

P E R S U I T TM

A Quick Guide

For Law Firms

- [Logging In](#)
- [Law Firm Profile](#)
- [Accessing the RFP](#)
- [Clearing Conflicts](#)
- [Accept Invitation to Participate](#)
- [Read / Print RFP](#)
- [Share with Colleagues](#)
- [Create a Proposal](#)
- [Submit a Proposal](#)
- [Revise / Withdraw a Proposal](#)
- [Auction Settings and Firm Options](#)
- [Messaging](#)

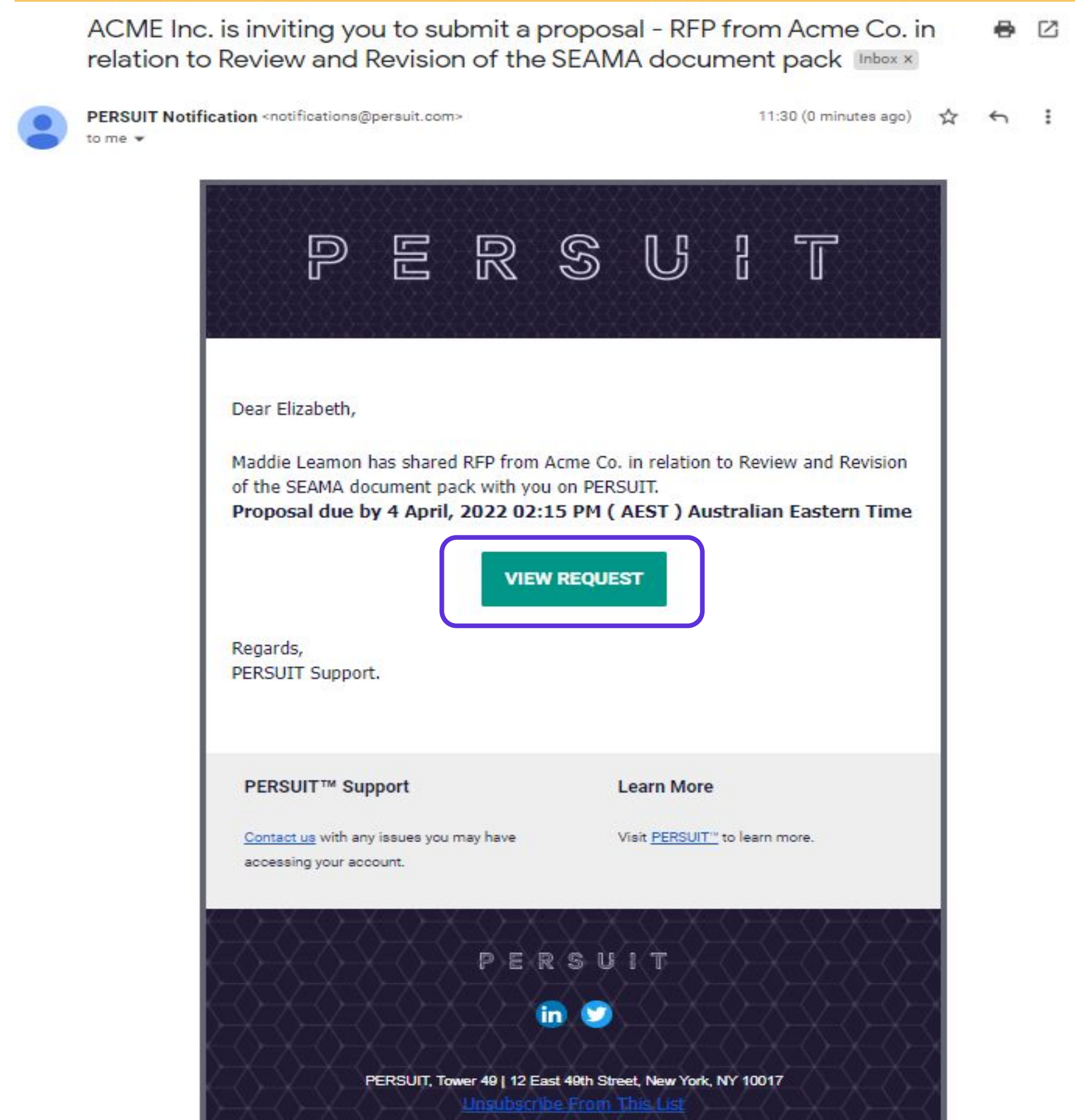
Logging In

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.

P E R S U I T TM



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

Settings - Organization Profile and Options

Organization Name *
York & Journey PLLC

Diversity

- Mansfield Rule certified
- Minority or Women Owned Business Enterprise (MWBE) certified
- NAMWOLF Member

Registered email domains

- yjlaw.com

SAVE

PER SUIT

HOME REQUESTS PROPOSALS

Requests requiring action

Client	Request Title	PERSUIT ID	Request Status	Proposal Status	Activity
Client 1	RFP from Client 1 regarding Employee & Labor Relations Immigration...	REQ-180682	OPEN TO PROPOSALS Due in 22 hours	PROPOSAL DRAFTED	14 Sep '22 7:59 AM
Client 1	RFP from Client 1 re Request for Contract Review and Drafting Portfo...	REQ-217974	EVALUATING Request reopened for your firm	PROPOSAL SENT	3 Sep '22 9:56 AM
Client 2	RFP from Client 2 in relation to a Class Action Litigation Matter	REQ-223929	EVALUATING		16 Aug '22 4:59 AM

Performance [VIEW MORE INSIGHTS](#)

Based on Requests where all due dates have passed or Requests that have been marked as completed.

\$15M USD Total Value of Successful Proposals	Invites by client		73 Total Invites	62 Participated	94% Win Rate
			58 Successful Proposals	12 Unsuccessful Proposals	3 No Result

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.

i Has your firm cleared conflicts and met participation requirements?
(You can change your response later)

Cleared conflicts

Unable to clear conflicts

Unable to participate (provide a reason)

SUBMIT

Request details

i Clear conflicts and meet participation requirements to view all Request details.

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.

i Will your firm participate in this Request?
(You can change your response later)

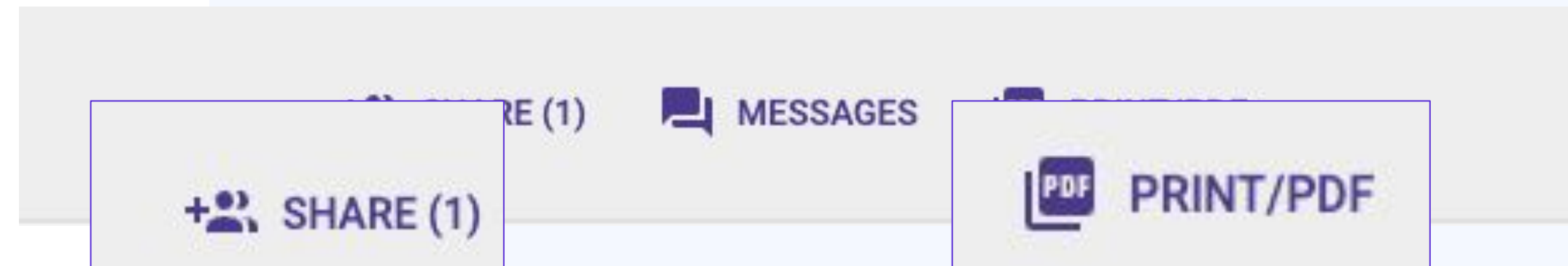
Participate

Unable to participate (provide a reason)

SUBMIT

Read/Print RFP

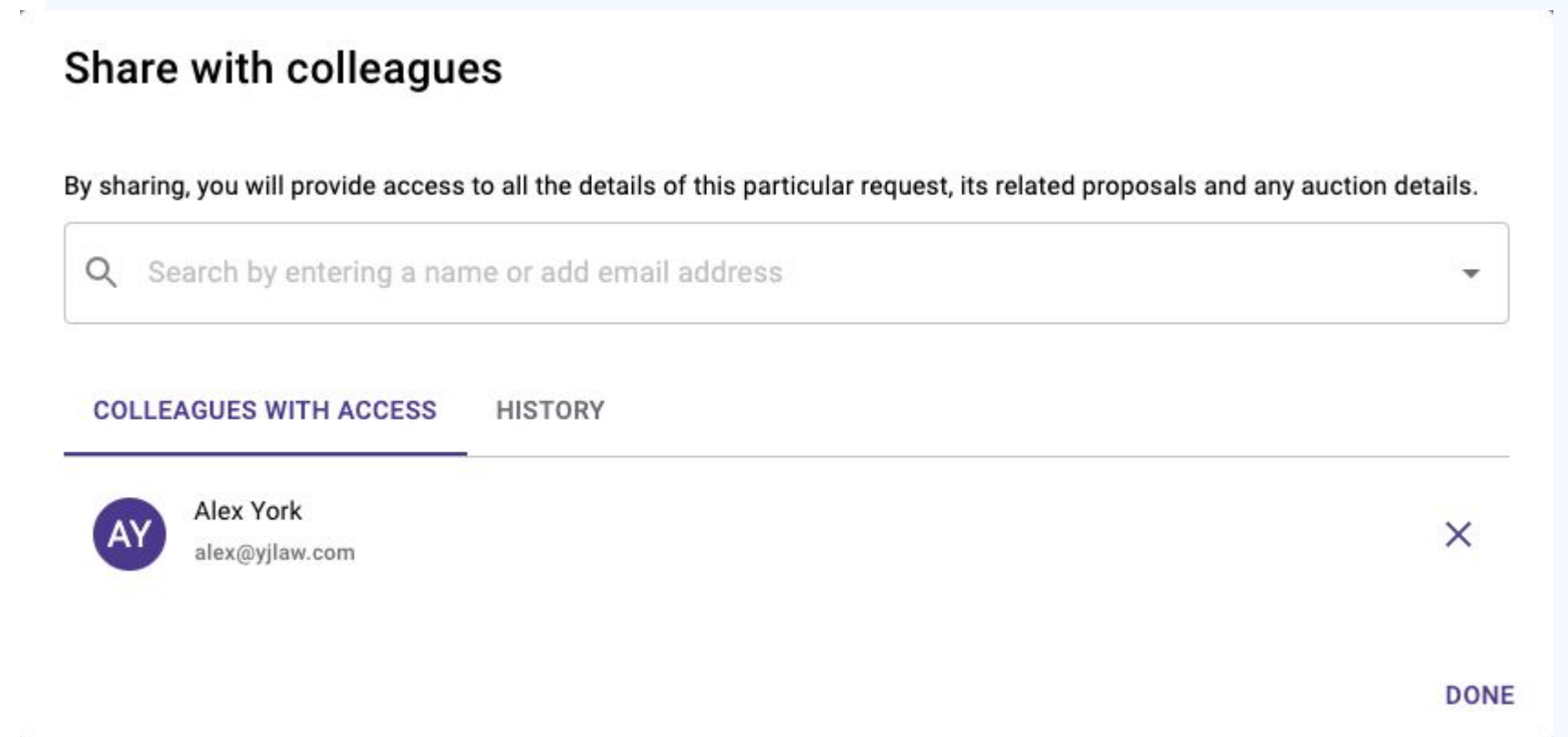
Once you have indicated your intent to participate, you will have the option to download the RFP and print it. Please note any deadlines the client has provided.



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.

The screenshot shows a 'Proposal summary' form. At the top, it displays 'To: Roland Buttigieg (ACME Inc.)' and 'Subject / Headline * Re: RFP for Employment Litigation'. Below this is a rich text editor for the 'Proposal summary' with a toolbar containing options like Paragraph, Bold, Italic, Underline, and text color. A 'Press ⌘0 for help' prompt and 'Unlimited characters' indicator are visible at the bottom of the editor. An 'ATTACH FILES' button is located at the bottom left of the form.

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.

The screenshot displays a table of 'Items' with a pricing preference dropdown menu open. The table lists six items, each with a 'Fixed Fee' type and a 'Sub-items' count. The dropdown menu shows 'Alternative Fee Arrangements' with options: Capped Fee, Contingency Fee, Fixed Fee, Success Fee, Budgeting Estimate, Hourly Rate (highlighted), Other (see summary), and Not Applicable.

Items	Fixed Fee	Sub-items
1. Utility Patent Application Fees	Fixed Fee	3 Sub-items
2. Design Patent Application Fees	Fixed Fee	2 Sub-items
3. PCT Patent Application Fee	Fixed Fee	0 Sub-items
4. Ongoing Patent Prosecution Fee Schedule	Fixed Fee	8 Sub-items
5. Patent Office Actions	Fixed Fee	2 Sub-items
6. Patent Maintenance /Renewal Fees	Fixed Fee	3 Sub-items

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

2. Phase 2: Pretrial Pleadings and Motion Practice

2.1 Draft and File Answer	Fixed Fee	-	-	▼	
2.2 Initial Disclosures	Fixed Fee	-	-	▼	
2.3 Draft any preliminary motions & discovery motions	Fixed Fee	-	-	▼	
Subtotal: Phase 2: Pretrial Pleadings and Motion Practice		Capped Fee	-	-	▼

[+ ADD SUB-ITEM](#) [?](#)

Assumptions & description

← Paragraph ▼ **B** *I* U

Press ⌘0 for help

Excluded from scope

2. Key Risk Factors

Please identify the key risk factors which Company faces in this litigation, and how your firm proposes to address each one.

Answer - Long text (Unlimited word response)*

← Paragraph ▼ **B** *I* U

Press ⌘0 for help

Unlimited characters

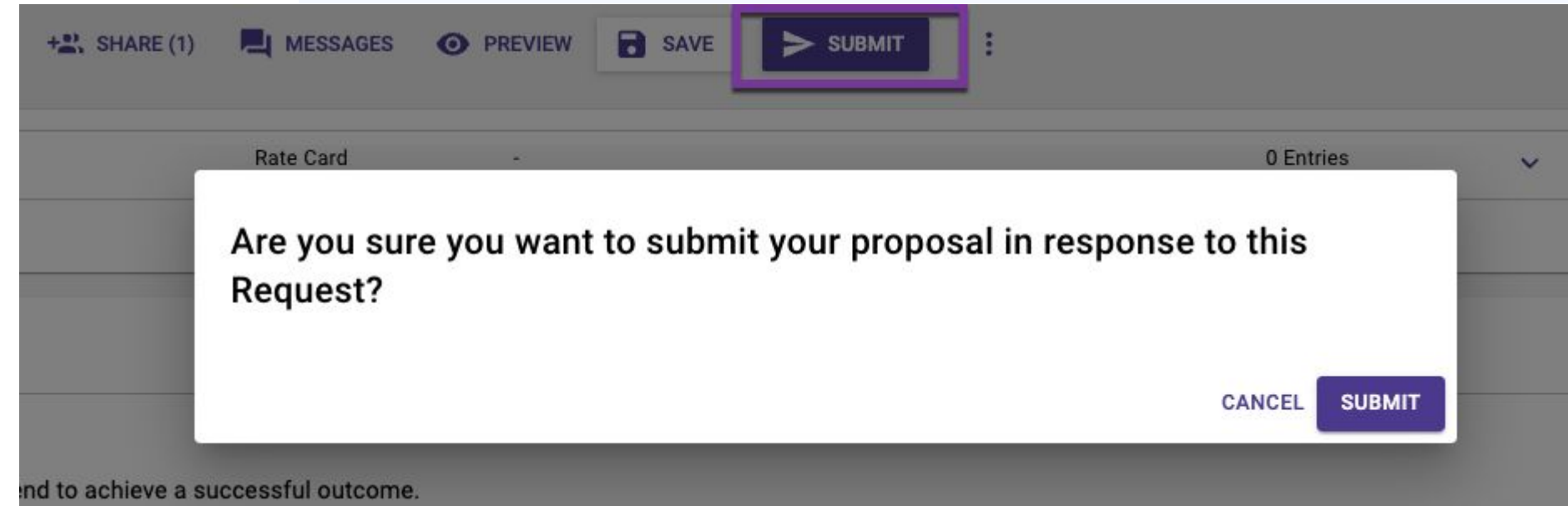
3. Expertise

Please describe your firm's expertise and experience in the area of gender discrimination, sexual harassment, and unlawful termination and retaliation under the law of Oz.

Answer - Long text (Unlimited word response)*

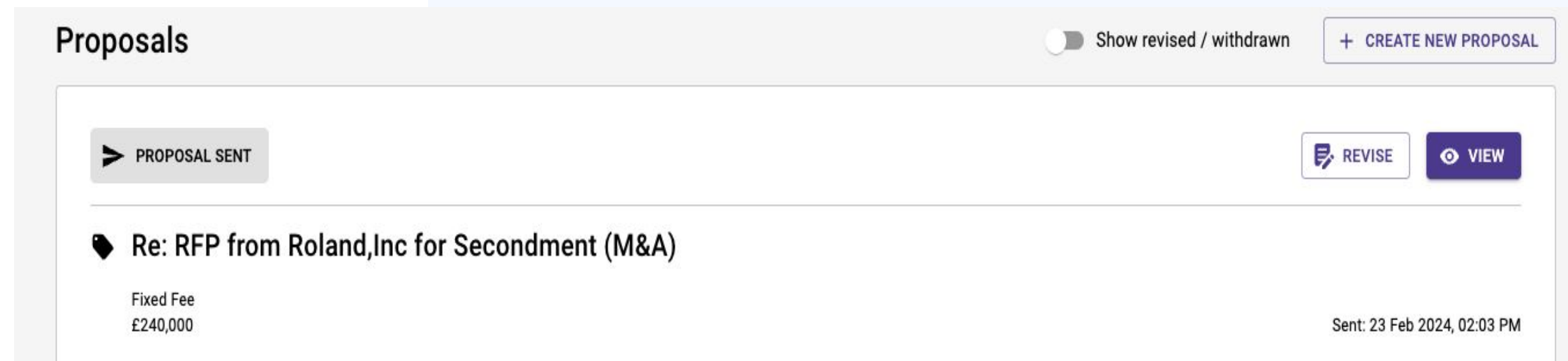
Submit Proposal

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.



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.

This screenshot shows the 'Rank Only' auction settings interface. At the top, there are tabs for 'DETAILED VIEW' and 'COMPARISON VIEW', with 'Rank Only' highlighted in a callout box. Below the tabs, the title reads 'RFP from ACME in relation to Project Star - R'. The main content area shows a card for 'Bye & Kalmus' with a 'Price ranking #3 of 3' label. Below the card are two buttons: 'VIEW PROPOSAL' and 'REVISE PROPOSAL'. At the bottom, a 'Total price' section displays '\$380,000 AUD' with 'Fixed Fee | AUD' and 'Last bid 3 months ago 18 January 2023, 9:44AM'.

This screenshot shows the 'Rank + Lowest' auction settings interface. At the top, there are tabs for 'DETAILED VIEW' and 'COMPARISON VIEW', with 'Rank + Lowest' highlighted in a callout box. Below the tabs, the title reads 'RFP from ACME in relation to Project Star - RL'. The main content area shows two cards. The first card is for 'Bye & Kalmus' with a 'Price ranking #3 of 3' label and a 'VIEW PROPOSAL' button. The second card is for a competitor with a 'Price ranking #1 of 3' label and a 'REVISE PROPOSAL' button. At the bottom, a 'Total price' section displays '\$305,000 AUD' and '\$380,000 AUD' with 'Fixed Fee | AUD' and 'Last bid' information.



This screenshot shows the 'Rank + All Bids' auction settings interface. At the top, there are tabs for 'DETAILED VIEW' and 'COMPARISON VIEW', with 'Rank + All Bids' highlighted in a callout box. Below the tabs, the title reads 'RFP from ACME in relation to Project Star - RF'. The main content area shows three cards. The first card is for 'Bye & Kalmus' with a 'Price ranking #3 of 3' label and 'VIEW PROPOSAL' and 'REVISE PROPOSAL' buttons. The other two cards are for competitor firms with 'Price ranking #1 of 3' and 'Price ranking #2 of 3' labels. At the bottom, a 'Total price' section displays '\$305,000 AUD', '\$320,000 AUD', and '\$360,000 AUD' with 'Fixed Fee | AUD' and 'Last bid' information.

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.

Messages		EXPORT	×
	INTERNAL CHANNEL Allen & Ferro		
	EXTERNAL CHANNEL ACME Inc.		