

# Implementation Process

Average Timeline: 4-6 Weeks



## 1. Strategy

### OBJECTIVE

Build a clear implementation roadmap aligned to the firm's priorities, workflows, and business development objectives.

### ACTIONS

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

### DELIVERABLES

- Implementation roadmap
- Use case definition
- Stakeholder alignment summary



## 2. Activation

### 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

### DELIVERABLES

- Configured Nexl environment
- Structured contact and ncompany database
- Technical setup documentation



## 3. Core Team Training

### 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 business development tracking

### DELIVERABLES

- Configured workflows and user roles
- Core team enablement
- Training materials and guidance



## 4. Rollout

### OBJECTIVE

Introduce Nexl to attorneys and staff in a structured way that demonstrates value and supports change management.

### ACTIONS

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

### DELIVERABLES

- Training Workspace with resources
- User training materials
- Initial rollout support