

## What is Engage for InterAction?

Engage is Fellsoft’s all new add-on product for LexisNexis InterAction.

Engage is a highly flexible tool designed to help significantly improve user engagement by providing valuable relationship data and intelligence from InterAction directly to end-users in whatever format your firm requires.

Users can be automatically provided with content tailored to their needs and according to your specifications. Engage content makes it simple for users to engage with, extract value from, and act on the information in order to enhance your firm’s relationship data and processes.

Engage content can be completely tailored to your firm’s existing InterAction data structures and processes, and can be adapted for perfect alignment with your firm’s specific goals and InterAction strategy.

Engage provides:

- Email alerts which can be generated automatically on flexible schedules from activities and most other data in InterAction.
- Standalone or intranet embedded web pages presenting InterAction data in a completely customizable and flexible user interface, including the ability to add or update data into InterAction directly from the page.

Think of Engage as an “app builder” for InterAction, which can be used to provide your own processes and user interface on top of contact and relationship data from InterAction.

## What are some sample usage scenarios for Engage?

Provide activity updates to end-users	<ul style="list-style-type: none"> <li>• Push selected content from a user’s My Alerts directly to them.</li> <li>• Push information such as activities, relationships &amp; additional fields on any set of contacts to any set of users.</li> <li>• Push information on activities of specific types to any set of users.</li> <li>• Push information on activities involving any set of users to any other set of users.</li> </ul>
Maintain relationship with key contacts	<ul style="list-style-type: none"> <li>• Monitor sets of contacts for recent BD activity, sending an alert to users who know any of the contacts that have no recent relevant activities.</li> </ul>
Targeted information sharing to prompt relationship development	<ul style="list-style-type: none"> <li>• Send an alert to a user when any of their known contacts is involved in a meeting that does not include that user.</li> <li>• Send an alert to a user when any of their known contacts has a new relationship with another user.</li> </ul>

Support a regular data review process and/or collect missing information	<ul style="list-style-type: none"> <li>Identify known contacts that meet certain conditions (for example missing specific information such as additional field values), generate an alert to the user including details of the relevant contacts, with a link to a web page where the user can easily update the missing information directly into InterAction.</li> </ul>
Custom web interfaces	<ul style="list-style-type: none"> <li>Provide targeted, searchable subsets of data from InterAction; for example, all forthcoming BD meetings or confirmed attendees at forthcoming events.</li> <li>Provide a customized user interface around a specific set of contacts, data &amp; functionality; for example, an experts database or a referrals process.</li> </ul>
Intranet integration	<ul style="list-style-type: none"> <li>Create dashboards of content from InterAction for inclusion on the intranet.</li> </ul>
Custom admin tools	<ul style="list-style-type: none"> <li>Create web pages for streamlining &amp; standardizing specific InterAction admin processes; for example, list cleaning.</li> </ul>

## How is Engage licensed?

The core Engage software is licensed on an annually renewable subscription basis.

## Where can I see Engage working?

To view a range of short demo videos, visit [engage.fellsoft.com](http://engage.fellsoft.com).

## How is the Engage software deployed?

Engage is installed and runs on customer managed hardware entirely 'on-premises'. There is no off-site data processing.

Your specific requirements will be met through providing content templates, either as modifications to our standard templates or completely customized. Content templates can be added or modified at any time.

## What IT resource is required to implement Engage?

Engage requires only minimal IT resource to initially install the software on a server and configure any supporting infrastructure (e.g. a mailbox and a database).

Once installed & configured, ongoing aspects of configuration and content management can be carried out through the administration interface by the CRM team without further IT resource.