



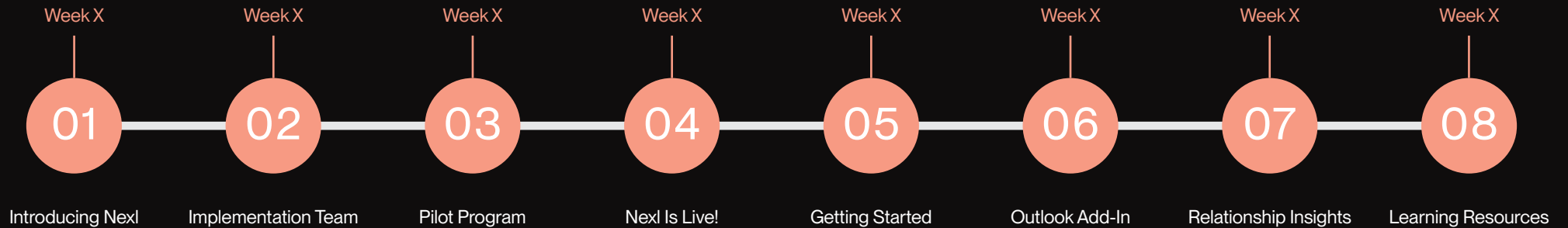
Internal Communications

Email Templates

8 ready-to-use templates covering the full implementation journey — from first announcement to ongoing adoption.

2026

Communications Timeline



How to use this guide

Each email template includes: suggested sender, target audience, pre-written body copy, and a CS tip for maximizing adoption impact. All placeholder text is marked in [BRACKETS] — customize before sending. Suggested Senders — Managing Partner or Firm Leadership for emails 01 and 04 (maximum impact at all-staff moments), Implementation Lead for emails 02, 03, 05, 06, 07, 08.



01 | Introducing Nexl

To: All Staff

From: Managing Partner / Firm Leadership

Week X

→ nexl.cloud

We are pleased to announce that the firm will be implementing Nexl — our new relationship intelligence and business development platform.



Why Nexl?

In today's competitive legal market, our success depends on building and nurturing the right relationships. Nexl gives us a single, intelligent view of our contacts, clients, and firm-wide engagement — without adding data-entry overhead to anyone's day.



Our three goals

- Centralize and share relationship data across the entire firm.
- Automate contact enrichment so our data stays current.
- Empower all teams — lawyers, BD, marketing, and business services — to collaborate and grow.



What happens next

Over the coming weeks you will receive training details, platform access, and guidance on getting started. In the meantime, explore nexl.cloud to learn more about the platform.

CS Tip: Lead with the 'why' — frame this as a strategic investment in the firm's growth, not a technology change.

02 | Meet Your Nexl Implementation Team

To: Core Implementation Team

From: Implementation Lead / CS Manager

Week X

→ help.nexl.cloud

Welcome to the core team that will bring Nexl to life at our firm. This email formally kicks off the implementation process.



The Activation Phase

Our first phase focuses on technical setup, configuring Nexl to suit our firm, and running targeted workshops with this group. This includes: kickoff meeting, email server integration, retrospective data import, tenant configuration, and core team training.



Your Nexl contacts

Your dedicated Client Services team includes:

- Implementation Manager — your day-to-day project contact for technical delivery and milestones.
- Client Success Manager — your go-to for training, product guidance, and adoption resources.
- Head of Client Services — point of escalation for anything urgent or strategic.



What we need from you

Please keep an eye out for calendar invitations and emails from the Nexl team. Your engagement during this phase is critical to a smooth go-live.

CS Tip: Personalize the Nexl team contacts section with the actual names and emails of the CS team assigned to this firm.

03 | You're Invited: Nexl Pilot Program

To: Pilot Group

From: Implementation Lead

Week X

→ help.nexl.cloud

Technical setup is complete and we're ready to begin our pilot. You've been selected as one of our early adopters.



Why you?

We've identified you as a partner, technology champion, or key stakeholder to help us shape how Nexl works for our firm. Your feedback over the next few weeks will directly influence how we roll out to the wider team.



Your first steps

- Log in at nexl.cloud and explore — there's already live data in the system.
- Complete the onboarding course at learn.nexl.cloud — takes around 20 minutes.
- Explore help articles at help.nexl.cloud whenever you need guidance.



Training coming soon

You'll receive a calendar invitation shortly for your first training session with the Nexl Client Services team. Bring your questions — no such thing as too many.

CS Tip: Keep the pilot group tight — 5 to 15 people works best. Prioritize enthusiastic adopters who will champion the platform to peers.

04 | Nexl Is Live — You're Invited to Our Kickoff!

To: All Staff

From: Managing Partner / Firm Leadership

Week X

→ nexl.cloud

Setup and onboarding are complete. Today we officially launch Nexl across the entire firm.



This is a big moment

Nexl is now live for everyone at the firm. This marks a significant step forward in how we manage relationships, develop business, and collaborate as a team. A huge thank you to the project team and pilot group who've worked hard to get us here.



Join our Kickoff Event

You're invited to our firm-wide Nexl Kickoff — where we'll share early wins from the pilot, walk through the platform, and set out our BD and marketing goals for the year ahead.

Date: [WEEKDAY, MM/DD/YYYY]

Time: [TIME]

Location: [ROOM / LINK]



What to expect

Training sessions will be rolling out over the next two weeks. You'll receive your personal invitation with session options shortly. In the meantime, your account is active — log in at nexl.cloud anytime.

CS Tip: This email sets the tone for firm-wide adoption. Keep it energetic and celebratory — the Kickoff event is your best adoption driver.

05 | Getting Started with Nexl — FAQs & Resources

To: All Staff

From: Implementation Lead

Week X

→ help.nexl.cloud

Thank you for joining our firm-wide training session. Here's a quick recap of the most common questions we covered.



How does Nexl work?

Nexl integrates with your email and calendar to automatically build and update your contact and company database — no manual data entry needed. It then enriches those records with job titles, social profiles, locations, and relationship signals.



What data can Nexl see?

Only the To, From, Cc, and timestamp of emails, plus attendees and date/time of calendar events. Nexl never accesses the content or subject of any email or meeting. Privileged and confidential information is never exposed.



What about private contacts?

You can mark any contact as 'Private' in Nexl, which removes their activity from the firm-wide view. For entire domains (e.g. personal email providers), contact your Admin to add a firm-wide exclusion.

CS Tip: Link to the actual Help Center articles for each FAQ — this drives self-service and reduces support queries in the first weeks post-launch.

06 | Did You Know? Nexl Lives in Your Outlook

To: All Staff

From: Implementation Lead

Week X

→ help.nexl.cloud

→ Outlook Add-In

You don't need to leave your inbox to use Nexl. The Nexl Outlook Add-In brings your relationship data directly into Outlook.



Getting the Add-In open

Click the Nexl icon in the top toolbar of your Outlook inbox. If you're on Outlook Web, look for the Nexl logo above the email body. Hit the Pin button to keep the pane open as you work.



What you can do from Outlook

From the Nexl Outlook Add-In you can:

- View enriched contact profiles for anyone in an email thread
- Check the AI Summary for a contact before you reply
- Add contacts or companies to Nexl lists
- Log activities, referrals, and opportunities
- Set Stay-in-Touch reminders
- View Who Knows Who and the Activity Feed



Why it matters

The Add-In means Nexl works where you already work — no context-switching, no extra tabs. If you only ever use one Nexl feature, make it this one.

CS Tip: Consider running a short 10-minute 'Outlook Add-In walkthrough' session in the first two weeks — it's the fastest way to demonstrate immediate value to lawyers.

07 | Uncover Your Firm's Relationship Network

To: All Staff

From: Implementation Lead

Week X

→ help.nexl.cloud

→ Who Knows Who

Have you explored the relationship intelligence features inside your Nexl contacts? Here's how to get the most from Who Knows Who and your Activity Feed.



Who Knows Who

Before any meeting or pitch, check the Who Knows tab on a contact or company to find the best internal intro path. See who at the firm has the strongest relationship, who's spoken to them most recently, and who shares common connections — all in seconds.



Activity Feed

The Activity Feed gives you a chronological view of every interaction your firm has had with a contact — emails, meetings, notes, and BD activities. Use it to get up to speed quickly before a client call, or to understand the history of a relationship before you reach out.



Notes

Add public or private notes to any contact or company. Public notes are visible firm-wide and are one of the most powerful ways to share context — use them to record meeting outcomes, preferences, and anything your colleagues would benefit from knowing.

CS Tip: This email works especially well paired with a real internal example — e.g. 'Last week, [Partner] used Who Knows Who to find the right intro for [Client] and landed a meeting.' Real stories drive adoption faster than feature descriptions.

08 | Keep Learning — Your Nexl Resources

To: All Staff

From: Implementation Lead

Week X

→ help.nexl.cloud

→ learn.nexl.cloud

As we wrap up the initial rollout, here's a reminder of all the learning and support resources available to you — so you can keep building your Nexl skills at your own pace.



Live support in the platform

Click the chat icon in the bottom right corner of Nexl at any time. From there you can search help articles, browse recent product updates, or send a message directly to the Nexl Client Services team.



Self-paced learning

Nexl's e-learning platform at learn.nexl.cloud has courses for all levels — from getting started to advanced Admin. Each course takes 15–30 minutes and includes interactive exercises.



Help Center

Written step-by-step guides for every feature are available at help.nexl.cloud. Use the search bar to find answers quickly, or browse by topic. New articles are published with every product release.

CS Tip: Consider scheduling a 'Q&A drop-in' session at week 4 — this is typically when early hesitancy gives way to genuine questions as people start using the platform in earnest.

Additional Resources

Internal Comms Plan

help.nexl.cloud

Brand Assets & Images

help.nexl.cloud

Help Center

help.nexl.cloud

E-Learning

learn.nexl.cloud



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 nexl.cloud

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.

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