P E R S U I T ™

Session 1: Templates

PERSUIT POWER USER
CERTIFIED

Today's Agenda

- What is a Template Library?
- How to access Templates?
- Who can create Templates?
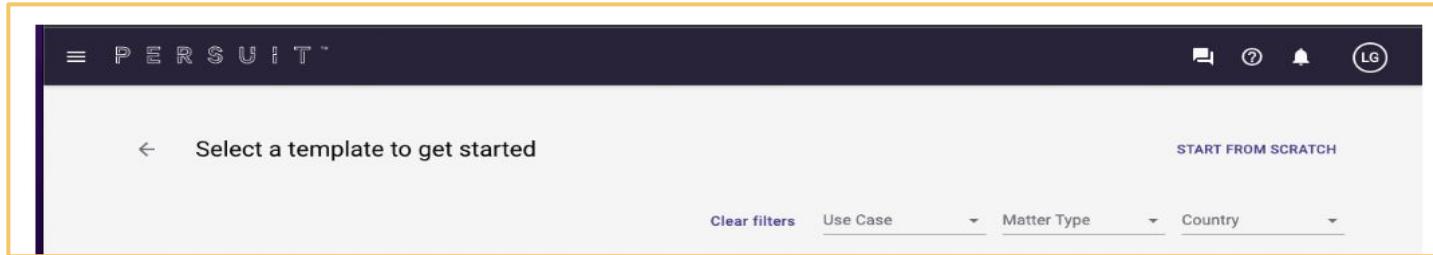- Overview of PERSUIT Templates

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What is a Template Library?

Template Library

PERSUIT TEMPLATES

PERSUIT offers **more than 80 global and country-specific templates** for all legal practice areas that are easily customizable.

CLIENT TEMPLATES

Clients are able to build their **own Template Library** on the platform. Client Templates shall be available to all Client users.

The template library has tags to help users quickly filter and choose the most applicable template they need. You can sort on the template library by use case, matter type, or country.
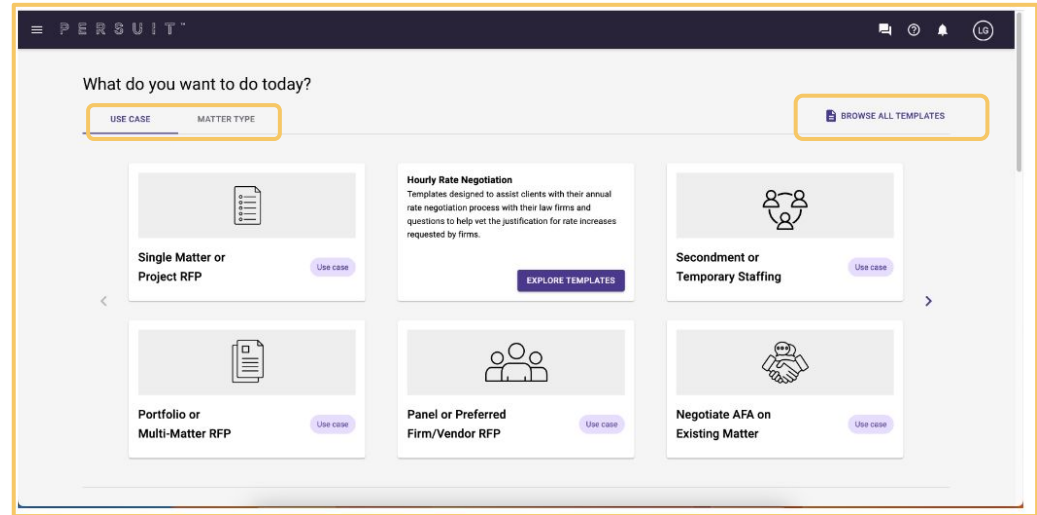
How to access Templates?

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PERSUIT Homepage

Homepage surfaces multiple **use cases** and **matter types** to serve as jumping off points into request workflows.

Once you pick a relevant use case or matter type, your **Company templates will be displayed first** in the list.
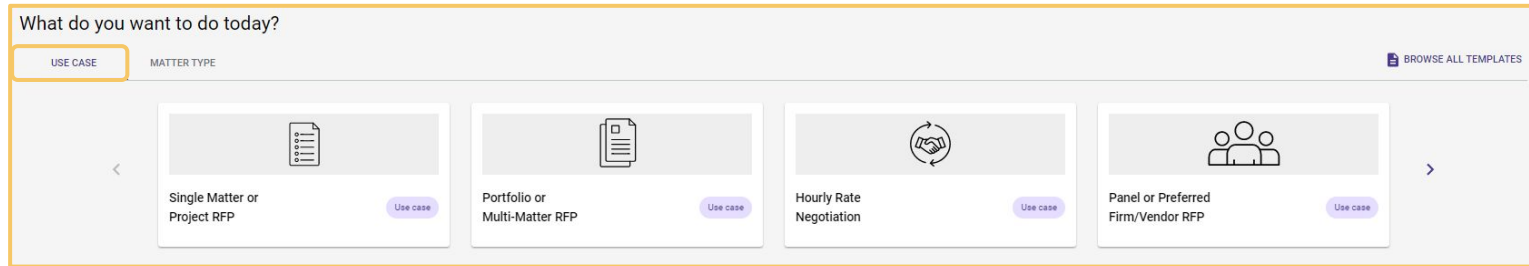
PERSUIT templates are next in the list. And the sort order is alphabetical within that batch of results.

Alternatively, you can access all templates by clicking on **"Browse All Templates"** at the top right corner.

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Use Cases

The use cases will appear on the main dashboard once you login. **Each use case will take you right to purpose-built templates** that you can use, or you can create your own.

What do you want to do today?

| USE CASE | MATTER TYPE | | | BROWSE ALL TEMPLATES |

Single Matter or Project RFP — Use case

Portfolio or Multi-Matter RFP — Use case

Hourly Rate Negotiation — Use case

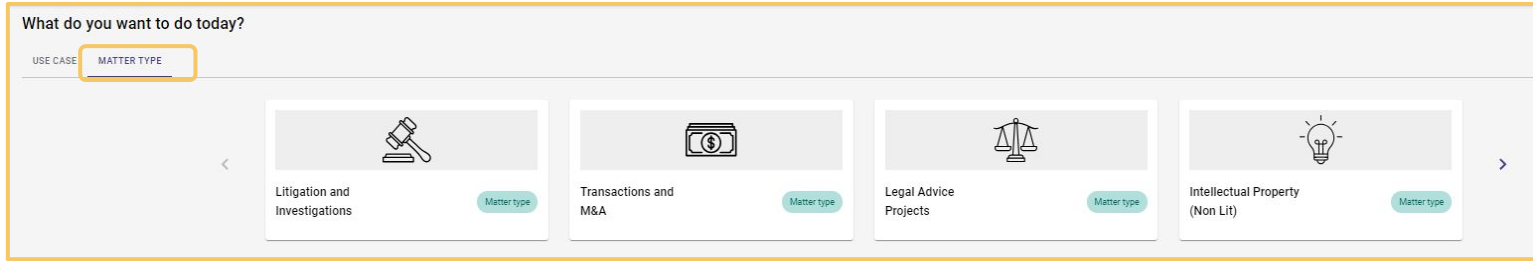Panel or Preferred Firm/Vendor RFP — Use case

The **use cases available** are as follows:

- Single Matter or Project RFP
- Portfolio-Matter RFP
- Hourly Rate Negotiation
- Panel or Preferred Firm/Vendor RFP

- Secondment or Temporary Staffing
- Negotiate AFA on Existing Matter
- RFI or Survey
- ...or start from scratch!

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Matter Types

The matter types will appear on the main dashboard just to the right from use cases. **Each matter type will take you right to purpose-built templates** that you can use, or you can create your own.

The **matter types available** are as follows:

- Litigation and Investigations
- Transactions and M&A
- Legal Advice Projects
- Intellectual Property (Non Lit)
- Regulatory Services (Non Dispute)

- Finance and Bankruptcy Practise
- Consulting, Tax and Accounting
- IT Services & SaaS
- Marketing and Advertising Services
- …or start from scratch!

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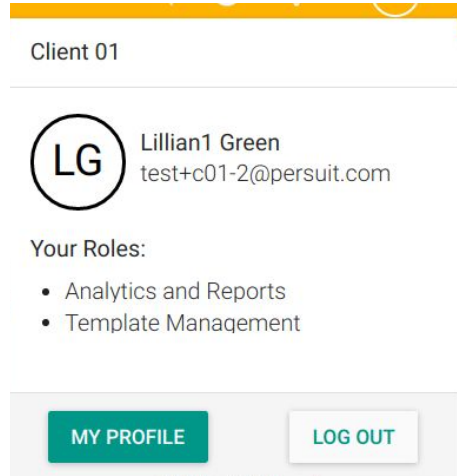# Who can create Templates?

Template Managers

Client users can be given this new "**template-manager**" role.

Only users with this role can:

- See the "Templates" item in the navigation menu of their dashboard;
- Edit organization templates;
- Create templates (including creating a template from an RFP);
- Publish and unpublish templates (more on this below);
- Copy templates.

To see whether you are a template manager, hover over your profile icon in the top right corner of the dashboard and your permissions will appear under Your Roles.

Let the PERSUIT team know if you or anyone in your organization should be upgraded to Template Manager.

Client 01

LG   Lillian1 Green
     test+c01-2@persuit.com

Your Roles:
- Analytics and Reports
- Template Management

MY PROFILE   LOG OUT

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Overview of PERSUIT Templates

PERSUIT Templates

Practice Areas	Topic	Location
Any	• Panel RFP • Rate Review • Ad Hoc Services • Hourly Rates • Legal/Commercial Advice • RFI • Court Reporting • Secondment • Diversity RFI	• Global • Global • Global • Global • Global (eng, fr, de) • Global • Global • Global • USA
Corporate	• Corporate Governance	• Global
eDiscovery	• Portfolio of Vendors	• Global
Employment	• Immigration Services • Employee Labor Relations • Position Statements	• USA • USA, FR, DE • Global

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General Advice	• Contract Review	• Global
IP	• Patent and Trademarks	• Global, Europe (fr, de)
IT	• Software/CLM	• Global
Litigation	• General Litigation • ANDA • Antitrust (defense, plaintiff) • AG/DOJ • Employment • FINRA • SEC Subpoenas or Investigations • International Arbitration • Patent • Writ of Certiorari • Products Liability	• USA, AU, UK, CA,BR, SG, FR, DE • USA • USA • USA • USA • USA • USA • Global • USA • USA • USA
Management Consulting	• General	• Global

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Management Consulting	• General	• Global
M&A	• General • Acquisition • Buy-Side Deal • Sell-Side Deal	• Global • Global (eng, fr, de) • Global, USA • Global, USA
Regulatory	• FERC Complaint • Charitable Foundation Investigation • Internal Investigations/Investigations	• USA • USA • Global
Transactions	• Joint Venture/Investment • Financing Projects	• Global • Global

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