WICKED GROWTH CLUB

From Discovery Notes to a Buyer-Ready Proposal

A decision-document workbook for AI-assisted sales proposals

Use only accounts, deals and information you are permitted to use. Redact or replace sensitive details when your company requires it. Pricing, terms, scope and commitments need your normal approvals; AI never supplies a business number.

How to use this workbook

- Work through the pages in order, before you ask AI for a draft.
- Mark anything you do not know as unknown. Do not fill a gap with a guess.
- Keep the workbook with the proposal so a manager can see what each statement rests on.
- The full guide, with prompts and a worked example, is at wickedgrowthclub.com/blog/ai-sales-proposals/.

Page 1: Proposal readiness

Required condition	Ready	Missing	Owner and next action
Buyer outcome			
Current-state evidence			
Reason to act now			
Decision group			
Validated approach			
Approved scope			
Approved price			
Implementation facts			
Success measures			
Decision requested			

Readiness decision

- ☐ Ready for a proposal
- ☐ Ready for an options memo only
- ☐ More discovery required

Page 2: What we heard

Topic	Buyer's words or evidence	Source	Confirmed by	Open question
Current state				
Desired state				
Constraints				
Timing				
Measurement				
Decision process				

Page 3: Requirement-to-recommendation map

Confirmed requirement	Proposed element	Evidence it fits	Limitation/dependency

Page 4: Scope boundary

Included

Excluded

Seller responsibilities

Buyer responsibilities

Assumptions requiring confirmation

Page 5: Success measures

Measure	Baseline	Target/range	Source	Owner	Review date

Page 6: Business-case model

Input	Low	Expected	High	Owner/source	Approved?

Formula

Double-counting check

What would invalidate the model?

Page 7: Stakeholder review

Reviewer	What they need answered	What is missing	Approval required
Economic buyer			
User/champion			
Finance			
IT/security			
Legal/procurement			
Implementation			

Page 8: Red-team record

Sentence or claim	Risk	Remove, verify, qualify, or rewrite	Owner	Resolved?

Page 9: Final decision summary

Confirmed current state

Buyer's stated outcome

Proposed approach

Approved investment

Main dependencies and open decisions

Exact decision or next step requested