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Proposal Template

AGDA Proposal Template

This template can be used as a basis for creating a proposal document when responding to a client's brief, request for quotation or request for proposal.

Once shortlisted, designers may be invited to 'pitch', which could include an in-person meeting or expanded materials like team introductions, case studies, or a perspective on the brief.

AGDA does not support pitching strategic or creative solutions.

Contents

To: *Addressee*

For: *Client name*

The project

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The Project

Project summary

Summarise the project based on the client brief, highlighting their needs, any challenges and objectives.

Example: *"The client is seeking to rebrand their retail space, aligning their visual identity with a more contemporary, eco-conscious market."*

Project goals

Specify the objectives of the design project. Is it focused on rebranding, packaging design, website development, or another deliverable?

Example: *"The primary goal is to create a cohesive brand identity that enhances customer experience."*

Target audience

Detail the demographics and psychographics of the audience the design will resonate with.

Example: *"The target audience is 25-45-year-olds, male skew who live in the inner city who prioritise sustainability and supporting local businesses in their purchasing decisions."*

Scope

Define exactly what services and deliverables are included in the project. This section ensures there's a clear understanding of what the client will receive.

Design Services

Specify which services you'll provide (e.g., logo design, packaging, copywriting).

Deliverables

Create a list of deliverables, including specific file formats and how they will be delivered.

Example: *"Three logo concepts presented in vector format, each with x colour variants."*

File formats & mode of delivery

Be specific about formats (e.g., AI, PDF, etc.) and the mode of delivery (e.g., digital files or printed materials).

Inclusions & extras

Clarify what's included in the scope (e.g., revisions) and any extras that might incur additional costs (e.g., additional design rounds, licensing fees).

Licensing

Detail any software, imagery, or typeface licensing the client needs to be aware of.

Intellectual Property

Specify IP terms, such as whether the design's copyright will transfer to the client upon completion and what usage rights they will have. If you assign copyright, ensure this is reflected in the project fee.

Timeline

Provide an estimated timeline for the project, broken down into phases. Timelines should be flexible but realistic, giving the client an overview of project milestones and deadlines.

Phase 1: Discovery and Research:

Include start and end dates for the research phase.

Phase 2: Design Concepts:

Indicate when the initial designs will be presented.

Phase 3: Revisions:

Estimate when the revision process will begin and end.

Phase 4: Final Delivery:

Provide the expected date for the project's final delivery.

Fee Schedule

Designers should break down costs and outline a payment schedule. Transparency in pricing helps manage expectations and avoid misunderstandings.

Cost Breakdown

Include pricing for each phase or deliverable (e.g., logo design - \$X, packaging - \$Y).

Deposit

Include details about the deposit (e.g., “50% deposit required to start the project”).

Payment Schedule

Structure payment terms (e.g., “25% due upon delivery of initial concepts, 25% due on final delivery”).

Additional Costs

Mention any extra fees that may arise, such as licensing or additional revisions.

Invoice Terms

Set payment terms (e.g., “Invoices are payable within 14 days”).

Make sure to mention GST if you're registered.

About your Studio

In this section, designers can introduce themselves, their values, approach, and expertise to the client. This personal touch helps establish credibility and builds a relationship with the client.

Studio Overview

Describe your studio's background, areas of expertise, and the type of clients you typically work with.

Example: *"We specialise in branding and digital design, helping small to medium-sized businesses enhance their visual identity."*

Values & Approach

Mention the key values that drive your work and how you approach the design process.

Example: *"Our process is highly collaborative, with feedback sessions at key stages of the design process."*

Success Metrics & Testimonials

Include any notable success metrics or client testimonials to reinforce your experience and results. You can also link to your portfolio here.

Terms and Conditions

AGDA Partner, Finn Roache provide specific terms and conditions, tailored to suit your business. Simply get in touch via their website at: www.finns.com.au and quote your AGDA membership number to receive special rates on their services.

Next Steps

Call to Action

Clarify the next steps, whether it's signing the proposal, paying a deposit, or scheduling a meeting.

Example: *"To proceed, please sign the proposal and submit a 50% deposit.
We look forward to working with you!"*

Contact Information

Ensure your contact details are readily available for any questions or next steps.