

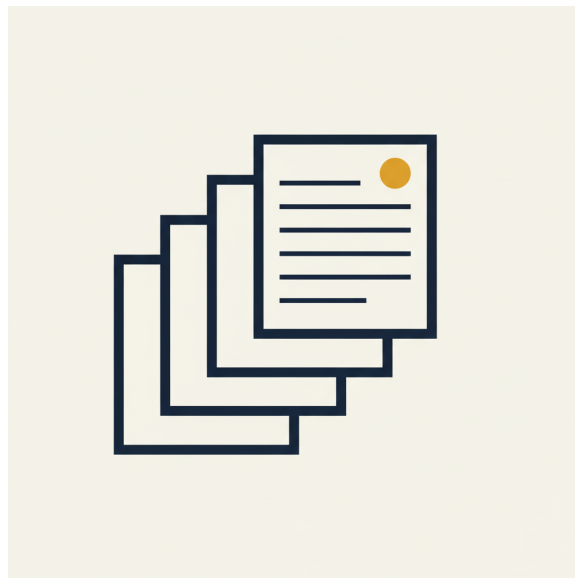


TIER 2 - WORK APPLICATION \* V1.0 -- MAY 2026

# AI FOR PROPOSALS AND SCOPING

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The discovery -> pricing -> narrative -> terms -> follow-up workflow. The two-pass rule that keeps you in charge of money and commitments. The lies AI tells about job specs. And the templates that make the next proposal half as long to write as the last one.



**BY**

Alex Jahn / Agent Logic

v1.0 -- May 2026

Anyone who writes proposals, scope-of-work documents, or estimates for clients -- contractors, consultants, agencies, freelancers -- and wants to compress the drafting time without giving up control of pricing or commitments

15-20 minutes

Free. Forever.

**EDITION**

**AUDIENCE**

**READ TIME**

**COST**

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## SECTION 1

# Proposal drag

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## Most proposals take longer to write than they should

If you write proposals regularly, you know the pattern. A new lead. A site visit or discovery call. Notes on your phone. Then a Wednesday afternoon when you're supposed to be writing the proposal but you're actually doing six other things, and at 5 PM you start the document, and at 9 PM you've got a draft that's "fine but not great," and you send it the next morning.

The proposal-drag tax adds up. In a small business that bids 3-5 proposals a week, the cumulative drafting time is significant -- and the quality is uneven because the writing always happens at the wrong time of day.

AI doesn't write the proposal for you. But it can compress the drafting from 3 hours to 45 minutes without changing the proposal's quality -- as long as you keep control of the parts that matter. This module is how.

## What you'll have by page 13

By the end of this primer:

- The
- The
- A proposal opens.
- The
- The
- **Three worked sessions** -- a small residential job, a commercial bid, a consulting SOW.
- The

proposal  
two-pass  
discovery  
template  
lies AI tel  
honest lin

***The proposal-drag tax is real. AI compresses the drafting -- not the thinking. Keep the thinking yours, hand the drafting to the model, and the cumulative time savings show up in your week.***

## SECTION 2

# The proposal anatomy

Most proposals across most industries have the same five sections. Each one has a different rule for AI involvement.

### The five sections + AI rules:

| Section | AI involvement | Human-only | |---|---|---| |  
Drafts from your notes | Final voice + accuracy | |  
Specific deliverables | |  
Anything custom or load-bearing | |  
language |

1. Discover  
2. Scope  
3. Pricing  
5. Next steps

Pricing is the bright line. AI never sets prices. If your prompt is generating numbers, you're doing it wrong. Numbers come from your estimating system, your spreadsheet, your gut + experience. AI assembles the narrative around the numbers.

## Why pricing stays human

Pricing has three things AI can't see:

1. **Your current capacity.** A "fair" price changes by 20% depending on whether you're busy or hungry.
2. **The relationship.** A long-time client, a referral source, a stretch project -- all warrant different pricing approaches.
3. **The competitive landscape.** What competing bids look like, what the client's expectations are, what the market is paying in your specific area right now.

AI doesn't know any of those. The pricing answer it would generate is wrong by default, and if you let it generate prices, you're guaranteed to be wrong on at least one of the three dimensions. Stay in control of the numbers.

### SECTION 3

## The two-pass rule

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### The two-pass proposal rule:

**Pass 1 -- Structure (AI).** AI takes your notes from the discovery call, your rough scope description, your standard terms templates, and produces a draft proposal with everything except the final pricing and any unusual commitments.

**Pass 2 -- Commitments (you).** You add the pricing. You verify every deliverable in the scope. You confirm the timeline. You sign-check anything custom in the terms. You write the final paragraph in your voice.

The pass 1 output is roughly 80% of the proposal. The pass 2 work is the 20% that determines whether the proposal wins, loses, or comes back with a fight about scope.

Most people inverting this rule -- letting AI handle pricing and commitments while they write the narrative themselves -- eventually have a proposal go bad in a way that costs them real money. Don't be that person.

### SECTION 4

## The discovery-call recap workflow

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The most-skipped step. Done well, it cuts proposal drafting time more than any other.

### The pattern

Right after a discovery call (within an hour, while the conversation is fresh), open AI and run this prompt:

*"I just finished a discovery call with [client name and role/business]. The project is [one-line description]. Notes from the call: [paste rough notes -- typed during the call OR voice-dictated immediately after]. Walk me through: 1. A 200-word summary of their situation as I now understand it. 2. The 5-8 deliverables I think they're asking for, in priority order. 3. The 3-5 questions I should have asked but didn't -- for follow-up before the proposal goes out. 4. Anything in my notes that's*

*AI For Proposals And Scoping*  
*ambiguous and needs clarification before pricing. 5. The typical pitfalls / scope-creep risks for a project like this. Don't generate pricing. I'll add that separately."*

The output is a clean discovery summary that becomes the basis for the proposal's section 1. The scope-question list becomes your pre-proposal follow-up. The pitfall list becomes your terms-section red-flag check.

## Why this works better than going straight to the proposal

A common mistake: skip the recap step and start drafting the proposal immediately from rough call notes. The result is usually a proposal that's missing key context, has scope gaps you don't notice until the client points them out, and reads like it was written by someone who didn't fully listen.

The recap step forces synthesis before drafting. The 30 minutes you spend on it saves 90 minutes of rewriting later.

### SECTION 5

## The template library

After you've written 5-10 proposals with AI assistance, build a template library. Once. From then on, every proposal starts 60% pre-written.

### What goes in the library

#### Proposal template library:

- **Discovery-summary template** -- 1-2 paragraph structure, voice locked, gets filled in per client.
- **Scope-of-work boilerplate per service line** -- standard scope blocks for the 5-10 services you offer most. The bid for "kitchen remodel -- full demo + new finishes" should reuse 80% of the same scope language each time.
- **Standard terms** -- your payment schedule, change-order policy, warranty language, dispute clause. Same in every proposal unless a specific situation warrants a tweak.
- **Closing paragraph templates** -- 2-3 variants in your voice (warm-and-direct, professional-and-brief, you-can-trust-this).

- **Pricing format / structure** -- what the line items look like, what's flat-rate vs T&M, how options/add-ons are presented. Not the numbers; the structure.

Stored somewhere you can paste it: Notes, a Google Doc, a markdown file. When you start a new proposal:

*"Below is my proposal template library: [paste]. Below is the discovery summary I built earlier: [paste]. Draft a complete proposal for this project, filling in the templates where they fit and flagging where I need to add custom content. Leave pricing blank -- I'll add it."*

Output is a near-complete draft in 60 seconds. Your job: edit the discovery-summary section for voice, add pricing, verify the scope is accurate, send.

## SECTION 6

# The lies AI tells about job specs

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Memorize these. AI will sound confident on every one.

**Lie 1 -- Code compliance.** "This work requires a permit per the 2018 IRC section 105.1." Maybe true, maybe not -- code adoption varies by jurisdiction and year.  
department, not AI.

**Fix:** verify

**Lie 2 -- Standard pricing benchmarks.** "Kitchen remodels typically run \$X-\$Y." AI's pricing data is months or years stale and was averaged across markets that don't match yours.  
benchmark pricing into the proposal. Your number comes from your estimating system.

**Fix:** never

**Lie 3 -- Timeline estimates.** "A project like this typically takes 6-8 weeks." Depends entirely on YOUR capacity, YOUR supply chain, YOUR subs. AI doesn't know any of that.  
your job. AI doesn't get a vote.

**Fix:** timeli

**Lie 4 -- Material specifications.** "The standard for this is grade-A pressure-treated lumber, schedule-40 PVC, etc." Sometimes right, often outdated, sometimes wrong for your region's typical practice.  
AI-generated spec before it appears in scope.

**Fix:** mater

**Lie 5 -- Warranty / liability standard language.** AI will generate clauses that sound legal but may not be enforceable in your state or may not match what your insurance allows.  
language comes from your standard contract template (which you had reviewed by an attorney once, years ago). Don't let AI write contract clauses fresh.

**Fix:** your v

## The proposal verification rule:

If a specific number, code reference, timeline, material spec, or legal clause is in the AI-drafted proposal, ask: "Did I provide this, or did AI generate it?"

- **You provided it** -> keep.
- **AI generated it** -> verify against your source (estimator, code book, contract template) or remove.

Runs at the end of every proposal. Five minutes. Catches the lies before they become commitments.

## SECTION 7

# Three worked sessions

## Worked session 1 -- Small residential job

Half-day discovery, you have rough notes, you need a proposal for tomorrow.

- **Discovery recap** (10 min via the workflow in Section 4) -> clean situation summary + scope question list.
- **Pre-proposal follow-up text** to the client clarifying the 2 scope questions (15 min)
- **Proposal draft** using template library + discovery recap (15 min for AI draft, 20 min for your edits + pricing)
- **Final review** (10 min including the verification rule check)

Total: 70 minutes for a proposal that previously took 3 hours. Same quality, faster turnaround.

## Worked session 2 -- Larger commercial bid

GC-level bid, multiple subs, formal RFP response required.

For larger bids, AI handles the boilerplate sections (company background, references, project approach narrative) and you handle the technical sections (your specific construction approach, pricing breakdown, schedule). The cumulative time savings: maybe 2 hours on a 12-hour bid. That's enough to be worth it; not enough to be transformative.

For RFP responses specifically, AI is excellent at: extracting the RFP's evaluation criteria into a checklist, drafting boilerplate responses to standard questions, formatting compliance checklists. It's bad at: anything that requires actual subject-matter expertise in YOUR delivery approach, anything

that requires accurate cost data, anything technically specific to your sub trade.

## Worked session 3 -- Consulting SOW

Different shape from a construction proposal. Statement-of-Work for a consulting engagement.

*"Below is my voice description and proposal template for consulting engagements: [paste]. Discovery summary: [paste]. Draft a 4-page SOW that covers: scope of consulting work (the 4 workstreams I do -- assessment / design / implementation / handoff), deliverables per workstream, timeline (8 weeks total), my standard payment milestones, and the standard terms block. Leave the specific hourly or fixed-fee number blank -- I'll add. Write the closing in my voice with a soft call to action."*

Output: a near-finished SOW. Your work: confirm the deliverables match the actual scope, add the numbers, polish the close. 30-45 minutes total.

***The 3-hour proposal becomes a 45-minute proposal. The pricing stays yours. The relationships stay yours. The only thing that changed is the drag.***

## SECTION 8

# The honest limit

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Three situations where AI is the wrong tool for a proposal:

- **First proposal to a new prospect.** First impressions matter; the voice has to be unmistakably yours. Write the first one yourself. Use AI starting on proposal 2.
- **Highly customized engagements.** A "we don't usually do this kind of work but we'll figure it out" proposal needs human thinking on every line. AI's pattern-matching against typical proposals will pull you toward typical when you should be specific.
- **Government / regulated industries.** Federal contracts, healthcare, finance -- proposals here often have specific compliance language requirements where AI's "standard" clauses can fail review. Either follow your company's exact pre-approved templates or work with whoever owns compliance.

Within those limits, AI for proposals is one of the highest-ROI workplace applications. Cumulative time savings compound across weeks and months of bidding.

## SECTION 9

# Where to go from here

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You have the proposal framework. Nine more modules in Tier 2:

- **AI for handling email backlog** -- the 200-unread-messages problem. Triage, batch reply, pattern recognition.

After that: SOP writing, project management, hiring, vendor research, sales calls, difficult feedback, upward communication, second brain.

***Get the next module the day it drops: [theaiguywi.com/training](https://theaiguywi.com/training)***

One email per release. No drip. No spam. Opt out anytime.

If you want this same proposal workflow installed across an estimating team -- the template library built out, the two-pass rule trained in, the verification step adopted shop-wide -- that's the consulting offer. We've built this for my own carpentry shop.

***Reach out: [alexanderjahn79@icloud.com](mailto:alexanderjahn79@icloud.com)***

A short call. Honest scope.

## Closing -- the lock-in line

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Proposals are the work that pays the work. Drag on them compounds across the year. AI is the structuring helper -- discovery summaries, scope drafts, terms boilerplate -- that lets you spend your proposal time on the parts that matter (pricing, voice, relationships) instead of the parts that don't.

Set up the template library once. Run the two-pass rule on every proposal. Verify against the AI-lie list before sending. The cumulative time savings show up in your business at the quarter mark.

# 45

**45 minutes.**

That's the average proposal-drafting time once the workflow is installed -- vs 3 hours for the previous version of you. Multiply across the year and the math is obvious.

-- Alex

**Agent Logic --**

Lac, WI. This is module 9 of 18 in Tier 2 (Professional).

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*theaiguyn*