IMPLEMENTATION PROCESS

Average Timeline: 4-6 Weeks

Discovery → Activation → Onboarding → Adoption → Growth
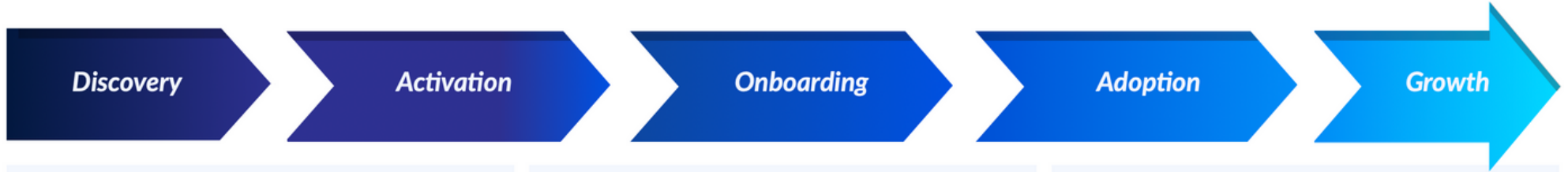
Activation Phase

- Kick-off meeting with Nexl Client Services Team
- Technical integration with email server
- Import existing contact lists
- Configure overall settings
- Core team training and workshops

Documentation

Implementation Process Overview
Technical Documentation
Use Case Presentation

Onboarding Phase

- Dedicated training session(s) for Admin users
- Firm-wide launch announcement
- Fundamentals course on Nexl University
- Training session(s) for all users
- Set up third-party integrations

Documentation

Launch Presentation
Launch Announcement Template
Nexl University

Adoption Phase

- Establish growth monitoring objectives
- Configure growth monitoring reports
- Consolidate user feedback
- Quarterly Business Reviews (QBRs)
- (3 months, 6 months, and 9 months post kickoff)

Documentation

Internal Communication Plan
Email Nurture Templates
Nexl Help Center