Sample Implementation Project Plan

Progress Update Presentation

Prepared by: Nexl Client Services Team
Last Updated: January 9, 2023

Your Client Services Team

Steven Ongenaet
Head of Client Services

Steven leads our Client Services team, developing the vision and strategy to provide the support clients need their business objectives with Nexl.

Gillian Hood
Product Success Manager

Gillian focuses on developing scalable support, communication, and knowledge resources to empower client teams and accelerate product adoption.

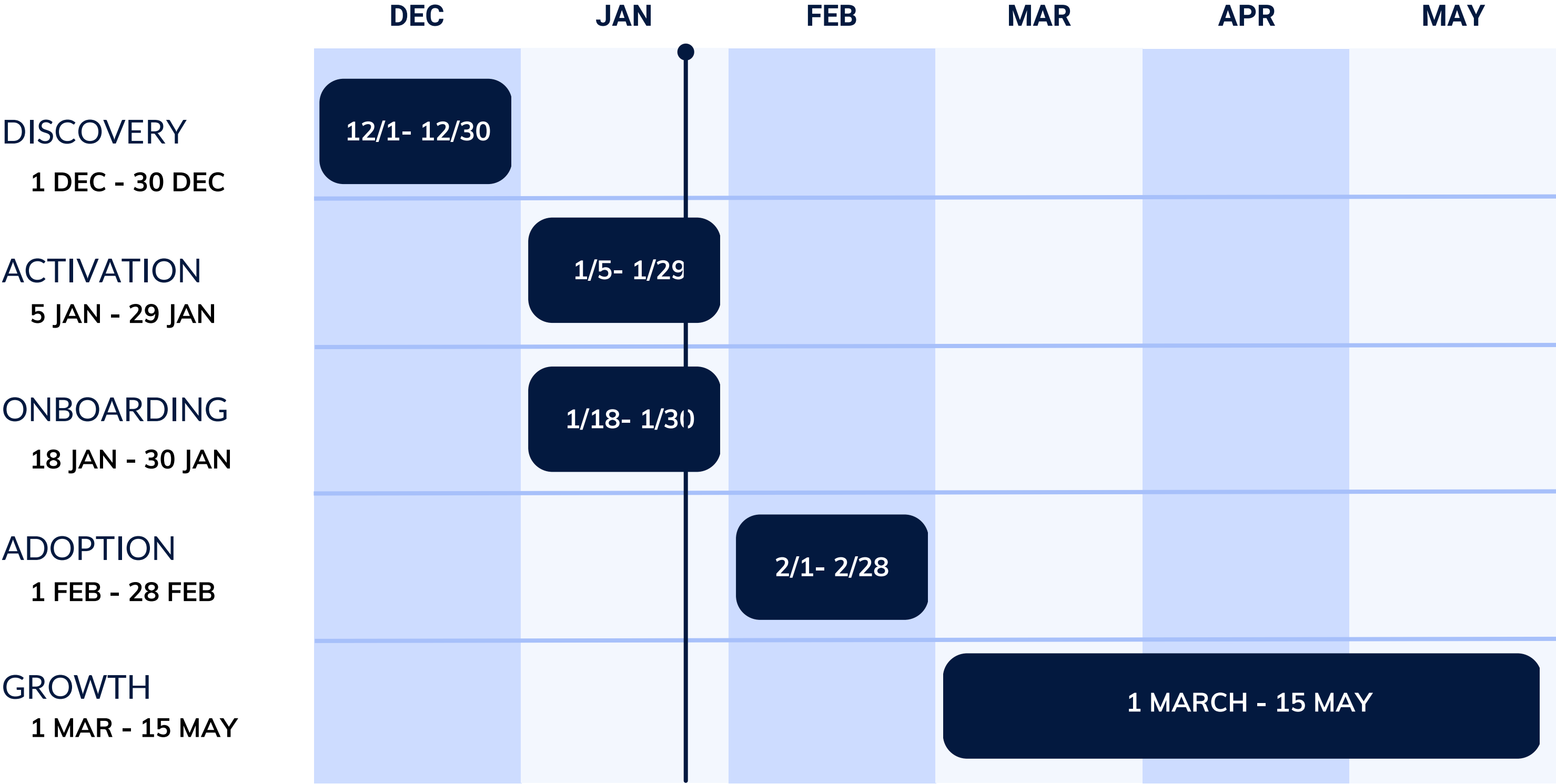**Candice Connellan**
Implementations Manager

Candice focuses on implementation project management, working closely with clients to coordinate processes and ensure efficient delivery of key outcomes.

Donna Mayfield
Client Solutions Consultant

Donna focuses on connecting the discovery process with post sales service delivery, helping clients to scope, implement, and execute the core use cases identified by client teams.

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Timeline for Implementation

| | DEC | JAN | FEB | MAR | APR | MAY |

DISCOVERY
1 DEC - 30 DEC
> 12/1- 12/30

ACTIVATION
5 JAN - 29 JAN
> 1/5- 1/29

ONBOARDING
18 JAN - 30 JAN
> 1/18- 1/30

ADOPTION
1 FEB - 28 FEB
> 2/1- 2/28

GROWTH
1 MAR - 15 MAY
> 1 MARCH - 15 MAY

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Milestone Overview

Stage	Purpose
Discovery DEC 2022	• Identifying requirements • Setting objectives • Proving value • Contract sign-off
Activation and Technical Set-Up JAN 2023	• Set up access for core team • Client enrichment lists and data cleaning • RevOps use case configuration • Core team workshops • Finalise communication plan • Plan workshops for any integrations
Champion Partner Onboarding JAN 2023	• Kick-off with champion partner group • Training and knowledge transfer workshops
Adoption FEB 2023	• Firmwide roll-out to identified groups • Training and knowledge transfer workshops
Growth Ongoing	• Ongoing Quarterly Business Review meetings between Nexl and Client
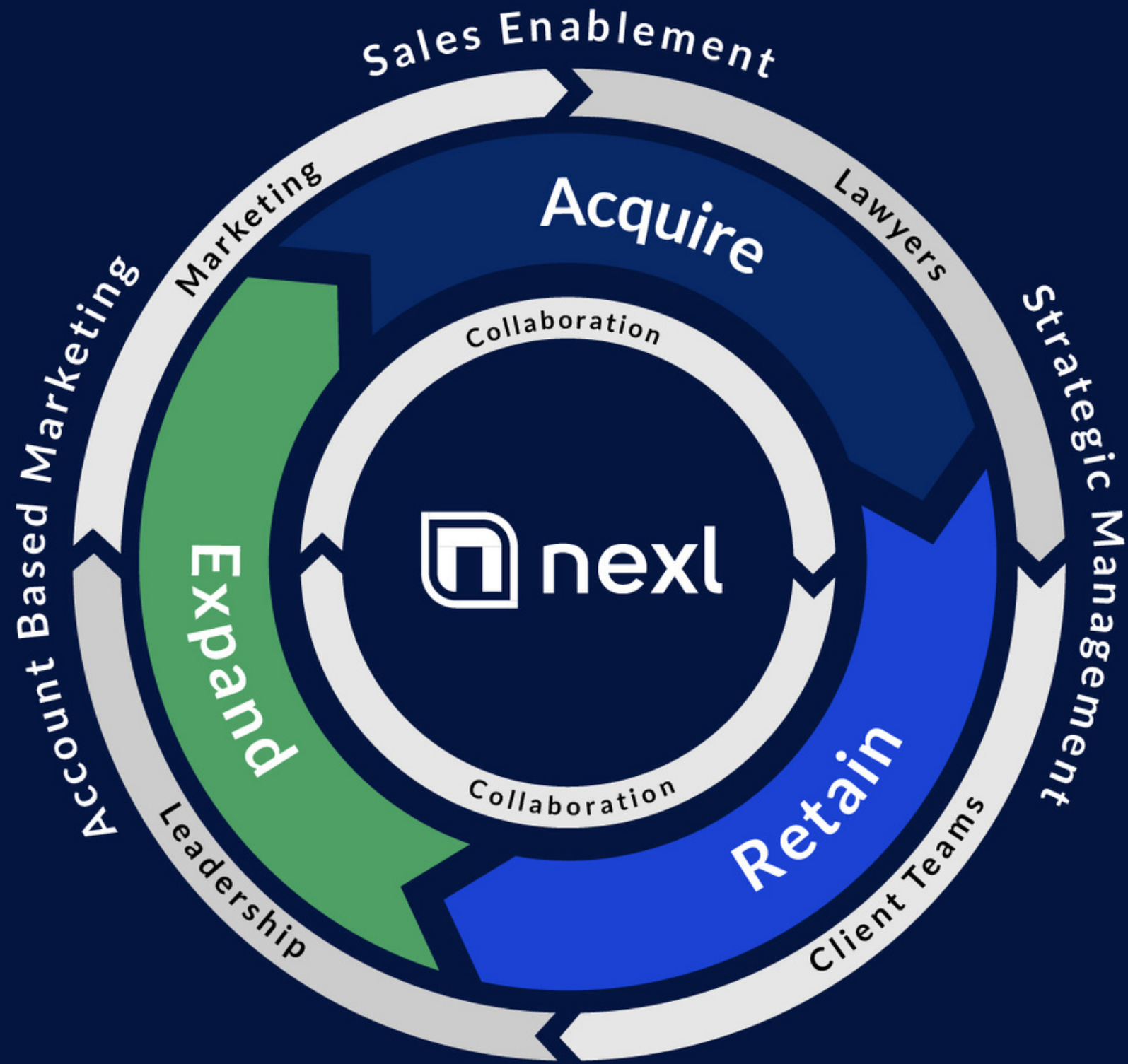
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Objectives

Business Objectives
- Business Development
- Marketing

Implementation Objectives
- Key Outcomes
- Measuring Success

Action Items: Activation

Task	Responsible	Status	Due Date	Dependency
Project Kick-Off Meeting	Nexl Contact / Client Contact	Complete	5 JAN	Availability of Key Contacts
O365 Tenant Set-Up	Nexl Contact / Client Contact	Complete	5 JAN	Tenant ID
Retrospective Data Import	Nexl Contact / Client Contact	In Progress	7 JAN	O365 Users have synced
Configuration Settings	Nexl Contact / Client Contact	In Progress	9 JAN	Client Preferences Discussed
Client Enrichment Lists	Nexl Contact / Client Contact	Not Started	12 JAN	None
Outlook Add-In Setup	Nexl Contact / Client Contact	Not Started	13 JAN	Firmwide Installation
Use Case Scoping & Objectives Meeting	Nexl Contact / Client Contact	Not Started	14 JAN	Availability of Key Contacts
Communications Planning Meeting	Nexl Contact / Client Contact	Not Started	21 JAN	Availability of Key Contacts
Schedule Core User Admin Training	Nexl Contact / Client Contact	Not Started	30 JAN	Availability of Key Contacts
Schedule Integrations Workshops	Nexl Contact / Client Contact	Not Started	30 JAN	Availability of Key Contacts
Schedule Quarterly Business Reviews	Nexl Contact / Client Contact	Not Started	30 JAN	Project KO

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ACTIVATION

JANUARY

PROJECT KICK-OFF MEETING — 5 JAN

O365 TENANT SET-UP — 5 JAN

RETROSPECTIVE DATA IMPORT — 7 JAN

CONFIGURATION SETTINGS — 9 JAN

CLIENT ENRICHMENT LISTS — 12 JAN

OUTLOOK ADD-IN SETUP — 13 JAN

USE CASE SCOPING & OBJECTIVES MEETING — 14 JAN

COMMUNICATIONS PLANNING MEETING — 21 JAN

SCHEDULE CORE USER ADMIN TRAINING — 30 JAN

SCHEDULE INTEGRATIONS WORKSHOPS — 30 JAN

SCHEDULE QUARTERLY BUSINESS REVIEWS — 30 JAN
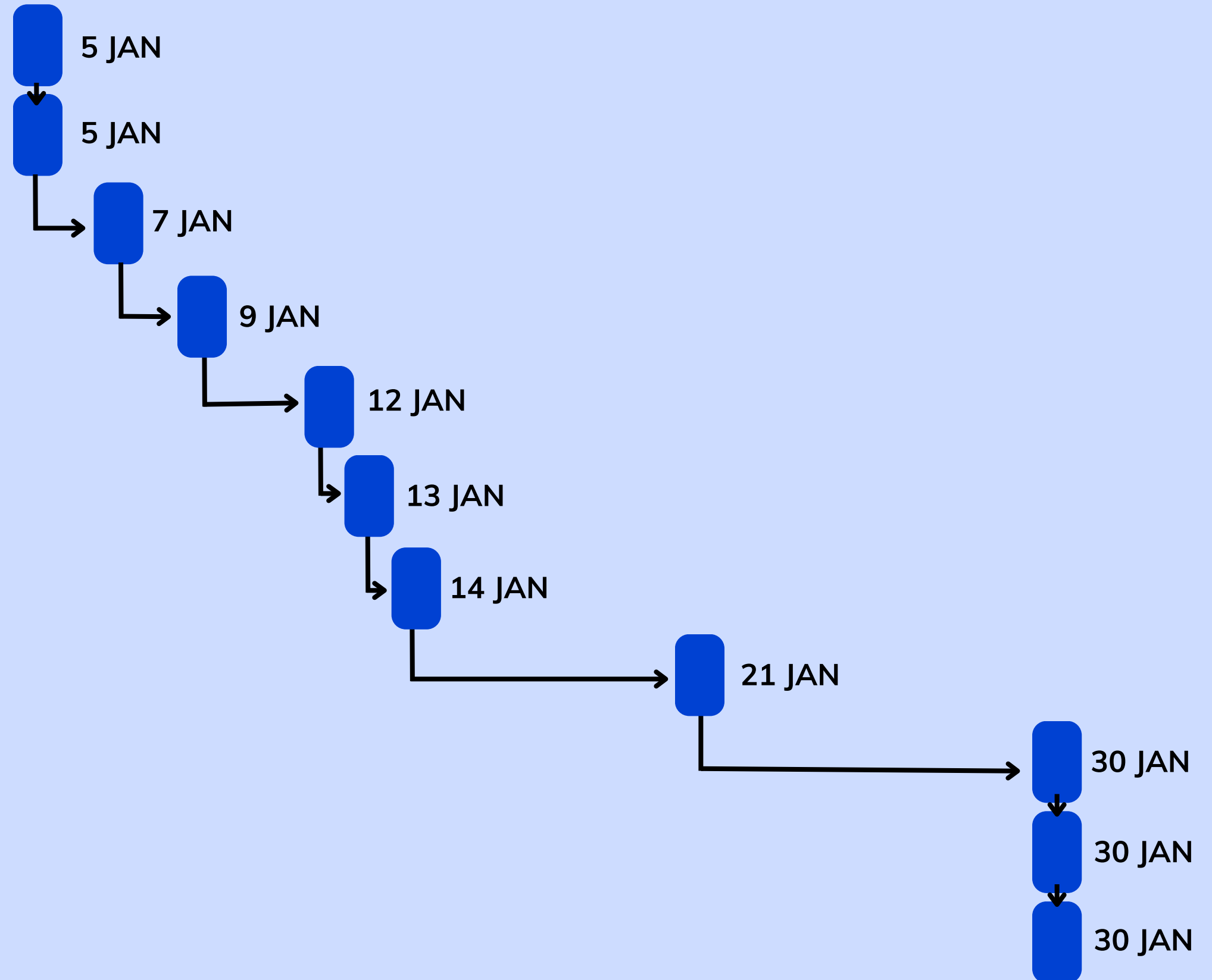
Action Items: Onboarding

Task	Responsible	Status	Due Date	Dependency
Online Fundamentals Introductory Course	Nexl Contact / Client Contact	Not Started	5 FEB	None
Growth Space Template Configuration	Nexl Contact / Client Contact	Not Started	6FEB	None
Objective Setting	Nexl Contact / Client Contact	Not Started	7 FEB	Availability of Key Contacts
Core User Training Plan Configuration	Nexl Contact / Client Contact	Not Started	8 FEB	Availability of Key Contacts
Core User Workshop 1: Individual User Success	Nexl Contact / Client Contact	Not Started	9 FEB	Availability of Key Contacts
Core User Workshop 2: Empowering Firm-wide Succes	Nexl Contact / Client Contact	Not Started	14 FEB	Availability of Key Contacts
Core User Workshop 3: Admin User Functionality	Nexl Contact / Client Contact	Not Started	19 FEB	Availability of Key Contacts
Use Case Workshop 1	Nexl Contact / Client Contact	Not Started	24 FEB	Availability of Key Contacts
Use Case Workshop 2	Nexl Contact / Client Contact	Not Started	28 FEB	Availability of Key Contacts

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ONBOARDING

FEBRUARY

ONLINE FUNDAMENTALS INTRODUCTORY COURSE — 5 FEB

GROWTH SPACE TEMPLATE CONFIGURATION — 6 FEB

OBJECTIVE SETTING — 7 FEB
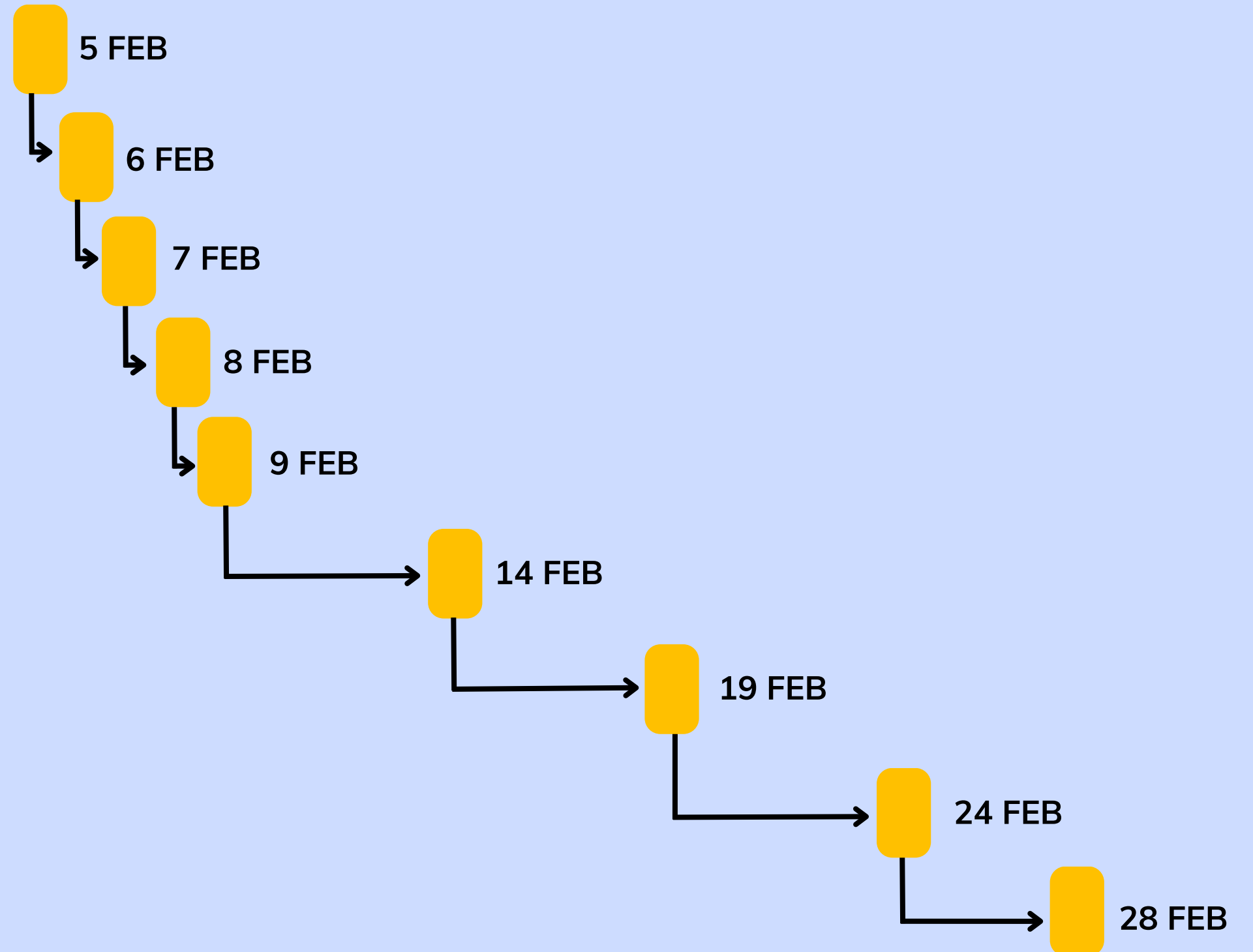
CORE USER TRAINING PLAN CONFIGURATION — 8 FEB

CORE USER WORKSHOP 1: INDIVIDUAL USER SUCCESS — 9 FEB

CORE USER WORKSHOP 2: EMPOWERING FIRM-WIDE SUCCESS — 14 FEB

CORE USER WORKSHOP 3: ADMIN USER FUNCTIONALITY — 19 FEB

USE CASE WORKSHOP 1 — 24 FEB

USE CASE WORKSHOP 2 — 28 FEB

Action Items: Adoption

	Task	Responsible	Status	Due Date	Dependency
	Core Team Status Meeting	Nexl Contact / Client Contact	Not Started	5 MAR	Availability of Key Contacts
	Consolidate User Feedback	Nexl Contact / Client Contact	Not Started	6 MAR	None
	Establish Growth Monitoring Objectives	Nexl Contact / Client Contact	Not Started	12 MAR	Availability of Key Contacts
	Configure Growth Monitoring Reports	Nexl Contact / Client Contact	Not Started	14 MAR	None
	First Quarterly Business Review	Nexl Contact / Client Contact	Not Started	28 MAR	Availability of Key Contacts

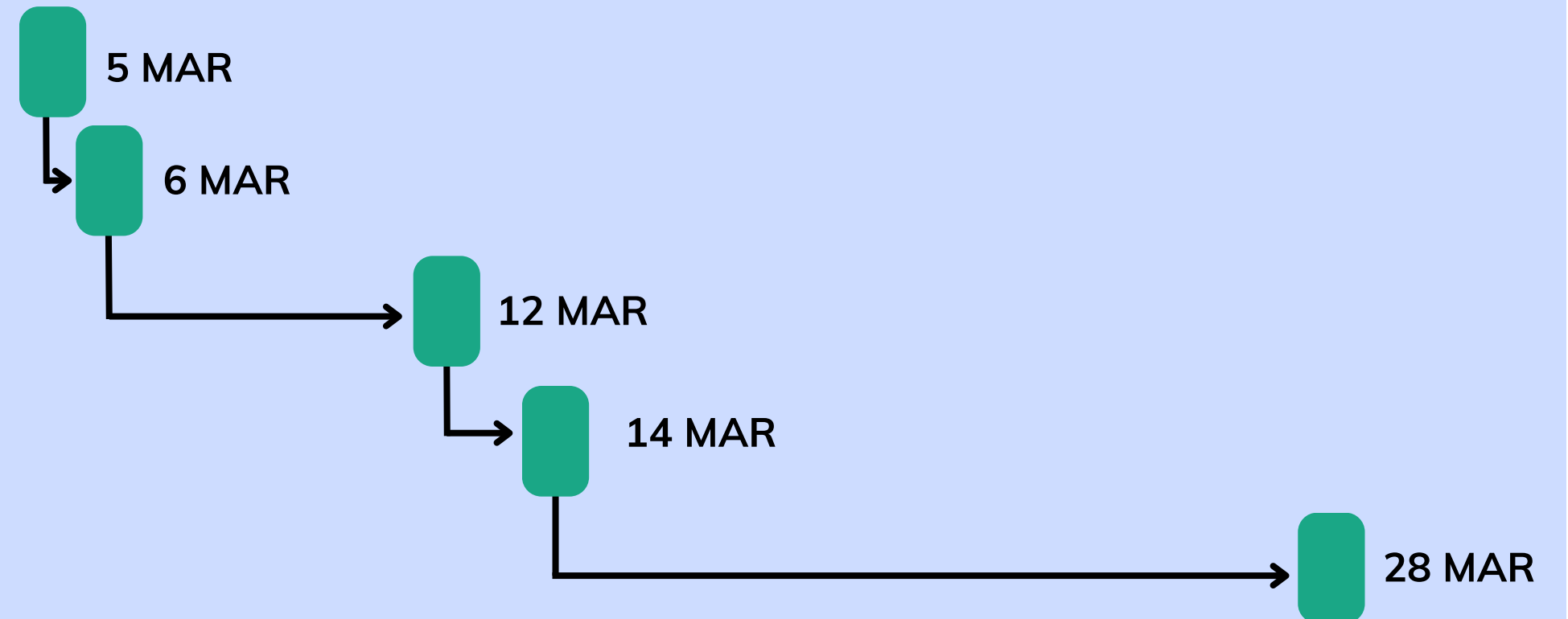nexl

ADOPTION

MARCH

CORE TEAM STATUS MEETING

CONSOLIDATE USER FEEDBACK

ESTABLISH GROWTH
MONITORING OBJECTIVES

CONFIGURE GROWTH
MONITORING REPORTS

FIRST QUARTERLY BUSINESS REVIEW

5 MAR

6 MAR

12 MAR

14 MAR

28 MAR

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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.