

◆ OPEN-SOURCE AI PLAYBOOK · FOR SALES

Proposal Builder

Proposals take days, so deals cool off between the call and the quote.

THE SYSTEM

Turns the call notes into a tailored, on-brand proposal the same day, priced from your rate card.

🕒 BUILD TIME

1-2 weeks

🔧 HOW IT'S BUILT

Low-code

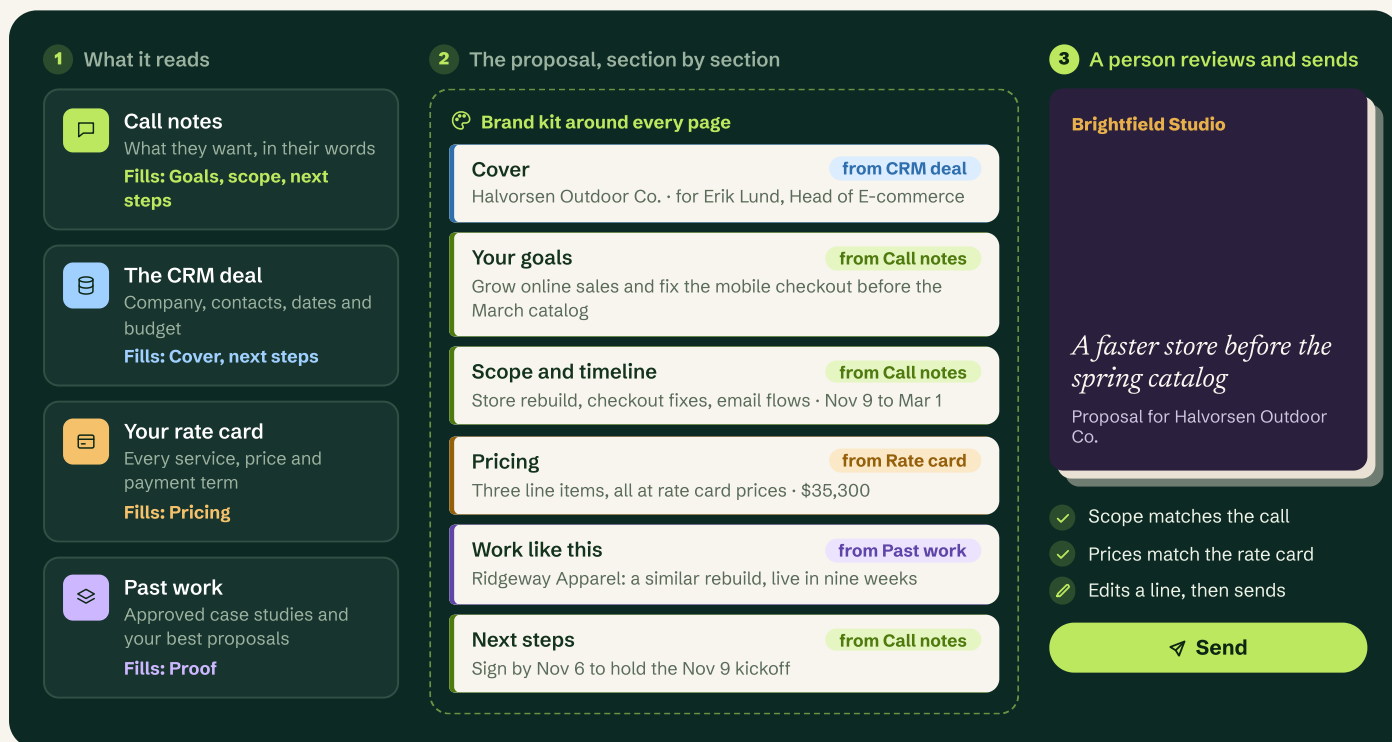
🛠️ WORKS WITH

Google Workspace or
Microsoft 365 +
HubSpot or Salesforce

👤 OWNER

Head of sales, or the
founder in a smaller
firm

How it works: every section has a source, and a person sends it



Sample proposal, fictional companies, people and prices. Nothing reaches the client until a person sends it.

What comes out: tailored, on brand, priced right

3–4 hours → about 10 minutes

Hands-on time for one tailored proposal. Our own team's numbers.

COVER, FROM THE CRM DEAL

Brightfield Studio

A faster store before the spring catalog

Proposal for Halvorsen Outdoor Co.

PRICING, FROM YOUR RATE CARD

04 · PRICING

Store rebuild on Shopify	\$24,000
Checkout and speed fixes	\$6,500
Email flows: welcome, cart, win-back	\$4,800
Total, fixed fee	\$35,300

✓ All prices match the rate card

PROOF, FROM PAST WORK

05 · WORK LIKE THIS

Ridgeway Apparel

"They rebuilt the store around how our customers actually shop on their phones."

✓ Approved case study

Sample proposal by a fictional agency to a fictional client. The prices are made up for the example.

Can we build it? **FOR YOUR TECH LEAD**

🔌 Tools you'll use

Deal details and call notes	HubSpot or Salesforce + call transcripts	or Pipedrive, Attio
Rate card and past proposals	Google Sheets and Drive	or Excel and SharePoint
Writing each section	Claude	or ChatGPT, Gemini
On-brand layout	A Google Docs template	or A Slides or HTML template
Running the steps	n8n	or Make, Zapier
Sending and e-signature	PandaDoc	or Qwilr, DocuSign, a PDF by email

🔑 Three ways to build it

Start simple 1-2 days

A Claude or ChatGPT project holding your rate card, best past proposals and brand rules. Paste in the call notes and drop the draft into your template.

Production 1-2 weeks

n8n starts from the CRM deal, pulls the call notes and rate card, fills a Google Docs template and sends the deal owner a link to review.

Custom 3-4 weeks

Adds a web proposal with options the buyer can choose, e-signature, and the signed scope written back to the CRM.

🔒 Access it needs

- ◆ Read access to the CRM deal, contacts and call notes
- ◆ Read access to the rate card, past proposals and approved case studies
- ◆ Permission to create documents in a drafts folder, never to send

🛡️ Guardrails

- ◆ Every price comes from the rate card. Nothing is made up
- ◆ Discounts or terms outside your rules go to a named approver
- ◆ Scope lists only what was agreed on the call or in writing
- ◆ Proof uses approved case studies and clients who agreed to be named
- ◆ A person reads and sends every proposal

🎯 What to measure

- ◆ Time from the call to the proposal being sent
- ◆ Hours of work per proposal
- ◆ Win rate, before and after
- ◆ Share of proposals sent without pricing fixes

👤 Who builds and runs it

A sales or ops lead who owns the rate card and the template, plus someone comfortable with n8n for one to two weeks. After that, whoever owns pricing keeps the rate card current and approves any flagged discounts.



◆ FREE, OPEN SOURCE, NO SIGN-UP

20 AI systems every company should *build first.*

This playbook is one of 20. Each one solves a problem almost every company has, and shows how the system works, the tools it runs on, how long it takes to build and where a person signs off. Read them all, download any of them, and send them to your team.

[See all 20 playbooks →](#)

START HERE

01 Company Brain

FOR EVERY TEAM

02 Meeting-to-Action
03 Instant Customer Answers

FOR MARKETING

04 Static Ad Creative System
05 Content Engine
06 Competitor Watch
07 Campaign Performance Report

FOR SALES

08 Speed-to-Lead Responder
09 Account Research & Outreach
10 CRM Autopilot
11 Proposal Builder
12 Pipeline Review Prep

FOR LEADERS

13 Automated Morning Brief
14 Weekly Business Review
15 Board & Investor Update

FOR OPS, FINANCE AND HR

16 Sales-to-Delivery Handoff
17 Invoice & Collections Chaser
18 Candidate Shortlist System
19 Contract Risk Review
20 New-Hire Onboarding

WANT HELP BUILDING IT?

We'll build your first AI systems with your team.

In a free 30-minute call with our founder, we'll look at your tools and your week, and pick the playbooks that would save you the most time first.



Pallav Kaushish

Co-Founder, AIxGrowth

Free 30-minute call · No commitment

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