



Sample Implementation Project Plan

Progress Update Presentation

Prepared by: Nextl Client Services Team
Last Updated: January 9, 2023

Your Client Services Team

Steven Ongenaet
Head of Client Services

Steven leads our Client Services team, developing the vision and strategy to provide the support clients need their business objectives with Nexl.

Candice Connellan
Implementations Manager

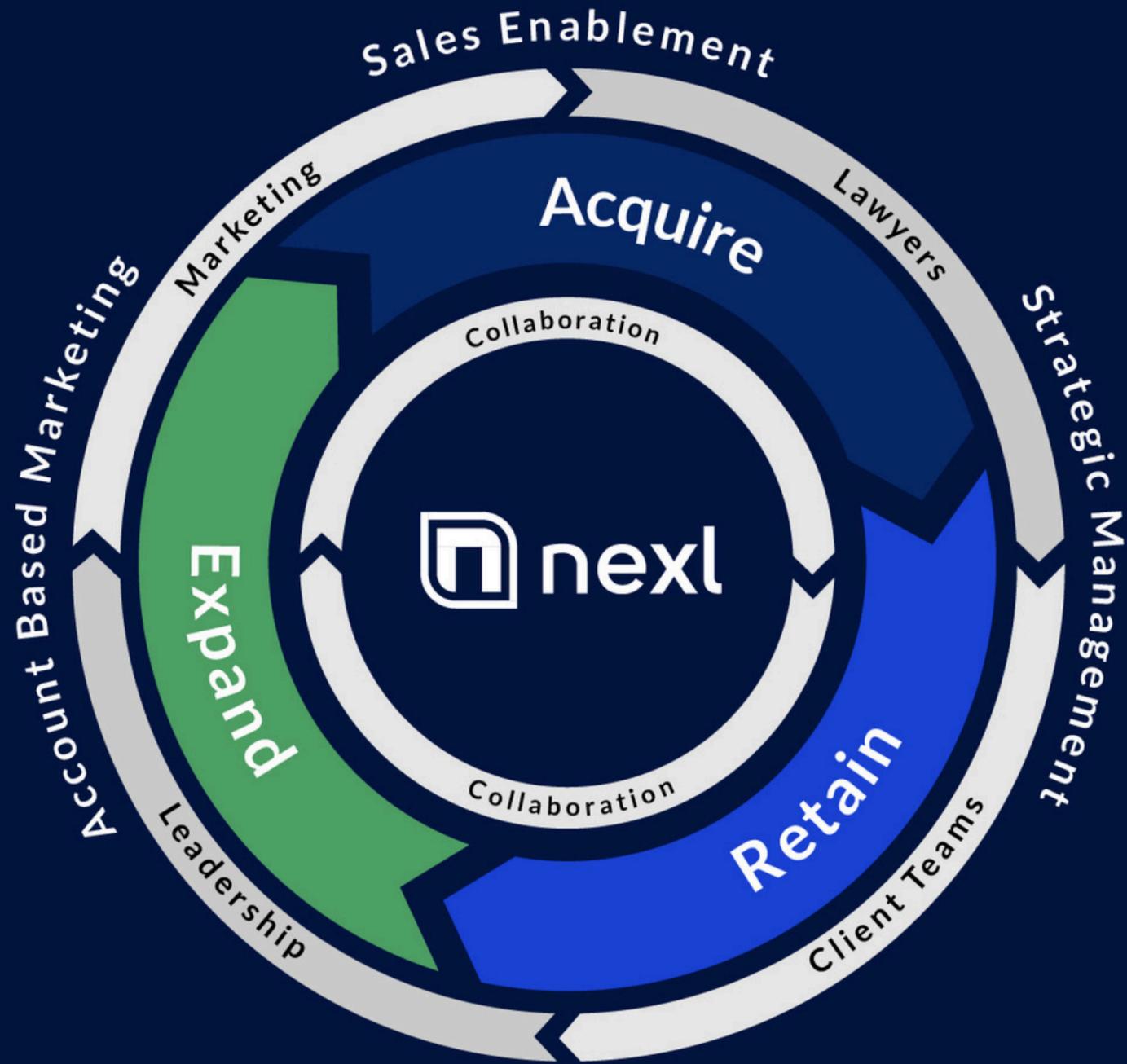
Candice focuses on implementation project management, working closely with clients to coordinate processes and ensure efficient delivery of key outcomes.

Timeline for Implementation



Milestone Overview

Stage	Purpose
Discovery DEC 2022	<ul style="list-style-type: none"> • Identifying requirements • Setting objectives • Proving value • Contract sign-off
Activation and Technical Set-Up JAN 2023	<ul style="list-style-type: none"> • Set up access for core team • Client enrichment lists and data cleaning • RevOps use case configuration • Core team workshops • Finalise communication plan • Plan workshops for any integrations
Champion Partner Onboarding JAN 2023	<ul style="list-style-type: none"> • Kick-off with champion partner group • Training and knowledge transfer workshops
Adoption FEB 2023	<ul style="list-style-type: none"> • Firmwide roll-out to identified groups • Training and knowledge transfer workshops
Growth Ongoing	<ul style="list-style-type: none"> • Ongoing Quarterly Business Review meetings between Nexl and Client



Objectives

Business Objectives

- Business Development
- Marketing

Implementation Objectives

- Key Outcomes
- Measuring Success

Action Items: Activation

Task	Responsible	Status	Due Date	Dependency
Project Kick-Off Meeting	Nexl Contact / Client Contact	Complete	5 JAN	Availability of Key Contacts
O365 Tenant Set-Up	Nexl Contact / Client Contact	Complete	5 JAN	Tenant ID
Retrospective Data Import	Nexl Contact / Client Contact	In Progress	7 JAN	O365 Users have synced
Configuration Settings	Nexl Contact / Client Contact	In Progress	9 JAN	Client Preferences Discussed
Client Enrichment Lists	Nexl Contact / Client Contact	Not Started	12 JAN	None
Outlook Add-In Setup	Nexl Contact / Client Contact	Not Started	13 JAN	Firmwide Installation
Use Case Scoping & Objectives Meeting	Nexl Contact / Client Contact	Not Started	14 JAN	Availability of Key Contacts
Communications Planning Meeting	Nexl Contact / Client Contact	Not Started	21 JAN	Availability of Key Contacts
Schedule Core User Admin Training	Nexl Contact / Client Contact	Not Started	30 JAN	Availability of Key Contacts
Schedule Integrations Workshops	Nexl Contact / Client Contact	Not Started	30 JAN	Availability of Key Contacts
Schedule Quarterly Business Reviews	Nexl Contact / Client Contact	Not Started	30 JAN	Project KO

ACTIVATION

JANUARY

PROJECT KICK-OFF MEETING

O365 TENANT SET-UP

RETROSPECTIVE DATA IMPORT

CONFIGURATION SETTINGS

CLIENT ENRICHMENT LISTS

OUTLOOK ADD-IN SETUP

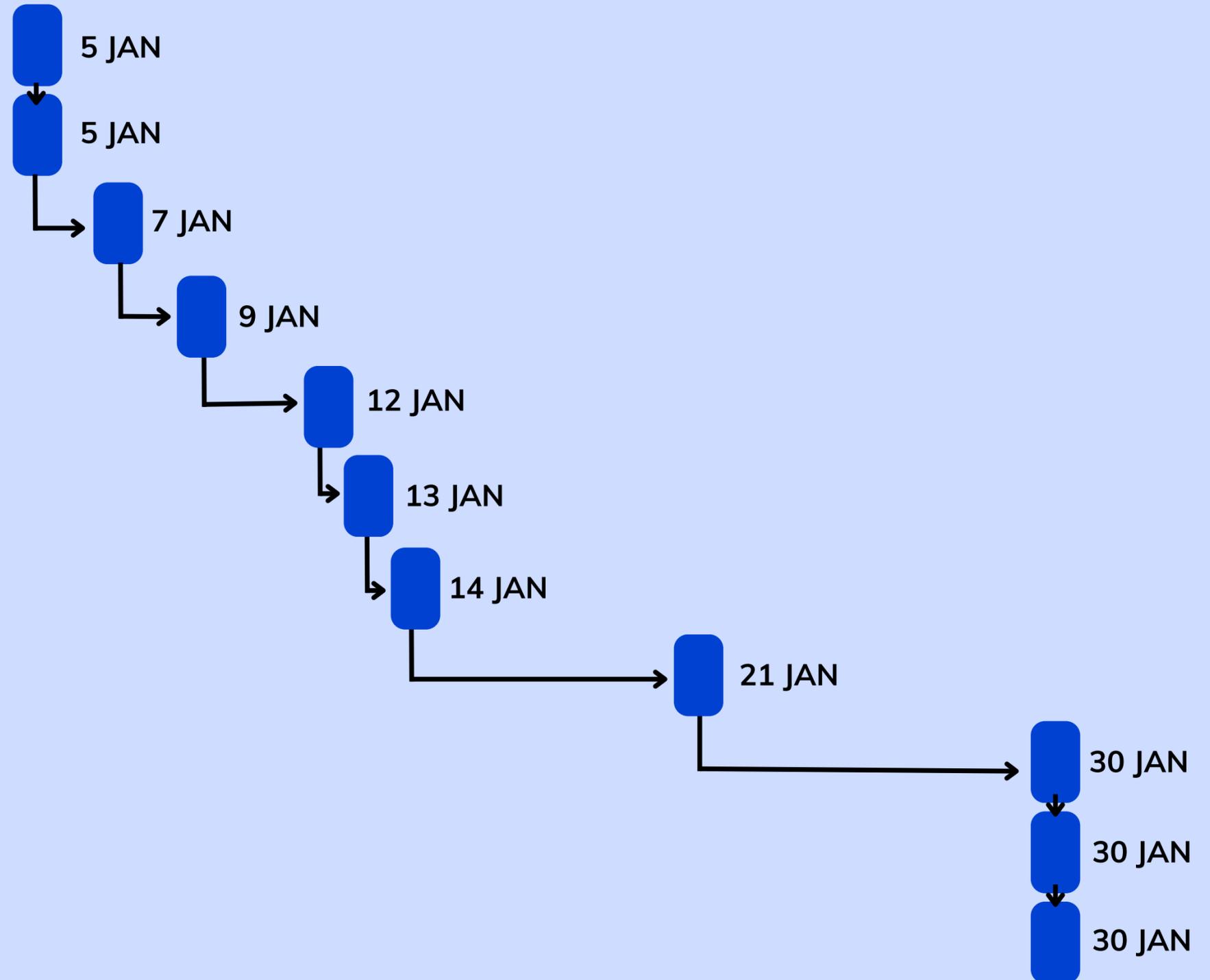
USE CASE SCOPING & OBJECTIVES MEETING

COMMUNICATIONS PLANNING MEETING

SCHEDULE CORE USER ADMIN TRAINING

SCHEDULE INTEGRATIONS WORKSHOPS

SCHEDULE QUARTERLY BUSINESS REVIEWS



Action Items: Onboarding

Task	Responsible	Status	Due Date	Dependency
Online Fundamentals Introductory Course	Nexl Contact / Client Contact	Not Started	5 FEB	None
Growth Space Template Configuration	Nexl Contact / Client Contact	Not Started	6FEB	None
Objective Setting	Nexl Contact / Client Contact	Not Started	7 FEB	Availability of Key Contacts
Core User Training Plan Configuration	Nexl Contact / Client Contact	Not Started	8 FEB	Availability of Key Contacts
Core User Workshop 1: Individual User Success	Nexl Contact / Client Contact	Not Started	9 FEB	Availability of Key Contacts
Core User Workshop 2: Empowering Firm-wide Succes	Nexl Contact / Client Contact	Not Started	14 FEB	Availability of Key Contacts
Core User Workshop 3: Admin User Functionality	Nexl Contact / Client Contact	Not Started	19 FEB	Availability of Key Contacts
Use Case Workshop 1	Nexl Contact / Client Contact	Not Started	24 FEB	Availability of Key Contacts
Use Case Workshop 2	Nexl Contact / Client Contact	Not Started	28 FEB	Availability of Key Contacts

ONBOARDING

FEBRUARY

ONLINE FUNDAMENTALS
INTRODUCTORY COURSE

GROWTH SPACE TEMPLATE
CONFIGURATION

OBJECTIVE SETTING

CORE USER TRAINING PLAN
CONFIGURATION

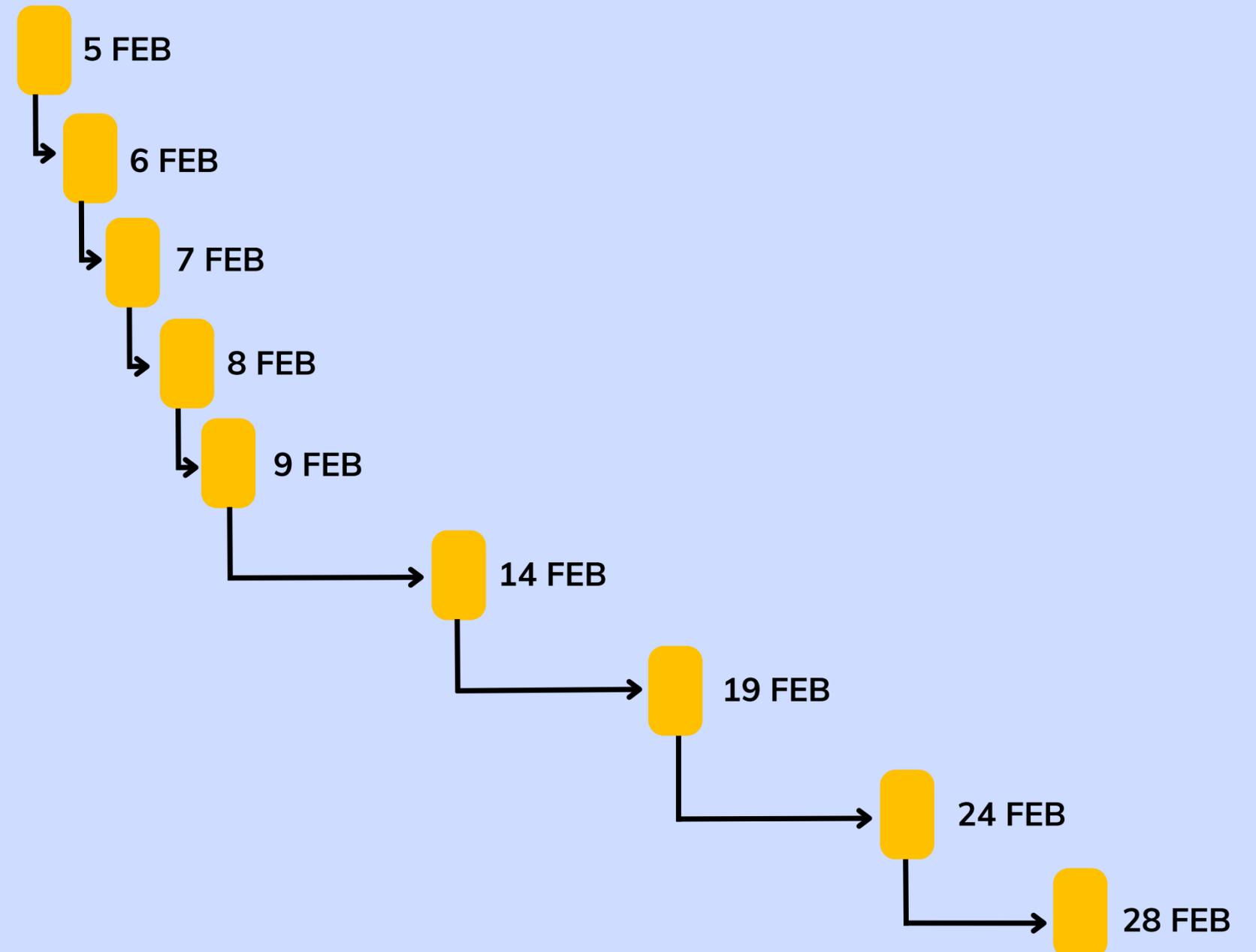
CORE USER WORKSHOP 1:
INDIVIDUAL USER SUCCESS

CORE USER WORKSHOP 2:
EMPOWERING FIRM-WIDE SUCCESS

CORE USER WORKSHOP 3:
ADMIN USER FUNCTIONALITY

USE CASE WORKSHOP 1

USE CASE WORKSHOP 2



Action Items: Adoption

	Task	Responsible	Status	Due Date	Dependency
	Core Team Status Meeting	Nexl Contact / Client Contact	Not Started	5 MAR	Availability of Key Contacts
	Consolidate User Feedback	Nexl Contact / Client Contact	Not Started	6 MAR	None
	Establish Growth Monitoring Objectives	Nexl Contact / Client Contact	Not Started	12 MAR	Availability of Key Contacts
	Configure Growth Monitoring Reports	Nexl Contact / Client Contact	Not Started	14 MAR	None
	First Quarterly Business Review	Nexl Contact / Client Contact	Not Started	28 MAR	Availability of Key Contacts

ADOPTION

MARCH

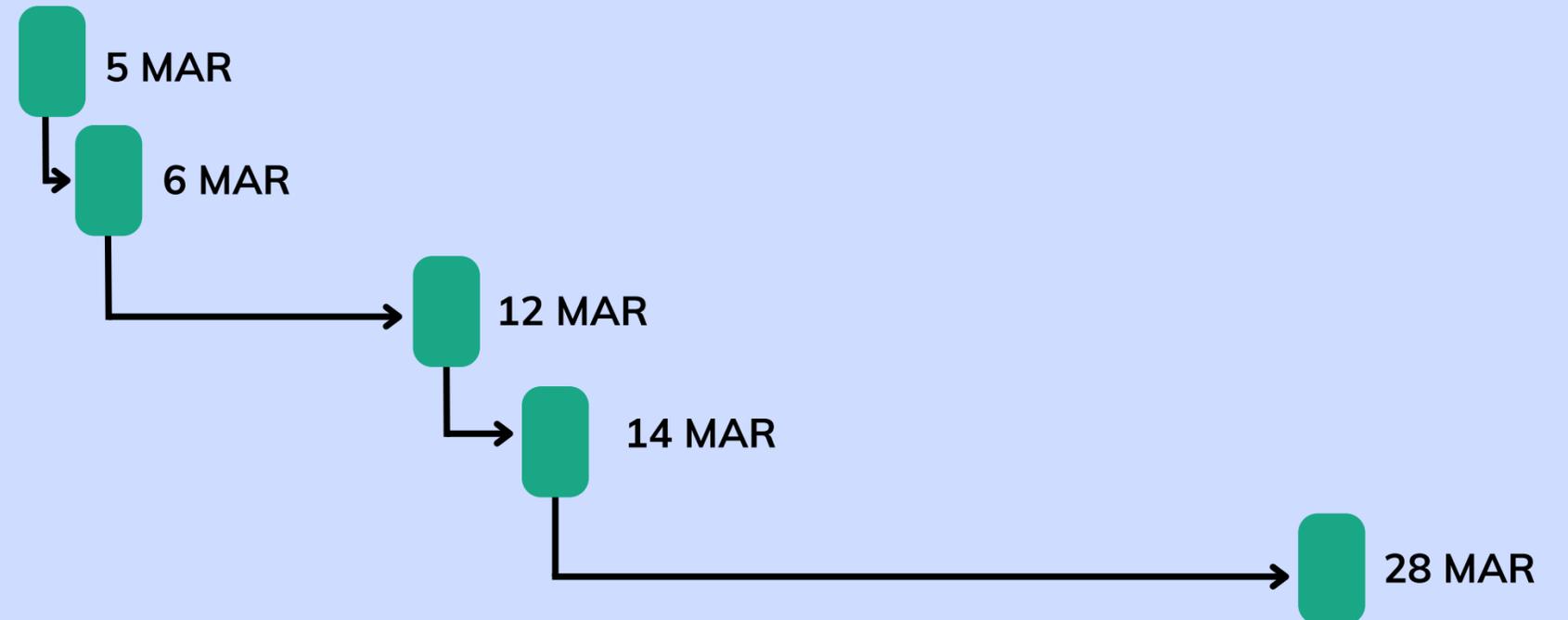
CORE TEAM STATUS MEETING

CONSOLIDATE USER FEEDBACK

ESTABLISH GROWTH
MONITORING OBJECTIVES

CONFIGURE GROWTH
MONITORING REPORTS

FIRST QUARTERLY BUSINESS REVIEW





Nexl is a leading provider of innovative legal technology solutions aimed at creating efficiencies, accelerating growth and providing data-driven insights that drive smart decision making. We offer scalable solutions for law firms of all shapes and sizes. Founded by legal professionals with vast experience working within legal firms, NEXL grew out of a desire to fundamentally change the way that legal firms grow and engage with internal and external stakeholders. The existing way of managing these relationships doesn't work. Today, we're driving the delivery of smart, innovative and technology-driven services to clients worldwide. Smart, insight-driven solutions underpin NEXL's purpose. Drawing from our own practical experience working within the professional services industry, our purpose is to develop and deliver technology solutions that will drive positive change in how law firms manage their client relationships and grow their practice.