

Free template · Professional services firms

Rebrand request for proposal

A fill-in brief for inviting agencies to quote on a rebrand. Every agency answers the same questions against the same scope, so the proposals you get back can be compared like for like.

How to use it

Complete sections 1–6 before you contact anyone. Send sections 1–8 to each agency you invite, and keep section 9 to score the replies.

Prefer to type it?

The free Rebrand Brief Builder covers sections 1–5 online and produces a brief you can copy or download: inkbotdesign.com/resources/brand-brief-builder/

1 About the firm

Enough for an agency to understand who you are without a call.

Firm name, and any trading names

Sector and specialisms

e.g. Commercial law firm: corporate, property and employment for owner-managed businesses

Size, offices and markets

What the firm does, in one sentence, as you would say it to a client

2 Why we are rebranding

The commercial problem, not the design one. Agencies quote better when they know what is at stake.

- ☐ Losing work on price ☐ Merger or acquisition ☐ Name change ☐ New service or market
☐ The brand looks dated ☐ Growth or succession ☐ Inconsistent materials

What isn't working, with specific examples

A pitch you lost, something a client said, a document you avoid sending

3 Objectives and how we will measure them

Objective

How we will measure it

By when

4 Clients and competitors

Our ideal clients: sector, size and the person who chooses us

The firms we are most often compared with

Why clients choose us today, in their words

5 What stays, what changes, what to avoid

Must stay: a name, colour, phrase or anything clients recognise us by

Already ruled out, and why

Brands we admire, in any sector, and what we admire about each

6 Scope of work

Tick what the proposal should cover. Anything unticked can be quoted as an option.

- ☐ Research and discovery
Partner and client interviews, competitor review
- ☐ Positioning and messaging
The argument for choosing the firm, key messages, tone of voice
- ☐ Naming
New name development and preliminary screening. Formal trademark clearance is usually handled by your solicitor or trademark attorney.
- ☐ Logo and visual identity
Logo system, colour, typography, imagery direction
- ☐ Brand guidelines
A working guide your team and suppliers can follow
- ☐ Website
State the number of pages, who writes the content and any integrations
- ☐ Proposal, pitch and document templates
- ☐ Signage and print design
Design only; production is usually quoted separately
- ☐ Launch and rollout support
Internal launch, client announcement, directory and profile updates

7 Budget, timing and decision

Budget range for professional fees

Ideal completion date, and any fixed deadline

Who makes the final decision

Who the agency will work with day to day

8 What we need in your proposal

Please answer in this order, in no more than ten pages.

- ☐ Your understanding of our problem, in your own words
- ☐ Your approach and the stages of the project
- ☐ Who will do the work, and how much of it the senior people will do themselves
- ☐ Two or three relevant projects, ideally for professional services firms

- ☐ A fixed fee for the scope in section 6, broken down by stage, with options priced separately
- ☐ What is not included, and any assumptions behind the fee
- ☐ A timeline with the decisions you will need from us, and when
- ☐ Two client references we may contact

Timetable

Date

RFP issued

Deadline for questions

Proposals due

Shortlist meetings

Decision

Send proposals and questions to

9 Scoring the proposals (keep this page internal)

Agree the weightings before the proposals arrive, so the decision isn't made on presentation alone. Score each agency 1–5 per criterion; multiply by the weight.

Criterion	Weight	Agency A	Agency B	Agency C
Understanding of our commercial problem	25%			
Relevant experience with firms like ours	20%			
Approach and process	20%			
The people doing the work	15%			
Fee, clarity of scope and value	15%			
References	5%			
Weighted total	100%			

Want a proposal from us?

Send the completed RFP to hello@inkbotdesign.com. Or start with the free Brand Equity Audit™: a three-page written diagnostic of your brand, typically within two working days, with no sales call. inkbotdesign.com/services/brand-audits/