

Agency Request for Proposal (RFP) Template

Instructions: Copy and paste this into a document. Replace [Bracketed Text] with your specific details.

Request for Proposal: [Project Name]

Company: [Your Company Name]

Date: [Date]

Proposal Deadline: [Date] at [Time]

Send to: [Contact Name] at [Email Address]

1. Executive Summary

[Briefly describe your company, the project, and the primary goal. Keep it to 1-2 paragraphs. This helps agencies quickly decide if they are a fit.]

Example:

[Company Name] is a B2B SaaS platform serving 500+ enterprise clients. We are seeking a UX agency to redesign our core dashboard to improve user retention and feature adoption. Our goal is to launch a modernized, intuitive v2.0 product by Q3 2024.

2. Company Background

- **What we do:** [Brief description of product/service]
- **Target Audience:** [Who are your users? e.g., "HR Managers at mid-sized tech companies"]
- **Current Situation:** [Describe current state. e.g., "Our current product was built 3 years ago by engineers. It is functional but difficult to learn, leading to high support costs."]
- **Why Now:** [What triggered this project? e.g., "We are raising Series B funding" or "Churn has increased."]

3. Project Objectives & Success Metrics

We are not just looking for a visual refresh. We need to solve specific business problems.

Primary Goals:

1. [Goal 1, e.g., Reduce time-to-value for new users]
2. [Goal 2, e.g., Increase adoption of the reporting feature]
3. [Goal 3, e.g., Modernize visual identity to match enterprise competitors]

Success Metrics (KPIs):

- [Metric 1, e.g., Increase activation rate from 20% to 35%]
- [Metric 2, e.g., Reduce support tickets related to "usability" by 25%]
- [Metric 3, e.g., Improve NPS from 30 to 50]

4. Scope of Work

We expect the engagement to cover the following phases. Please confirm if you recommend adjusting this scope.

Phase 1: Discovery & Research

- Audit of existing product
- Stakeholder interviews ([Number])
- User research/interviews ([Number])
- Competitive analysis

Phase 2: UX Strategy & Design

- Information Architecture / User Flows
- Wireframes (approx. [Number] screens/flows)
- Interactive Prototypes

Phase 3: UI Design

- High-fidelity visual design
- Design System / Component Library creation
- Responsive adaptations (Mobile/Tablet/Desktop)

Phase 4: Handoff & Support

- Developer documentation and specs
- QA support during implementation

Out of Scope:

- [List things NOT included, e.g., "Copywriting," "Logo Design," "Front-end Development"]

5. Technical & Constraint Requirements

- **Platform:** [e.g., Web App, iOS, Android]
- **Technology Stack:** [e.g., React, Vue, WordPress]
- **Design Tools:** We prefer files in [Figma/Sketch/Adobe XD].
- **Compliance:** Must adhere to [GDPR / WCAG AA Accessibility / HIPAA].
- **Language:** Project must be conducted in [English/German/French].

6. Budget & Timeline

Budget Range: [e.g., €40,000 – €60,000]

Transparency note: We are sharing our realistic budget to save everyone time. Please propose the best solution that fits within this range. If a viable solution requires more, please explain why.

Target Timeline:

- **Kickoff:** [Date]
- **Design Complete:** [Date]
- **Launch:** [Date]

7. Proposal Requirements

Please submit your proposal in PDF format, including:

1. **Agency Overview:** Who you are and your USP.
2. **Relevant Experience:** 2-3 case studies of similar projects (include outcomes).
3. **Proposed Approach:** How you would tackle our specific challenge.
4. **Project Plan:** Rough timeline and phases.
5. **Team:** Bios of the specific people who would work on this.
6. **Pricing:** Detailed breakdown of costs (fixed fee or time & materials).

8. Selection Criteria

We will evaluate proposals based on:

- Understanding of our business goals (25%)
- Relevance of past work (20%)
- Proposed methodology (20%)
- Team expertise (20%)
- Price and value (15%)

9. Submission Process

- **Questions Due:** [Date] (Send to [Email])
- **Answers Shared:** [Date]
- **Proposal Deadline:** [Date] at [Time]

We look forward to reviewing your proposal.