NEXACORE
CONSULTANCY
CO. L.L.C S.O.C

PEOPLE. PROCESS. PERFORMANCE.

Onboarding Playbook

Practical implementation guidance for efficient, resilient and scalable businesses — delivered by NexaCore Consultancy, Dubai.

CLIENT DELIVERY FRAMEWORK

From kick-off to confident go-live

- 01 Assess
- 02 Design
- 03 Deliver
- 04 Measure

Dubai, United Arab Emirates

23+ years
SaaS & implementation experience

Director-level
Customer operations leadership

Hands-on
Transformation & delivery support

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Welcome to NexaCore



01

Welcome to NexaCore

Welcome to NexaCore, and congratulations. Choosing business software and a transformation partner is a big decision, and you've made it. What comes next is the good bit: turning that decision into a system your people genuinely enjoy using.

We're delighted you're here, and we cannot wait to get started.

So, what happens now?

From today right through to go-live, you have a dedicated NexaCore Project Manager alongside you. They bring the right experts to the right conversations, keep the plan honest, and make sure you always know what's coming next. You'll never have to guess where things stand.

Behind them sits a whole team of implementation consultants, trainers and specialists who do this every day. You're in experienced hands.



What to expect

What you can expect from us

- We'll be clear about what happens next, and when
- We'll tell you early if something changes, rather than hoping you don't notice
- We'll bring the right expert to every conversation
- We'll be honest and transparent with you throughout

What we'll ask of you

- Time in diaries, protected and treated as your organisational BAU
- Decisions when we need them, from people who can make them
- Shout as soon as something feels wrong, rather than at the next catch-up

That's genuinely it. When those two lists work together, projects go well. We've seen it hundreds of times.

About this playbook

This playbook explains how we work, what to expect at each stage, and how to get the very best from your project. Have a read, share it with your team, and bring your questions to kick-off. There's no such thing as a silly one.

Here we go!



How to use this playbook



02

Getting the most from it

This playbook is here to make your project easier. It's not a contract and it's not a manual — it's the friendly explanation of how a NexaCore implementation actually works, written so that everyone on your team can pick it up and understand it.

A few suggestions:



Read it in full with your Project Sponsor and core project team, ideally before kick-off.



Share it with everyone involved, not just your project lead. The more of your team who understand how this works, the smoother it goes.



Come back to it during the project, not just at the start. The sections on change control, escalation and raising issues are most useful once you're underway.

How it's organised

Each section stands on its own, so you can dip in wherever you need to. Broadly, the early sections cover who's involved and what the journey looks like, the middle sections cover how we run things together, and the later sections are practical reference: training, checklists, jargon and where to get help.

This playbook explains **how** we work together. Your SOW or Product Specification documents define **what** we're delivering.



Who's who



03

Your NexaCore team

You'll meet a few different people during your project, and each of them is there for a reason. Here's who does what.



Project manager

Your main point of contact throughout. Owns the plan, the timeline and the budget, runs your project meetings, manages change control and keeps everyone coordinated.

Why this matters: One familiar person with the whole picture in their head, so you always know who to ask.



Implementation consultants

The subject matter experts who run your consultancy sessions, advise on configuration and guide you through building the system.

Why this matters: You get best-practice advice from people who've done this with organisations like yours, so the system is set up to fit the way you actually work.



Customer experience manager

Looks after you once you're live and helps you get more value from NexaCore over time.

Why this matters: Your relationship with us doesn't end at go-live. Someone is already thinking about what comes next.



NexaCore support

Handles questions and issues once you're live, through the Client Care Centre.

Why this matters: A clear route for help that's always open, day to day.

Your team

The projects that go best are the ones where the right people on your side are named early and given real time to take part. Please confirm these roles, and their availability to your project manager, before kick-off.

Project sponsor

Sets direction, unblocks decisions and champions the project internally. Usually a senior leader. Not involved day to day, but visible at the key moments.

Project lead

Your day-to-day counterpart to our Project Manager. Coordinates your side, chases your actions and joins the regular catch-ups.

Subject matter experts

Attend the relevant sessions, answer the detailed questions and validate configuration decisions for their area. We'll also ask them to complete the relevant system training and keep building their knowledge through the customer education resources we provide, so they become genuine experts in NexaCore as well as in your organisation.

Technical contact

Handles access, security and any technical setup on your side. See the IT Expectations section for what this typically involves.

Data owners

Knows where your people and operational data lives and can get it out in the format we need, on time.

We recommend naming more than one Subject Matter Expert per area. People change departments and leave organisations, and a project that rests on one person's knowledge stalls the moment that person moves on. Two named experts protects your timeline and spreads the load. On smaller projects, one person often wears two or three of these hats, and that's absolutely fine. What matters is that every role has a name against it and that name knows they have it.

Your project journey



04

From here to go-live

Every project is a little different, but they all follow the same shape. Here's the journey you're about to go on, so you can see what's coming and prepare for it.

01

1. Welcome

A relaxed first hello, faces to names, and an agreement on how we'll work together.

What we need from you: Your project team names and availability.

02

2. Kick-off

The proper starting line. We agree scope, timeline and who does what.

What we need from you: The right people in the room, including your sponsor.

03

3. Discovery

We get to know how you work today and what you want to change.

What we need from you: Honest answers and your subject matter experts.

04

4. Configuration

Your consultants advise and support you as you configure the system. Some technical products are configured by NexaCore — your consultant will confirm which.

What we need from you: Decisions made promptly and actions completed between sessions.

05

5. Data migration

Your data is prepared, transferred and checked.

What we need from you: Complete, accurate data in the agreed format, at the agreed time.

06

6. Testing

You check the system does what you need it to do before it goes anywhere near your people.

What we need from you: Time set aside for real testing, and clear feedback.

07

7. Training

Your team learns the system through NexaCore resources and consultancy sessions.

What we need from you: Training completed ahead of the relevant sessions.

08

8. Go live: Core Team

Your core operational team starts using the system as the live system of record for the agreed scope.

What we need from you: Final sign-off on data and configuration, and confirmation your team is ready to switch.

09

9. Go live: Self-service

Your employees and managers get access to the system for the agreed scope.

What we need from you: Confirmation your communications and internal launch plan are ready.

10

10. Hypercare

A short, closely supported period straight after go-live while everyone settles in.

What we need from you: Early flagging of anything that feels off.

11

11. Business as usual

A warm handover to the team who look after you from here.

What we need from you: A quick look back with us at what went well.

A note on timings

You'll notice there are no durations above, and that's deliberate. Timings depend on your scope, your resourcing and how ready your data is. Your specific dates come in your project plan, which your Project Manager confirms with you once scope is agreed.

What we can tell you is that the projects that finish on time are almost always the ones where the customer starts their tasks early. Momentum is worth more than speed.

What live looks like



05

What go-live actually means

Go-live is the point where we've delivered everything in your agreed implementation scope and your system is configured, tested and ready to use. **It marks the end of the implementation, not the start of everyone using the system.**



That second part matters, because the two often get talked about as if they're the same thing — and they're not.

Go-live and rollout are different things

Go-live is ours to deliver. Rollout is yours to decide.

We confirm the system is ready. When and how you introduce it to your people — the timing, the comms, the training push, whether it lands the same week or a month later — is entirely your call, based on your own readiness. Some customers roll out the day after go-live. Others wait for the start of a pay period, or the quiet spell after year end. Both are fine.



What go-live includes

- ✓ Your agreed modules configured and tested
- ✓ Your data migrated and checked
- ✓ Your implementation team trained and able to get in
- ✓ Your core day one processes working end to end



What go-live isn't

Go-live isn't the moment every possible feature is switched on. Very few organisations go live with everything, and the ones who try usually end up moving their date.

Anything outside your agreed day one scope is handled as a later phase or an add-on. That's not us being unhelpful, it's us protecting your go-live date. Getting the core right and building from there is genuinely the faster route.

Known issues at go-live

Very few projects reach go-live with a completely empty defect list, and that's normal. What matters is that anything still open is known, understood and has either a workaround or an agreed fix date. Your Project Manager will keep a list of open items and walk you through it before you sign off, so nothing on it comes as a surprise. If something genuinely blocks a core day one process, that's a conversation about the date, not something we ask you to sign off around.



Your day one scope

Your Project Manager will walk you through your specific day one scope at kick-off. If you find something you expected to be there and it isn't, tell us early. That's exactly the kind of thing we'd rather sort out in week two than week twenty.



And after go-live

You move into hypercare, a short period where we stay close while everyone finds their feet. After that, your Customer Experience Manager picks things up and starts looking at what else NexaCore can do for you.

In short: NexaCore go-live means your system is ready. Your rollout is when you choose to start using it with your people.

Assumptions and dependencies



06

Being upfront pays off

Every project plan rests on a few assumptions. Saying them out loud at the start is one of the simplest ways to avoid a delay later, so here they are.

What we're assuming:

- You'll provide complete, accurate data at the agreed point and in the agreed format
- The people you've nominated will be available throughout the project, including through holidays and busy periods
- Your requirements can be met within the scope agreed for your project. Anything beyond that is handled as a change, not absorbed quietly into the project
- Decisions will be made by the agreed date by someone empowered to make them
- Any third party you're relying on is briefed and ready. You manage that relationship — we work directly only with our approved partners, or where we've specifically agreed to



If any of these are not true for you, that's completely fine. Just tell us now rather than later, and we'll plan around it together.

What depends on what

Some steps simply cannot start until an earlier one is finished. Configuration usually cannot begin until a specification has been reviewed and approved. Testing cannot start until data has landed.

Employee training cannot be booked until the configuration is stable, though your own team is trained much earlier so they can configure it.

This matters because a dependency doesn't just delay the task behind it — it can push everything after it. A week of slippage early on rarely stays a week.

Your Project Manager will map the specific dependencies for your project and keep them visible in your plan, so you can always see what's waiting on what.



The one thing to remember

If you think you might miss a date, tell us as soon as you suspect it, not once it has happened. Early warning gives us options. We can reorder work, bring a session forward, or find another way through. That's a much better conversation than a surprise.

Risk management



07

Risks are normal

Every project carries risk. That's not a warning sign — it's just how projects work. What matters is that we spot risks early, talk about them openly, and do something about them while there's still time.

Your Project Manager looks round corners for a living. If they raise a risk with you, it's not because things are going badly. It's because they're doing exactly what they should be.

How we manage risks together

- Risks are logged in Wrike, our project management tool, where you can see them at any time
- Each one has an owner and an agreed action, so nothing sits in a list going stale
- We review the live risks at your regular catch-ups
- If a risk grows or a mitigation isn't working, we escalate it rather than hope



You can raise a risk at any point. If something is worrying you, that's reason enough to log it.

The risks we see most often

Delays to go-live

What causes it: Data, approvals or testing not completed on time.

How we reduce it together: Complete actions by the agreed dates and flag blockers as soon as they appear.

Data problems

What causes it: Inaccurate or incomplete source data.

How we reduce it together: Validate data before you send it, and use the interim checks we build into the plan.

Additional cost

What causes it: Rework, late change requests or missed deadlines.

How we reduce it together: Get decisions right first time and raise changes formally before work starts.

Lost momentum

What causes it: Actions not completed between sessions.

How we reduce it together: Diarise actions immediately after each session, while it's all still fresh.

Key person unavailable

What causes it: Holidays, illness or competing priorities.

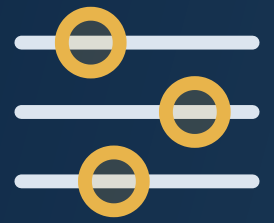
How we reduce it together: Name a deputy for every project role at kick-off.

When a risk becomes an issue

A risk is something that might happen. An issue is something that has. If a risk turns into an issue, your Project Manager will tell you straight away, explain the impact, and come to you with options rather than just a problem.



Change control



08

Things change, and that's fine

Projects evolve. You learn something in discovery, your organisation reshapes, a new requirement appears. None of that is a problem. What we want to avoid is change happening quietly, so that scope, cost or timeline shift without anyone deciding they should.

Change control is simply how we make those decisions properly, together.

What counts as a change

Anything outside the scope agreed in your contract. That includes:

- Adding a module, feature or integration
- Changing an agreed way of working after it has been signed off
- Moving a milestone or the go-live date
- Asking for additional consultancy or training days

If you're not sure whether something is a change, just ask. Your Project Manager would far rather have a two-minute conversation than an awkward one later.

How to raise a change

1. Talk to your Project Manager. Most changes start as a conversation, and some turn out not to be changes at all.
2. If it's a change, your Project Manager raises a change request capturing what you want and why.
3. We assess the impact on scope, timeline and cost, and come back to you with it in writing.
4. You decide. Nothing moves until you've agreed it.
5. Once agreed, the plan, budget and documentation are updated so everything stays in step.

What we'll always tell you



What the change will cost, if anything



What it does to your timeline, including any knock-on effects



What the alternatives are, including doing it after go-live instead

The golden rule: Nothing changes without your say-so. You'll always see the impact before you commit to anything, and you're always free to say no, or not yet.

Escalation process



09

Escalating isn't complaining

If something isn't working, we want to know. Raising your hand early isn't a criticism of anyone — it's the fastest way to fix things, and we'd genuinely rather hear from you in week three than at go-live.

Most things get resolved with a straightforward conversation with your Project Manager. This section is for when that hasn't worked, or when something needs more attention than a catch-up can give it.

When to escalate

- Something has been raised and hasn't moved
- You're not getting the responses from the people you need
- Something is at risk of affecting your go-live date
- You're simply not confident in how the project is going

That last one is a perfectly good reason on its own. Confidence matters.



How it works

To escalate, contact your Project Manager and say you'd like to escalate. They won't take it personally, and they'll make the introduction themselves.

The escalation process

LEVEL 1

Speak to your project manager

This is your first stop for anything at all.

What to expect: An acknowledgement and an agreed way forward.

LEVEL 2

Speak to your project operations manager

Level 1 hasn't resolved it, or the issue affects your timeline.

What to expect: A review of the project and a plan to get it back on track.

LEVEL 3

Speak to the head of program delivery

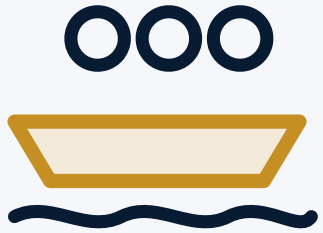
The issue is serious, or Level 2 hasn't resolved it.

What to expect: Senior ownership and a direct line while it's being sorted.

Escalation on your side

It works both ways. There will be moments when we need a decision, a piece of data or a person, and the normal route hasn't delivered it. Please tell us at kick-off who we should turn to when that happens, and how you'd like us to approach it.

Agreeing this while everything is calm makes it far easier to use when things are not.



Help, incidents, defects and ideas



10

Four different things, four different routes

During your project you'll come across things you want to raise. Knowing which kind of thing you've found means it gets to the right people quickly, and it means you know what to expect back. Here they are, side by side.

What it is	What that means	Where it goes	What it means for your project
Help with your new system	You're not sure how to do something, or you want advice on the best way to set something up.	Your Project Manager or Implementation Consultant, in your normal sessions.	No impact. This is what your project time is for. Questions about modules you already have live go to Client Care instead.
Incident	Something that used to work has stopped working, or you cannot get in.	NexaCore Support, through the Client Care Centre.	Usually none. If it blocks a project task, tell your Project Manager as well.
Product defect	The software isn't behaving the way it's designed to behave.	Raised with Support, investigated and, if confirmed, passed to our product team.	Handled case by case. See next slide.
Product suggestion	Where the product is working as designed but you have an idea for something.	Logged with our product team as feedback.	None. Suggestions are not project commitments.



Not sure which one you've got?

Ask your Project Manager. Working out which route something belongs on is part of their job, and getting it right at the start saves everyone time.

If a defect is open during your project

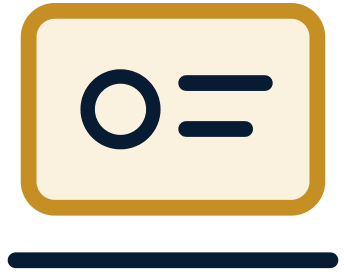
This is the one that worries people most, so let's be clear about it.

An open defect doesn't automatically stop your project. Most of the time we agree a workaround, re-sequence a bit of work, or carry on around it while the fix is developed. Your Project Manager will always tell you what the options are.

A defect only holds a milestone if we jointly decide it should, because the impact genuinely warrants it. That's a decision you're a part of, not something that happens to you.

If a defect does start to threaten a date, it gets managed as a project risk, with an owner, an action and a regular review, exactly like any other risk.

If you're already live on other NexaCore modules, anything to do with those goes through Client Care as a normal support ticket, not through your project team. Session time is booked for your implementation, so if something comes up that belongs with Client Care, your consultant will point you to the right place.



A word on suggestions

Please keep them coming. A lot of what NexaCore delivers today started as a client saying, "wouldn't it be good if". We log every suggestion and our product and advisory teams genuinely review them.

A logged suggestion isn't a commitment to build it, and it should never be assumed as part of your project scope. If you need something specific by a specific date, that's a conversation to have with your Project Manager, not a suggestion to log.



Ways of working



11

How we'll work together

Good projects run on rhythm. Regular contact, clear notes and no surprises. Here's what that looks like in practice.

Project catch-up call

How often: Regular, with the cadence agreed at kick-off.

Where: Microsoft Teams

Call summary and actions

How often: After each catch-up.

Where: Wrike

Consultancy sessions; invites and agendas

How often: As scheduled in your plan.

Where: Microsoft Teams

Project documentation, plan, risks and change log

How often: Kept up to date throughout.

Where: Wrike

Ad hoc questions

How often: Whenever you need.

Where: Your project manager, by email

A quick note on session invites

We'll always set up and send the invites for your consultancy sessions ourselves. It keeps the session linked to the right task in Wrike and means the notes and follow-up land where they should. If you need to move a session, just ask your Project Manager rather than sending a new invite — one rescheduled outside the system tends to lose its paper trail.

A few practical notes

- Consultancy sessions are recorded and transcribed, for training and quality purposes
- If a session finishes early, use the remaining time to push on with actions. Unused time cannot be carried over
- Your Project Manager will confirm working hours and availability at kick-off, including anything either side needs to plan around
- Notes and actions live in Wrike rather than in inboxes, so nobody is relying on having been on the call



Getting the most from your sessions

Read the agenda beforehand

Ten minutes of preparation regularly saves an hour in the session.

Protect the time

Sessions work best when people are properly in them, not half-watching from another meeting.

Know the detail

Bring the person who knows the detail, not just the person who owns the outcome.

Come ready to decide

Most sessions need a decision made on the day, so send people who can make one.

Check who needs to be in the room

Sessions involve your live data and your processes, so everyone attending should be cleared to see it.

Say when something doesn't make sense

Everyone else on the call is usually thinking it too.

Follow-up actions

Book the follow-up actions into diaries before the call ends.

Who should be in the room

Consultancy sessions involve real data and real detail about how your organisation works. Anyone joining needs to be authorised to see that data and have a genuine reason to be there — which isn't always the same as being closely involved in the project.

If you have multiple entities, or areas where visibility needs to be kept separate, flag it at Discovery. We can structure the sessions around it so the right people see the right things.

Sometimes that means a Project Manager, IT contact or other stakeholder should sit out part of a session. That's not a slight — it just means they get a summary afterwards instead. Better to plan for it than to realise mid-session.



Working well together

We hold ourselves to a standard built on teamwork, timely communication, clear goals and honest feedback, and we ask the same of you. We're firmly committed to making this a positive experience for everyone involved, and we don't accept our people being treated unprofessionally or disrespectfully.

In practice, that hardly ever needs saying. Most of our projects are a pleasure, and we intend yours to be one of them.



What your project manager does

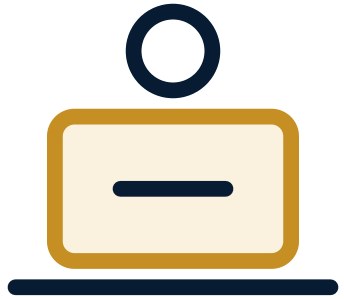


12

What project management means at NexaCore

Every NexaCore implementation has one person leading it, steering you all the way from a signed deal to a confident go-live. Depending on the scope of your project, that'll either be a NexaCore Project Manager or one of our lead consultants. Either way, they shape the plan, bring the right experts together and keep everyone pulling in the same direction, so you always have a single, familiar point of contact with the whole picture in hand.

Here's what they do day to day, and how you can get the most from the time built into your project.



How your project is led

These are the things the person leading your project looks after. The depth of each one depends on the size and complexity of your project, but the care behind it never changes.

01

1. Welcome call

A relaxed first hello to put faces to names and agree how we'll work together, so you feel settled before the real work begins.

02

2. Kick-off meeting

The proper starting line, where we agree scope, timeline and who does what, so everyone sets off in the same direction together, with everything you need to know to make it a success.

03

3. Project planning

Your roadmap from here to go-live, kept clear and realistic, so you can always see what's coming and when.

04

4. Dependency mapping

Joining the dots between tasks and the things we need from you, so nothing sits waiting and delays don't sneak up on you.

05

5. Risk and assumption management

Looking round corners for anything that might trip us up, so small worries get sorted before they ever become big ones.

06

6. Decision management and governance

Capturing key decisions, providing clarity, making sure decisions get made and the project keeps moving so there are no surprises.

07

7. Change control

A calm, clear way to handle changes as they come up, so nothing shifts by surprise and you always see the impact first.

How your project is led (continued)

08

8. Status updates and reporting

Straightforward updates in regular meetings so you're always in the loop without having to ask, with a follow-up project summary report.

09

9. Stakeholder management

Keeping everyone, from your team to your leadership, on the same page and on side, so momentum never stalls.

10

10. Resource coordination

Quietly pulling together NexaCore's consultants and specialists behind the scenes, so you get one joined-up team, not a relay of handovers.

11

11. Milestone tracking

Keeping an eye on the key dates as things move, so if anything drifts we spot it while there's still time to act.

12

12. Go-live planning and readiness

Lining up the final checks and sign-offs, so launch day feels like a planned event, not a leap of faith.

13

13. Transition to BAU

A warm handover to the team who will look after you next, so there's no cliff-edge after go-live and you're clear on your next steps as you continue your journey with NexaCore.

14

14. Project close and lessons learned

A proper wrap-up to confirm it's all done and capture what went well, so you finish with a clean line under it and we keep getting better.

Working together

The best implementations are a team effort. Your Project Manager steers the delivery, and a handful of things work best coming from you and your team. Getting clear on this early is the single biggest thing that keeps a project running smoothly.

What your Project Manager focuses on

- Being your main point of contact for the duration of your project
- Shaping and steering the overall delivery
- Supporting decision making and removing blockers
- Keeping you on track for go-live
- Staying on top of risks, changes and dependencies
- Bringing NexaCore's experts together for you
- Keeping you and your stakeholders in the loop

What sits with you

- Picking one main contact and project sponsor
- Getting us to the right people and decisions promptly
- Building and configuring your system, with our guidance
- Getting your tasks and data done on time
- Getting your training done on time
- Guiding the change inside your own organisation
- Raising concerns and challenges as soon as you can
- Making the calls you need to, when they're needed

Your Project Manager steers the delivery, coordinating the NexaCore consultants who guide and support you through your system build. A good part of that build sits with you and your team — populating your data, setting up your code tables, and configuring the system to work the way your organisation does. Your consultants will show you how, answer your questions, and sense-check your work as you go.

The time in your project is set by the modules you've purchased, and if you ever need a little more, for a trickier rollout or a longer runway, extra days can easily be added. Just say the word to your NexaCore contact.

IT expectations



13

Getting the technical bits out of the way early

There's a small amount of technical setup on your side, and almost none of it's difficult. What makes the difference is doing it early, because IT tasks have a habit of needing a ticket, an approval and someone's calendar.

Please name a technical contact before kick-off. They don't need to be on every call, but they do need to be reachable.



What your IT team will typically need to do

Browsers

Make sure your users are on a current, supported browser. The platform is a modern web application, so this is the main client-side requirement.

Network and firewall

Most customers need no firewall changes. NexaCore solutions are reached over standard HTTPS on port 443 to public endpoints, so no inbound access is required. If your network restricts outbound traffic, your IT team should allow our documented domains — please use domains rather than IP addresses, as cloud addresses change without notice.

Access and logins

Single sign-on is the expected way in. We support SAML 2.0 and OpenID Connect, and we recommend multi-factor authentication alongside it. Confirm which identity provider you use and who administers it, so your IT team can plan the setup.

Test accounts

Provide the accounts needed for testing, including any test users with particular permissions.

Integrations and technical setup

Where you're using data connectors or APIs, the configuration on your side is yours to own. We provide the specification, the endpoints and support through the setup calls, but the work happens in your systems. Please involve your IT or security team early — approvals and change windows on the customer side are one of the most common reasons this slips.

Secure file transfer (SFTP)

NexaCore uses SFTP to transfer data securely.

Email deliverability

The system sends email on your behalf — notifications, reminders and password resets — so your mail server needs to accept it. Your IT team will need to add the SPF, DKIM and DMARC records. This is quick to do but often needs a change request on your side, so it's worth starting early.



Moving data securely

Your data is people and business-critical data, so it never travels by email attachment. We use secure file transfer, and your Project Manager will set this up with you and walk your team through it.

In practice it means a secure location that both sides can reach, with access limited to named people. Once it's set up it's straightforward to use, and it means everyone can stop worrying about where a spreadsheet ended up.



The one thing that catches people out

IT change requests inside large organisations can take weeks. If your technical contact needs to raise an internal ticket for anything above, please get it raised in the first fortnight. It's the single most common cause of a delay that nobody saw coming.

Third party integrations



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When NexaCore needs to talk to another system

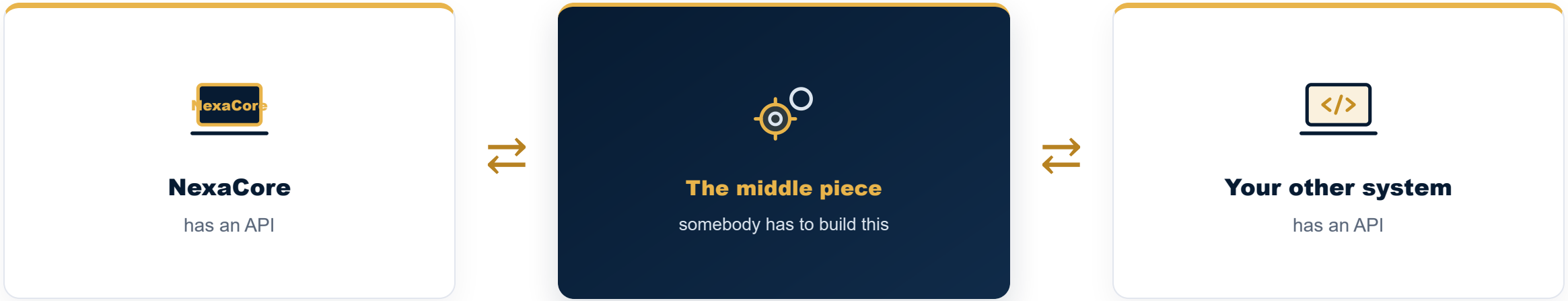
Plenty of projects involve connecting your platform to something else: a payroll or pension provider, a finance system, a benefits platform, or your identity provider. These integrations are usually straightforward. What makes them tricky isn't the technology — it's agreeing who builds what and agreeing it early.



Somebody has to build the bit in the middle

We have an API. Your other system almost certainly has one too. But two APIs don't talk to each other on their own. Something has to sit between them, taking data out of one, translating it, and putting it into the other.

That piece in the middle is real software. It has to be specified, built, tested and looked after. So, the first question on any integration isn't whether it can be done — it's who's building the middle piece. There are three answers, and your Project Manager will confirm which one applies to you during discovery.



The three routes

An integration NexaCore already offers

NexaCore builds and looks after the middle piece. It's part of our product ecosystem, so we build it, support it and keep it working.

What does this mean for you? The quickest route by a distance. Your project team configures it and tests it with you. Not every system has one, so we'll tell you early whether yours does.

A specialist integration partner

An integration firm that you appoint and contract with directly will build and look after the middle piece.

What does this mean for you? You choose and manage the supplier. We give them everything they need from our side: our API documentation, access to a test environment, and a technical contact while they build.

Your own team

Your in-house developers build and look after the middle piece.

What does this mean for you? The same from us: documentation, test access and technical support. Your team keeps the code and looks after it afterwards.

Where there's no existing NexaCore integration for what you need, the build sits with you or with a partner you appoint, rather than with your NexaCore project team. We'll be clear about which route you're on as soon as we understand the requirement, so you can plan around it.

Not everything needs a build

Before you commit to one, it's worth asking whether something simpler would do. Where both systems support scheduled file exchange, moving files on a timetable is often quicker to set up, simpler to run and perfectly sufficient for what you need. Your Project Manager can talk you through whether that fits.



Who does what

The short version: we own our side, your provider owns theirs, and the piece in the middle belongs to whoever is building it. Being clear about which is which from day one is what keeps an integration on track.

NexaCore will

- Confirm whether an existing NexaCore integration covers what you need
- Build and test our side of the connection
- Tell you promptly if something isn't going to work

You will

- Decide which route you're taking, as early as you can
- Own the relationship and the contract with your provider or partner
- Make the introductions and keep everyone engaged
- Confirm what you need the integration to do
- Test the end result and confirm it works for you

Your third party will

- Confirm what their system supports
- Provide their specification, credentials or access
- Build and test their side
- Work to a timescale you've agreed with them

Getting your integration right

Lead times, and why we ask so early

Third parties work to their own timescales, and those timescales are outside our control and often outside yours too. Some providers turn things round in days. Others have a queue, a change window or a quarterly release cycle.

Please start the conversation with your provider as soon as your project begins, even before anything has been designed. Knowing their lead time early lets us build the plan around it. Finding out late that they need eight weeks is one of the most common reasons a go-live date moves.

Who looks after it once you're live

An integration is software, and software needs looking after. Systems get upgraded, APIs change, and a connection that worked perfectly at go-live can need attention later. Where NexaCore has built and supports the integration, that maintenance is ours. Where the middle piece was built by a partner or by your own team, it stays with them, so it's worth agreeing support arrangements at the same time as the build rather than afterwards.

If your provider goes quiet

It happens. Tell your Project Manager as soon as it does, and we'll look at the options together. We can often re-sequence work, go live without the integration and add it as a later phase, or find an interim approach. What we cannot do is chase your provider on your behalf, because we have no contractual relationship with them.

An integration that's at risk of missing a date is managed as a project risk, so it stays visible and reviewed rather than quietly drifting.

Training: NexaCore Academy



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Training is the best investment you'll make

Of everything you'll do during this project, training is the thing with the highest return. Teams who arrive at their sessions already trained ask better questions, make better decisions and go live with far more confidence.

Getting to know your system happens in the way that suits you best. NexaCore Academy, our online learning platform, offers self-paced courses tailored to each product and module that you can dip in and out of around the day job. Alongside it you have live training sessions, webinars and recordings, bitesize product sessions, and a knowledge base full of self-help guides. Together these give you everything you need to build real confidence and genuine ownership of your system.

How it works



Your Project Manager confirms which courses each of your people needs



Everyone gets their own access and works through their courses at their own pace



You can go back to the content at any time, including after go-live

Timing matters more than you might think

Relevant training needs to be completed **before** the consultancy session it relates to. This isn't box-ticking. A configuration session with an untrained team turns into a training session, and then the configuration still has to happen somewhere else.

> Where prerequisite training hasn't been done, a session will need to be rescheduled, and rescheduled sessions are subject to our cancellation policy. We'd much rather that never came up, so please build training time into diaries early.



A tip from projects that went well

Block the time. An hour a week in the calendar, treated as unmovable, beats good intentions every time. The teams who do this are noticeably more relaxed by the time go-live comes round.



After go-live

Our NexaCore knowledge resources remain available to you, which makes it the natural home for onboarding new starters into the system later. Your Customer Experience Manager can talk you through keeping your team current as NexaCore develops.

Our cancellation policy



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What the policy says

Your project includes a set amount of consultancy and project time, based on the scope and modules you've agreed. That time is booked in advance with named specialists, which is why cancellations at short notice cannot simply be moved.

Once you and NexaCore have agreed a date for delivering a service, both of us will take all reasonable steps to keep it. If you need to cancel or postpone and we cannot redeploy the consultant to other paid work, charges apply:

No charge

When given **more than 8 working days' notice**. We'll simply rebook.

50%

of the fees for that session to be charged when given **4 to 8 working days' notice**.

100%

of the fees for that session to be charged when cancelled **within 4 working days**.

So, eight working days is the number to keep in mind. Beyond that, cancelling costs you nothing.

This also applies where a session cannot go ahead because prerequisite actions haven't been completed. For example, if the required training hasn't been done or the data we needed hasn't arrived. In those cases, the session cannot achieve what it was booked for, so it counts as used.

NexaCore may also need to cancel or postpone a session in circumstances beyond our control. Where that happens, the position is set out in your Master Services Agreement.

Capitalised terms have the meaning given to them in the Master Services Agreement, which takes precedence over this summary.

How to avoid it entirely

This is one of the easiest things in the whole playbook to avoid, and the answer is always the same: **tell us early.**



If you cannot make a session, tell your Project Manager as soon as you know



If prerequisite actions won't be finished in time, say so before the day, not on it



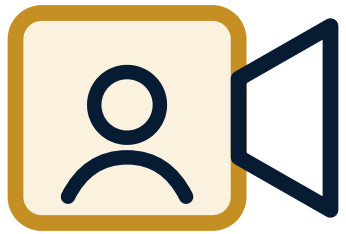
If your team's availability changes for a period, tell us and we'll replan around it

Given notice, we can almost always move things, bring other work forward or use the time differently. We're not trying to catch anyone out. We just cannot recover a session that nobody could attend.

If a session finishes early

Use the remaining time to keep working through the actions from that session while you have your consultant with you. What it's not is a window to move onto another module or another topic; your consultant is booked and prepared for the session in front of them and won't have the background on other parts of your system to give you a useful answer. If something else has come up, raise it with your Project Manager and we'll get the right person booked in.

Unused time cannot be carried over to another session, so it's worth making the most of what you have.



Managing your tasks in Wrike



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Your project hub

Wrike, our project management tool, is where your project lives. Your plan, your tasks, your documents, your risks and your change log are all in one place, visible to both sides, all the time.

It means you never have to hunt through email to find out where something got to, and you never have to wait for a status update to know what's happening. Just look.

Getting in

Your Project Manager will set up your access and walk you and your team through it early in the project. There's nothing to install and no cost to you. Here's what you'll find there:



Your project plan

See what's happening now, what's coming next and how it all fits together



Your tasks

Everything assigned to your team, with owners and due dates



Meeting notes & actions

Written up after each catch-up, so nothing depends on who was on the call



Documents

Your signed order form, specifications, data templates and reference material



Risks and changes

The live picture, not a snapshot from a fortnight ago

Keeping your tasks moving

Check your tasks

between sessions rather than only during them

Update a task when it's done

so the plan reflects reality and your Project Manager isn't chasing

Comment on the task itself

rather than emailing, so the context stays with the work

If a due date is going to slip, change it early and say why

a moved date with a reason is fine. A silently missed one isn't.

A gentle nudge

The single strongest predictor of a project finishing on time is whether the customer's tasks get updated between sessions. It takes a few minutes a week, and it changes everything downstream.

Your readiness checklist



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Ready for kick-off

Work through this before your kick-off meeting. If you can tick everything, you're in excellent shape, and your project is starting from the strongest possible position.

- [ ] Project Sponsor, Project Lead and subject matter experts confirmed, briefed and told they have the role
- [ ] A deputy named for each key role, in case of holiday or illness
- [ ] Scope reviewed and understood by everyone who needs to know what's in scope
- [ ] This playbook read and shared with your wider project team
- [ ] Wrike accessed and bookmarked by everyone who will use it
- [ ] Technical contact named, and any internal IT change requests raised
- [ ] Relevant NexaCore Academy training started or scheduled
- [ ] Weekly project time blocked in your team's diaries
- [ ] Data sources and data owners identified ahead of the migration stage
- [ ] Any third party providers contacted, with their lead times understood
- [ ] Kick-off invitations accepted by the right people, including your sponsor
- [ ] Questions written down ready to bring to kick-off

What looks good once you're underway

- [ ] Tasks updated in Wrike between sessions, not just during them
- [ ] Actions diarised straight after each session while they're fresh
- [ ] Blockers raised as soon as they appear, rather than at the next catch-up
- [ ] Training completed ahead of the sessions it relates to
- [ ] Decisions made by the agreed date, by someone empowered to make them
- [ ] Anything that feels off flagged early, however small it seems

If you can't tick everything

That's not a disaster, and it's definitely not a reason to delay telling us.

Talk it through with your Project Manager. A known gap we can plan around is far better than a surprise in week six.



Jargon buster



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Plain English, no judgement

Every industry has its own shorthand, and ours is no exception. Here's what we mean when we say these things. If you hear something that's not on this list, please just ask. We'll happily explain it, and we'll add it here.

Term	What it actually means
BAU	Business as usual. Normal life after your project finishes and you're just using the system.
Change control	The agreed way of handling anything that changes your scope, cost or timeline.
Configuration	Setting the system up to match how your organisation works.
Defect	The software isn't behaving the way it's designed to. Different from something being set up differently to how you expected.
Dependency	Something that has to happen before something else can start.
Discovery	The early stage where we get to know how you work today and what you want to change.

Term	What it actually means
FRD	Functional Requirements Document. The detailed record of how your system needs to work, built up during discovery and signed off before configuration begins.
Go-live	The day your system starts being used for real, for your agreed scope.
Help request	A question or a bit of advice needed. Usually handled in your project sessions.
Hypercare	The short period straight after go-live when we stay especially close.
Incident	Something that was working has stopped working. Raised with Support.
Kick-off	The formal start of your project, where scope, plan and roles are agreed.

More terms you'll hear

Term	What it actually means
Milestone	A significant point in the plan, usually with a sign-off attached.
Product suggestion	An idea for something NexaCore doesn't do yet. Logged with our product team as feedback.
RAG status	Red, amber or green. A quick shorthand for how something is tracking.
RAID log	Risks, assumptions, issues and dependencies, all tracked in one place.
SFTP	Secure file transfer. How your data moves between you and us safely.
Sign-off	Your formal confirmation that something is agreed, so the next stage can begin.

Term	What it actually means
SME	Subject matter expert. The person who really knows how a particular area works.
SOW	Statement of Work. The contractual definition of what we're delivering.
Sponsor	Your senior leader who owns the outcome and unblocks the difficult decisions.
UAT	User acceptance testing. Your team checking the system does what you need before go-live.
Wrike	The tool where your project plan, tasks and documents live.



Remember:

If you hear something that's not on this list, please just ask. We'll happily explain it, and we'll add it here.

Frequently asked questions



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How much time will this take from my team?

It varies with scope, but plan for your project lead to spend a meaningful part of their week on it, and your subject matter experts to be available for sessions and the actions that follow. Your Project Manager will give you a realistic picture at kick-off. It's usually more than people expect, and the projects that go best planned for that.

What happens if someone on our project team leaves partway through?

Tell your Project Manager as soon as you know. The sooner we know, the more we can do, and we'll replan the tasks around whoever is picking the work up. This is also why we ask you to name a deputy for each key role at kick-off, so there's always somebody who already has the context.

What happens if we lose momentum?

It happens, usually because something urgent lands elsewhere in your organisation. Tell us early and we'll replan around it rather than letting tasks quietly age. What we'd ask is that you don't go quiet, because a paused project is far easier to restart than a drifting one.

Can we pause the project if something comes up on our side?

Yes. Talk to your Project Manager before you decide rather than after, since a planned pause is much easier to manage well than an unplanned one. We'll agree how long the pause is, what happens to any booked sessions, and how we pick things back up when you're ready.

What if we decide we want something extra during the project?

Talk to your Project Manager. Anything outside your agreed scope goes through change control, so you'll see the cost and the timeline impact before you commit to anything. Sometimes the best answer is to do it as a phase two, and we'll tell you when we think that's the case.

Does the project cost change if our scope turns out to be bigger than expected?

If what we find in discovery is genuinely more complex than the original scope assumed, we'll tell you as soon as we see it, explain why, and talk you through the options before anything is agreed. As with any change, nothing moves forward, and nothing is added to cost, without your sign-off first.

There's an open defect. Does our project stop?

Almost never. We agree a workaround or re-sequence the work, and a defect only holds a milestone if we jointly decide it should. There's a whole section on this, because it's a question we're asked a lot.

Can we add scope after go-live?

Absolutely. Anything you want to add once you're live goes through your Customer Experience Manager, who picks up the relationship from that point, rather than your Project Manager.

Who do we contact once we're live?

NexaCore Support through the Client Care Centre for day-to-day questions and issues, and your Customer Experience Manager for anything about your wider relationship with NexaCore.

Can we book the whole implementation up front, so resources and dates are guaranteed?

Not the whole thing. We book sessions in a rolling window ahead of you rather than fixing every date at kick-off, because a fully booked plan only holds if every date holds — including yours. One slip then means rebooking a chain of sessions rather than one.

What we do commit to is your go-live date, the sequence of stages, and the sessions in the current window. Your Project Manager will always be booking ahead of where you are, so you're never waiting on a date. If you have a fixed constraint — a payroll cutover, a period your team cannot be available — tell us at kick-off and we'll plan around it.

Are our calls recorded?

Consultancy sessions are recorded and transcribed for training and quality purposes. If you have any concerns about that, raise them with your Project Manager.

How far in advance are sessions booked?

Sessions are usually scheduled around 8 weeks in advance with named specialists, so the earlier your availability is confirmed the better the dates you'll get. Your Project Manager will confirm the current booking horizon at kick-off.

What if we need to move or cancel a session?

Tell your Project Manager as soon as you know. Given notice we can almost always rearrange. Within the notice window, the session counts as used, and additional time may need to be purchased. See the cancellation policy section.

Do you deliver on site?

Our standard delivery is remote, which is faster to schedule and works well for the vast majority of projects. If on-site delivery in Dubai or the UAE matters to you, raise it with your NexaCore contact and we'll talk it through.

Need help?



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Just ask

If you're unsure about anything at all, ask your NexaCore Project Manager. That's what they're there for, and no question is too small. The ones people worry about asking are usually the ones worth asking.

If you need	Go to
Anything about your project	Your Project Manager
Advice on how to set something up	Your Project Manager or Implementation Consultant, in your sessions
Help with something that has stopped working	NexaCore Support, through the Client Care Centre
Self-service guidance and how-to articles	www.nexacore-consultancy.com/support
Information on our security, compliance and data protection	trust.nexacore-consultancy.com
Anything outside your scheduled sessions	projects@nexacore-consultancy.com
To escalate something	Your Project Manager, or projects@nexacore-consultancy.com

Two places worth bookmarking



The Client Care Centre

Our self-service knowledge base, full of how-to articles and guidance. It's worth a look before raising anything, because the answer is often already there and available immediately.



The NexaCore Trust Centre

Where we publish our security posture, compliance evidence and data protection practices. Useful for your IT and information security teams, and a good link to have to hand when they ask.

NEXACORE
CONSULTANCY
CO. L.L.C S.O.C

And finally

Thank you for choosing NexaCore. We know an implementation asks a lot of your team, and we don't take that lightly.

We're looking forward to working with you, and to the day we all get to say you're live.

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