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DBA Guide to buying design



09 Proposal score sheet

dba

In association with

The Voice
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For use in scoring a response to the brief

Notes on Use

The pro forma is an example and indicative of the sort of scoring sheet that has proved helpful, especially where a project team is seeing a lot of agency responses.

It has been developed in Word so that you can modify it to match what you are looking for and the information requested in the brief sent to the invited agencies (see section 2).

The scoring system is up to you. (It can be out of 5 or out of 10 for instance). You can apply a weighting score if there are elements of the pitch that are more important to you than others.

For a proposal review: The best approach to scoring the documents is to brief the team who will be looking at the responses together but allow them to read and complete the forms in their own time. Set a review meeting date where the individual scores are then discussed, aggregated and agreed upon before deciding who will be approached to deliver the project.

For a creative pitch review: Bear in mind that you will be giving feedback to the unsuccessful agencies and will require as much detail as they can provide for each response to allow you to do this. One of the ways to do this is to use a new sheet as the feedback sheet, aggregating all the comments and the scores in one place ready for feedback.

When preparing for the call back to the agency you can use a modified version of the pitch feedback pro forma in section 7.

Allow for time to give the agency feedback. They will have spent time developing their response and will want to understand where they were strong as well as where they were not. They will want to use this feedback to help improve their performance in future proposals they write.

Client name

Project

Company

Representative

Date / /2013

Subject	Comments	Score
Understanding of the company and its business		
Understanding of the brief		
Approach to the project and meeting objectives	Existing relationship. Pitch brief delivered face to face or by email? RFI. Was there a Chemistry stage?	
Agency's design process clear?		
Programme of work outlined		
Evidence of similar projects		
Project plan and timescale		
Cost breakdown		

Subject	Comments	Score
Consultancy terms and conditions Do they have their own or are they happy to proceed with yours?		
Agency question/s		
Questions?		
Comments		
Notes/feedback		
Final score		