



# Institute of Actuaries of India

Statutory body established under an Act of Parliament

Unit No. F-206, 2nd Floor, F Wing, Tower II, Seawoods Grand Central,  
Plot no R-1, Sector 40, Nerul Road, Navi Mumbai - 400706  
+91 22 6243 3333 +91 22 6243 3322

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## Request for Quotation (RFQ)

Integrated Communications Proposal & Scope of Work

Brand Messaging & Archetype Workshop + Visual Identity Manual

**Issued by:** Institute of Actuaries of India (IAI)

**Date:** 20 September 2025

### 1. Executive Summary

The Institute of Actuaries of India (hereinafter referred to as “IAI”) invites proposals from qualified communication and branding agencies for an integrated branding exercise. The objective is to strengthen IAI’s brand identity, positioning, and consistency across all internal and external communication channels.



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## 2. About IAI

The Institute of Actuaries of India (IAI) is a statutory body established by an Act of Parliament, viz. The Actuaries Act, 2006 for regulating the profession of Actuaries in India. The nodal ministry for the Institute is Department of Financial Services, Ministry of Finance.

For further information, please visit: [www.actuariesindia.org](http://www.actuariesindia.org).

## 3. Project Objectives

The primary objective of this project is to:

- Formulate and articulate the IAI brand narrative, positioning, and voice through a **comprehensive Brand Messaging Framework**.
- Design and codify a **Visual Identity Manual** setting out binding standards and guidelines governing the use of brand assets.

This initiative aims to ensure **uniformity, consistency, and recognizability** of the IAI brand across communication platforms, stakeholders, and touchpoints.

## 4. Scope of Work

- The agency will engage closely with the Institute of Actuaries of India (IAI) to uncover and articulate the essence of the brand. This will begin with interactive



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sessions involving IAI's leadership, members, and other key voices to capture insights, values, and aspirations that define the institution. A thorough review of current positioning will be carried out, including an examination of peer organizations, perception studies, and a detailed mapping of collaborators and stakeholder groups.

- Based on these insights, the agency will design communication approaches that reflect IAI's objectives. A structured messaging model will be developed to ensure coherence across channels, supported by a clear and compelling positioning line that expresses IAI's role and relevance. To bring personality and consistency, the agency will recommend an archetype that reflects the institution's character and aligns with its vision.
- Workshops will be organized to validate and refine these directions with stakeholders, ensuring shared understanding and alignment. The outcome of this entire exercise will be consolidated into a practical toolkit that captures the positioning, key messages, defining brand line, and guidance on application—serving as a reference for all future communication and engagement.

## **B. Visual Identity Manual**

The Visual Identity Manual shall include:

- IAI Logo usage & placement guidelines
- Color palette (CMYK, RGB, HEX, Pantone)
- Typography standard the
- Business stationery templates



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- Social media creative templates
- Printable templates
- Brand imagery & iconography
- Implementation & usage guidelines

## 5. Deliverables

1. **Brand Guideline (PDF):** Comprehensive document capturing IAI's visual identity system including logos, colors, typography, graphic elements, imagery, and application guidelines.
2. **Editable Templates:** Business cards, stationery, presentations, reports, and digital creatives, etc.
3. **Digital Asset Package:** Packaged files of logos (all formats), fonts, icons, and templates.
4. **Training Session:** One virtual training session (60 minutes) for IAI stakeholders.
5. **Version Control Requirement:** To provide editable file & not just the PDF
6. **Number of Creatives Expected:**
  - **Tagline/Defining Statement:** Agency to provide a minimum of **3–4 options**, each with supporting rationale.



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- **Visual Identity Concepts:** Agency to present at least **2 distinct design directions** (colour palette, typography, imagery style) before finalization.
  - **Templates (stationery, presentations, social media):** Agency to provide at least **2 layout variations** for review and selection.
  - **Final Toolkit:** The selected options to be consolidated into the approved Brand Messaging Toolkit and Visual Identity Manual.

## 6. Timeline

- **Project Commencement:** Within 2 weeks of PO issuance
- **Duration:** Approximately 6–8 weeks (to be proposed by the agency)
- **Final Deliverables:** Messaging toolkit, Visual Identity Manual, digital assets, training session.

## 7. Proposal Submission Requirements

Agencies must submit the following (within three (3) working days of RFQ issuance):

- Agency profile
- Understanding of scope



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- Proposed deliverables & timeline
- Team composition
- Past work samples (2 – 3 client references with contact details)

## 8. Commercial Proposal

(To be filled by Agency)

<b>Component</b>	<b>Description</b>	<b>Cost (INR)</b>	<b>Applicable Taxes</b>	<b>Total (INR)</b>
A. Brand Messaging & Archetype Workshop				
B. Visual Identity Manual				
C. Any Other Costs				



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<b>Total Project Cost (A + B + C)</b>				
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**9. Payment Terms:** To be mutually agreed upon with the selected agency.

## 10. Evaluation Criteria

- Relevant experience in brand messaging and visual identity development
- Demonstrated understanding of IAI's requirements
- Quality of proposed methodology and deliverables
- Cost-effectiveness and transparency
- Team expertise and track record

## 11. Submission Instructions

- **Deadline for submission:** On or before 27 September 2025
- **Submission email:** [riddhi@actuariesindia.org](mailto:riddhi@actuariesindia.org)
- **CC:** [binita@actuariesindia.org](mailto:binita@actuariesindia.org)
- **Subject line:** RFQ Submission – Brand Messaging & Visual Identity | IAI



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## 12. Budget Guidelines

Agencies should provide a detailed cost breakdown for:

- Brand Messaging & Archetype Workshop
- Visual Identity Manual

## 13. Questions & Clarifications

- Queries must be submitted by **24 September 2025**.
- All questions to be sent to [ridhhi@actuariesindia.org](mailto:ridhhi@actuariesindia.org) (cc: [binita@actuariesindia.org](mailto:binita@actuariesindia.org)).

## 14. Terms & Conditions

14.1. IAI reserves the right to accept or reject any or all proposals without assigning reasons.

14.2. Agencies may be invited for a presentation/discussion prior to final selection.

14.3. Exclusions must be clearly stated in the proposal.

14.4. IAI does not guarantee any minimum business or assignment.



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## 15. Governing Law

This RFQ and any Contract or Agreement arising from it, shall be governed and construed in accordance with the Indian Laws and subject to the exclusive jurisdiction of competent courts at Mumbai, Maharashtra, India.

## 16. Terms of Confidentiality

In the event, the selected Agency is terminated from position with IAI prior to a Contract or an Agreement is entered into, all information shared by IAI during this engagement, including brand strategy, internal documentation, and other non-public information, shall be treated as confidential by the Agency. The agency shall not disclose or use such information for any purpose other than for the performance of services under this RFQ. Agencies must declare if they are currently engaged with any organizations that may be perceived as competing bodies to IAI

## 17. Limitation of Liability

IAI shall not be liable for any indirect, incidental, or consequential damages arising out of this engagement.