

AVERAGE TIMELINE: 4-6 WEEKS

Nexpl Implementation Process

A high-level view of the implementation stages Nexpl uses to move from early planning through to rollout and user adoption.

This document is based on the original implementation process overview and has been rebuilt in the updated Nexpl brand style for website use.



A structured implementation journey

Nexl's implementation process is designed to move from early alignment into a configured environment, then into team readiness and broader rollout. The goal is to make sure the system is not only live, but usable, relevant, and adopted.



Why this structure works

Each stage builds on the previous one. That means planning informs setup, setup informs training, and training supports a more confident and visible rollout.

What this document is for

Use this as a concise reference for clients and internal teams who want to understand the purpose, actions, and outputs of each implementation stage.

Timeline

The original implementation overview positions this as an average 4–6 week process, though exact timing will always depend on scope, client readiness, and agreed deliverables.

STAGE 1

Strategy

The first phase focuses on clarity. The aim is to build an implementation roadmap aligned to the firm's priorities, workflows, and business development objectives.

01

Objective

Build a clear implementation roadmap aligned to the firm's priorities, workflows, and BD goals.

02

Actions

- Initial consultation and stakeholder alignment
- Review of existing systems and workflows
- Identification of primary use cases
- Definition of success criteria
- Implementation roadmap planning

03

Deliverables

- Implementation roadmap
- Use case definition
- Stakeholder alignment summary

04

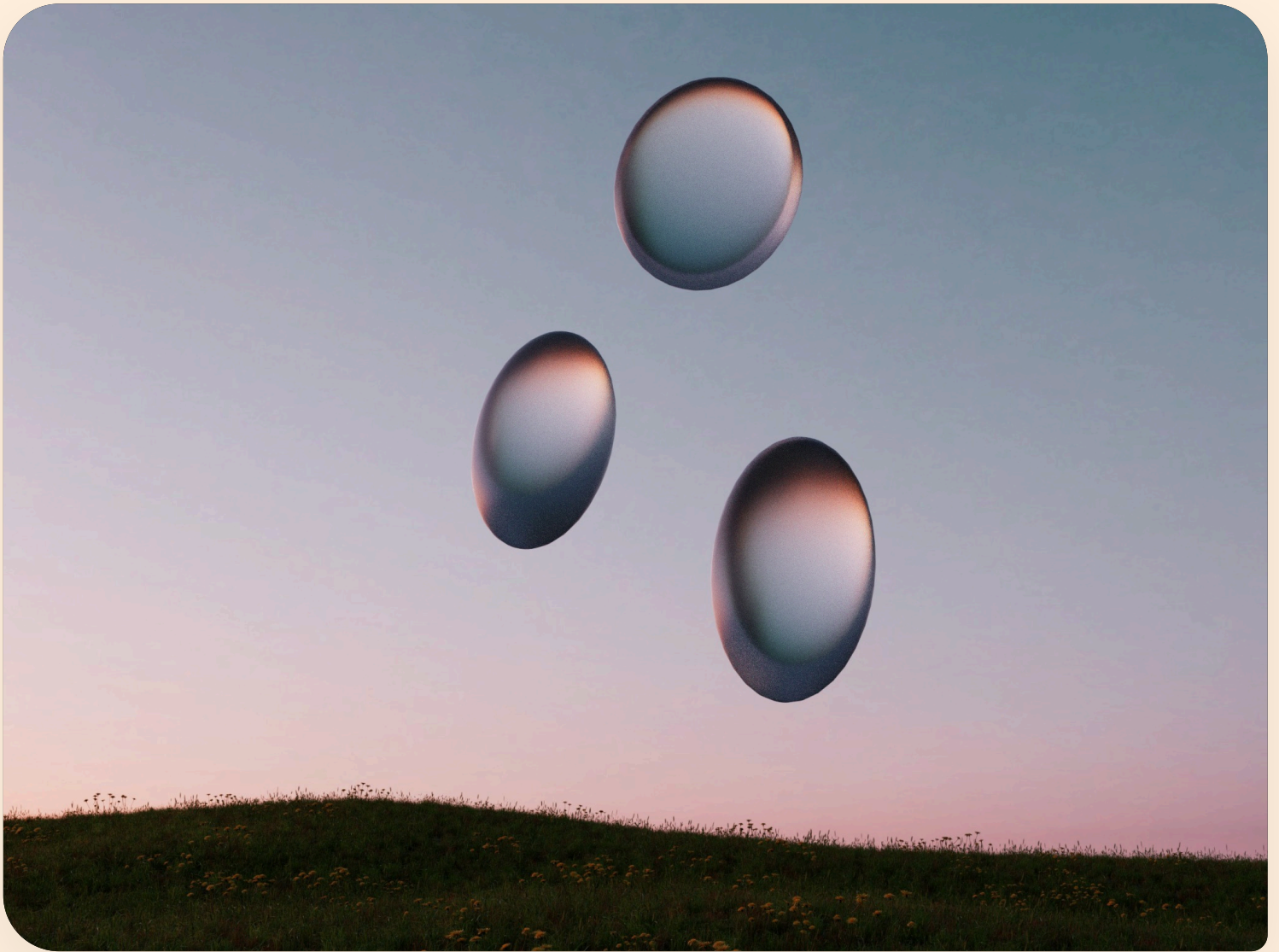
Why it matters

This stage ensures the project starts with agreement on what success looks like, rather than moving straight into technical work without context.

STAGE 2

Activation

The activation stage focuses on standing up the Nexl environment and preparing the relationship database so the platform is ready for meaningful use.



Objective

Establish a structured Nexl environment and prepare the firm's relationship database.

Actions

- Email integration and technical setup
- Import of contacts and companies
- Core system configuration
- Data validation and preparation

Deliverable: Environment setup

A configured Nexl environment that reflects the agreed technical and workflow foundations.

Deliverable: Structured data

A cleaner, more usable contact and company database supported by technical setup documentation.

Activation focus

This stage is not just about switching systems on. It is about setting the platform up in a way that supports future workflows, not just technical connectivity.

STAGE 3

Core Team Training

Before wider rollout, the internal project team needs to be confident using the platform, managing workflows, and supporting the broader firm.

Objective

Enable the internal project team to confidently manage the system and prepare for rollout to the wider firm.

Actions

- Core team training sessions
- Workflow and process mapping
- User roles and permissions configuration
- Best-practice guidance for relationship intelligence and BD tracking

Deliverable: Enablement

Core team members leave this stage with a stronger understanding of the system and how it should be used internally.

Deliverable: Structure

Configured workflows, role settings, and training materials help make the next stage more repeatable and controlled.

Why this stage matters

Rollouts work better when the core team already knows how to support usage, answer questions, and connect the system to real day-to-day practice.

STAGE 4

Rollout

The final stage introduces Nexl to attorneys and staff in a structured way that demonstrates value, supports change management, and helps the firm move from setup into live use.



Objective

Introduce Nexl to attorneys and staff in a structured way that demonstrates value and supports broader adoption.

Actions

- Training sessions for attorneys and staff
- Demonstration of priority use cases
- Guided walkthrough of relationship intelligence workflows
- Initial support and Q&A

Deliverable: Training Workspace

Users are supported with training resources and structured materials they can refer back to after launch.

Deliverable: Initial support

The rollout includes early support so users are not left to figure out value or process on their own.

KEY OUTCOMES

What the implementation process is designed to achieve

Across all four stages, the implementation process is built to create not just technical readiness, but practical adoption and a clearer path to value.



Clarity

A roadmap aligned to stakeholder priorities, use cases, and measurable success criteria.

Readiness

A configured environment, prepared data, and technical foundations that support real use.

Enablement

A core team that understands the system and is ready to support broader adoption.

Rollout confidence

A structured introduction to the wider firm that helps users understand how Nexl supports their work.

In practice

The strongest implementations are the ones that connect system setup to real workflows. That is why this process moves from strategy into activation, then into enablement and rollout rather than treating implementation as a purely technical exercise.

Source document: Implementation Process overview. Rebuilt as branded HTML for website use from the original uploaded PDF. Keep this HTML file and the assets folder together when publishing.