

Private Label Product Brief & RFQ Checklist

Turn a product idea into a quotation that your team can evaluate

Complete one brief per product or SKU. Mark undecided items as open, attach the information you already have, and ask for a written response to exclusions and assumptions. This worksheet helps your brand and manufacturer agree the same scope before production.

1. Describe the commercial brief

- ☐ Company / brand: _____ Contact: _____
- ☐ Product idea in one sentence: _____
- ☐ Sales country: _____ Customer group: _____ Sales channel: _____
- ☐ Preferred format: _____ Pack size / units per pack: _____
- ☐ Opening quantity per SKU: _____ Repeat-order forecast: _____
- ☐ Target launch window: _____ Delivery destination: _____

2. Select the development route

- ☐ Select an available product direction / adapt an existing formula / develop a new formula / manufacture to an approved specification.
- ☐ List ingredients and quantities already decided. Identify required changes, exclusions, flavour preferences and details still open.
- ☐ For botanical ingredients, specify plant part and powder or extract description. Attach your formula or specification with its version and date.
- ☐ If development is needed, request its scope, trial stages, sample quantities and revision terms separately from commercial manufacturing.
- ☐ Identify who will approve the formula, samples, artwork and changes. Discuss confidentiality, ownership or exclusivity before assuming any arrangement.

3. Define the sample decision

- ☐ Sample needed to evaluate: appearance / taste / handling / packaging / agreed analytical requirements.
- ☐ Reference sample or benchmark: _____ Evaluation owner: _____
- ☐ Ask what the sample represents and record feedback against the brief. List unresolved points separately from approvals.

Compare the offer. Record the decision.

4. Specify the complete pack

- ☐ Primary container: _____ Label / print status: _____ Carton / insert / seal needs: _____
- ☐ Confirm coding, outer-case quantities, component minimums and who supplies each item.
- ☐ Ask who pays for, owns and stores unused printed packaging. Agree handling of artwork revisions and obsolete components.
- ☐ Name the person responsible for reviewing destination-market requirements and approving the final print file.

5. Compare costs, documents and timing

- ☐ Ask every supplier to quote the same formula, quantity and pack. Separate one-off development or setup costs from repeat-order unit costs.
- ☐ Itemise samples, packaging, testing, documents, freight and taxes. Record exclusions, quotation validity and payment terms.
- ☐ List required tests and buyer documents. Where certification matters, ask for current evidence and confirmation of the applicable product and activity scope.
- ☐ Agree what starts the lead time: specification, artwork, payment or material readiness. Track development, production, testing and delivery as separate stages.
- ☐ Confirm the process for order changes, complaints and repeat orders, including the specification and artwork versions to retain.

Your RFQ message

- ☐ We are developing [product] for [market/channel], in [format and pack], with an opening quantity of [units per SKU]. We have [formula/specification/artwork] and need support with [open items]. Please provide an itemised proposal covering development if needed, samples, packaging, testing, documentation, minimum order and the approval steps required for a confirmed schedule.
- ☐ Attach: product brief, current specification, packaging references and buyer checklist. Record remaining decisions: _____ Owner / due date: _____
- ☐ Before comparing totals, check that each proposal answers the same brief and that any supplier substitutions or exclusions have been made explicit.

Discuss your requirement with Aayuritz

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