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AI Proposal & Follow-Up System

Delivery Pack

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Version 1.0

1. System Overview

System Name: AI Proposal & Follow-Up System

Purpose: To help the team turn discovery notes into professional proposals, client summaries and follow-up emails using a clear AI-supported workflow.

Primary Users: Business owner, consultant, account manager, sales manager or business development lead.

Expected Benefit: Faster proposal preparation, clearer client communication, more consistent proposal structure and better follow-up discipline.

2. Business Problem

Before this system, proposal creation often depended on manual writing, scattered notes and individual judgment. This could slow down follow-up and create inconsistency across proposals.

The new system provides a repeatable process for moving from discovery notes to client-ready commercial communication.

3. Workflow Map

Step	Action	Output
1	Collect discovery notes	Structured input for the AI workflow
2	Summarize client context	Client needs, goals and pain points
3	Create proposal draft	First proposal version
4	Review manually	Correct scope, claims, pricing and next steps
5	Create follow-up email	Professional message ready for review
6	Save and track	Final proposal and next action in folder or CRM

4. Tools Used

- ChatGPT or Claude for structured draft generation.
- Google Docs or Microsoft Word for final proposal editing.
- Google Drive, OneDrive or internal folder for storage.
- CRM or lead tracker for opportunity notes and next steps.
- Optional: Canva or Slides for visual proposal formats.

5. Prompt Library

Prompt 1 — Discovery Summary

Use this prompt after a discovery call to transform raw notes into a structured client summary.

Act as a senior business consultant. Based on the discovery notes below, create a structured summary with: client context, main challenges, business goals, decision criteria, services discussed, risks, missing information and recommended next step. Keep the tone professional and factual. Do not add unsupported claims.

Paste inputs: Client name, industry, call notes, services discussed, budget range, timeline, decision makers and next action.

Prompt 2 — Proposal Draft Generator

Act as a senior business strategist. Based on the structured client summary below, create a professional proposal draft. Include: context, key challenges, recommended solution, deliverables, timeline, responsibilities, expected outcomes and next steps. Keep the tone clear, business-oriented and credible. Do not exaggerate claims. Highlight assumptions and missing information separately.

Prompt 3 — Follow-Up Email

Write a professional follow-up email based on the approved proposal summary below. The email should thank the client for the conversation, summarize the main need, attach or reference the proposal, explain the next step and invite a response. Keep it concise, clear and professional.

Prompt 4 — Internal CRM Notes

Summarize this opportunity for internal tracking. Include: lead source, client need, potential value, urgency, decision stage, next action, owner and follow-up date.

6. SOP — How To Use The System

1. After every discovery call, complete the discovery notes template.
2. Run the Discovery Summary prompt and review the output.
3. Add any missing information before generating the proposal draft.
4. Run the Proposal Draft prompt.
5. Review the draft manually for accuracy, scope, pricing, claims and tone.
6. Move the approved draft into the company proposal template.
7. Create the follow-up email using the Follow-Up Email prompt.
8. Save final documents in the correct client folder or CRM.
9. Set the next action and follow-up date.

7. Quality Control Checklist

- Client name and details are correct.
- The client challenge is described accurately.
- The proposed solution matches what was discussed.
- Pricing, terms and timeline have been checked manually.
- No exaggerated or unsupported claims are included.
- The tone matches the company brand.
- The next step is clear.
- A human has reviewed the final proposal before sending.

8. Example Output Structure

- Client Context
- Current Challenge
- Recommended Approach
- Scope of Work
- Deliverables
- Timeline
- Commercial Terms
- Expected Outcomes
- Assumptions
- Next Steps

9. Team Training Notes

The team should use AI to accelerate the first draft, not to replace commercial judgment. The final proposal remains a human-reviewed business document.

- Use complete and clear notes as input.
- Do not paste unnecessary confidential information.
- Always review claims, pricing and scope.
- Improve prompts based on real examples.
- Keep approved examples in a shared folder for consistency.

10. First 30 Days

- Use the system for every relevant discovery call.
- Track time from call to proposal.
- Collect examples where the draft was useful or weak.
- Update prompts based on recurring corrections.
- Review the workflow after 2-3 weeks and improve the SOP.

11. Next Steps

Recommended next step: Use this system consistently for a first cycle, then review performance and decide whether to connect it with lead management, content or reporting workflows.

Ready to Put This System to Work?

Start your first implementation cycle or reach out to discuss how this system can be tailored to your specific needs.

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