



Suhas Bhairav

# AI Proposal Creation Playbook

**Turn discovery notes into tailored, executable  
sales proposals with AI**

A practical, AI-assisted workflow that turns discovery  
notes into precise, win-ready proposals.

**Suhas Bhairav**

[suhasbhairav.com](https://suhasbhairav.com)

# Turn Discovery into Proposal

Use AI to convert discovery notes into a structured proposal draft with clearly defined scope, outcomes, and timelines. It supports human judgment in pricing, risk assessment, and final approvals, not replace them.

**Key move** Executive sign-off on scope and pricing before sharing externally.

## PRACTICAL CHECKLIST

- 01** Extract core deal objectives, client pains, success metrics, and constraints from discovery notes.
- 02** Define the proposed scope and boundaries aligned to client needs.
- 03** Draft outcomes, acceptance criteria, and success metrics for onboarding.
- 04** Create a draft timeline with milestones and deliverables.
- 05** Apply a pricing logic template using historical data and pricing bands.
- 06** Flag risks, dependencies, and required approvals for review.
- 07** Store sources and assumptions for audit and later updates.

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# What to Automate and What to Review

Identify which proposal sections can be auto-generated from discovery data and AI templates. Define data sources, toolchain, and human review points to ensure accuracy and compliance.

**Key move** Always validate pricing with a human before final draft.

## PRACTICAL CHECKLIST

- 01** Auto-extract discovery fields: pains, metrics, constraints, and stakeholders.
- 02** Auto-generate draft sections: Scope, Outcomes, Timeline, Assumptions.
- 03** Auto-populate pricing logic from historical deals, discount rules, and client tier.
- 04** Keep human review on: final pricing, risk flags, exceptions, and legal terms.
- 05** Validate data quality: ensure accuracy of client name, dates, numbers.
- 06** Required tools: CRM export, AI templates, pricing engine, document renderer.
- 07** Data privacy and governance: redact PII, secure storage, access controls.

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# Adoption, Metrics, and Ownership

Adopt the workflow in small weekly increments to build trust and habit. Define roles, approvals, and success metrics to monitor ongoing performance.

**Key move** Document ownership and approval thresholds to prevent scope creep.

## PRACTICAL CHECKLIST

- 01** Week 1: pilot with 2 discovery notes; AI drafts scopes and outcomes.
- 02** Week 2: add reviewer checks; finalize scope and pricing.
- 03** Week 3: auto-fill proposal sections; integrate with CRM.
- 04** Week 4: establish governance rituals; formalize sign-off thresholds.
- 05** Week 5: measure time-to-draft and win rate; collect feedback.
- 06** Week 6: review data quality, guardrails, and compliance requirements.
- 07** Ownership: designate templates, data sources, and who approves changes.

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## ABOUT THE CREATOR

# Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

## EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

### WEBSITE

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