PERSUIT™

A Quick Guide

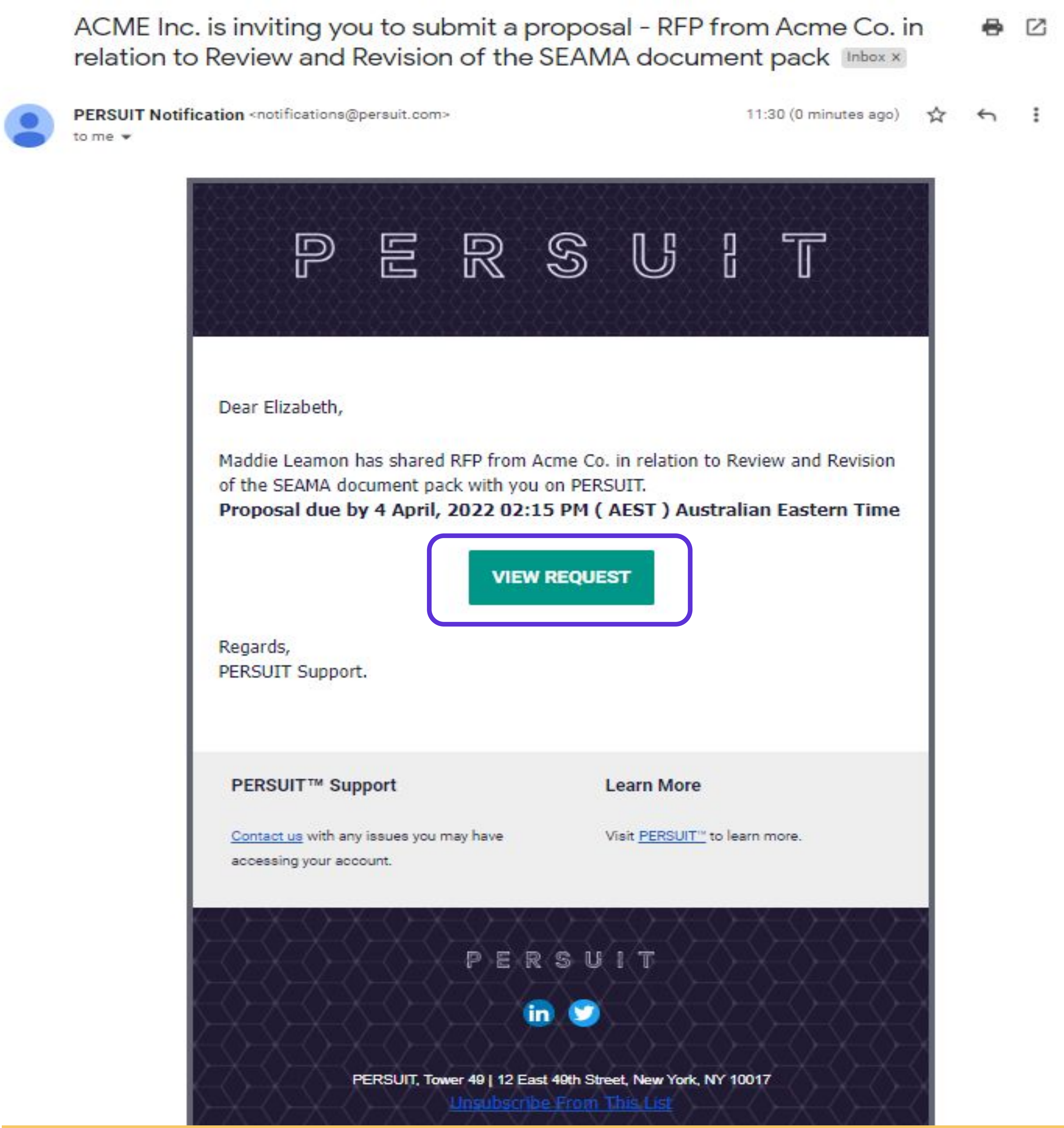
For Law Firms

Logging In

Once a client sends your firm a request to submit information or a proposal on the PERSUIT platform, the person(s) at your firm whom the client has invited (can be one or multiple people) will receive the following email.

By clicking **View Request**, the user will be directed to the PERSUIT login page. Pro Tip: We suggest bookmarking https://app.persuit.com for future reference. If you have been sent a request on PERSUIT in the past, an account has been made for you automatically; no further steps are required from PERSUIT to activate your account.

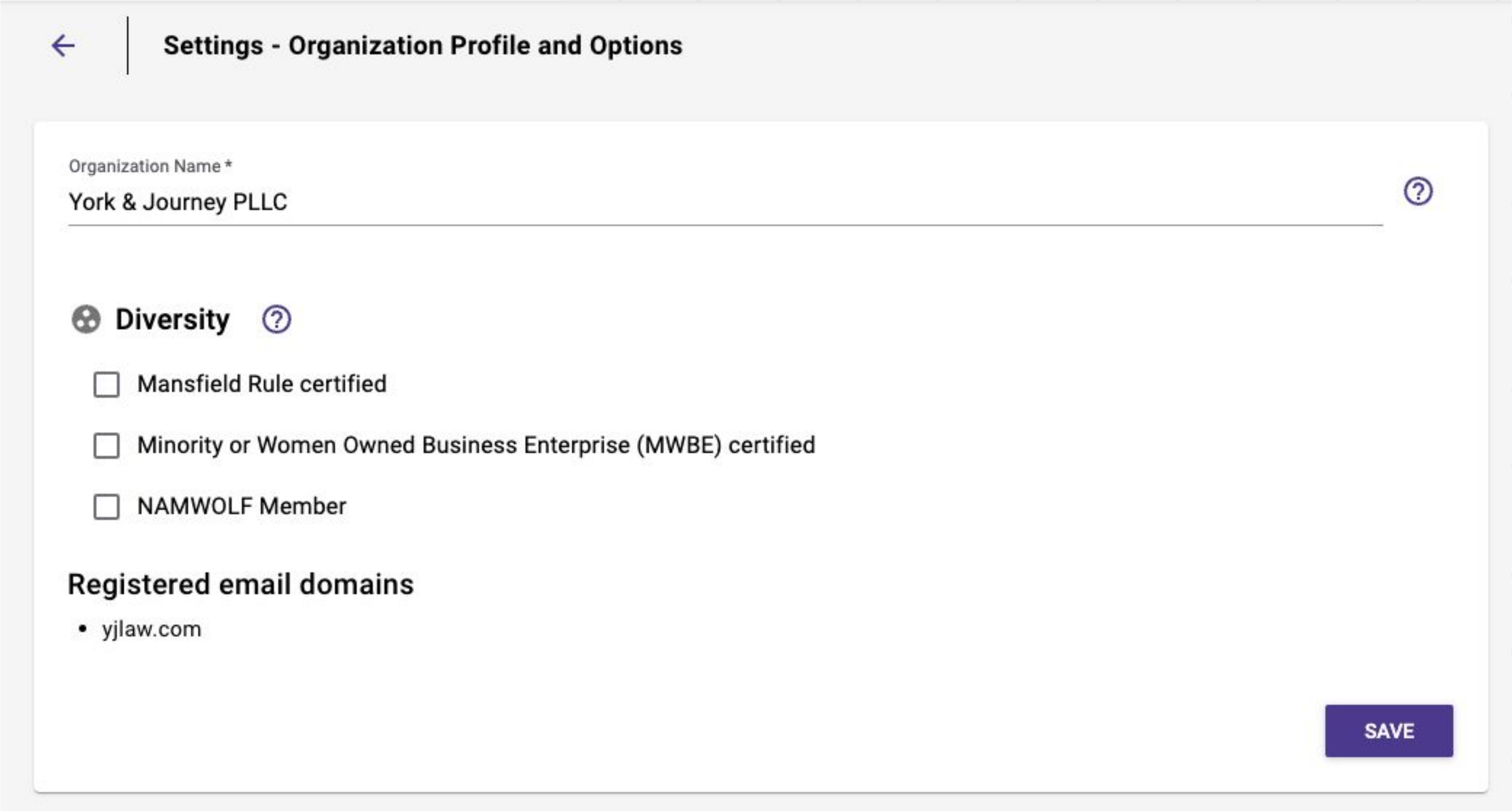
If you have forgotten the password, simply click **Forgot Password** to reset it.



Law Firm Profile

Once you have logged in, you will be prompted to update your contact information. Please visit Settings to update your law firm name and indicate any Diversity Certifications your firm holds.

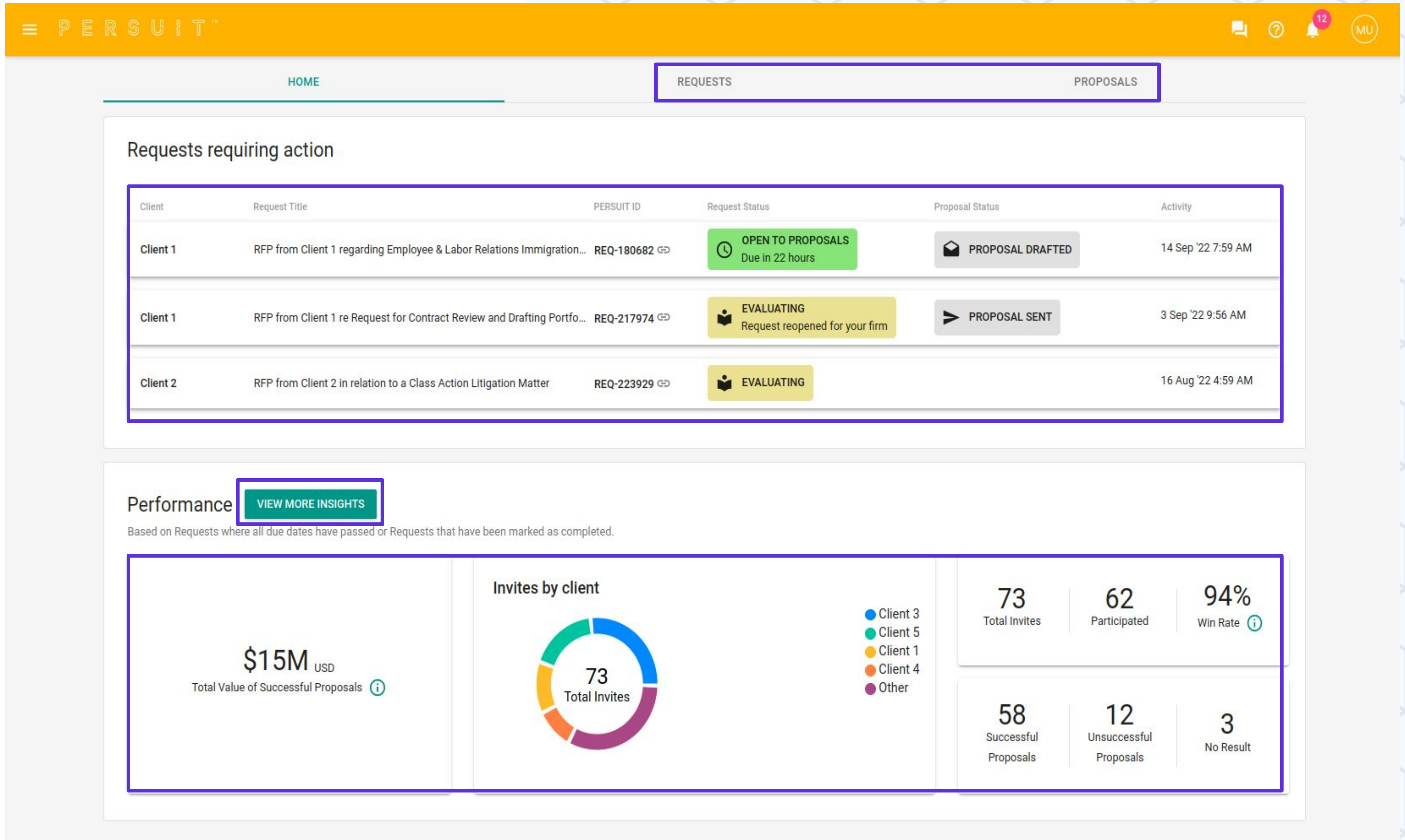
You should also contact support@persuit.com to indicate who from your firm should be a Designated Contact and receive all PERSUIT RFPs from either an individual client, or all clients.



Accessing the RFP

On your homepage, you will see:

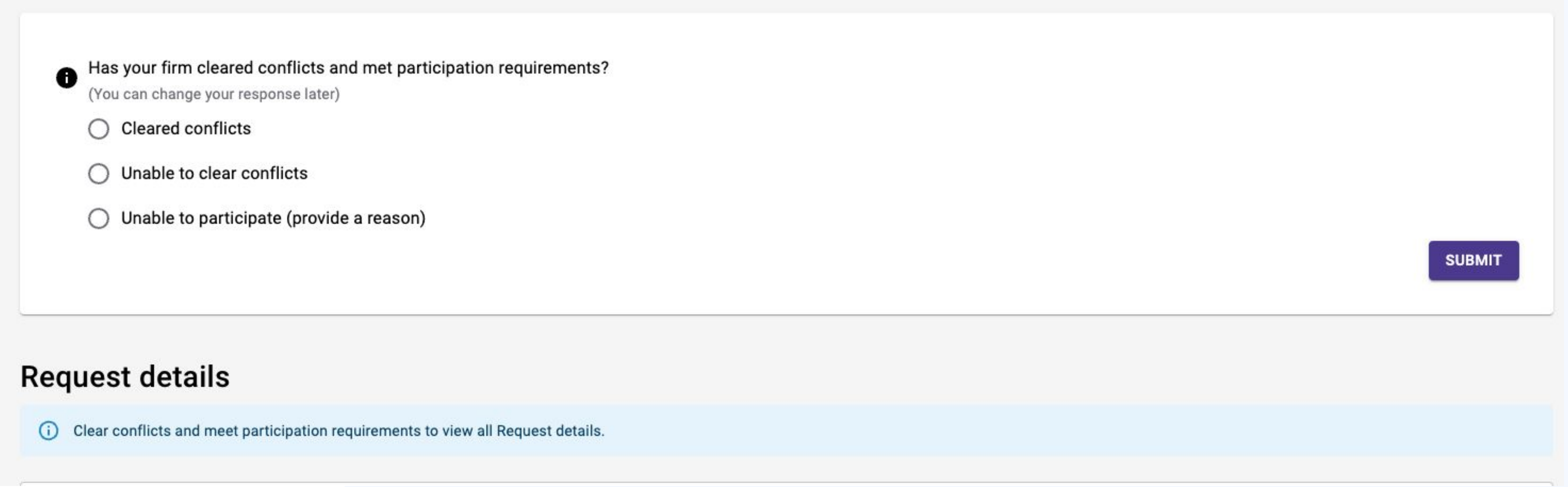
- a list of the requests that you have been personally invited to by your clients
- requests from firm colleagues
- requests you've been invited to
- a list of all proposals you've submitted
- high level performance metrics
- a breakdown of invites by client



Clearing Conflicts

Clients have the option to turn on or off a Conflicts Check section within each request. If Conflicts Check is turned on, this will prevent you from being able to read the full scope of the RFP until after you have indicated Yes to having cleared conflicts.

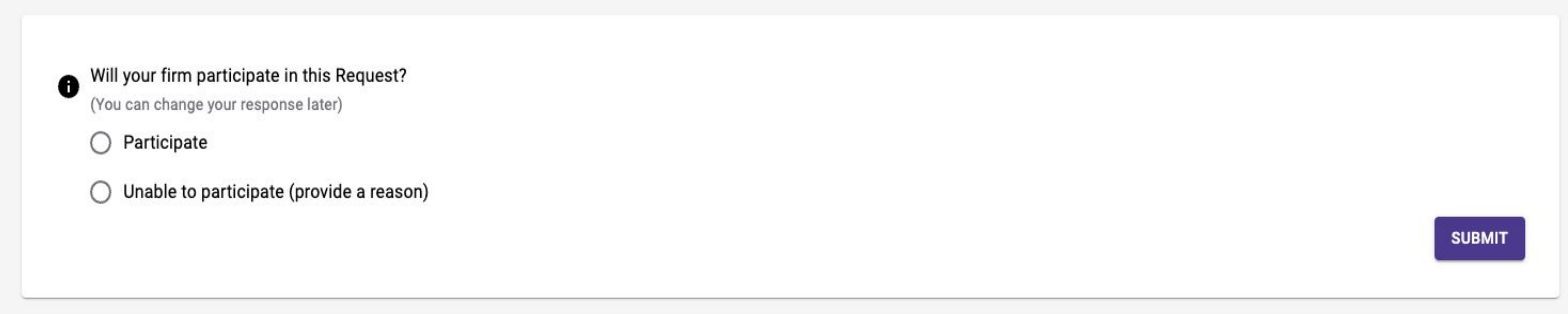
You may message the client if you need more information.



Accepting Invitation

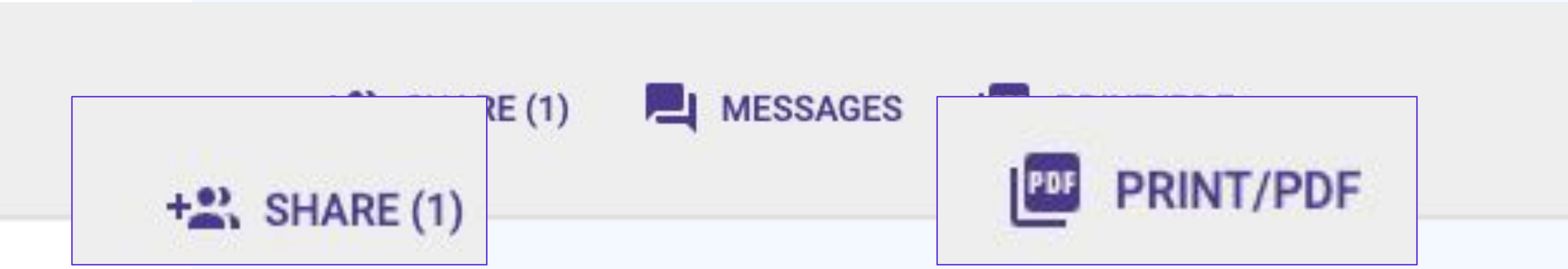
If the Conflicts Check is turned off, your firm will be able to read the full RFP as soon as you are invited and you may indicate in the questionnaire section that your firm has indeed cleared conflicts. You will be prompted to indicate Yes or No as to whether you would like to participate in the sourcing event.

You cannot start drafting a response until after submitting your intent to participate.



Read/Print RFP

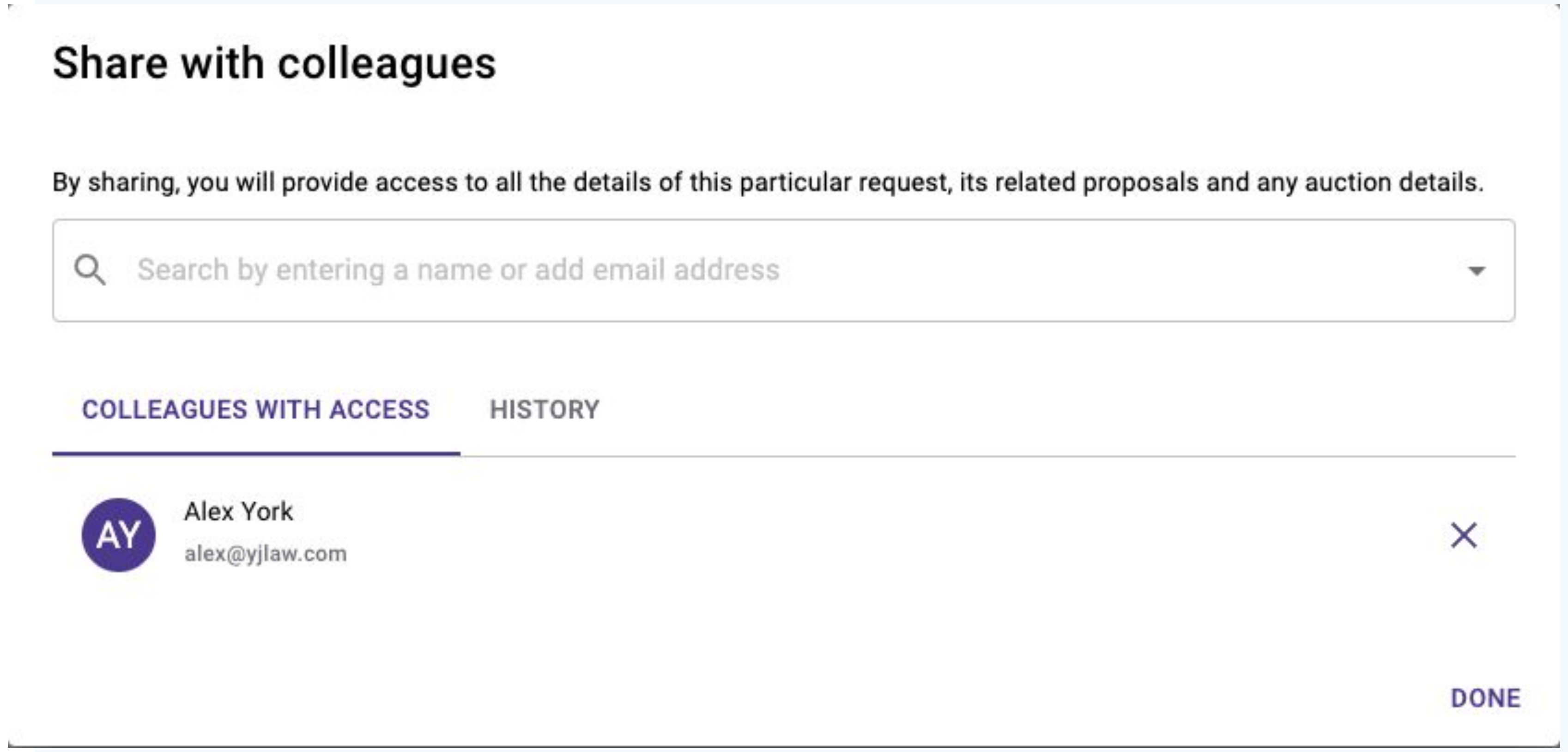
Once you have indicated your intent to participate, you will have the option to download the RFP and print it. Please note any deadlines the client has provided.



Share with Colleagues

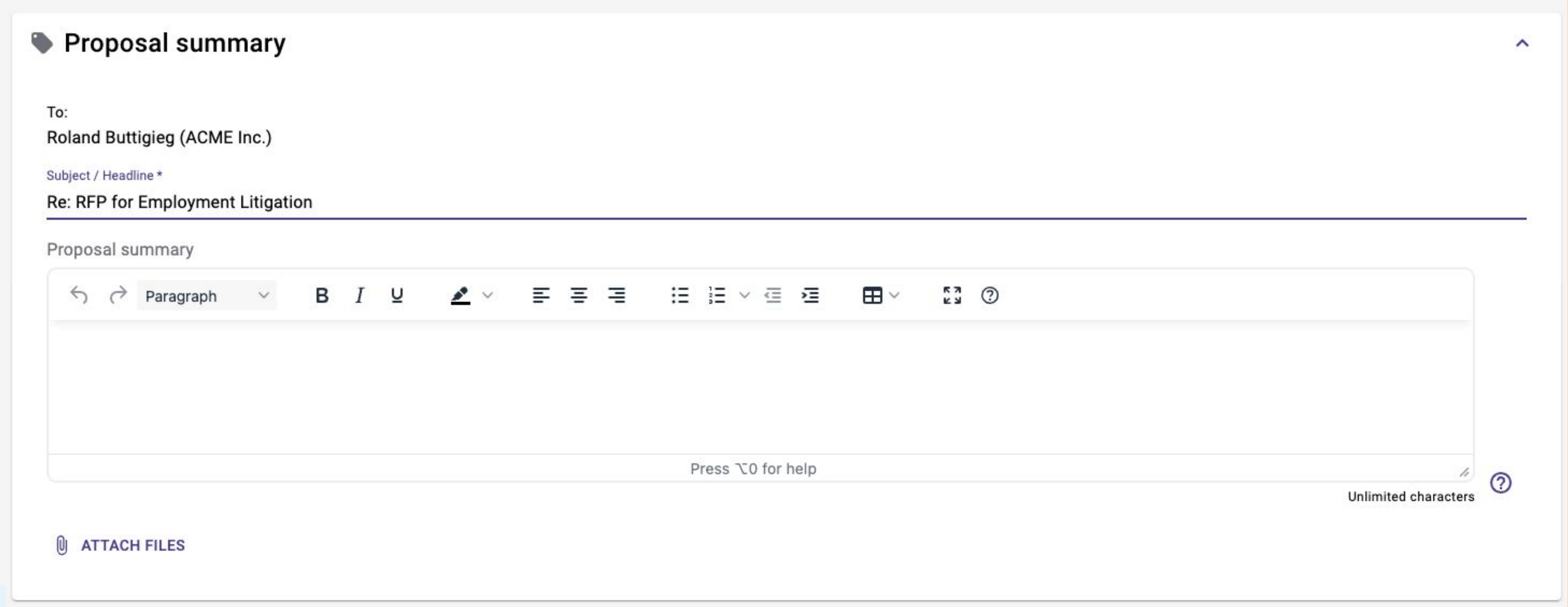
If you are not the appropriate person to respond to the request, or would like to collaborate with a colleague, you are able to share the request with your colleagues by clicking the Shared button.

The system will first show the colleagues that already have access. You can add more colleagues by clicking the dropdown or by typing their email addresses. This will trigger an invitation email to that colleague.



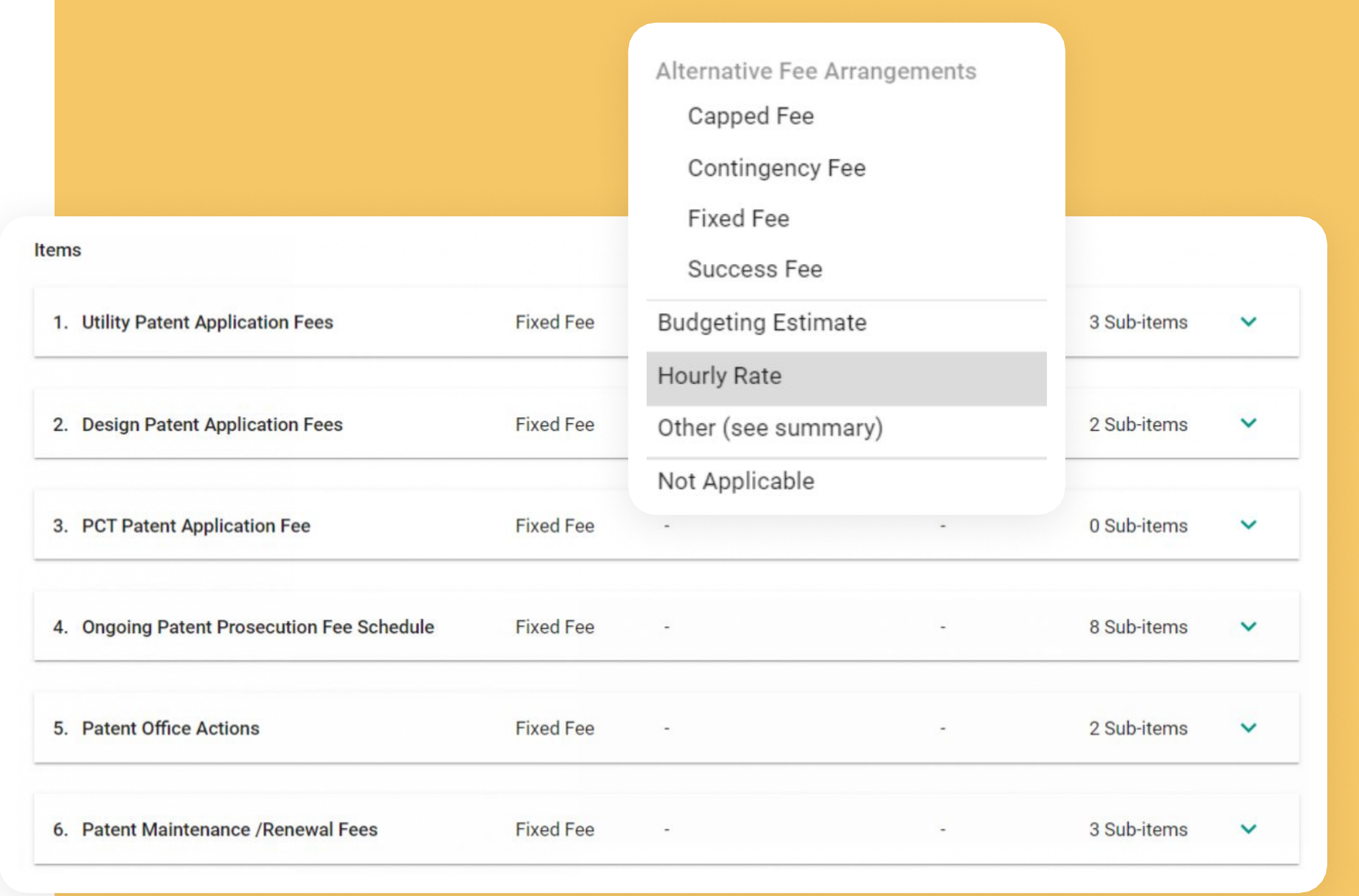
Create a Proposal

The first field is the TITLE of your proposal which defaults to RE:[Client title of RFP]. This can be personalized by your firm. The Proposal Summary is a default field that may be provided by your firm to provide an intro to your proposal. You may also attach files, but ensure that you are only doing so based on the rules determined by the client in the RFP with respect to format.



Pricing

The pricing section allows you to provide a total fee for the project (if enabled by the client) as well as fees at the **phase** or **activity** level. Phase level fees are called Items in PERSUIT. And activities within each phase are called Sub-items. For the total price, items, and sub-items, firms will see the pricing preference that has been provided by the client (i.e. fixed fee, capped fee, budget estimate, etc.). Firms can choose to deviate from the preference provided by the client by clicking on the Pricing drop-down menu.



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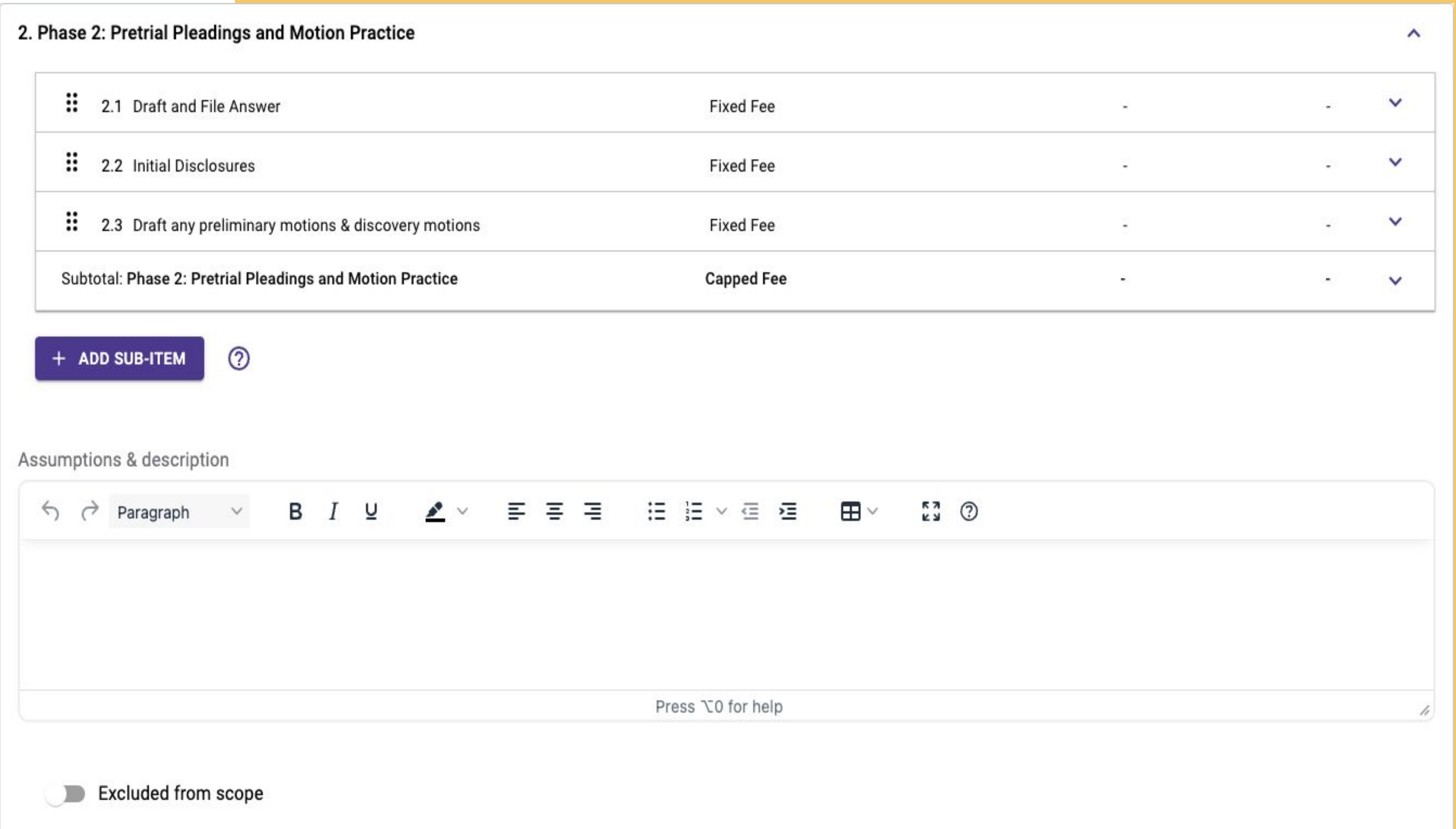
Pricing

Clients can also provide their assumptions for each item in the comment box provided.

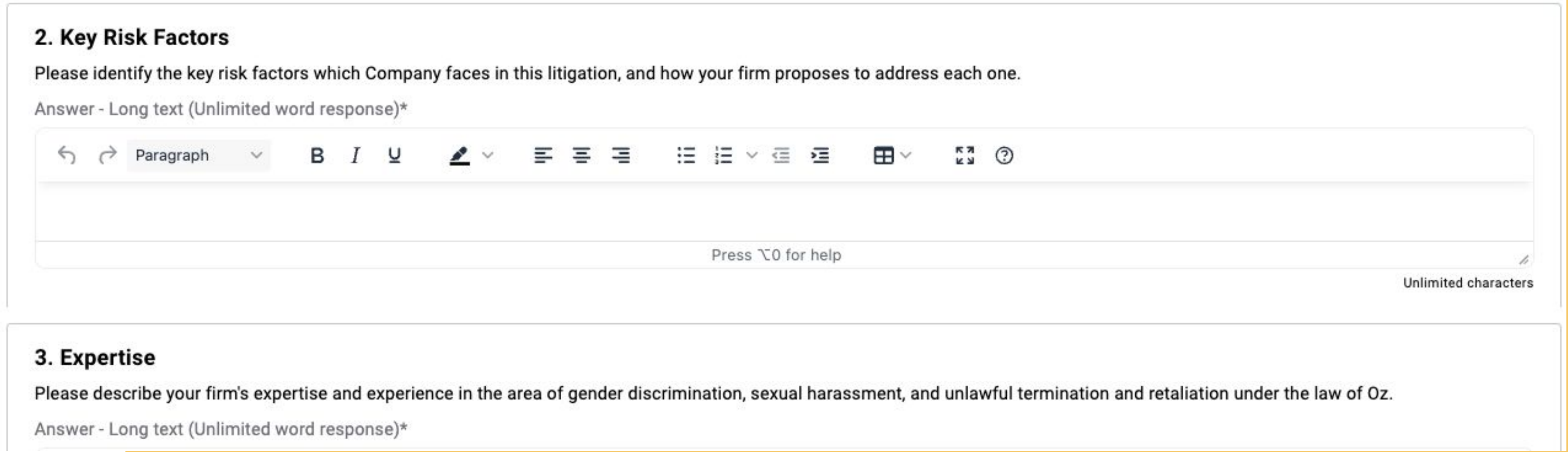
If a firm would not like to provide pricing for an item for any reason, they can toggle the Excluded from Scope button. Further, if the firm believes additional sub-items will be required, they can click Add Sub-item and describe the activity and the fee that would be assessed to each sub-item. The Hours field is not required when submitting a proposal, but some clients may ask that you fill it in.



Questionnaire

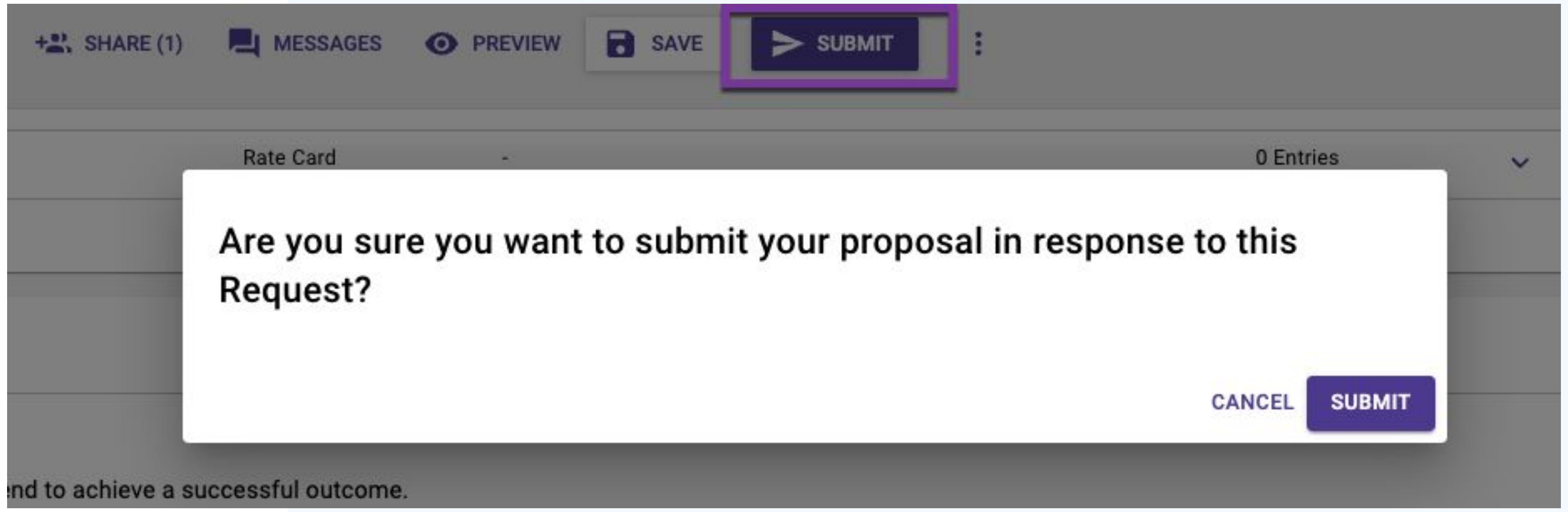
The questionnaire section includes the following response types:

- Yes/No - answers are limited to selecting Yes or No
- Paragraph - rich text answer, no character limit
- Short Text - plain text answer, 800 character limit
- Medium Text - plain text answer, 2500 characters (~400 words)
- Long Text - plain text answer, Unlimited characters
- Numeric - only numeric character answers allowed (9 characters)
- Money - only numeric currency based answers allowed
- Percentage - a numeric character with a percentage (%) suffix
- Single-choice - choose a single option from a pre-defined list of options
- Multi-choice - choose multiple options from a pre-defined list of options
- Linear Scale - choose a single option on a linear scale with a pre-defined range



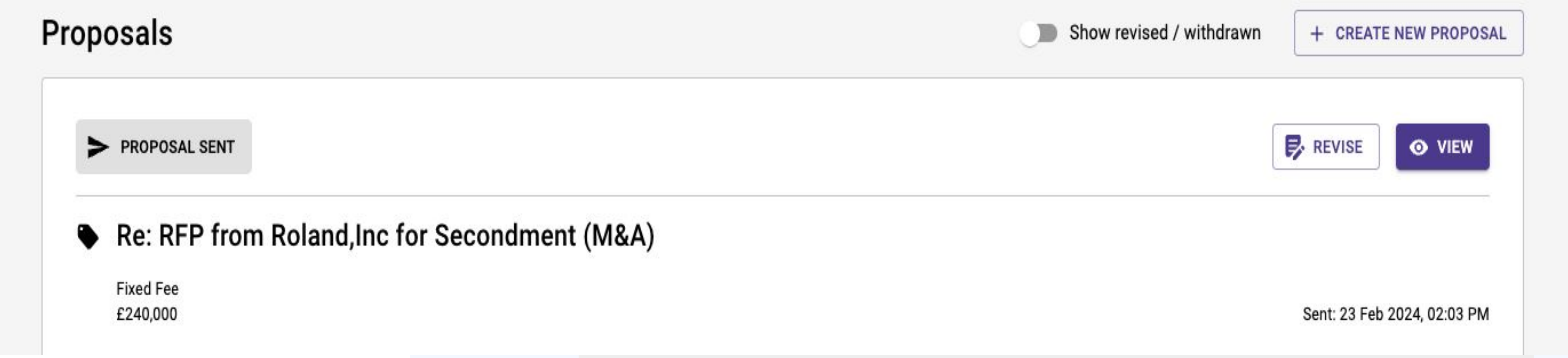
Submit Proposal

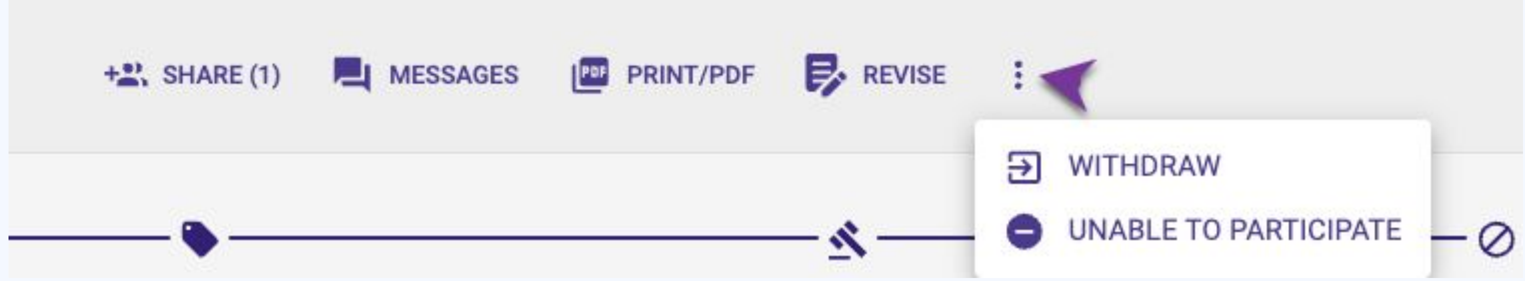
Once you are ready to submit your proposal, you may click **Preview** to review a PDF copy of it. When you are ready to send to the client, click **Submit**.



Revise / Withdraw Proposal

As long as the RFP is Open, firms can revise their proposals after submitting them by clicking **Revise**. They can also withdraw their proposals by clicking **Withdraw**. Note that clients may still access their withdrawn proposals in their archive.





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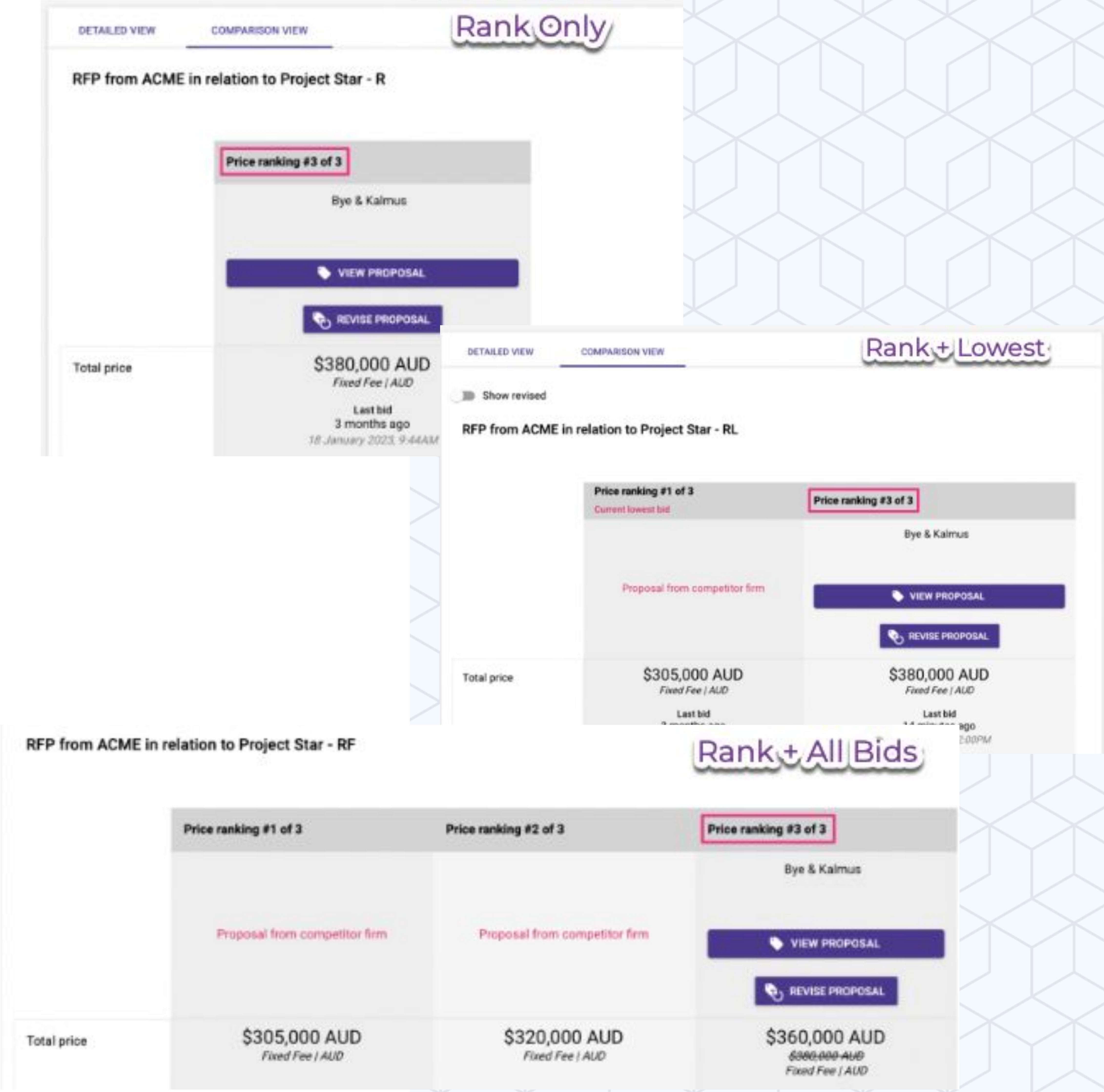
Auction Settings and Firm Options

During a reverse auction or virtual pricing event, firms will be able to see either 1) rank only, 2) rank and price of competing firms, or 3) rank and lowest bid.

The Rank is based solely on the firm's total or comparison price. Clients may score proposals according to many qualitative factors, but the price rank is provided solely to give firms feedback so that they may improve the competitiveness of their pricing. See the visual difference between the auction settings. Clients may choose to enable any of the three options.

Note that even where the price is visible, firm names and answers to questions are always anonymous.



Messaging

Law firms can send messages to their clients through Messaging Channels. These channels are private between the firm and the client – no other firms have access to these questions. However, clients may choose to make their answers to questions visible to law firms via a Clarification which gets posted to the RFP and triggers an email notification to firms or the client may answer your question directly in your private messaging channel.

The messaging channels are specific to each request - there is not an overall messaging channel with the client that is agnostic of specific requests.

Note that firms also have an Internal messaging channel which allows you to send messages to your internal law firm colleagues privately.