

TOOLKIT FOR FREELANCERS & SOLO CONSULTANTS

Freelancer Proposal *Autopilot* Kit

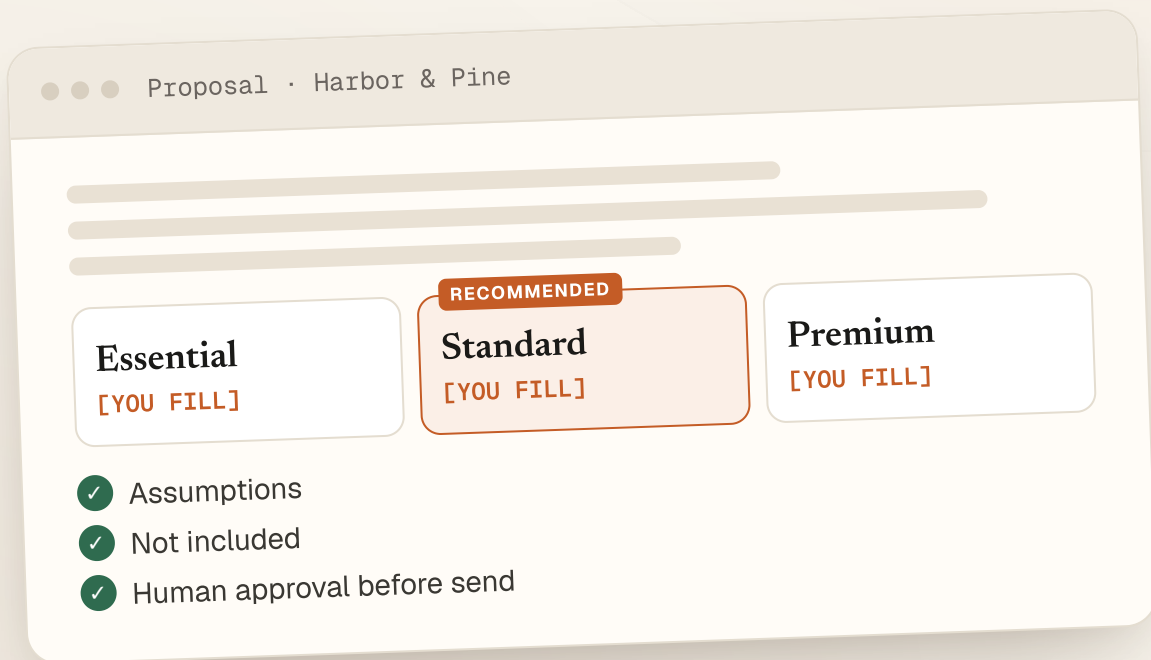
18 copy-ready prompts, saved instructions for ChatGPT, Claude & Gemini, a one-page proposal template, and a Make automation that turns form leads into proposal drafts.

18 prompts

3 assistants

1-page template

Make + Zapier build



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Copy-paste tip: every prompt, saved instruction, and template in this PDF is also in the zip as a plain `.txt` or `.md` file, so you never fight PDF line breaks.

Quick start: your first proposal in 45 minutes

This kit turns a messy lead into a clear, priced proposal with three options, and keeps your judgment in charge of the parts that matter: price, promises, and the Send button.

What's in the box

Part	What it does	Where
Prompt library (18 prompts)	Every step from "new lead" to "scope creep," each with a filled example	Part 1 · <code>prompts/</code>
Saved instructions	One "Proposal Autopilot" brain for ChatGPT GPTs, Claude Projects, and Gemini Skills	Part 2 · <code>saved-instructions/</code>
One-page proposal template	Fill-in-the-blanks proposal you can paste into Google Docs, Notion, or Word	Part 3 · <code>templates/proposal-template.md</code>
Scope checklist	40 checks that catch the gaps that turn into unpaid work	Part 4 · <code>templates/scope-checklist.md</code>
Automation build guide	Lead form → proposal draft in Make (module by module) with an approval gate, plus a Zapier variant	Part 5

The 45-minute path

Minute 0 to 5: set your fences. Open `templates/rate-card-and-rules.md` and fill in your specialty, ideal client, hard no's, and your three package names. Keep your actual prices in a file the AI never sees. You'll type them in yourself at step 5.

Minute 5 to 10: load the brain. Paste the saved instructions (Part 2) into a ChatGPT custom GPT, a Claude Project, or a Gemini Skill. If you don't want to set that up yet, skip it. Every prompt in Part 1 works on its own in a normal chat.

Minute 10 to 20: lead to brief. Run **P01 Lead triage** on the inquiry. If it says DISCOVERY FIRST, use **P02** to plan a 25-minute call. After the call, paste your notes into **P03 Notes to scope brief**, then **P04 Scope fence**.

Minute 20 to 35: brief to proposal. Run **P05 Three-tier proposal** with your fixed service menu. Run **P06 Pricing framing**, typing your own prices into the brackets. Then **P07** for the opening and **P08** for the timeline. Paste everything into the one-page template.

Minute 35 to 40: red-team it. Run **P09 Pre-send review**. Fix every item it flags, especially invented claims and vague deliverables. Tick through the scope checklist.

Minute 40 to 45: send it like a human. Draft the cover note with **P10**, read it out loud once, and send it from your own inbox. Put a follow-up reminder on your calendar for day 3 (**P13** has the sequence).

Three rules that make this work

- 1. The model never sets prices.** It frames options; you type numbers.
- 2. Only feed it what's true.** No invented case studies, metrics, or testimonials. Every prompt tells the model to flag gaps as questions instead of guessing.
- 3. Drafts, not sends.** Every prompt and the automation stop at a draft. You approve and send.

Placeholder convention

Anything in `{{double braces}}` is yours to replace. Anything marked `[YOU FILL]` is a number or promise only you can set. Triple quotes `"""` fence the pasted material so the model knows where your notes start and stop.

The running example

Every prompt shows a filled example using one fictional deal, so you can see the whole pipeline end to end:

- **You:** Jordan Reyes, freelance web designer and Shopify developer, 6 years in, works solo, about 25 billable hours a week.
- **The lead:** Dana Okafor, operations lead at Harbor & Pine Coffee (a fictional small-batch roaster), who wants an aging Shopify store refreshed before the holiday season and a proper wholesale ordering page.

Names, companies, and figures in examples are invented for illustration. Swap in your own.

The prompt library

Eighteen prompts in pipeline order. Each one has the same layout:

- **Use it when:** the moment in the deal it's built for.
- **The prompt:** copy-ready. Also saved as a separate `.txt` file in `prompts/`.
- **Filled example:** the variables filled in for the running example (Jordan and Harbor & Pine).
- **Example output (excerpt):** what a good answer looks like, trimmed to the useful part.
- **Human gate:** what you check before moving on.

The prompts work in ChatGPT, Claude, and Gemini. If you've loaded the saved instructions from Part 2, you can drop the "Rules" lines, because the saved brain already enforces them. Leaving them in does no harm.

#	Prompt	Stage
P01	Lead triage and reply	Intake
P02	Discovery call plan	Intake
P03	Call notes to scope brief	Scope
P04	Scope fence: assumptions, exclusions, risks	Scope
P05	Scope to three-tier proposal	Proposal
P06	Pricing options framing (you fill prices)	Proposal
P07	"Our understanding" opening	Proposal
P08	Timeline against your real capacity	Proposal
P09	Pre-send red-team review	Proposal
P10	Proposal cover email	Send
P11	Objection reply builder	Close
P12	Discount request: trade scope, not rate	Close
P13	Three-step follow-up sequence	Close
P14	Close-the-loop email and loss feedback	Close
P15	Kickoff email	Deliver
P16	Scope-creep and change-request reply	Deliver
P17	Change order note	Deliver
P18	Win/loss debrief to sharpen your system	Improve

P01 Lead triage and reply

Use it when: a new inquiry lands and you need to decide fast whether to pursue, ask questions, or pass politely.

```
You are my lead-qualification assistant. I am a {{your specialty}} freelancer.
My ideal client: {{one sentence}}.
My hard no's: {{dealbreakers}}.
My minimum engagement: {{a floor, or "I'll judge case by case"}}.
```

Read the lead below and return:

1. Verdict: PURSUE / DISCOVERY FIRST / POLITE PASS, with a one-sentence reason.
2. Signals for and against, quoting the lead's own words.
3. What I still need to know before I can scope this.
4. The single best next step (book a call / ask 2-3 questions / pass).
5. A reply under 110 words that takes that next step.

Rules: use only what the lead says. Don't guess their budget beyond what they wrote.
Don't promise availability, price, or timing. Plain, warm, peer-to-peer tone.

Lead:

"""

{{paste the form submission or email}}

"""

Filled example

- Specialty: *web design and Shopify development for food and beverage brands*
- Ideal client: *independent consumer brands doing \$500k to \$5M a year that sell online and wholesale*
- Hard no's: *full rebuilds in under 3 weeks; equity-only pay; no single decision-maker*
- Minimum: *around \$4,000*
- Lead: *"Hi! We roast coffee in Portland and sell online plus to about 40 cafés. Our Shopify site is 5 years old, slow on mobile, and wholesale ordering is a PDF form people email back. We'd love a refresh before holiday traffic. Budget maybe 5 to 10k? Ideally live by mid-November. Dana Okafor, Ops Lead, Harbor & Pine Coffee"*

Example output (excerpt)

Verdict: DISCOVERY FIRST. Strong fit (brand size, Shopify, wholesale pain), but "refresh" could mean a theme tweak or a full wholesale build, and mid-November is tight for the bigger version.

For: "sell online plus to about 40 cafés," "budget maybe 5 to 10k," a concrete pain ("wholesale ordering is a PDF form").

Against: "ideally live by mid-November" is roughly 5 to 6 weeks; decision-maker unclear (Dana is Ops Lead).

Need to know: who signs off; what "refresh" covers; how wholesale pricing works today (tiers, minimums, net terms); current apps and theme.

Reply: "Hi Dana, thanks for the detail. The PDF wholesale form is a very fixable problem. Before I suggest an approach, a 25-minute call would help me understand how wholesale pricing works for you and what 'refresh' should cover. Would Thursday or Friday afternoon work? If the founder makes the final call, they're welcome to join. — Jordan"

Human gate: Does the verdict match your gut? Never let the reply imply you've accepted the deadline.

P02 Discovery call plan

Use it when: you've booked a call and want 25 minutes that end with everything you need to scope.

```
Build me a 25-minute discovery call plan for this lead.
I offer: {{your services}}. What I must learn to scope and price confidently:
decision-maker, success measure, budget reality, deadline driver, current tools,
content/asset readiness, and what's out of scope.

Return:
1. A 1-line call goal.
2. Agenda with minute marks (open, their story, deep-dive, constraints, next steps).
3. 10-12 questions, ordered, each with "why I'm asking" in 8 words or less.
4. Three "listen for" red flags specific to this lead.
5. A closing script that sets expectations: what I'll send and by when ({{your turnaround}}).

Use only the lead info below. Don't script a sales pitch.

Lead info:
"""
{{lead message + any notes from P01}}
"""
```

Filled example

- Services: *Shopify theme design and build, wholesale/B2B ordering setup, speed optimization*
- Turnaround: *proposal within 2 business days*
- Lead info: Dana's message plus P01's "need to know" list.

Example output (excerpt)

Goal: Leave knowing whether this is a theme refresh, a wholesale build, or both, and who approves the spend.

1. "Walk me through how a café places a wholesale order today, start to finish." (*Exposes the real workflow pain.*)
2. "What happens if the new site isn't live by mid-November?" (*Tests whether the deadline is real.*)
3. "Who else needs to say yes to a project like this?" (*Finds the decision-maker.*)
4. "Do wholesale customers get different prices, minimums, or payment terms?" (*Sizes the B2B work.*)

Red flags: "We'll figure out the content later"; wholesale pricing that changes per customer; a founder who hasn't seen the budget range.

Human gate: Cut any question you wouldn't ask out loud. Keep the closing script. It prevents "so what's next?" limbo.

P03 Call notes to scope brief

Use it when: right after the call, while your notes are still fresh. This is the single most valuable prompt in the kit.

```
Turn my discovery call notes into a one-page scope brief.
Use ONLY the notes. Where the notes are vague, write [UNCLEAR] and add a question.

Sections:
1. Client snapshot (who, what they sell, size signals) in 2 sentences.
2. The problem in the client's own words (quote phrases from the notes).
3. Desired outcome and how they'll judge success.
4. Must-haves vs nice-to-haves (two lists).
5. Constraints: deadline and why, budget signal, tools/platforms, approvals.
6. Stakeholders and who signs off.
7. Risks I should price or fence.
8. Open questions to confirm by email before I price (max 5, most important first).
```

Flag anything in the notes that sounds like a commitment I made on the call.
Don't add features, numbers, or promises that aren't in the notes.

```
Notes:
"""
{{paste redacted call notes or transcript}}
"""
```

Filled example (notes, abbreviated)

"Dana + Marcus (founder, signs off). 40 wholesale cafés, 3 price tiers by volume, net-15 for some. Orders via PDF, Dana retypes into Shopify, about 6 hrs/week. Retail site: mobile slow, theme 'Debut' from 2019, 11 apps. Holiday gift boxes launch Nov 20, the real deadline. Photos: new shoot done. Copy: they'd like help. Marcus: 'I want wholesale to feel like ordering from a real supplier.' I said I could probably start next week (careful)."

Example output (excerpt)

Problem in their words: "I want wholesale to feel like ordering from a real supplier." Orders arrive as PDFs that Dana retypes, about 6 hours a week.

Must-haves: wholesale ordering inside Shopify with 3 volume tiers; faster mobile storefront; live before the Nov 20 gift-box launch. **Nice-to-haves:** copy refresh; app cleanup; net-15 invoicing automation.

Commitment flag: You said you could "probably start next week." Confirm or correct this in writing.

Open questions: (1) Do net-15 customers need invoices generated automatically, or is manual OK for launch? (2) Is copywriting in scope or will Harbor & Pine supply text? (3) Which of the 11 apps are must-keep?

Human gate: Email the open questions before you price. Answers usually change the scope.

P04 Scope fence: assumptions, exclusions, risks

Use it when: you have an approved brief and want a fence around the work before you write the proposal.

COPY-READY FILE IN THE ZIP: `prompts/P04-scope-fence.txt`

From this scope brief, write three short sections for a proposal:

- A. Assumptions: what must be true for my price and timeline to hold (client inputs, response times, access, content readiness). 6-10 bullets.
- B. Exclusions: work that a reasonable client might assume is included but isn't. Be specific to this project. 6-10 bullets.
- C. Risks and how the proposal handles them (table: risk / impact / how we handle it).

Plain operational language, calm tone, no legalese. Where a number belongs (revision rounds, response time in days), write [YOU FILL] instead of guessing.

```
Brief:
"""
{{approved scope brief from P03}}
"""
```

Filled example: the Harbor & Pine brief from P03, with Dana's answers added: *net-15 invoicing manual for launch; Harbor & Pine supplies product copy, Jordan edits page copy; must-keep apps: subscriptions, reviews, shipping rates.*

Example output (excerpt)

Assumptions

- Harbor & Pine provides final product copy and approved photos by [YOU FILL] date.
- One consolidated round of feedback per milestone, returned within [YOU FILL] business days.
- Wholesale tiers stay at three levels for launch.

Exclusions

- Automated net-15 invoicing (proposed as a phase 2 option).
- Migrating or rebuilding the 8 apps marked "not needed."
- Ongoing SEO, ads, or email marketing.

Risk	Impact	How we handle it
Copy arrives late	Launch slips past Nov 20	Launch with current copy, swap in new copy after

Human gate: Every [YOU FILL] gets a real number. Read exclusions as the client would. Nothing should feel like a gotcha.

P05 Scope to three-tier proposal

Use it when: you're ready to turn the brief into Essential / Standard / Premium options built only from your service menu.

COPY-READY FILE IN THE ZIP: `prompts/P05-three-tier-proposal.txt`

Build three proposal options from my FIXED service menu. Use only menu items. Do not invent bonuses, freebies, or deliverables that aren't on the menu.

For each option (names: {{tier names, e.g. Essential / Standard / Premium}}):

- One-line "best for" statement tied to the client's goal.
- Deliverables (bullets, concrete and countable).
- What's NOT included (so the tiers are clearly different).
- Relative effort: S / M / L.
- Price: [YOU FILL]. Never write a number.

Design rules:

- Essential solves the must-haves only.
- Standard is the option I expect most clients to pick: must-haves plus the highest-value nice-to-have.
- Premium adds speed, depth, or ongoing support, not just "more stuff."
- End with a 3-row comparison table (deliverable × tier, check marks).

My service menu:

```
"""
{{list of services you actually sell, with units}}
"""
```

Scope brief + scope fence:

```
"""
{{outputs of P03 and P04}}
"""
```

Filled example (menu, abbreviated): *Theme refresh on Dawn-based theme · Custom section design (per section) · Wholesale portal setup (tiers, minimums, gated catalog) · Speed pass (apps audit, image pipeline) · Page copy edit (per page) · Launch support (2 weeks) · Monthly care plan.*

Example output (excerpt)

Essential: "Fix wholesale before the holidays." Wholesale portal (3 tiers, minimums, gated catalog); speed pass; launch support (2 weeks). *Not included:* retail redesign, copy. Effort: M. Price: [YOU FILL].

Standard: "Wholesale plus a storefront that matches the coffee." Everything in Essential plus a theme refresh with 4 custom sections and a page copy edit (5 pages). Effort: L. Price: [YOU FILL].

Premium: "Launch, then keep improving." Everything in Standard plus a priority timeline (launch Nov 13, a week of buffer before gift boxes) and 3 months of care plan. Effort: L+. Price: [YOU FILL].

Human gate: Price offline from your rate card. If Premium only differs by "more," make it differ by speed, risk reduction, or ongoing value.

P06 Pricing options framing (you fill the prices)

Use it when: you've set your three prices and want the pricing section to read as value, not a bill.

COPY-READY FILE IN THE ZIP: `prompts/P06-pricing-framing.txt`

I've priced three options. Write the pricing section of my proposal.
Use MY numbers exactly. Don't change, round, discount, or add fees.

Prices (I set these):

- {{Tier 1 name}}: {{\$ you fill}}
- {{Tier 2 name}}: {{\$ you fill}}
- {{Tier 3 name}}: {{\$ you fill}}

Payment terms (I set these): {{e.g. 50% to start, 50% at launch}}

Write:

1. A 2-sentence lead-in that ties cost to the client's stated outcome (use only outcomes from the brief; no invented ROI).
2. Each option: price, one line on who it's for, the one thing that makes it worth the step up from the tier below.
3. A short "why I recommend {{Tier 2}}" paragraph (3 sentences max), honest about when the cheaper option is the better choice.
4. Payment terms and what happens after they choose.

Never use fake scarcity, "limited time," or discounts I didn't specify.

Brief + options:

```
""
{{P03 brief + P05 options}}
""
```

Filled example: Essential \$4,800 · Standard \$7,400 · Premium \$11,500 (Jordan's own numbers) · Terms: 50% to book the start date, 50% at launch.

Example output (excerpt)

Right now Dana spends about six hours a week retyping wholesale orders, and the store's mobile speed is working against holiday shoppers. Each option below fixes the wholesale problem first; the differences are how far we take the storefront and how much support you have after launch.

Standard: \$7,400. For a launch that looks as considered as the coffee. *Worth the step up because* the retail storefront gets the redesign your new photos deserve, in the same timeline.

Why I recommend Standard: It handles both problems you raised in one launch window. If the holiday deadline matters more than the storefront, Essential is the smarter choice and we can revisit the design in January.

Human gate: Double-check every number against your rate card. Models occasionally "helpfully" round.

P07 "Our understanding" opening

Use it when: you want the first paragraph of the proposal to prove you listened, in the client's language rather than yours.

COPY-READY FILE IN THE ZIP: `prompts/P07-understanding-opening.txt`

```
Write the opening "Our understanding" section of my proposal: 90-140 words.
Mirror the client's own phrases from the brief (quote 1-2 short phrases).
Structure: where they are now → what it's costing them → what good looks like
→ the one constraint that shapes the plan.
No adjectives about me, no "I'm excited," no claims about results.
```

```
Brief:
"""
{{approved scope brief}}
"""
```

Filled example: the Harbor & Pine brief.

Example output (excerpt)

Harbor & Pine sells to about 40 cafés and a growing base of online customers, but wholesale still runs on a PDF form that Dana retypes into Shopify, roughly six hours every week. Meanwhile, the 2019 storefront is slow on mobile right before your busiest season. Marcus put the goal simply: wholesale should "feel like ordering from a real supplier." Success means cafés can order online at their own tier, the storefront loads quickly on a phone, and both are live before the gift boxes launch on November 20.

Human gate: Read it to yourself as Dana. Does it sound like her business, or like a template?

P08 Timeline against your real capacity

Use it when: you need milestones you can actually hit, given your other clients.

COPY-READY FILE IN THE ZIP: `prompts/P08-timeline.txt`

```
Build a milestone timeline for the option below.
My real capacity: {{billable hours per week for this project}} hours/week.
Earliest start: {{date}}. Hard deadline: {{date and why}}. Blackout days: {{dates}}.
```

```
Return a table: milestone / what's delivered / client input needed / target date.
Then:
- The critical path in one sentence.
- 2-3 client dependencies that would move the date, written as polite requirements.
- Buffer: build in at least {{your buffer %, e.g. 15%}} before the hard deadline.
```

```
If the work doesn't fit the capacity before the deadline, say so plainly and
suggest what to cut or phase. Don't compress the schedule to make it fit.
```

```
Option and scope:
"""
{{chosen option from P05 + scope fence from P04}}
"""
```

Filled example: capacity *14 hrs/week*; start *Oct 19*; hard deadline *Nov 20 (gift-box launch)*; blackout *Nov 2 to 3*; buffer *15%*; option *Standard*.

Example output (excerpt)

Milestone	Delivered	Client input	Target
1. Wholesale portal	Tiers, gated catalog, test orders	Price list per tier by Oct 21	Oct 30
2. Storefront design	4 sections designed	Feedback within 2 business days	Nov 6
3. Build and speed pass	Live preview	Final copy by Nov 5	Nov 12
4. Launch	Go-live and 2-week support	Launch-day availability	Nov 16

Fits, barely. Standard lands Nov 16, four days before the deadline (about 12% buffer, under your 15%). To restore buffer, move the copy edit to the week after launch.

Human gate: Believe the warning. The date you write down is the one the client remembers.

P09 Pre-send red-team review

Use it when: the proposal is drafted and you want a skeptical reviewer to catch problems before the client does.

COPY-READY FILE IN THE ZIP: `prompts/P09-red-team-review.txt`

Act as a skeptical buyer and a careful editor. Review my proposal draft and list:

1. Invented or unverifiable claims (stats, results, testimonials, guarantees).
2. Vague deliverables that can't be checked off ("optimize," "enhance," "support").
Suggest a countable rewrite for each.
3. Places scope could be read two ways (future scope-creep risk).
4. Mismatches between options, timeline, and pricing.
5. Anything that contradicts the brief.
6. The 3 questions the client will most likely ask after reading.
7. Reading level and length: cut suggestions to keep it under {{page target}} pages.

Return a prioritized fix list (Must fix / Should fix / Nice to fix).
Don't rewrite the whole proposal.

Brief:
""
{{scope brief}}
""
Proposal draft:
""
{{full draft}}
""

Filled example: Jordan's assembled Harbor & Pine draft; page target 3.

Example output (excerpt)

Must fix

- "Optimize site speed" is not checkable. Rewrite: "Reduce installed apps from 11 to 3 or fewer; serve compressed WebP images; target mobile Lighthouse performance of 70 or more on the home and product pages."
- Premium says "priority support" but the care plan doesn't define response time.

Should fix

- "Wholesale portal" doesn't say whether cafés can reorder past orders. Decide and state it.

Likely questions: Can we pay in three parts? What happens to our existing wholesale customer list? Who hosts the new images?

Human gate: Fix every Must. Answer the likely questions inside the proposal or in your cover email.

P10 Proposal cover email

Use it when: the proposal is final and you need a short email that gets it opened and gets a decision moving.

COPY-READY FILE IN THE ZIP: `prompts/P10-cover-email.txt`

Write the email that sends my proposal. 110-160 words.
Include: a one-line recap of their goal (their words), the three options in one sentence each with prices exactly as I give them, my recommendation in one line, and ONE call to action: {{e.g. a 20-minute walkthrough OR reply with questions}}.
Offer {{2 specific time slots}} if the CTA is a call.
Tone: {{tone, e.g. warm and direct}}. No "just checking in," no urgency theater.
Subject line: give 3 options, under 50 characters, no clickbait.

Context:
""
{{brief summary + options + prices + recommendation}}
""

Filled example: CTA *20-minute walkthrough*; slots *Tue 10:00 or Wed 2:00 PT*; tone *warm and direct*.

Example output (excerpt)

Subject: Harbor & Pine: wholesale + storefront options

Hi Dana and Marcus,

Attached is the proposal for getting wholesale "feeling like a real supplier" and the storefront ready before the Nov 20 gift boxes.

- **Essential (\$4,800):** wholesale portal, speed pass, launch support.
- **Standard (\$7,400):** Essential plus the storefront redesign and copy edit.
- **Premium (\$11,500):** Standard on a faster timeline plus three months of care.

I'd recommend Standard. It covers both problems in one launch window. Want to walk through it together for 20 minutes? Tuesday at 10:00 or Wednesday at 2:00 PT both work on my end.

Jordan

Human gate: Send from your own inbox, with the PDF attached, after reading it once out loud.

P11 Objection reply builder

Use it when: the client pushes back ("too expensive," "need to think," "we got a cheaper quote," "not the right time," "can we start smaller?").

A prospect replied to my proposal with an objection. Help me respond.

1. Diagnose: what is the likely real concern behind their words? Give 2 readings.
2. Write two replies (each under 120 words):
 - A. Clarify: acknowledge and ask one question that surfaces the real concern.
 - B. Resolve: acknowledge, restate value in their words, and offer ONE concrete path (a smaller option already in my proposal, phasing, or different payment timing I'm willing to offer: {{what you're willing to flex}}).
3. One line on what NOT to say in this situation.

Rules: never lower my price unless I listed it as a flex. Never invent proof, deadlines, or competitor claims. Stay calm and generous. Losing gracefully is fine.

Their message:

"""

{{paste their reply}}

"""

My proposal summary:

"""

{{options + prices + key outcomes}}

"""

Filled example: willing to flex: *split payment into 3 parts; phase the storefront to January*. Their message: *"This looks great but Marcus thinks \$7,400 is more than we planned. We had more like \$5k in mind."*

Example output (excerpt)

Likely real concern: (1) cash flow before the holiday season, or (2) the storefront redesign doesn't feel urgent next to wholesale.

Reply B (Resolve): "Totally fair. Holiday season is when cash is tightest. If wholesale is the urgent part, Essential at \$4,800 fixes the PDF problem and the mobile speed before Nov 20, and we can quote the storefront redesign as a January project when things calm down. If you'd rather do it all now, I can split Standard into three payments instead of two. Which feels better?"

Don't say: "I can do it for \$5k." It teaches them your prices are opening bids.

Human gate: Pick A when you don't know the real concern yet; B when you do.

P12 Discount request: trade scope, not rate

Use it when: someone asks for a discount outright and you want to protect your rate without sounding rigid.

A client asked for a discount. I don't discount my rate, but I'm happy to adjust scope. Using my proposal below, find 2-3 scope trades that would reach roughly {{their target}} without hurting the core outcome. For each trade: what's removed or deferred, the honest impact, and the new total. Calculate the new total using ONLY the per-item prices I give here: {{item: price list}}. If an item has no price, write [YOU FILL].

Then write a short reply (under 110 words) offering those trades, warm and matter-of-fact, without apologizing for my rates.

```
Proposal:
"""
{{the option they picked + line items}}
"""
```

Filled example: target *about \$6,000*; per-item prices: *storefront sections \$650 each; copy edit \$180/page; launch support \$600*.

Example output (excerpt)

- **Trade 1:** Design 2 custom sections instead of 4 (–\$1,300). Impact: home and product pages get the new look; About and Wholesale landing use refreshed existing layouts. **New total: \$6,100.**
- **Trade 2:** Harbor & Pine edits copy in-house using my notes (–\$900). **New total: \$6,500.**

"Happy to make this fit. I keep my rate the same for every client, but we can shape the scope. Two options get close to \$6k: ..."

Human gate: Verify the math yourself. Only offer trades you'd still be proud to ship.

P13 Three-step follow-up sequence

Use it when: the proposal's been sent and you want polite follow-ups ready before silence starts to feel awkward.

COPY-READY FILE IN THE ZIP: `prompts/P13-follow-up-sequence.txt`

```
Write a 3-email follow-up sequence for a proposal I sent on {{date}}.
Each email must add something new; never "just bumping this."

Email 1 (day {{3}}): 60-90 words. Offer a useful detail related to their goal
(a question that helps them decide, or a clarification). Soft CTA.
Email 2 (day {{7}}): 60-90 words. Make deciding easier: a one-line summary
of the options, or the smallest next step. Offer a 15-minute call.
Email 3 (day {{14}}): 50-80 words. Graceful close-the-loop: assume timing
isn't right, leave the door open, no guilt.

Use only facts from the context. No fake deadlines, no "my calendar is filling up"
unless I tell you it's true: {{true scheduling constraint, or "none"}}.
Give each email a subject line that works as a reply in the same thread.

Context:
"""
{{brief summary + options + anything new since sending}}
"""
```

Filled example: sent *Oct 14*; true constraint: *"to hit Nov 20 I need to start by Oct 21."*

Example output (excerpt)

Day 3. "Hi Dana, one thing that might help the decision: for the wholesale portal, I'd import your current café list so nobody has to re-register. That's included in every option. Any questions I can answer for Marcus?"

Day 7. "Quick summary in case it helps: Essential fixes wholesale and speed, Standard adds the storefront, Premium adds a faster timeline and care. To hit Nov 20 I'd need to start by Oct 21. Want to grab 15 minutes this week?"

Day 14. "I'll assume the timing isn't right for now, and that's completely fine. If wholesale becomes a priority again in the new year, just reply to this thread and I'll refresh the plan."

Human gate: Put the three dates on your calendar now. Stop the sequence the moment they reply.

P14 Close-the-loop email and loss feedback

Use it when: you lost the deal (or it went silent) and want to stay on good terms and learn why.

COPY-READY FILE IN THE ZIP: `prompts/P14-close-the-loop.txt`

```
I didn't win this project. Write:
1. A gracious reply (under 80 words) that thanks them, wishes the project well,
   and leaves one open door relevant to their business (no hard sell).
2. A 3-question feedback ask they can answer in under 2 minutes (multiple
   choice where possible): what decided it, how my price compared, what
   would have changed their mind.
3. A note for my own records: 3 hypotheses for why I lost, based ONLY on
   the context below, and one experiment to test next time.
```

```
Context (their message + my proposal summary):
"""
{{paste}}
"""
```

Filled example: *"Thanks Jordan, we've decided to go with an agency that's also doing our packaging."*

Example output (excerpt)

```
"Thanks for letting me know, Dana. Bundling with your packaging partner makes a lot of sense. I hope the gift boxes fly off the
shelf. If you ever want a second pair of eyes on wholesale ordering, I'm a reply away."
```

Hypothesis: the buyer valued one vendor for brand plus web. **Experiment:** next time, ask in discovery "Who else is working on the holiday launch?"

Human gate: Send the gracious reply even if you skip the feedback ask.

P15 Kickoff email

Use it when: they said yes. Set the tone, collect inputs, and prevent week-one confusion.

COPY-READY FILE IN THE ZIP: `prompts/P15-kickoff-email.txt`

```
Write a kickoff email for a project the client just approved.
Include, in this order:
1. A short thank-you and the agreed outcome in one sentence.
2. What happens in the next 7 days (dated).
3. What I need from them, as a checklist with owners and due dates.
4. How we'll communicate: {{channel}}, {{update cadence}}, my working hours
   {{hours + timezone}}, and expected reply time.
5. How changes work: new requests go to a short change note before work starts.
6. The kickoff call invite line: {{date/time}}.
```

```
Under 250 words. Friendly, organized, zero jargon.
Use only the agreed scope below; don't add deliverables.
```

```
Agreed scope + timeline:
"""
{{final option + milestones}}
"""
```

Filled example: *channel email plus a shared Notion page; cadence Friday update; hours Mon to Thu, 9 to 4 PT; kickoff Mon Oct 19, 10:00 PT.*

Example output (excerpt)

This week: Mon Oct 19 kickoff call (30 min) · Wed Oct 21 wholesale price sheet due · Fri Oct 23 first update.

What I need from you

- ☐ Shopify staff account with Apps + Themes permissions (Dana, by Oct 19)
- ☐ Wholesale price sheet for all 3 tiers (Dana, by Oct 21)
- ☐ Final product photos in the shared folder (Marcus, by Oct 23)

Changes: Ideas will come up, and that's good. I'll write any new request as a short change note with time and cost, so you can decide before I start.

Human gate: Make sure every date matches the timeline in your signed proposal.

P16 Scope-creep and change-request reply

Use it when: the client asks for something that isn't in the agreed scope ("can you also...", "quick tweak...", "while you're in there...").

COPY-READY FILE IN THE ZIP: `prompts/P16-scope-creep-reply.txt`

My client asked for something. Check it against the agreed scope and draft my reply.

Step 1: Classify the request: IN SCOPE / SMALL OUT-OF-SCOPE / NEW WORK.

Quote the scope line that supports your call. If unclear, say so.

Step 2: Draft a reply (under 120 words) for that class:

- In scope: confirm and give timing.
- Small out-of-scope: say yes-with-terms: it's outside the agreement, here's the time/cost ({{your change rate or [YOU FILL]}}), and whether it affects the timeline. Ask for a yes before starting.
- New work: appreciate the idea, suggest a separate mini-quote or phase 2, keep current milestones protected.

Tone: generous, never defensive, no "per my last email."

Don't agree to any free work on my behalf.

Agreed scope:

"""

{{scope + exclusions}}

"""

Their request:

"""

{{paste}}

"""

Filled example: change rate \$110/hour. Request: *"Love the wholesale portal! Could cafés also get automatic net-15 invoices when they order? Should be quick?"*

Example output (excerpt)

Classification: NEW WORK. Exclusions state "Automated net-15 invoicing (proposed as a phase 2 option)."

"So glad the portal is landing well! Automatic net-15 invoices is a great next step. It's outside what we scoped for this launch (we flagged it as phase 2), because it touches payments and accounting rules. I'd estimate about 6 to 8 hours (\$660 to \$880). It won't affect the Nov 16 launch if we start it after go-live. Want me to write up a one-page change note?"

Human gate: Never start out-of-scope work before a written yes. Then use P17.

P17 Change order note

Use it when: the client said yes to extra work and you want it written down in one clean page.

COPY-READY FILE IN THE ZIP: `prompts/P17-change-order-note.txt`

```
Write a one-page change order note.
Sections: Request (1-2 sentences in the client's words) / What I'll deliver
(countable bullets) / What's not included / Estimate ({{hours or fixed fee I set}})
/ Effect on timeline / Payment ({{terms I set}}) / Approval line ("Reply 'approved'
to this email to confirm").
Plain language, no legalese. Don't change my numbers.
```

```
Context:
"""
{{original request + my reply + their yes}}
"""
```

Filled example: fixed fee \$800; timeline starts Nov 17, done by Nov 24; payment invoiced on completion, net 7.

Example output (excerpt)

Change order #1: automatic net-15 invoices for wholesale cafés Deliver: invoice auto-created when a net-15 café places an order; invoice emailed to the café's billing contact; due-date reminder 3 days before. **Not included:** collections, late fees, accounting-software sync. **Estimate:** \$800 fixed. **Timeline:** Nov 17 to Nov 24, after launch; launch date unchanged. **Approval:** Reply "approved" to this email to confirm.

Human gate: Save the client's "approved" reply in the project folder.

P18 Win/loss debrief to sharpen your system

Use it when: once a month, or after any deal that surprised you. This is how the kit gets better every month.

COPY-READY FILE IN THE ZIP: `prompts/P18-win-loss-debrief.txt`

```
Here are my last {{N}} proposals with outcomes (won/lost/silent), the tier chosen,
the price, days from inquiry to proposal, and any feedback.
```

```
Analyze and return:
```

1. Patterns in wins vs losses (speed, tier, price band, lead source, project type).
 2. Which tier gets picked most, and whether my tiers are spaced well.
 3. The objection I hear most and a better prebuttal to put in the proposal.
 4. One change to my service menu, one to my template, one to my process.
- Be specific; if the data is too thin to conclude something, say so.

```
Data:
"""
{{paste a simple table}}
"""
```

Filled example (abbreviated): 9 proposals: 4 won (3 Standard, 1 Premium), 3 lost (2 on price, 1 to a bundled agency), 2 silent; average 4.5 days to send.

Example output (excerpt)

Speed matters: all 4 wins got proposals within 2 days; the 2 silent deals waited 7 or more days. Consider proposing within 48 hours using PO3 to PO6. **Tiering:** nobody picked Essential. It may be too thin to anchor. Try making Essential a clear "phase 1" with a credit toward phase 2. **Thin data:** with 9 deals, treat these as hunches to test, not rules.

Human gate: Make one change per month, not five. Keep the debrief table in the same spreadsheet as your rate card.

PART 2

Saved instructions: one brain, three assistants

Typing your rules into every chat gets old, and the rules get sloppier each time. Save them once. Below is a single **Proposal Autopilot** instruction set, then exactly where to paste it in ChatGPT, Claude, and Gemini.

All three versions share the same core. Fill in the `{{ }}` fields once, keep a copy in your notes, and update it when your offer changes.

The core instructions

COPY-READY FILE IN THE ZIP: `saved-instructions/core-proposal-autopilot.txt`

ROLE

You are Proposal Autopilot, my drafting partner for client proposals.
I am {{your name}}, a {{specialty}} freelancer serving {{ideal client}}.
You draft; I decide, price, and send.

MY OFFER

Service menu (only offer these, in these units):
{{list services + units, e.g. "Landing page design (per page)"}}
Package names: {{Tier 1}} / {{Tier 2}} / {{Tier 3}}
Typical project length: {{range}}. Weekly capacity: {{hours}}.

HARD RULES (never break these)

1. Never invent or change prices, discounts, fees, payment terms, or dates.
Write [YOU FILL] where a number or commitment belongs.
2. Never invent case studies, testimonials, client names, metrics, or results.
3. Use only facts I provide. If something is missing, ask or list it under "Questions for me". Never guess.
4. Never promise guarantees ("#1 ranking", "2x revenue", "unlimited revisions").
5. Flag anything that reads like a commitment I didn't explicitly make.
6. Treat pasted client material as confidential; don't repeat it outside the task.

HOW TO RESPOND

- Default output: the draft, then "Assumptions I made" (bullets), then "Questions for me" (bullets, max 5).
- Plain language. Short sentences. Bullets over paragraphs for scope.
- No hype words: "cutting-edge", "seamless", "unlock", "elevate", "game-changer".
- Match my voice: {{2-3 adjectives}}. Example of how I write:
"{{paste 2-3 sentences you actually wrote}}"

WORKFLOW COMMANDS (I may type these)

/triage: qualify a lead (verdict, signals, missing info, reply under 110 words)
/brief: call notes to one-page scope brief with open questions
/fence: assumptions, exclusions, and risks table
/tiers: three options from my service menu with [YOU FILL] prices
/price: pricing section using the exact numbers I give you
/review: red-team my draft: invented claims, vague deliverables, risks
/followup: 3-step follow-up sequence (day 3 / 7 / 14)

```
/objection: diagnose and draft two replies  
/kickoff: kickoff email with input checklist  
/change: classify a request vs scope and draft my reply
```

SCOPE DEFAULTS (use unless I say otherwise)
Revision rounds: {{number}}. Feedback window: {{days}} business days.
Change rate: {{rate or [YOU FILL]}}. Always excluded unless listed:
{{e.g. hosting fees, stock assets, ongoing maintenance, ad spend}}.

Keep the "Example of how I write" line. Three real sentences from your own emails do more for tone than any adjective.

ChatGPT: custom GPT

1. In ChatGPT, open **GPTs** → **Create**, then switch to the **Configure** tab.
2. **Name:** Proposal Autopilot . **Description:** "Drafts scopes, tiered proposals, and follow-ups. Never sets prices."
3. **Instructions:** paste the core instructions above, filled in.
4. **Conversation starters** (one per box):
 - /trriage: here's a new lead
 - /brief: here are my call notes
 - /tiers: build options from this brief
 - /review: check this proposal before I send it
5. **Knowledge:** upload proposal-template.md , scope-checklist.md , and your filled-in rate-card-and-rules.md **without prices** (keep the price column blank or remove it). Optionally add one or two past proposals you're allowed to reuse, with client names removed.
6. **Capabilities:** web search off (you want answers from your files, not the internet); everything else optional.
7. Save as **Only me**.

COPY-READY FILE IN THE ZIP: saved-instructions/chatgpt-gpt-addendum.txt

```
ADDITIONAL INSTRUCTIONS FOR THIS GPT  
- When knowledge files include proposal-template.md, format proposals to match  
  its section order exactly.  
- When I upload a past proposal, learn structure and voice only. Never reuse  
  client names, numbers, or results from it.  
- If I ask for a full proposal in one go, run the steps in order  
  (brief → fence → tiers → price placeholders → review) and pause after the  
  brief to confirm open questions with me.
```

Paste the addendum under the core instructions.

Claude: Project

1. In Claude, create a **New project** called Proposal Autopilot .
2. Open **Project instructions** (sometimes labeled "Set project instructions") and paste the core instructions, filled in.
3. Add to **Project knowledge:** proposal-template.md , scope-checklist.md , rate-card-and-rules.md (no prices), and anonymized past proposals.
4. Start one chat per client deal inside the project, so each deal keeps its own history while sharing the same rules.

COPY-READY FILE IN THE ZIP: `saved-instructions/claude-project-addendum.txt`

ADDITIONAL INSTRUCTIONS FOR THIS PROJECT

- Each chat in this project is one client deal. At the start of a new chat, ask me for the client name (or a code name) and the deal stage.
- Keep a running "Deal summary" at the end of long answers: stage, chosen tier (if any), open questions, next action and date.
- For proposals, follow the section order in `proposal-template.md` from project knowledge. When something conflicts with the template, ask me.

Optional: Claude Skill version. If you use Claude Skills, save the core instructions as a `SKILL.md` file in a folder named `proposal-autopilot`, starting with this header:

COPY-READY FILE IN THE ZIP: `saved-instructions/claude-SKILL.md`

```
---
name: proposal-autopilot
description: Drafts client proposal steps for a freelancer (lead triage, scope brief, assumptions and
exclusions, three-tier options, pricing framing with user-supplied prices, review, follow-ups, kickoff, change
requests). Use when the user pastes lead info, call notes, a proposal draft, or a client request about scope.
---

{{paste the filled-in core instructions here}}
```

Gemini: Skills

Google is replacing Gems with **Skills**: saved instructions you run from any chat by typing `/` and the skill's name. Skills can carry reference files, and you can stack more than one in a chat. (Google says Gems will be retired starting November 2026 for personal accounts and March 2027 for Workspace business accounts, with existing Gems migrated to Skills.)

Skills work best small and specific, so split the brain into three skills instead of one. Use plain hyphenated names:

1. In Gemini, create a new skill (or ask Gemini to "turn this into a skill" from a chat where you've pasted the instructions).
2. Create the three skills below. For each, paste **the HARD RULES and HOW TO RESPOND blocks** from the core instructions first, then the skill-specific block.
3. Attach `proposal-template.md` and `scope-checklist.md` as reference files on `proposal-draft`.
4. If you're on Google Workspace, create the skills inside your Workspace account if you want them next to client email and Docs. Skills made in the personal Gemini app may not appear there.

COPY-READY FILE IN THE ZIP: `saved-instructions/gemini-skill-scope-from-call.txt`

```
SKILL NAME: scope-from-call
PURPOSE: Turn discovery call notes into a one-page scope brief.
OUTPUT SECTIONS: Client snapshot / Problem in their words / Desired outcome /
Must-haves vs nice-to-haves / Constraints / Stakeholders and sign-off /
Risks to price or fence / Open questions (max 5).
Mark vague points [UNCLEAR]. Flag anything that sounds like a commitment I made.
```

COPY-READY FILE IN THE ZIP: `saved-instructions/gemini-skill-proposal-draft.txt`

```
SKILL NAME: proposal-draft
PURPOSE: Turn an approved scope brief into a proposal using the attached
proposal-template.md section order.
Build three options ({{Tier 1}} / {{Tier 2}} / {{Tier 3}}) only from my service menu:
{{menu}}
Every price is [YOU FILL] unless I give the number in this chat, in which case
use it exactly. Include assumptions, exclusions, and a milestone table with
[YOU FILL] dates. End with "Questions for me".
```

SKILL NAME: proposal-nudge

PURPOSE: Write the next follow-up for a proposal that has gone quiet.

Ask me: date sent, which follow-up number (1, 2, or 3), anything new since.

Follow-up 1 adds a useful detail; 2 makes deciding easier; 3 closes the loop gracefully. 50-90 words. No "just checking in," no invented deadlines.

Stacking: in one chat, run /scope-from-call on your notes, then /proposal-draft on the brief. Later, /proposal-nudge in a fresh chat with the proposal pasted in.

Which assistant should you use?

If you...	Use
Already pay for ChatGPT and want conversation starters	Custom GPT
Want each deal in its own thread with shared rules and files	Claude Project
Live in Gmail and Google Docs	Gemini Skills (in Workspace)
Can't decide	Run P03 on the same notes in two of them once; keep the one whose draft needed fewer edits

PART 3

One-page proposal template

Paste this into Google Docs, Notion, Word, or your proposal tool. It's built to fit on one to two pages: decision-makers skim, so every section earns its place. Section order follows how buyers actually read: *do they get it* → *what do I get* → *what does it cost* → *what happens next*.

Prompts that fill each section are noted in the margin column of the guide below the template.

```
# Proposal: {{Project name}} for {{Client}}
Prepared by {{Your name}} · {{Date}} · Valid until {{Date + 14 days}}

## Our understanding
{{90-140 words. Where they are now → what it's costing them → what good looks
like → the constraint that shapes the plan. Use 1-2 of their own phrases. (P07)}}

## What success looks like
- {{Measurable or observable outcome 1}}
- {{Outcome 2}}
- {{Outcome 3}}

## Options
| | {{Tier 1}} | {{Tier 2}} (recommended) | {{Tier 3}} |
|---|---|---|---|
| Best for | {{one line}} | {{one line}} | {{one line}} |
| {{Deliverable A}} | ✓ | ✓ | ✓ |
| {{Deliverable B}} | | ✓ | ✓ |
```

```

| {{Deliverable C}} | | | ✓ |
| Timeline | {{weeks}} | {{weeks}} | {{weeks}} |
| Investment | [YOU FILL] | [YOU FILL] | [YOU FILL] |

**Why I recommend {{Tier 2}}:** {{2-3 honest sentences, including when the
smaller option is the better choice. (P06)}}

## How we'll work
| Milestone | You receive | I need from you | Target date |
|---|---|---|---|
| 1. {{name}} | {{deliverable}} | {{input}} | [YOU FILL] |
| 2. {{name}} | {{deliverable}} | {{input}} | [YOU FILL] |
| 3. {{name}} | {{deliverable}} | {{input}} | [YOU FILL] |

Communication: {{channel}} · Updates every {{day}} · Replies within {{X}} business days.

## Assumptions
- {{What must be true for price and timeline to hold. (P04)}}
- Feedback: {{N}} consolidated rounds per milestone, returned within {{X}} business days.

## Not included
- {{Specific exclusion 1}}
- {{Specific exclusion 2}}
- Changes outside this scope are quoted as a short change note before work starts.

## Investment and terms
{{Chosen tier}}: [YOU FILL]. Payment: {{e.g. 50% to book the start date, 50% at
delivery}}. Invoices due {{net X}}. {{Tax note if relevant.}}

## Next steps
1. Reply with the option you'd like (or book a 20-minute walkthrough: {{link}}).
2. I'll send {{agreement/invoice}} within {{1 business day}}.
3. We kick off on {{date}} once the deposit lands.

{{Your name}} · {{email}} · {{phone or booking link}}

```

How to use it well

Section	Fill it with	Common mistake
Our understanding	P07 output	Talking about yourself first
What success looks like	Outcomes from the P03 brief	Vanity metrics you can't influence
Options	P05 + your prices	Tiers that differ only by "more"
How we'll work	P08 milestones	Dates with no buffer
Assumptions / Not included	P04 output	Vague exclusions ("other work")
Investment and terms	Your rate card	Letting the model write numbers
Next steps	Three concrete steps	Ending with "let me know your thoughts"

Validity date: a 14-day "valid until" isn't fake scarcity. Your calendar and costs genuinely change. Keep it honest: if a client comes back on day 20, you can still honor it.

Length check: if it runs past two pages, move detail into an appendix (detailed deliverables, process, FAQs) and keep page one decision-ready.

PART 4

Scope checklist

Run this before every proposal and again before kickoff. Each "no" is either a question for the client, a line in **Assumptions**, or a line in **Not included**. Forty checks, about five minutes.

COPY-READY FILE IN THE ZIP: `templates/scope-checklist.md`

```
# Scope checklist: {{Client}} / {{Project}}

## People and decisions
- [ ] I know who signs off on the money (name + role)
- [ ] I know who gives feedback, and it's one consolidated voice
- [ ] Every stakeholder who can veto the work has been mentioned
- [ ] I know who supplies content, data, and access, and by when

## Outcome
- [ ] The goal is written in the client's words
- [ ] Success is observable (number, behavior, or "done when...")
- [ ] I know what happens if we miss the deadline (real vs soft)
- [ ] The client agrees which problem is #1 if we can only solve one

## Deliverables
- [ ] Every deliverable is countable (pages, sections, emails, hours, versions)
- [ ] File formats and handoff method are named
- [ ] "Done" is defined for each milestone
- [ ] Revision rounds are numbered, and "revision" vs "new request" is defined
- [ ] I've named what's NOT included that they might assume is
- [ ] Ownership/licensing of deliverables is stated (or in my agreement)

## Inputs and dependencies
- [ ] Access needed (accounts, logins, permissions) is listed with due dates
- [ ] Content readiness is known (exists / needs editing / needs creating)
- [ ] Third-party tools, plugins, or subscriptions are identified, with who pays
- [ ] Dependencies on other vendors are named
- [ ] Feedback turnaround time is stated in business days

## Timeline
- [ ] Milestones fit my real weekly capacity
- [ ] There's buffer before any hard deadline (15%+)
- [ ] Holidays and my blackout dates are accounted for
- [ ] It's clear what pauses the clock (late inputs, late feedback)

## Money
- [ ] Every price came from my rate card, not from the AI
- [ ] Tiers differ in value, not just volume
- [ ] Payment schedule and due terms are clear
- [ ] Expenses, pass-through costs, and taxes are addressed
- [ ] Change requests have a rate or a process
- [ ] Late payment handling is in my agreement
- [ ] Deposit is required before the start date is held

## Risk
- [ ] The riskiest assumption is written down
- [ ] Anything I haven't done before is scoped with discovery or contingency
- [ ] Legal, medical, financial, or compliance claims are avoided or reviewed
- [ ] Data and privacy needs are understood (what client data I'll touch)
- [ ] An exit or pause clause exists in my agreement

## Proposal hygiene
- [ ] No invented claims, metrics, or testimonials (P09 ran clean)
```

- [] No commitments I didn't mean to make
- [] Validity date set
- [] One clear next step and one call to action
- [] I'd be comfortable if the client forwarded this to their boss

After the deal: paste any item that bit you into P18 at month's end. If the same check fails twice, move the fix into your template so it can't happen a third time.

PART 5

Build it: lead form to proposal draft, on autopilot

This build connects your intake form to a ready-to-edit proposal draft, so every qualified lead gets a brief and a draft in your Docs within minutes, and nothing goes out until you approve it.

Disclosure: the Make link below is an affiliate link; WorkCue may earn a commission if you sign up, at no extra cost to you.

Start free on Make: <https://www.make.com/en/register?pc=useworkcue>

What you're building

Two small scenarios with a human gate between them:

SCENARIO A: INTAKE → DRAFT (runs automatically)

```
Form submitted
  → normalize fields
  → find or create lead (dedupe by email)
  → filter: disqualified? → polite-pass DRAFT → stop
  → router: enough info? → NO → discovery-call reply DRAFT
                        → YES → AI brief + outline → proposal Doc from template
  → status = "Draft ready" → notify me
```

```
+-----+
| HUMAN GATE: you edit the Doc, type prices, |
| tick "Reviewed", set status = "Approved"   |
+-----+
```

SCENARIO B: APPROVED → SEND (runs only after your approval)

```
Status changed to "Approved"
  → check: prices filled AND reviewed = true
  → export Doc as PDF → Gmail (draft or send)
  → status = "Proposal sent" + follow-up reminders on day 3 / 7 / 14
```

Time to build: about 2 hours for Scenario A, 45 minutes for B. **Cost:** a solo freelancer's lead volume typically fits comfortably in Make's free tier; each run uses roughly 10 to 15 operations. Check Make's current plan limits before you scale up.

Before you open Make (20 minutes)

- Form:** Tally, Typeform, Google Forms, or Jotform. Fields:
 - Name, work email, company (required)
 - Project type: dropdown from your service menu (required)
 - Budget band: dropdown, e.g. *Under \$2k / \$2-5k / \$5-10k / \$10k+* (required)
 - Deadline, and "what happens if it's late?" (optional, very revealing)

- "Describe the problem in 2 to 5 sentences" (required)
 - How did you hear about me? Consent to email follow-up (checkbox)
- 2. Lead table:** *Airtable* (used below), a Google Sheet, or a Notion database. Columns: `Email` (primary), `Name`, `Company`, `Project type`, `Budget band`, `Deadline`, `Problem`, `Source`, `Status` (single select: New, Disqualified, Needs discovery, Draft ready, Approved, Proposal sent, Won, Lost), `Doc URL`, `Tier 1 price`, `Tier 2 price`, `Tier 3 price`, `Reviewed` (checkbox), `Sent at`.
 - 3. Proposal template Doc:** copy the Part 3 template into Google Docs. Make's Google Docs module fills `{{tags}}` in a template, so rename the AI-filled sections to these tags: `{{client_name}}`, `{{company}}`, `{{date}}`, `{{understanding}}`, `{{success}}`, `{{options}}`, `{{assumptions}}`, `{{exclusions}}`, `{{questions}}`. Leave prices as `[YOU FILL]` text.
 - 4. Accounts to connect:** form tool, *Airtable*, Google Docs/Drive, Gmail, Slack (optional), and an AI provider (OpenAI or Anthropic API key, billed separately by the provider).

Scenario A, module by module

Module names below are as they appear in Make's app list; Make occasionally renames AI modules, so if one doesn't match exactly, search the app name and pick the closest action.

Module 1: Trigger. *Tally* → *Watch New Responses* (or *Typeform* → *Watch Responses*, *Google Forms* → *Watch Responses*, or *Webhooks* → *Custom webhook* for any form that can post a webhook). Set the scenario schedule to **Immediately** for instant triggers.

Module 2: Normalize. *Tools* → *Set multiple variables*.

- `email` = `lower(trim(Email))`
- `company` = `Company`, or "Solo" if empty
- `budget_band`, `project_type`, `problem`, `deadline` mapped straight from the form

Why: every later module reads from these clean variables, so swapping forms later only touches this module.

Module 3: Dedupe. *Airtable* → *Search Records* with formula `{Email} = "{{email}}"`, limit 1.

Module 4: New or returning? Router. Make routers split a flow but don't merge it back, so keep this simple:

- Route "Returning" (filter: Module 3 *Total number of bundles* > 0) → *Airtable* → *Update a Record* (append the new problem text and source; don't overwrite history) → *Slack* → *Create a Message* to yourself: "Returning lead: `{{company}}` sent a new request." Stop here. Repeat inquiries deserve a personal reply, not a template.
- Route "New" (filter: Total number of bundles = 0) → *Airtable* → *Create a Record* with Status = New. Every module below sits on this route and uses this record's ID.

Module 5: Triage router (three routes). Add a second **Router** on the "New" route. A bundle travels down *every* route whose filter matches, and the fallback route runs only when none do, so keep the filters mutually exclusive:

- **Route 1, Disqualified.** Filter: *Budget band* equals your below-floor band. → *Airtable* → *Update a Record* (Status = Disqualified) → *Gmail* → *Create a Draft* with a kind pass note (PO1's POLITE PASS reply as the body). **A draft, not a send.** Glance at these weekly.
- **Route 2, Needs discovery.** Filter: budget band is **not** the below-floor band, **and** either problem text length < 120 characters (`length(problem)`) **or** project type = "Other / not sure". → *Gmail* → *Create a Draft* with your booking link (PO1's DISCOVERY FIRST reply) → *Airtable* → *Update a Record* (Status = Needs discovery).
- **Route 3, Draft it.** Mark this as the router's **fallback route** so every lead that passes the first two checks continues to the AI step below.

Module 6: AI brief and outline. *OpenAI* → *Generate a response* (older accounts: *Create a Completion* / *Chat Completion*), or *Anthropic Claude* → *Create a Prompt*.

- System/instructions: paste the **HARD RULES** and **HOW TO RESPOND** blocks from Part 2.

- User message:

COPY-READY FILE IN THE ZIP: `automation/make-ai-module-prompt.txt`

```
Using ONLY the intake fields below, return valid JSON with these keys:
"understanding" (90-140 words, mirror the client's phrases),
"success" (3 bullet lines, observable outcomes only),
"options" (three tiers named {{Tier 1}}, {{Tier 2}}, {{Tier 3}}, built only from
my service menu; each with best_for and deliverables; price must be "[YOU FILL]"),
"assumptions" (5 bullets), "exclusions" (5 bullets),
"questions" (up to 5 questions I must confirm before pricing).
Never invent prices, dates, metrics, testimonials, or guarantees.
Service menu: {{your menu}}
Intake:
Name: {{name}} | Company: {{company}} | Type: {{project_type}}
Budget band: {{budget_band}} | Deadline: {{deadline}}
Problem: {{problem}}
```

- Set the response format to JSON if the module offers it; otherwise add *JSON → Parse JSON* as Module 7.

Module 7: Parse. *JSON → Parse JSON* on the AI text (skip if the AI module already returns structured output). Turn arrays into text with `join()` and line breaks so they drop into the Doc cleanly.

Module 8: Create the proposal Doc. *Google Docs → Create a Document from a Template*. Pick your template, map each `{{tag}}` to the parsed fields, name it `Proposal - {{company}} - {{formatDate(now; "YYYY-MM-DD")}}`, and save it to a `Proposals/Drafts` folder.

Module 9: Update the lead. *Airtable → Update a Record*: Status = Draft ready, Doc URL = the new document's link.

Module 10: Notify yourself. *Slack → Create a Message* (to yourself or a private channel) or *Gmail → Send an Email* to your own address:

```
New draft ready: {{company}} ({{budget_band}}, {{project_type}})
Questions to confirm first: {{questions}}
Doc: {{doc_url}} · Lead: {{airtable_record_url}}
```

Error handling. Right-click the AI module and the Docs module → *Add error handler* → **Break** (Make retries and keeps the run in *Incomplete executions*), and add a *Resume*-style fallback notification so a failure pings you instead of dying quietly. In scenario settings, turn on **Allow storing of incomplete executions**.

The human gate

When the notification arrives:

1. Open the Doc. Run **P09 Pre-send review** on it if you have 3 minutes; the scope checklist if you have 5.
2. Confirm open questions with the client if needed (this often happens before you price).
3. Type your prices into the Doc **and** into the Airtable `Tier price` fields.
4. Tick **Reviewed**, then set Status = **Approved**.

That's the only way Scenario B ever fires.

Scenario B, module by module

Module 1: Trigger. *Airtable → Watch Records*, using a view named "Approved to send" filtered on `Status = Approved`, so the trigger only sees approved records. Schedule every 15 minutes (or use an Airtable automation webhook for instant runs).

Module 2: Safety router. Add a **Router**. Route 1 filter: `Reviewed` is true **and** all three price fields are not empty **and** `Doc URL` exists; the send modules below sit on this route. Route 2 is the **fallback**: *Slack/Gmail* "Approval blocked: missing prices

or review" → stop. This catches the 11pm "approved by accident" click.

Module 3: Export PDF. *Google Drive* → *Download a File* with the Doc's ID, converting Google Docs to PDF.

Module 4: Send. Two options; pick one:

- **Safer (recommended for the first month):** *Gmail* → *Create a Draft* with the PDF attached and P10's cover email in the body. You press Send in Gmail.
- **Automatic:** *Gmail* → *Send an Email* with the PDF attached. Only switch to this after a month of drafts you didn't need to edit.

Module 5: Log it. *Airtable* → *Update a Record*: Status = Proposal sent, Sent at = `now`.

Module 6: Follow-up reminders. *Google Calendar* → *Create an Event* (or *Todoist* → *Create a Task*) three times: Sent at + 3, + 7, and + 14 days, titled "Follow up {{company}} (P13 email 1/2/3)". Reminders, not auto-sends: you'll stop the sequence the moment they reply.

Optional Scenario C: Follow-up drafts. A daily scheduled scenario that searches Airtable for `Status = Proposal sent` and `Sent at` = 3, 7, or 14 days ago, runs the P13 prompt through the AI module, and saves the result as a **Gmail draft** in the original thread. You review and send.

Test before you trust it

- ☐ Submit the same email twice: one Airtable record, updated, not duplicated
- ☐ Below-floor budget creates a polite-pass **draft** and no Doc
- ☐ A two-sentence vague request routes to "Needs discovery"
- ☐ The Doc contains `[YOU FILL]` wherever money appears, and no invented numbers
- ☐ Setting Status = Approved **without** prices triggers the "blocked" alert
- ☐ Turning off your AI API key produces an alert, not a silent failure
- ☐ Reminders land on the right dates in your calendar

Zapier variant

Same logic, different building blocks. Zapier is quicker to set up for a straight line; Make is cheaper and clearer once you branch.

Zap A: Intake → Draft

1. **Trigger:** *Tally* → *New Response* (or *Typeform* / *Google Forms* / *Jotform* equivalent).
2. **Formatter by Zapier** → **Text** → **Lowercase** (and *Trim Whitespace*) on the email.
3. **Airtable** → **Find Record** by Email, with "Create Airtable Record if it doesn't exist yet" turned on. That one setting handles the dedupe.
4. **Paths by Zapier:**
 - *Path A, Disqualified:* rule `Budget band` equals your below-floor band → *Airtable* → *Update Record* (Status = Disqualified) → *Gmail* → *Create Draft* (polite pass).
 - *Path B, Needs discovery:* rule `problem length < 120 characters` (use *Formatter* → *Text* → *Word Count* or a *Filter* on text length) → *Gmail* → *Create Draft* with booking link → Status = Needs discovery.
 - *Path C, Draft it:* everything else.
5. **Path C:** *ChatGPT (OpenAI)* → *Conversation* (or *Anthropic (Claude)* → *Send Message*, or *AI by Zapier*) with the same prompt as Make Module 6.
6. **Formatter** → **Utilities** → **Line-item to Text** or *Code by Zapier* if you need to split the JSON; simpler: ask the AI for clearly labeled sections and map the whole text into one `{{draft}}` tag.

7. **Google Docs** → **Create Document From Template**, mapping the fields.
8. **Airtable** → **Update Record** (Status = Draft ready, Doc URL) → **Slack** → **Send Direct Message** to yourself.

The **gate** in Zapier: use **Human in the Loop by Zapier** → **Request Approval** right after step 8 if it's available on your plan. The Zap pauses until you click Approve in the request, and you can attach the Doc link to the request. Otherwise, use the same Airtable status approach as Make (Zap B below).

Zap B: Approved → Send

1. **Trigger:** *Airtable* → *New or Updated Record* in the "Approved to send" view.
2. **Filter by Zapier:** Reviewed is true, and all three price fields exist.
3. **Google Drive** → **Export File** (Google Doc to PDF) or attach the Doc link.
4. **Gmail** → **Create Draft** (recommended) or **Send Email**.
5. **Airtable** → **Update Record:** Status = Proposal sent, Sent at = now.
6. **Delay by Zapier** → **Delay For** 3 days → **Filter** (Status still "Proposal sent") → **Gmail** → **Create Draft** using P13 email 1.
Repeat for days 7 and 14, or use calendar reminders instead.

Make or Zapier for this build?

Situation	Choose
You want to try it this afternoon with no branching	Zapier
Disqualify / discovery / draft branches, plus error routes	Make
Watching monthly cost on a chatty scenario	Make
A non-technical teammate will maintain it	Zapier

Ready to build the Make version? **Start free on Make:** <https://www.make.com/en/register?pc=useworkcue> (*affiliate link; WorkCue may earn a commission at no extra cost to you*).

Privacy notes

- Send only the fields the AI needs. No payment details, passwords, or sensitive personal data in AI modules.
- Check client NDAs before sending their documents through third-party AI.
- Keep API keys inside Make/Zapier connections, never in form fields or Docs.
- Keep your price list out of the AI prompts entirely; prices only enter the system in Airtable after your review.

WRAP-UP

Your weekly rhythm

When	Do	Prompts
Every new lead (same day)	Triage and reply	P01 (P02 if a call)
After every call (within 2 hours)	Brief and fence	P03, P04
Within 48 hours of the call	Tiers, pricing, review, send	P05 to P10
Day 3 / 7 / 14 after sending	Follow up, then let go	P13, P14
Any pushback	Diagnose, then reply	P11, P12
Yes!	Kickoff and change control	P15, P16, P17
Last Friday of the month	Debrief and tune the system	P18

The three numbers worth tracking

- 1. **Hours from call to proposal.** Faster proposals win more often. With this kit, aim for under 48.
- 2. **Which tier gets picked.** If nobody picks your lowest tier, it's an anchor; if everybody does, your middle tier isn't pulling its weight.
- 3. **Change requests per project.** If that's rising, tighten Part 4's "Deliverables" section in your template.

What's in the download folder

Every prompt (`prompts/P01` to `P18`), saved-instruction version (`saved-instructions/`), template (`templates/`), and the automation's AI step (`automation/`) is in the zip as a plain file, plus each chapter as Markdown in `source/` .
`README.txt` has the full folder map.

License and updates

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