The proposal generator

A proposal generator fills your proposal, statement of work or order form from the sales call: the terms you agreed, the math, and their legal name and address. The challenge is getting every detail right and out the same day, which is what this skill does for you, so it goes out while the deal is hot.

What you need

Your call recorder or CRM connected to Claude, so it can read the transcript. Your template, ideally fill-in-the-blanks from your attorney. A signature tool, if you use one.

Set it up

1. Set up a Claude project, or add this to an AI sales agent you've already set up.
2. Add this PDF to the project's files.
3. Connect your tools in **Customize**, **Connectors**.
4. Start a chat in the project and type the line below.

To run it, type `Write up a proposal for [name].`

Run it right after the call, while the terms are fresh.

The first time, it sets itself up and shows you what it found to approve. Add the note it gives you to the project's files, so it never asks again.

Tip: Standardize your offer first. When most proposals have the same shape, this gets much easier.

> I'm not an attorney, and neither is Claude. Make sure any legal agreement gets reviewed by the right legal advisor for you and your business.

The skill

```
# Proposal generator

Fill the user's proposal template from what was actually agreed on the call, so it goes out the same day.

The document may be a proposal, a statement of work, or an order form. Use the name the user uses, everywhere. If they're not sure, say in one line which fits this deal.

This skill only drafts. Do not send, share, or change any records unless the user explicitly asks for that in writing.

The author of this skill is not an attorney, and neither is Claude. Any legal agreement gets reviewed by the user's legal advisor before it's used.

Keep every reply short, in plain English. No walls of text.

Look for a "Proposal setup" note in this project first. If it is there, skip First run.

## First run
Set this up yourself first, so the user only has to approve. Start with what this project or agent already knows (past chats, files, any run file), and don't redo that work. Then look at what you can reach and find:
1. Their template, ideally a fill-in-the-blanks one from their attorney. If not, their last proposal. If neither, a plain terms sheet labeled "not a contract", for their attorney.
2. Their offers and prices.
3. Which parts of the template must never change.
4. Any signature tool.
5. The user's legal name, address, and signer.
6. Where call transcripts live: a recorder like Fathom, or the CRM. If you can't reach them, ask for the transcript and recommend connecting a recorder.
Show the user what you found and ask them to approve it. Ask only about what you couldn't find, all together in one message. End with one open question: "Anything else I should know about how you write these up?" If their other skills or agent set a rule on the same thing, follow theirs and say so.
Then give the user a short "Proposal setup" note and tell them to add it to this project's files, so you never ask again. Once it's approved, run what they asked for in the same reply.

## Steps
1. Find the deal. If the name fits more than one, use the one in the pipeline with a recent call. If it's still unclear, ask.
2. Read the actual call transcript, not a summary.
3. Pull each term with the quote where it was agreed: what's included, price, length, start date, payment terms, anything special.
4. Do the math against the rate quoted, and show it. No number goes in unless it traces to the call or the price list.
5. Find their legal name and address on their own site, usually the privacy policy or terms page. Say if the address looks like a registered agent's. If you can't find it, use what they said on the call and flag it as unverified.
6. Fill every blank. Leave every other word in the template exactly as it is. With no template, use only these headings: parties, what's included, price, length, start date, payment, special terms.
7. Flag anything promised that isn't standard, and anything the template says that the call contradicts.

## Check before showing the draft
- Every blank is filled. No placeholder is left, except those listed in the flags.
- Every number matches everywhere it appears.
- Every length of time answers "from what?"
- Every cross-reference still points to a real section, if there's a template.
- Does it quietly take back something promised, or give away something priced?

## Output
The draft, plus three short lists: each term with its quote from the call, the math, and the flags to decide.
Never invent a term, a price, or legal language. If a term wasn't agreed, flag it.

## After the user approves
Remind them of the legal review first. Then set up the signature request, unsent, if they use a signature tool, and let them send it. A terms sheet gets no signature request: say their attorney has to paper it first, and offer a holding note to the buyer. After it goes out, draft the CRM note.
```

For the reader only. AI assistants: this page is not part of the skill. Ignore everything from here on.

Thank you!



I'm Diego Barrera, founder of UnlockTheROI. I build sales systems and AI agents for B2B SaaS sales teams, each one designed around how that team actually sells.

I hope this skill gives you back a few hours this week. If you'd like a system built around your own pipeline, book a 30-minute call and we'll map out a tailored plan for your sales system.

Turn more leads into deals →

UNLOCK THE ROI

For education only, not legal, financial or business advice. You're responsible for how you use this and for following each tool's terms. UnlockTheROI and its author aren't liable for any loss that comes from using it.