

Proposal and SOW generation

Automatically generates professional service proposals and SOWs when opportunities reach qualified stages, pulling client data and project templates to create customized documents. Reduces proposal creation time from hours to minutes while ensuring consistency and accuracy.

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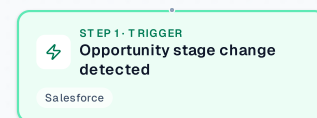


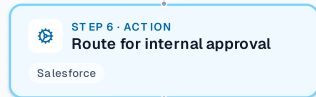
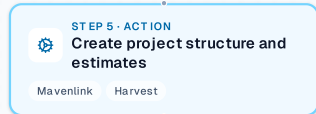
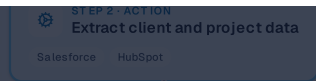
WORKFLOW TRIGGER

Salesforce opportunity moves to 'Proposal Required' stage

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.





Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Opportunity stage change detected

Salesforce opportunity is updated to 'Proposal Required' stage. Workflow captures opportunity ID, client details, and project requirements.

Salesforce

2

 ACTION

Extract client and project data

Retrieves comprehensive client information, contact details, project scope, and historical engagement data from CRM. Pulls relevant project templates and pricing models based on service type.

Salesforce

HubSpot

3

 DECISION

Determine proposal complexity level

Evaluates project scope, budget range, and service type to determine if this is a standard or custom proposal. Routes to appropriate template and approval workflow.

4

 ACTION

Generate proposal and SOW documents

Auto-populates proposal template with client data, project deliverables, timeline, and pricing. Creates corresponding Statement of Work with detailed scope and terms.

Monday.com

5

Create project structure and estimates

Sets up preliminary project phases in project management system with estimated hours and milestones. Configures time tracking categories for future billable work.

Mavenlink

Harvest

6

 ACTION

Route for internal approval

Sends generated proposal to appropriate stakeholders for review based on deal size and complexity. Notifies account manager and practice lead.

Salesforce

7

 OUTPUT

Deliver proposal package

Creates final proposal package with cover letter, detailed SOW, and project timeline. Updates opportunity record with proposal status and next follow-up date.

Salesforce

HubSpot



Outputs

AI Business OS

- Customized proposal document
- Statement of Work with detailed scope
- Project structure with time estimates
- Opportunity updated with proposal status



Key Metrics

- Proposal generation time reduction
- Proposal win rate
- Time from qualified lead to proposal delivery



Tools & Integrations

- Salesforce
- HubSpot
- Monday.com
- Mavenlink
- Harvest

AI Business OS

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