



STRATEGIC PARTNERSHIP

AUGUST 2025



LexisNexis CounselLink

PROFESSIONAL SERVICES TEAM



Kelley **HOWELL**
Business Consultants



STEPHANIE **BECK**
Technical Consultants



DAVE **STALSBROTEN**
Project Management &
Customer Success



KIM **HUMPHRIES**
Attorney Implementation
& Paper Processing



DONNA McCOY

Senior Director of PSO
Leads the team of four managers.

OUR GOALS FOR TODAY



CounselLink+ Offerings

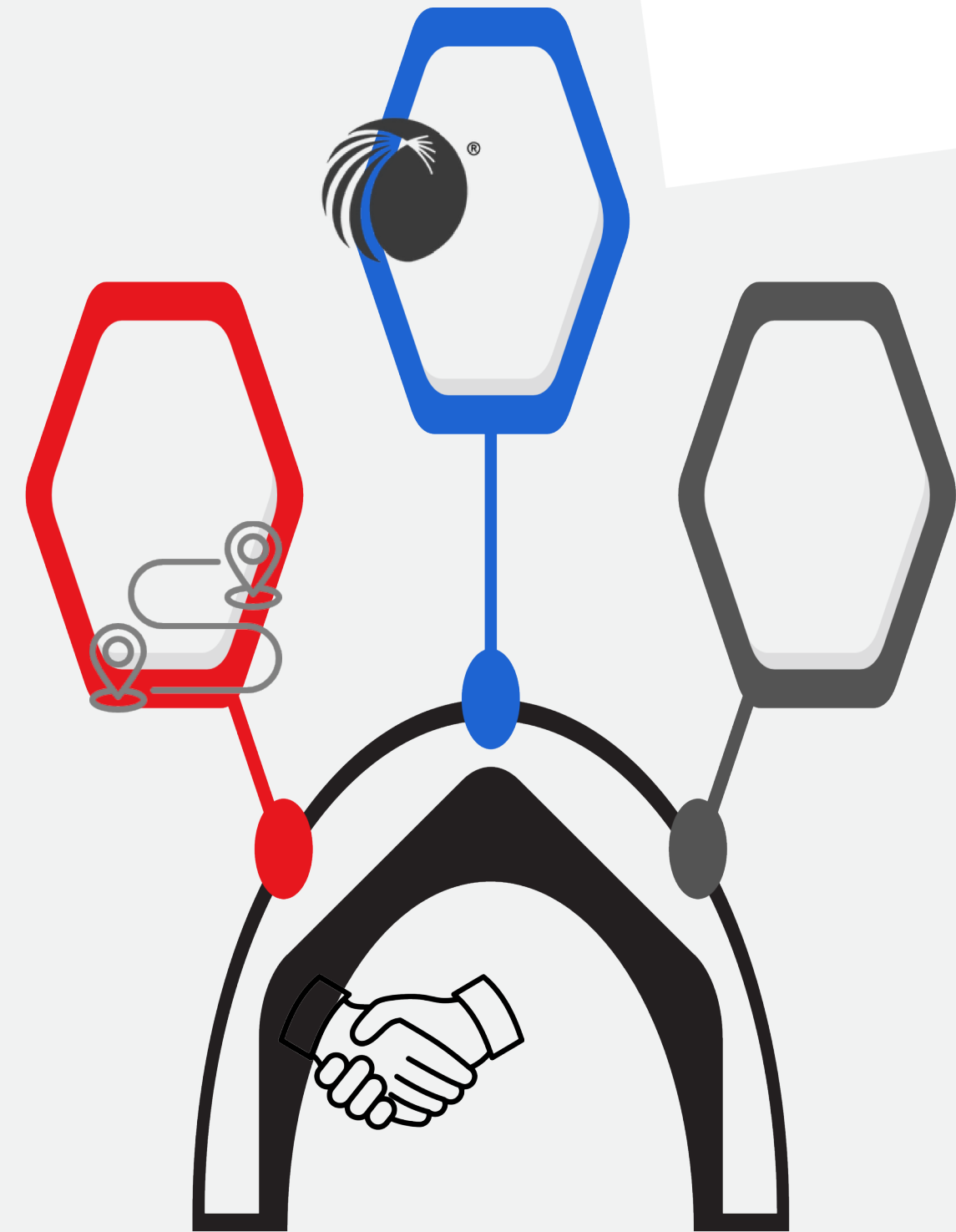


Implementation Journey



Partnership

- Project Management
- Onboarding
- Technical



	FOUNDATIONS	ESSENTIALS	ADVANCED	PREMIER	WORK MANAGEMENT
	Under \$5M OCS Client Configured	Under \$25M OCS	Under \$75M OCS	Over \$75M OCS	Removed e-billing component
Product Switcher	✓	✓	✓	✓	✓
ELM	✓	✓	✓	✓	✗
CLM	✓	✓	✓	✓	✓
Work Intake	✓	✓	✓	✓	✓

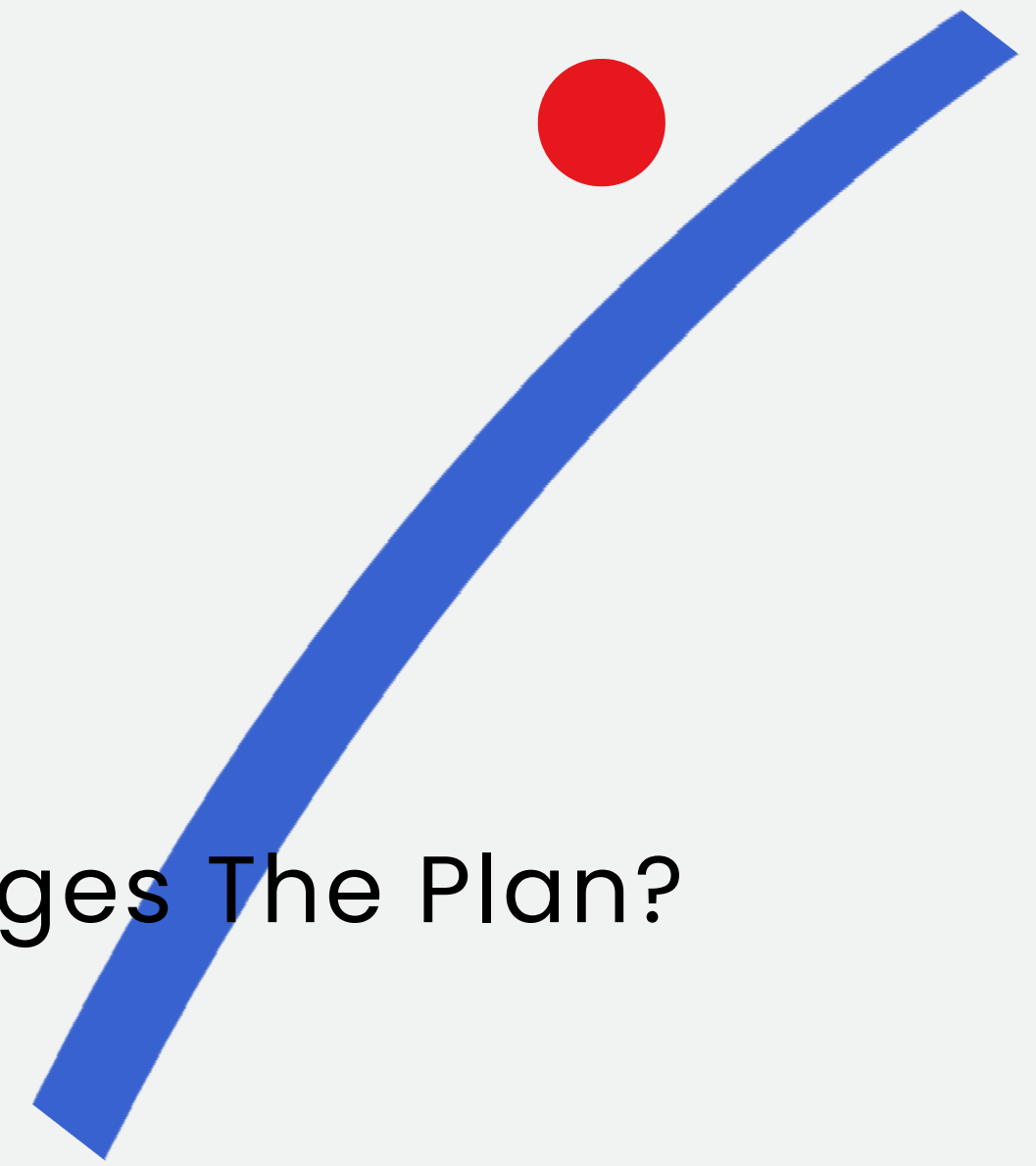


IMPLEMENTATION JOURNEY

How Long Do Implementations
Take?

Who Manages The Plan?

What Tools Do We
Use?



IMPLEMENTATION ROAD MAP

1

PREPARATION

CounselLink pre-work
Partner/Lexis prep meeting

2

CLIENT KICKOFF

Partner-led presentations
CounselLink inputs

3

WEEKLY REQUIREMENTS MEETING

Partner/Lexis pre-meeting
Partner-led client meeting

4

CONFIGURATION

Workbook
Partner training

5

CONNECTIONS

APIs
Integrations
Conversions

6

UAT

Two weeks
Partner-led

WORKBOOK SAMPLE

Thank you for choosing **CounselLink + Advanced** for your work, contract, and legal spend management needs.

We're looking forward to collaborating on this project with you, starting with the **Front End Configurations** in this requirements workbook.

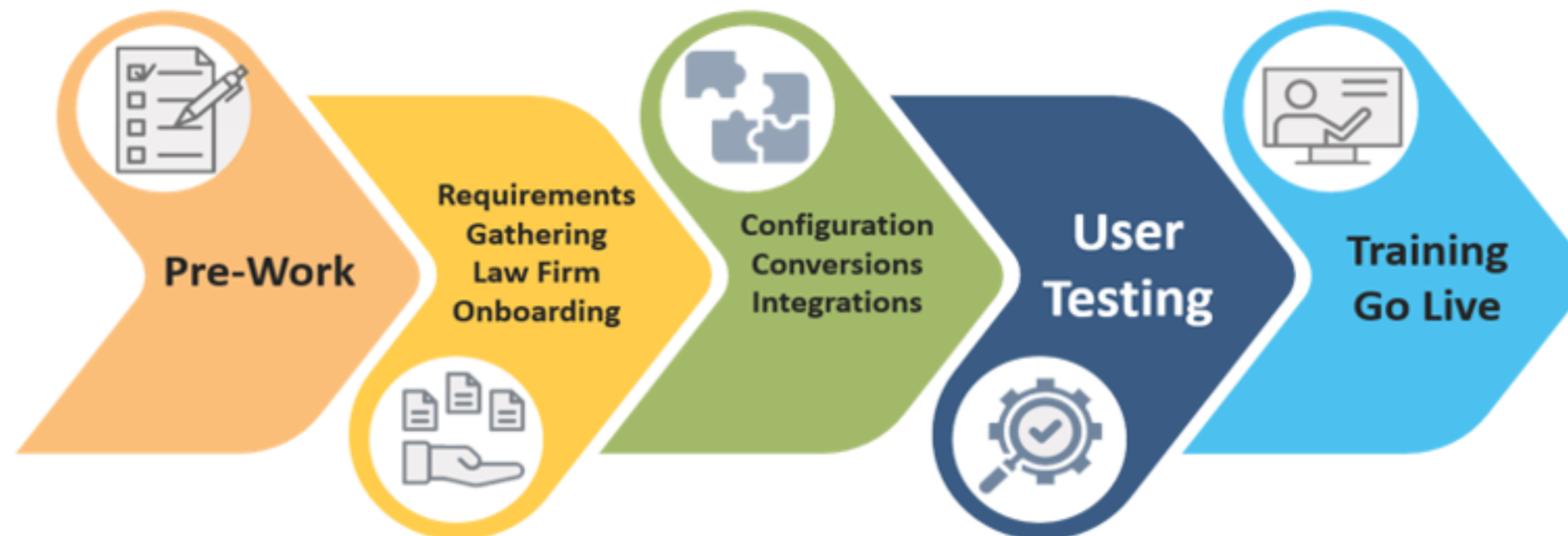
Your CounselLink business consultant will provide you a final copy at the end of the implementation.

i Each tab in the workbook will be color-coded, based on status:

IN PROGRESS

COMPLETED

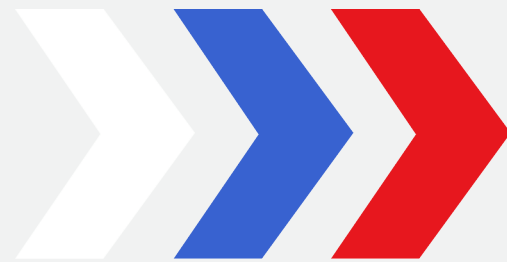
WORK MANAGEMENT CONTRACT LIFECYCLE MANAGEMENT LEGAL SPEND MANAGEMENT



IMPLEMENTATION HOME STRETCH

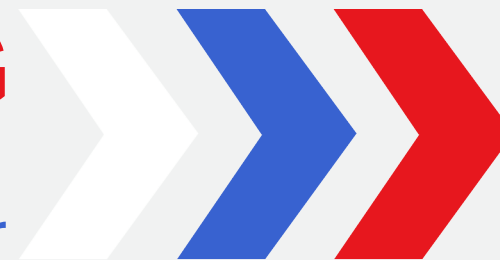


CONFIGURATION
COMPLETE



TRAINING

- Lexis trainer
- Partner joins



TRANSITION

- Four week stabilization
- Post-implementation plan

IMPLEMENTATION JOURNEY

TECHNICAL SERVICES



CounselLink Delivered

- Batch file integrations
- Conversions
- Custom reports

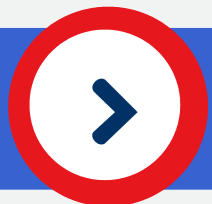


Partner Delivered

- Requirements analysis
- Data prep for conversion
- API application development

EXAMPLES

Customer wants a custom intake form but has no in-house API experience.



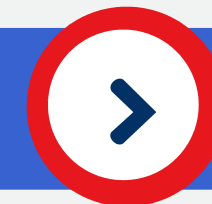
CounselLink: Provides APIs and endpoint recommendations.



Partner: Builds and hosts custom API program.



Customer needs to migrate all matter data from T360.



CounselLink: Import CSVs, assist with resolving errors.



Partner: Gets data, writes queries, puts into correct CSV format.

BENEFITS OF PARTNERSHIP

Business Analysis

Change Management

Product Knowledge

Know Contract Limits

- Quick Requirements Gathering
- Avoid Duplicative Customer Meetings
 - Meet a Day in Advance
 - Kickoff PPT Collaboration





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