Alex Dapkus

"Hello, my name is \_\_\_\_ from the YMCA Do you have a few minutes to talk?" Let them know that you noticed they haven't been here in a while. Ask them what has prevented them from coming. Offer solutions to their barriers, offer to help them register for a class or get started with a success appointment.

Are there any questions or concerns that I can help you with? If they discuss cancellation, find out why. Suggest putting membership on hold, financial assistance, or helping them get connected with the right resource.

Leaving a Voicemail: Hello, my name is \_\_\_\_\_ and I'm calling from the YMCA I \_\_\_\_\_. I was calling to see how your experience has been so far. Please give us a call if you have any questions. We would love to hear from you and help you get connected with resources to help you reach your wellness goals.

# Win Back Campaigns



Daxko Operations > Membership > Discount Groups

**Promotion** ☒ Yes

**Code Required** ☒ Yes  

**Membership Specific** ☒ Yes 1 memberships can use this code. [Manage Memberships](#)

**Availability**

The dates below indicate when this promotion may be applied. If a checkbox is toggled on but no dates are entered, this promotion will be available all of the time.

☒ Online

From   to

☐ In-house

From  to



# Online Promotions

Daxko Operations > System Menu > Promo Codes



Daxko Family Center

Membership ▾Programs ▾Child Care ▾Fundraising ▾Finance ▾Appointments ▾

daxko operations

Manage Promotions » Manage Promotions

Live Chat

 · Crystal Montana at (01) Downtown Center ▾

Manage Online Promotions

[Add Promotion](#)

Promotion Name	Codes	Start Date	End Date
25OFF	25OFF	11/2/2022	11/7/2023
Aquatics	1233	12/13/2018	12/31/2018
BCDR Early Registration	earlybird	2/4/2020	11/29/2020
Coach Code	coachcode	3/25/2024	3/26/2024
Early Bird Registration	Earlybird21	12/15/2021	12/30/2022
EarlyBird22	EarlyBird22	2/1/2022	12/31/2022
Fall Early Bird Registration	EmailFall2015 + <div>1 more</div>	7/21/2015	8/31/2015
groupon	groupon	1/25/2023	1/26/2023
HKD2024	HKD2024	4/1/2024	4/30/2024
July Promo	YAYJULYPROMO	6/30/2024	7/30/2024
MIL2023	MIL23	8/31/2023	9/9/2023
Program0	EDFF	6/14/2022	6/16/2022

## Promotion Details

Promotion Name

Fall Early Bird Registration

Code

EmailFall2015 ✖

SocialMediaFall ✖

[Add Another](#)

Start Date

07/21/2015

End Date

08/31/2015

# Custom Transaction Emails

Daxko Operations > System Menu > Email Setup

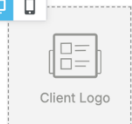


## Email Setup

Online Membership Join Email



Trial Membership Email



Client Logo

Branch Name  
Branch Address  
Branch City Branch State  
Branch Zip  
Branch Phone

Member Full Name  
Member Address  
Member City Member State Member Zip  
Member Phone  
Member Email  
Tax ID: Branch Tax ID  
Unit ID: Member Unit Id  
Order Date

Create Custom

Creat



Fee Details



Fee Summary



Schedule Document

CONTENT

ROWS

SETTINGS



TITLE



IMAGE



BUTTON



DIVIDER



SOCIAL



DYNAMIC  
CONTENT



HTML



VIDEO



ICONS





**Engaging with Opt-Outs**

**Analytics**

**Automation & Targeting**



# Three Ways We Can Help

Create effortless experiences that connect



## Award-Winning Websites & Digital Marketing

Elevate your digital front door



## Data-Driven Marketing Automation

A simple way to reach and connect with your community



## Industry Leading Customer Relationship Management (CRM)

Everything you need, all in one place





# Engaging with Your Community

Create effortless experiences

Crystal Montana





daxko<sup>®</sup>