

QUICK PRODUCT SUMMARY

# Nexpl At A Glance

A concise overview of what Nexpl is, what it helps firms do, and what it does not do.

This document is based on the original At A Glance PDF and has been rebuilt in the updated Nexpl brand style for website use.

OVERVIEW

## What is Nexpl?

Nexl is an all-in-one, no-data-entry CRM, client intelligence, and collaboration platform designed to help firms turn relationships into revenue.



## What makes it different

Nexl combines CRM, relationship intelligence, and collaboration in one platform so teams can work from a more complete view of their contacts, companies, and opportunities.

## How it supports adoption

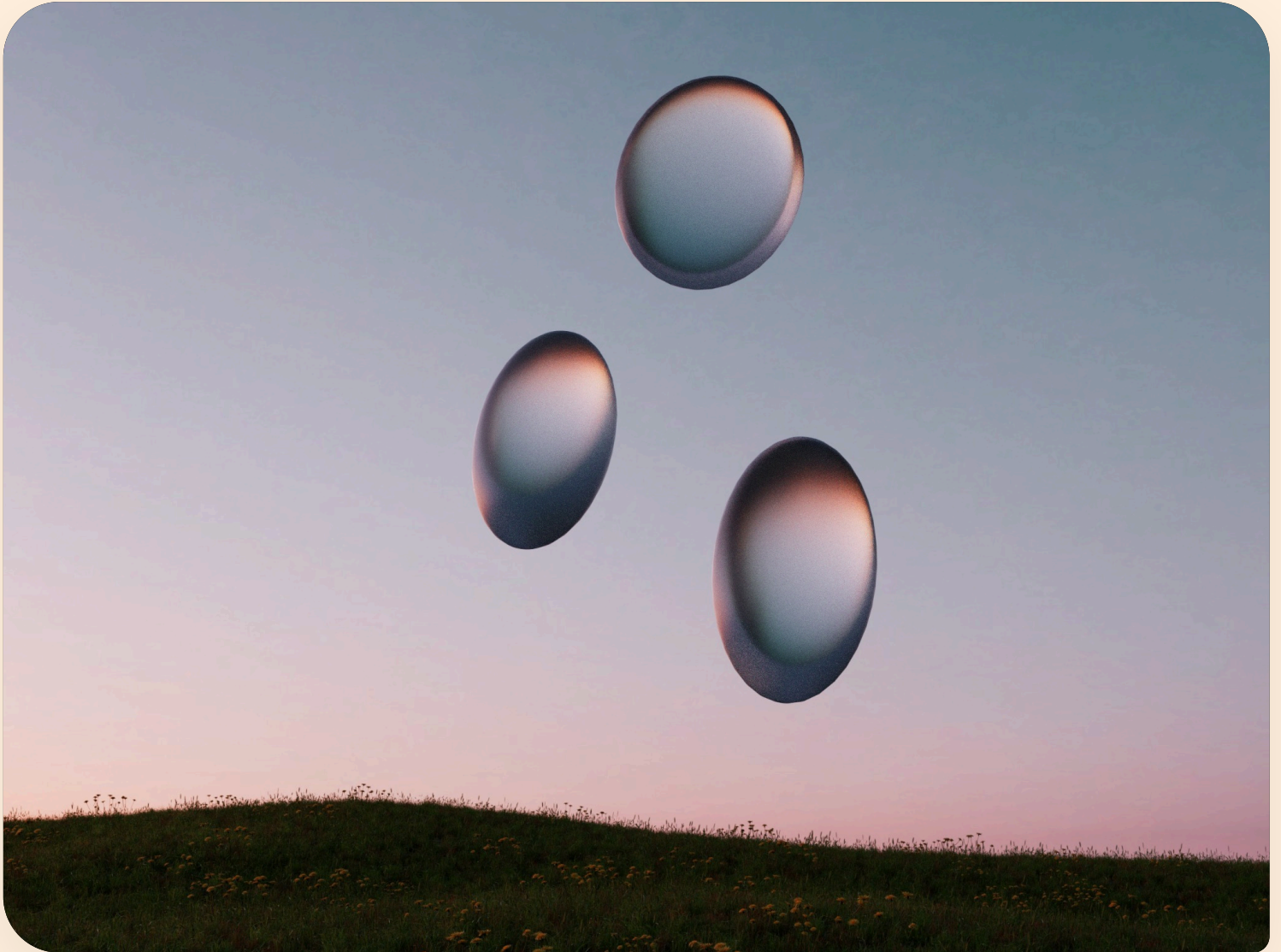
By reducing manual data entry and connecting to familiar workflows such as email and calendar activity, Nexl is designed to fit more naturally into the way lawyers and BD teams already work.

## At a glance

The original document positions Nexl as a platform that automates data capture, strengthens relationship visibility, and supports firm-wide collaboration without relying on users to manually maintain everything.

# What Nexl does

The original At A Glance document highlights four core value areas that make the platform useful in day-to-day practice and BD workflows.



## Automated data capture

Nexl automatically pulls in information from email and calendar activity, then enriches it with external sources.

## Proactive relationship management

Stay-In-Touch reminders help users keep important relationships active and identify where re-engagement may be timely.

## Inbox-connected workflows

The Outlook add-in helps users add contacts, create opportunities, and manage reminders directly from their existing workflow.

## Referral and relationship visibility

Shared contacts and levels of interaction help teams identify who should be involved in referrals, introductions, and opportunities.

## Core outcomes

- Automatically capture and enrich contacts
- Generate valuable relationship insight
- Support firm-wide collaboration

## Practical themes from the original document

- Data entry
- Relationships
- Inbox workflows
- Referrals
- Who Knows Who

### BOUNDARIES

## What Nexl does not do

The original document is explicit about what Nexl does not access or enable. That clarity helps build trust and sets the right expectations.

### Included

- Capture and enrich contacts
- Generate relationship insight
- Enable collaboration across the firm

### Not included

- Reading email bodies
- Scraping email signatures
- Exposing confidential or privileged information
- Monitoring user behaviour in a surveillance-style way

## Why this matters

The boundaries in the original document are part of the value proposition. Nexl is designed to help firms work with relationship data while keeping sensitive content and privileged information out of scope.

### PRODUCT THEMES

## How the platform is framed

The At A Glance document presents Nexl as a product that connects relationship data, business development workflows, and collaboration in a way that is meant to feel practical rather than heavy.



## Relationship-first

The emphasis is on helping firms see and use relationship intelligence more effectively, rather than treating CRM as a static database.

## **Workflow-connected**

The product is positioned as something that works alongside the inbox and day-to-day professional activity, not outside of it.

## **Collaborative**

By showing shared contacts and levels of interaction, Nexl supports stronger visibility into who should be involved across the firm.

## **Practical to explain**

This overview document is designed to give a concise summary that can be used in client-facing or internal contexts where a short explanation is more useful than a full technical guide.

## **Use case**

This page works well as a short product explainer or orientation reference when you need a simple overview before moving into more detailed technical or workflow documentation.