

P E R S U I T TM



Session 6: Editing & Revising an RFP

PERSUITTM

Today's Agenda

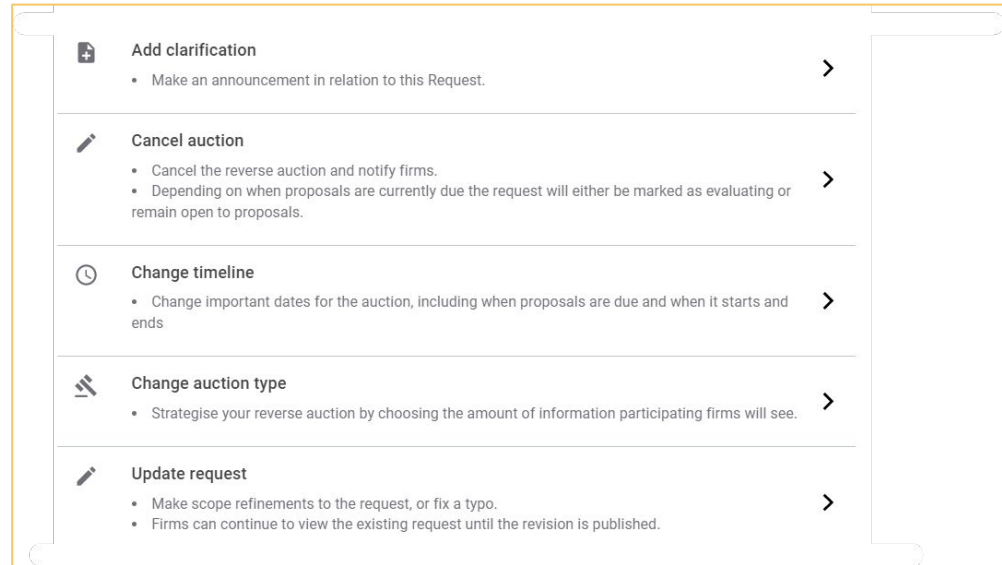
- 5 Ways to Edit an RFP
- Communicating with Firms on PERSUIT

Can I edit an RFP Request?

Editing Options

There are 5 ways to implement changes to your RFP once it has been sent to the firms

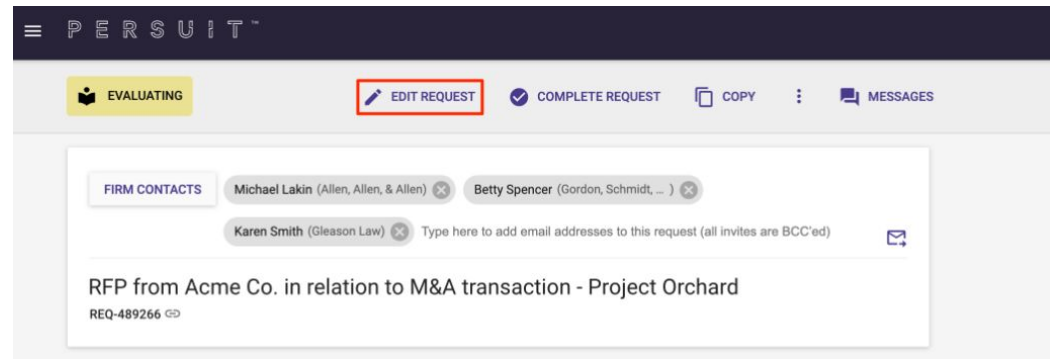
1. Add Clarification
2. Cancel Auction
3. Change Timeline
4. Change Auction Type
5. Update Request



Option 1: Add Clarification

The PERSUIT platform's [ADD CLARIFICATION](#) feature gives you the ability to send information to all firms in one communication

Step 1: Click on Edit Request found at the top navigation



Option 1: Add Clarification

Step 2: Click on Add Clarification in the Edit Request pop-up



Edit request

The screenshot shows the 'Edit request' interface with a progress bar at the top indicating three steps: 1. Select an action, 2. Action options, and 3. Review and confirm. Below the progress bar is a list of actions:

- Add clarification** (highlighted with a red box)
 - Make an announcement in relation to this Request.
- Cancel auction**
 - Cancel the reverse auction and notify firms.
 - Depending on when proposals are currently due the request will either be marked as evaluating or remain open to proposals.
- Change timeline**
 - Change important dates for the auction, including when proposals are due and when it starts and ends.
- Change auction type**
 - Strategise your reverse auction by choosing the amount of information participating firms will see.
- Update request**
 - Make scope refinements to the request, or fix a typo.
 - Firms can continue to view the existing request until the revision is published.

Option 1: Add Clarification

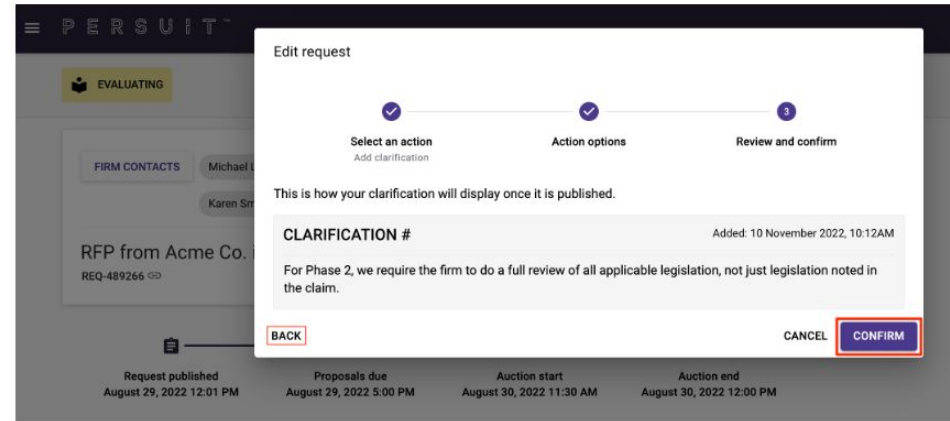
Step 3: In the next screen, type out the Clarification to be issued and then press Next



The screenshot shows the 'Edit request' modal in the PERSUIT system. The modal is titled 'Edit request' and has a progress bar at the top with three steps: 'Select an action' (completed), 'Action options' (current step), and 'Review and confirm'. Under 'Action options', there is a sub-section 'Add clarification'. Below this, there is a text area with a rich text editor toolbar. The text entered in the field is: 'For Phase 2, we require the firm to do a full review of all applicable legislation, not just legislation noted in the claim'. At the bottom of the modal, there are buttons for 'BACK', 'CANCEL', and 'NEXT'. The 'NEXT' button is highlighted with a red box. The background shows a list of RFPs, with 'RFP from Acme Co. REQ-489266' selected.

Option 1: Add Clarification

Step 4: You can then review your Clarification and either 'go back' to edit the message or press Confirm to post the Clarification



Option 1: Add Clarification

In the Matter section, you and the invited respondents can find all Clarifications in sequential order:



The screenshot shows the PER SUIT interface for a request titled "RFP from Acme Co. in relation to M&A transaction - Project Orchard" (REQ-489266). The status is "EVALUATING". The interface includes buttons for "EDIT REQUEST", "COMPLETE REQUEST", "COPY", and "MESSAGES". A section titled "CONFLICT CHECK / T&CS / NDA PREVIEW" contains a note: "This is what the invited firms will see once they've cleared conflicts and/or accepted terms and/or signed an NDA". Below this is "CLARIFICATION #1" (System) added on 30 August 2022, 9:21AM, titled "Auction settings have been updated". A table compares original and new auction settings:

| | ORIGINAL | NEW |
|----------------------------|--------------------------|--------------------------|
| Auction Start date changed | 30 August 2022, 10:00 AM | 30 August 2022, 11:30 AM |
| Auction End date changed | 30 August 2022, 10:30 AM | 30 August 2022, 12:00 PM |

Below the table are "CLARIFICATION #2" (added 10 November 2022, 10:12AM) and "CLARIFICATION #3" (added 10 November 2022, 10:14AM). Red arrows point to these two clarifications.

Option 2: Cancel Auction

The PERSUIT platform will not allow you to adjust the auction timeline or cancel the auction once it has begun, so any changes must happen before its start

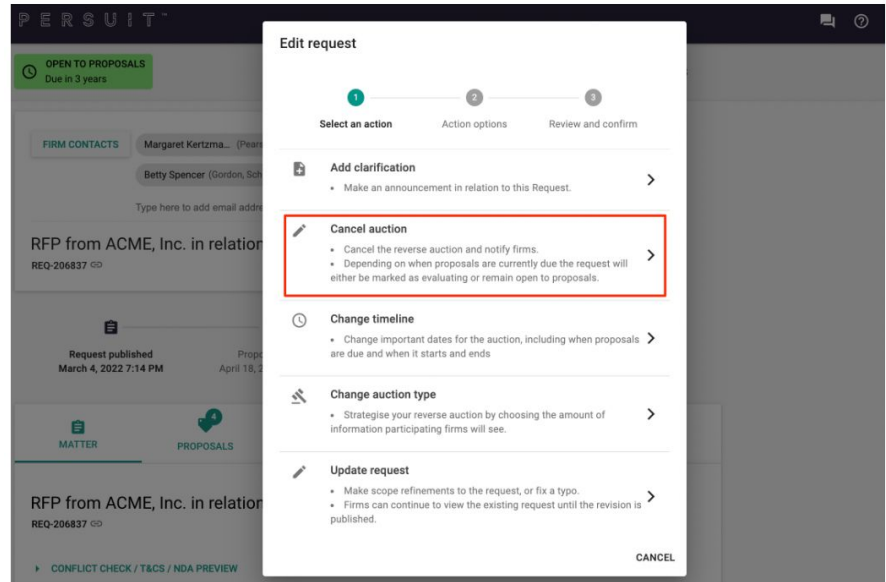
Step 1: Click on Edit Request found at the top navigation



The screenshot shows the PERSUIT platform interface. At the top, the logo 'PERSUIT' is visible. Below it, there is a navigation bar with several options: 'OPEN TO PROPOSALS Due in 3 years', 'SHARE (26)', 'EDIT REQUEST' (highlighted with a red box), 'COPY', and 'MESSAGES'. Below the navigation bar, there is a section for 'FIRM CONTACTS' with a list of names and roles: Margaret Kertzma... (Pearson Hardman), Thomas Kuhic (Litt Wheeler Willia...), Betty Spencer (Gordon, Schmidt, ...), and Christopher Mitchell (Bye & Kalmus). There is also a '+ 4 MORE' link. Below the list, there is a text input field with the placeholder 'Type here to add email addresses to this request (all invites are BCC'ed)'. At the bottom, the title of the request is 'RFP from ACME, Inc. in relation to Patent Filings, Prosecutions, Office Actions' with the ID 'REQ-206837'.

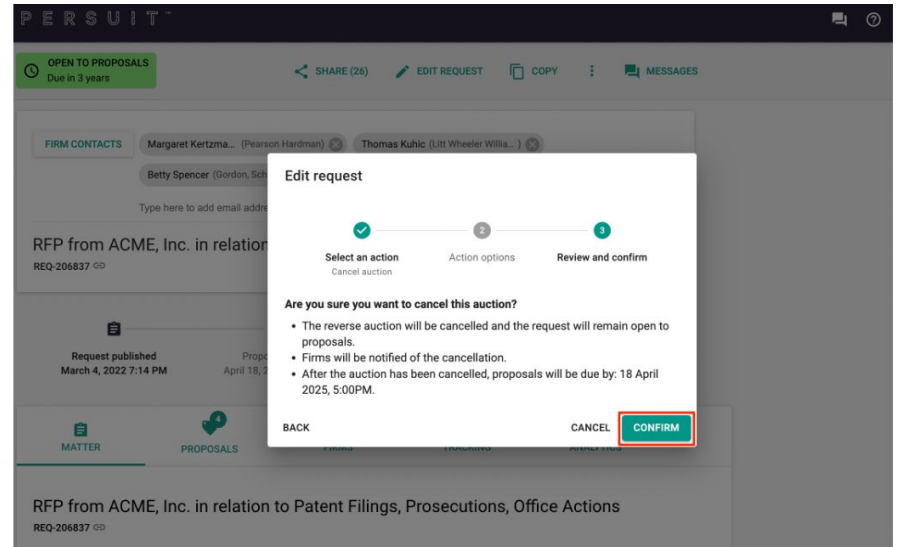
Option 2: Cancel Auction

Step 2: The Edit Request pop-up will expand and you will find the option to Cancel Auction



Option 2: Cancel Auction

Step 3: Once you select this option, you can review the decision to cancel and select Confirm to finalize the process

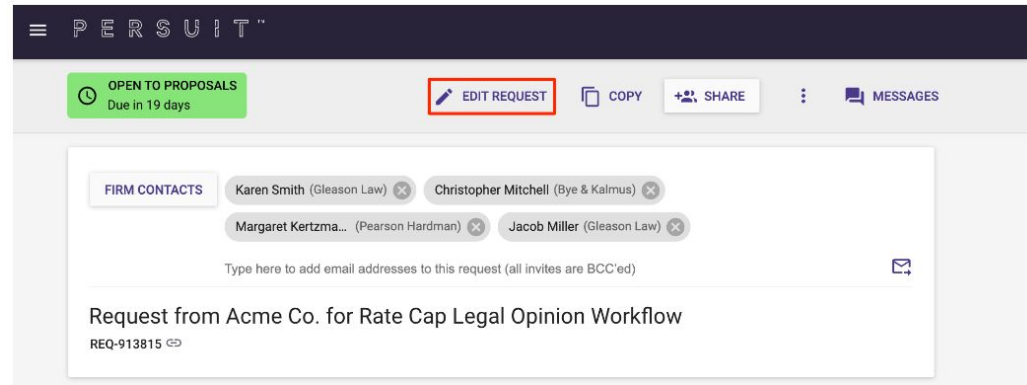


All participating Firms will be notified of the auction cancellation by email and a system generated clarification will be published in the matter section.

Option 3: Change Timeline

Whether you want to adjust the amount of time Firms have to submit their proposals or reschedule the Reverse Auction, changes to a RFP timeline can be made easily in the PERSUIT platform even after the Request has been published

Step 1: Click on Edit Request found at the top navigation



Option 3: Change Timeline

Step 2: When the Edit Request pop-up expands, you will find the option to Change Timeline



The screenshot shows the 'Edit request' pop-up in the PER SUIT system. The pop-up is titled 'Edit request' and has a progress bar at the top with three steps: 1. Select an action, 2. Action options, and 3. Review and confirm. The 'Select an action' step is currently active. Below the progress bar, there are several options listed with right-pointing chevrons:

- Add clarification**
 - Make an announcement in relation to this Request.
- Cancel auction**
 - Cancel the reverse auction and notify firms.
 - Depending on when proposals are currently due the request will either be marked as evaluating or remain open to proposals.
- Change timeline** (highlighted with a red box)
 - Change important dates for the auction, including when proposals are due and when it starts and ends
- Change auction type**
 - Strategise your reverse auction by choosing the amount of information participating firms will see.
- Update request**
 - Make scope refinements to the request, or fix a typo.
 - Firms can continue to view the existing request until the revision is published.

A 'CANCEL' button is located at the bottom right of the pop-up. The background shows a blurred view of the main interface with a green 'OPEN TO PROPOSALS' button and a 'Request from Acme' card.

Option 3: Change Timeline

Step 3: After choosing the Change Timeline option, you will be able to change the Timezone, Proposals Due Date, Auction Start Date and Auction End Date of the RFP within a centralized location. When you've finished making changes, click Next.



PER SUIT

OPEN TO PROPOSALS
Due in 19 days

FIRM CONTACTS Karen S
Margan

Type here

Request from Acme
REQ-913815

Request published
November 16, 2022 4:54 PM

MATTER PROPOSALS FIRMS TRACKING ANALYTICS

Edit request

1 Select an action
Change timeline

2 Action options

3 Review and confirm

Timezone*
USA Eastern Time

Proposals due date
2022/12/15 04:00 PM (EST)

Auction start date
2023/01/09 02:00 PM (EST)

Auction end date
2023/01/09 02:30 PM (EST)

BACK CANCEL NEXT

Option 3: Change Timeline

Step 4: You can review the changes you've made before clicking Confirm to move onto the Review and Confirm screen to finalize the process



The screenshot shows the 'Edit request' screen in the PERSUIT application. The screen is divided into three steps: 1. Select an action (Change timeline), 2. Action options, and 3. Review and confirm. The 'Review and confirm' step is currently active. A confirmation message states: 'The following clarification will be issued once you have confirmed your changes:'. Below this, a table shows the updated auction settings. The table has three columns: 'CLARIFICATION #', 'ORIGINAL', and 'NEW'. The first row is for 'Proposals Due date changed', the second for 'Auction Start date changed', and the third for 'Auction End date changed'. At the bottom of the screen, there are three buttons: 'BACK', 'CANCEL', and 'CONFIRM'. The 'CONFIRM' button is highlighted with a red border.

| CLARIFICATION # | ORIGINAL | NEW |
|----------------------------|---------------------------|---------------------------|
| System | | |
| Proposals Due date changed | 16 December 2022, 4:00 PM | 15 December 2022, 4:00 PM |
| Auction Start date changed | 9 January 2023, 1:30 PM | 9 January 2023, 2:00 PM |
| Auction End date changed | 9 January 2023, 2:00 PM | 9 January 2023, 2:30 PM |

Option 3: Change Timeline

Once the clarification has been sent, Firms will receive an automatic email notification alerting them of the timeline change. Everyone can then view the clarification which can be found at the top of the RFP:



The screenshot displays the PER SUIT™ interface for a Request for Proposal (RFP). At the top, a green banner indicates "OPEN TO PROPOSALS Due in 18 days". Below this, a timeline shows key dates: Request published (November 16, 2022 4:54 PM), Proposals due (December 15, 2022 4:00 PM), Auction start (January 9, 2023 2:00 PM), and Auction end (January 9, 2023 2:30 PM). The main navigation bar includes tabs for MATTER, PROPOSALS (with a notification badge), FIRMS, TRACKING, and ANALYTICS. The current view is for a "Request from Acme Co. for Rate Cap Legal Opinion Workflow" (REQ-913815). A red arrow points to a "CLARIFICATION #1" message from the system, dated November 28, 2022, at 12:13 PM. The message states "Auction settings have been updated" and provides a table of changes.

| | ORIGINAL | NEW |
|----------------------------|---------------------------|---------------------------|
| Proposals Due date changed | 16 December 2022, 4:00 PM | 15 December 2022, 4:00 PM |
| Auction Start date changed | 9 January 2023, 1:30 PM | 9 January 2023, 2:00 PM |
| Auction End date changed | 9 January 2023, 2:00 PM | 9 January 2023, 2:30 PM |

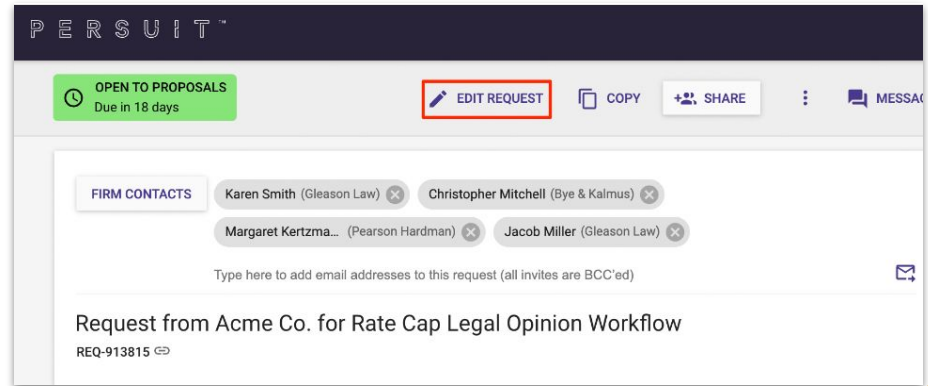
Option 4: Change Auction Type

PERSUIT offers three different Auction Types to help you strategize and best position yourself for success:

- Rank
- Rank and the Lowest Bid
- Rank and All Bids

Our platform allows you to change the Auction Type even after a Request has been published

Step 1: Click on Edit Request found at the top navigation



Option 4: Change Auction Type

Step 2: When the Edit Request pop-up expands, you will find the option to change Auction Type



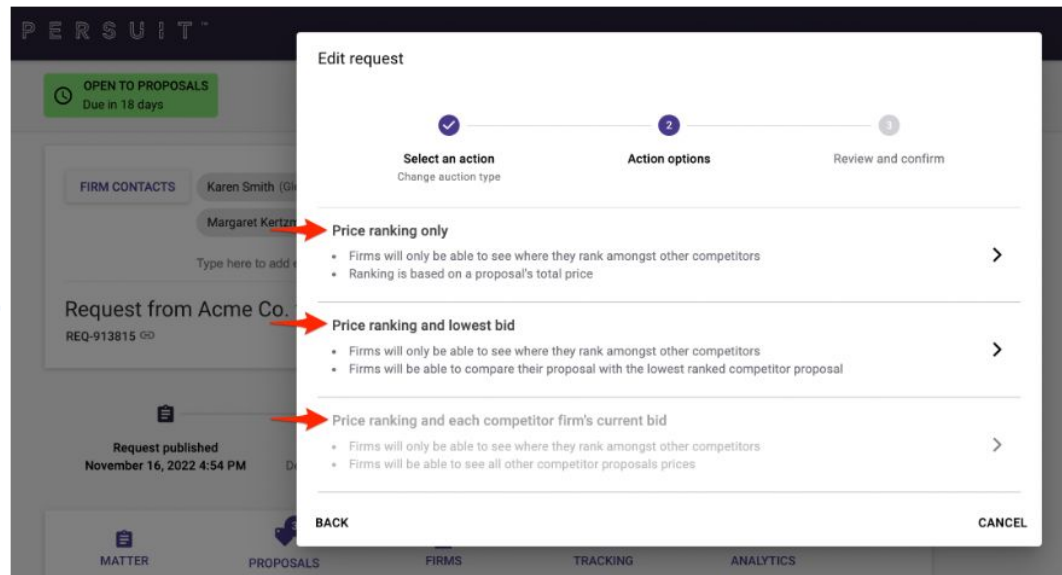
The screenshot shows the PERSUIT interface with an 'Edit request' pop-up. The pop-up has a progress bar with three steps: 1. Select an action, 2. Action options, and 3. Review and confirm. The 'Select an action' step is active. The list of actions includes:

- Add clarification**: Make an announcement in relation to this Request.
- Cancel auction**: Cancel the reverse auction and notify firms. Depending on when proposals are currently due the request will either be marked as evaluating or remain open to proposals.
- Change timeline**: Change important dates for the auction, including when proposals are due and when it starts and ends.
- Change auction type**: Strategise your reverse auction by choosing the amount of information participating firms will see. (This option is highlighted with a red box.)
- Update request**: Make scope refinements to the request, or fix a typo. Firms can continue to view the existing request until the revision is published.

A 'CANCEL' button is located at the bottom right of the pop-up. The background shows a request from Acme Co. (REQ-913815) published on November 16, 2022, at 4:54 PM, with a status of 'OPEN TO PROPOSALS' due in 18 days.

Option 4: Change Auction Type

Step 3: After choosing the Change Auction Type option, you will be able to choose between our three auction types. The option that is grayed out is the current designated Auction type.

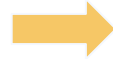


When you've made a selection, you will be taken to a Review and Confirm screen to finalize the process.

Option 5: Update Request

In order to add a pricing item or question after your RFP has been sent, you will need to update it

Step 1: Click on Edit Request found at the top navigation



The screenshot displays the top navigation bar of an RFP interface. The status is 'EVALUATING' with 'Firm selected' below it. Navigation options include 'SHARE (33)', 'EDIT REQUEST' (highlighted with a red box), 'COMPLETE REQUEST', and 'MESSAGES'. Below the navigation bar, the 'FIRM CONTACTS' section lists several contacts: Michael Lakin (Allen, Allen, & Allen), Karen Smith (Gleason Law), Margaret Abbott (Smitham & Walker...), and Thomas Kuhic (Litt Wheeler Willia...). There is a '+ 4 MORE' link and a text input field for adding email addresses. The main content area shows the title 'RFP for Commercial Litigation Matter' and the ID 'REQ-334408'.

Option 5: Update Request

Step 3: You'll be able to add a pricing item or a question



The screenshot shows a software interface for managing pricing. At the top, there is a header with a dollar sign icon and the word "Pricing". Below this, the "Total Price" section contains a checkbox labeled "Request total price" which is checked, and a dropdown menu currently set to "Fixed Fee". To the right of the dropdown is a checkbox labeled "Allow other pricing models" which is also checked. Below the "Total Price" section is the "Instructions and assumptions" section, which contains a sub-section titled "Pricing Instructions" with two paragraphs of text. At the bottom of the "Instructions and assumptions" section is a button labeled "+ ADD ITEM". Below the "Instructions and assumptions" section is a section titled "Questions" with a button labeled "+ ADD QUESTION".

Option 5: Update Request

Step 4: Add instructions to the top of the Update Request form before clicking "Send Update"

A screenshot of a software interface for an 'Update Request'. At the top, there is a navigation bar with buttons for 'SAVE', 'PREVIEW', 'DISCARD DRAFT', 'SEND UPDATE', and 'MESSAGES'. The 'SEND UPDATE' button is highlighted with a red box. Below the navigation bar, the title 'Update Request' is displayed. The main content area contains a section titled 'Update instructions for firms' with a sub-header 'Update instructions for firms' and a paragraph: 'Please provide instructions to your firms on any details that have been updated in this Request. A guideline has been provided for you.' Below this is a blue link labeled 'EXAMPLE'. A rich text editor toolbar is visible, showing options for Paragraph, Bold (B), Italic (I), Underline (U), and other formatting tools. The text area below the toolbar contains the instruction: 'Please provide pricing for the additional item. Thank you!'.

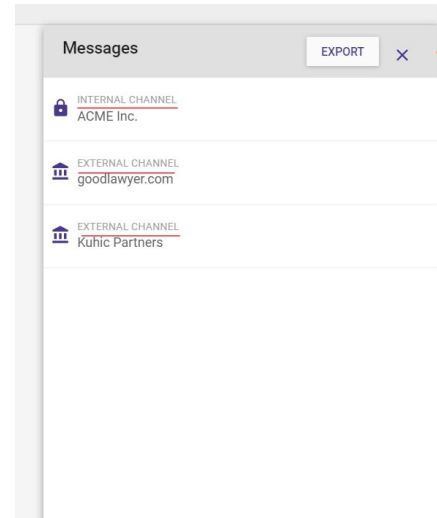
How can I communicate with the Firms?

Messages Channel

Use the [Messages feature](#) in PERSUIT for real time messaging:



- **External Channel:** allows you to communicate with people in a firm who can access the RFP
- **Internal Channel:** communication with your colleagues on each Request



You can export messages for your internal records