Superside

CHECKLIST

What To Include in a Graphic Design RFP

While templates vary, the core information within graphic design RFPs remains the same. This checklist (with examples) helps you issue a strong RFP—so you can find an equally strong creative partner.

COMPANY OVERVIEW

Introduce and describe your company, including your mission, industry and the purpose (high-level reasoning behind) the RFP. This helps the respondents understand the context and your brand identity.

To encourage participants to learn more about your brand, include links to your website, brand guidelines, etc.

SCOPE OF WORK (SOW)

This is the direct "ask" of the RFP. Be as clear and specific about the work, expectations and requirements as possible.

Clarify if you're looking for a short- or long-term partnership, limited or ongoing project, single or range of creative services, etc.

GOALS & OBJECTIVES

While this will vary by the project and intent of the RFP, list your primary goals and objectives. (Example below)

- Brand awareness—5% increase
- Click thrus—2% or above
- Conversions—2% to 10% (varies by channel)

MARKETS & AUDIENCES

Include key market and audience information, including locations and segments as well as profiles and personas. (Example below)
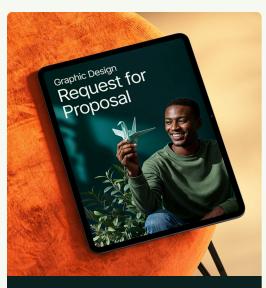
- Primary market: Enterprise tech companies in the United States
- Primary audience: CMOs and ECDs leading-in house teams

Link to relevant research, data and profiles.

CREATIVE SERVICES

Define the types of creative services you're looking for, including the priority (primary, secondary, optional) and scope (strategy, concept, production). The more detail you give, the better. (Example below)

- Primary: Video—strategy, concept, production
- Secondary: Ad creative—concept, production
- Optional: Copywriting—concept

TIPS

1. Before you write—Identify stakeholders and the information you need to collect for creating the RFP.
2. Make the information detailed but scannable.
3. Make a shared document or internal file that contains your repeatable/evergreen RFP information.

GENERATIVE AI

As generative AI advances, clarify your company's perspective on its use in creative workflows by sharing your:

- Comfort and experience level
- Preferred tools and workflows
- Interest in emerging applications
- Level of customization
- AI restrictions

DELIVERABLES & CHANNELS

List all the main deliverables and channels. (Example below)

- Static and video social media ads
- Instagram, LinkedIn and Reddit

PROJECT/PARTNERSHIP TIMELINE

- Project/partnership length
- Kickoff
- Milestones
- Delivery dates

BUDGET

- Total or range
- Payment terms
- Payment methods

Provide an overview of the timeline for the RFP process.

- Kickoff
- Submissions due
- Vendor selection

EVALUATION CRITERIA

Share the primary ways you'll be comparing vendors and their proposals. Be specific and indicate which criteria carry the most weight. Give an overview of an ideal vendor and go into further detail calling out key qualities or differentiators. (Example below)

Key Qualities
In addition to the strength of their response and quality of their creative work, ideal vendors must also demonstrate the following: (All four qualities will be equally weighted.)

- **Return on Investment (ROI).** Offering efficient, cost-effective services and a desire to continually add value to the relationship.

- **Collaboration & Communication.** A commitment to and ability to support collaboration and communication. Including productivity apps and design software.

- **Use of Innovation.** Ability to think creatively and integrate the latest design trends, like sustainable design or generative AI integration.

- **Diversity & Inclusion.** State clearly if and how your company may require specific DEI elements in proposals, presentations and representation with your business partners.

> **TIP**
>
> As you'll be scoring or ranking vendor responses, be sure to call out and consider the most important criteria while writing your RFP.

Share openly how you'd like participants to submit their proposals. Outline mandatory business information and submission requirements, including:

Proposal Format & Submission Details

- Presentation deck—file sizes and formats
- Submit via e-mail, portal, etc.

Vendor Information

- Company name
- Business address
- Date of establishment
- Business registration
- Proof of financial position
- Payment terms and methods
- Other business information relevant to the specific RFP ask

Team & Resourcing

- Company structure
- Team and talent location(s)
- Onboarding process
- Project management and talent allocation
- Primary design software and tools
- Capacity

Quality & Service

- Number of referrals required and format
- Industry experience
- The dedicated resources provided
- Communication and reporting processes
- Technology used to support quality & service
- Standard service level agreement (SLA)

Legal & Compliance

- Data & security
- Environmental, social & governance
- Any AI-related documentation
- Non-disclosure agreements

"What Else" │ "How We're Different"

- Provide space for partners to call out key insights or reasons why they should be considered.

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creative team™