Founders AI
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PRACTICAL AI FIELD GUIDE

AI Proposal System

How to Turn a Conversation Into a Clear Offer

A practical prospecting guide for founders, business owners, consultants, salespeople, and creators who want better leads before better messages.

- Build an ICP
- Spot buying triggers
- Research accounts
- Map buyer roles
- Score lead quality
- Know what not to automate

Start here

Most weak proposals are not weak because they look bad.

They are weak because they make the buyer do too much work.

The buyer has to remember what you talked about. They have to translate your offer into their internal language. They have to explain the price to someone else. They have to figure out what happens next. They have to decide whether the risk feels worth it.

AI can help with this, but only if you give it the right job.

Do not ask AI to “write me a proposal” from nothing.

Ask AI to turn a real conversation into a clear decision document.

That is the difference.

The Founders AI rule

The proposal is not where you prove you are smart.

The proposal is where you make the next decision easier.

A good AI-assisted proposal should do five things:

- Reflect the buyer’s situation in their own language.
- Explain the recommended path clearly.
- Show what is included and what is not included.
- Make the pricing logic easier to understand.
- Give the buyer a simple next step.

If the proposal does not help the buyer explain the decision to someone else, it is not finished.

Why proposals matter more now

Buyers are doing more research before they talk to you.

Gartner reported that B2B buyers use an average of seven information sources during a recent purchase, and 45% said they used generative AI, mainly to gather vendor and product information (BusinessWire / Gartner).

That means your buyer may already have opinions before your proposal arrives.

Your proposal is not just “the thing with the price.”

It is the document that helps the buyer validate what they think they know, understand what applies to their situation, and decide whether moving forward feels safe.

Forrester also found that modern business buyers, especially Millennial and Gen Z buyers, do more self-guided research and have less patience for generic outreach (Forrester).

That same rule applies to proposals.

Generic proposals feel lazy.

Clear proposals feel like help.

The proposal stack

Before you write anything, separate the proposal into six layers.

1. **The buyer situation:** what they said, what they want, what is broken, and why now matters.
2. **The decision:** what they are actually deciding.
3. **The recommended path:** what you believe they should do next.
4. **The scope:** what is included, what is excluded, and what depends on them.
5. **The value logic:** why the offer is worth the cost, time, and risk.
6. **The next step:** exactly what they need to do if they want to move forward.

AI is useful because it can help organize these layers.

But you are still responsible for whether the layers are true.

Step 1: collect the proposal inputs

Do not start with a blank page.

Start with raw material.

Collect:

- Your meeting notes.
- The follow-up email.
- The buyer's goals.
- The buyer's current problem.
- Any exact language they used.
- The decision-makers or influencers.
- Their timeline.
- Their budget range, if known.
- Their risks, blockers, or concerns.
- The result they want.
- The specific next step discussed.

PandaDoc's proposal guidance recommends gathering client goals, timeline, budget range, and decision-makers before building the proposal (PandaDoc).

That is the right starting point.

If you skip this step, AI will fill the gaps with smooth-sounding guesses.

Smooth guesses are dangerous.

Prompt: proposal input sorter

Use this prompt after a sales call, discovery call, client call, partnership call, or project conversation.

```
You are helping me prepare a proposal.

Do not invent facts.
Use only the information I provide.
If something is missing, mark it as "Unknown."

Here are the raw notes:
[Paste notes, transcript, follow-up email, or bullet points]

Organize the information into:
1. Buyer situation
2. Stated goals
3. Current pain or problem
4. Exact phrases the buyer used
5. Decision-makers or stakeholders mentioned
6. Timeline
7. Budget or pricing clues
8. Risks, objections, or concerns
9. Recommended next step
10. Missing information I should confirm before writing the proposal
```

The last section is the most important.

You want AI to tell you what it does not know.

Step 2: define the buyer’s decision

Most proposals answer the wrong question.

They answer:

“What do we sell?”

The better question is:

“What decision is the buyer trying to make?”

Examples:

- Should we hire help or keep doing this internally?
- Should we fix this now or wait?
- Should we buy the basic version or the full version?
- Should we trust this person with an important process?
- Should we spend money before we have perfect certainty?

Once you know the real decision, the proposal becomes easier to write.

The proposal should help them make that decision.

Prompt: decision finder

```
Based on the notes below, identify the real decision the buyer is trying to make.

Do not summarize the whole conversation.
Focus only on the decision.

Return:
1. The surface-level decision
2. The deeper business decision
3. The emotional or risk-based decision
4. What the proposal must prove for them to feel safe moving forward

Notes:
[Paste organized notes]
```

This helps you avoid a proposal that is technically complete but emotionally irrelevant.

Step 3: write the buyer summary first

The first useful section of the proposal should not be about you.

It should be about them.

Write a short buyer summary:

- What they are trying to accomplish.
- What is currently getting in the way.
- Why this matters now.
- What happens if they do not solve it.

Keep it short.

The buyer should feel, “Yes, that is what we said.”

Example:

```
Based on our conversation, the main issue is not that your team lacks tools.
The issue is that your sales conversations are producing interest, but the offer is not
being translated into a clear decision document. You want a proposal that makes the scope,
price, timeline, risk, and next step easy for the buyer to review and share internally.
```

That paragraph is more valuable than a generic “About Us” page.

Step 4: make the recommendation clear

A weak proposal lists options without guidance.

A strong proposal makes a recommendation.

You can still include options, but the buyer should know what you believe is the best path and why.

Use this structure:

- **Recommendation:** what you suggest.
- **Why this path:** the reasoning.
- **What it solves:** the buyer's stated problem.
- **What it does not solve:** the boundary.
- **What we need from you:** the buyer's responsibility.

This matters because buyers are not only buying the deliverable.

They are buying confidence in your judgment.

Prompt: recommendation builder

```
Using only the buyer context below, draft a clear recommendation section for a proposal.

Rules:
- Do not overpromise.
- Do not invent ROI.
- Do not use hype.
- Explain why this recommendation fits the buyer's stated situation.
- Include what this does not solve.
- Include what the buyer must provide or decide.

Buyer context:
[Paste buyer situation, goals, pain, timeline, risks]

Offer details:
[Paste what you are proposing]
```

Read the output carefully.

If it sounds more confident than the facts allow, pull it back.

Step 5: write scope so nobody has to guess

Scope is where trust is either built or damaged.

A clear scope should include:

- What is included.
- What is not included.
- What the buyer must provide.
- What the timeline depends on.
- What counts as done.
- What changes would require a new quote.

Do not hide exclusions.

Exclusions protect both sides.

They also make the proposal feel more honest.

Saveable tool: scope table

Use this simple table before you send a proposal.

Area	Included	Not included	Buyer responsibility
Strategy			
Setup			
Content			
Automation			
Training			
Support			

You do not need every row every time.

The point is to stop vague promises before they become problems.

Step 6: make pricing easier to understand

Pricing is not just a number.

Pricing is a story about value, effort, risk, and timing.

A buyer may not need a long explanation, but they do need to understand what the price connects to.

A simple pricing section can include:

- The price.
- What is included.
- Payment terms.
- Optional add-ons.
- What changes the price.
- When the price expires, if relevant.

PandaDoc recommends including pricing and optional add-ons, and notes that interactive pricing tables can let buyers compare options or add services themselves (PandaDoc).

You do not need advanced software to use the principle.

You just need the buyer to understand the choice.

Step 7: add the internal-forwarding test

Many proposals are read by people who were not on the call.

That means your proposal must survive being forwarded.

Before sending, ask:

- Could someone understand the situation without hearing the call?
- Could a manager explain the price to another manager?
- Could an operator understand what will change in the work?
- Could a finance person understand the payment terms?
- Could a skeptical person find the risk section?
- Could the buyer find the next step in under ten seconds?

Highspot's buyer-enablement guidance emphasizes that sellers should give buying committees concise proof, risk details, implementation context, pricing context, and role-specific answers they can use in internal discussions (Highspot).

Treat the proposal like a document your buyer may have to defend.

Help them defend it.

Step 8: use AI to find gaps

Before you send the proposal, ask AI to critique it.

Do not ask:

"Is this good?"

Ask:

"What would make a buyer hesitate?"

Prompt: proposal gap check

```
Review this proposal from the perspective of a skeptical buyer.

Do not rewrite it yet.

Find:
1. Claims that need proof
2. Vague scope language
3. Missing next steps
4. Pricing confusion
5. Risks that are not addressed
6. Parts that sound generic
7. Places where the buyer may need internal justification
8. Anything that sounds like AI wrote it

Proposal:
[Paste proposal draft]
```

This is one of the highest-value uses of AI.

It helps you see what you missed before the buyer does.

Step 9: write the next step like an instruction

The end of the proposal should not be vague.

Avoid:

```
Let me know what you think.
```

Use:

```
If this looks right, reply with "approved" and I will send the agreement and first invoice.
```

Or:

```
If you want to move forward, the next step is a 30-minute kickoff call. I have Tuesday at 10:00 AM or
Thursday at 2:00 PM available.
```

Or:

```
If the scope is right but the timeline needs to change, reply with the target launch date and I will
adjust the schedule.
```

The buyer should not have to invent the next action.

Saveable tool: proposal structure

Use this structure for a simple AI-assisted proposal.

1. **Title page:** buyer name, your company, proposal date.
2. **Buyer summary:** what they are trying to solve.
3. **Recommended path:** what you suggest and why.
4. **Scope:** what is included and excluded.
5. **Timeline:** phases, milestones, and dependencies.
6. **Pricing:** price, terms, optional add-ons, expiration if relevant.
7. **Proof:** relevant examples, experience, or evidence.
8. **Risks and assumptions:** what must be true for this to work.
9. **Next step:** the exact action to move forward.

Do not make it longer unless the buyer needs more detail.

Saveable tool: proposal quality scorecard

Score the proposal before you send it.

Question	Score 1-5
Does it reflect the buyer's actual words and situation?	
Is the recommendation clear?	
Is the scope specific enough to prevent confusion?	
Is pricing easy to understand?	
Are risks and assumptions visible?	
Can someone forward this internally without explaining everything?	
Is the next step obvious?	
Did a human verify every claim?	

If the total is under 32, revise before sending.

What not to automate

Do not fully automate:

- Final pricing decisions.
- Custom ROI claims.
- Legal terms.
- Commitments about delivery capacity.
- Claims about results you cannot prove.
- Scope boundaries you have not reviewed.
- Sensitive buyer details.

Salesforce's 2026 sales report notes that 51% of sales leaders with AI say disconnected systems slow AI initiatives, and 74% of sales professionals are focusing on data cleansing (Salesforce).

Bad data makes bad proposals faster.

Speed is only useful if the proposal is accurate.

Final reminder

AI can help you draft faster.

But the goal is not a faster proposal.

The goal is a clearer decision.

Use AI to organize the conversation, expose gaps, and improve the structure.

Use your judgment to make the offer honest, specific, and easy to approve.