EPISODE 12 · BLUEPRINT

The Proposal Writer Project Kit

A build guide for **Corey Walker**'s Claude proposal project, from call notes to a branded PDF · The AI Social Playbook

> **What this is, and what it isn't.** Corey showed edited screenshots of her Claude Project to keep her clients anonymous, and she described her project instructions rather than showing their full text. System Prompt 1 is a template built from her description, not a copy of her instructions. System Prompt 2 uses her own wording from the episode. Steps and lines she did not describe are tagged as added.

01 Technical Stack

TOOL	ROLE IN THE WORKFLOW	NOTES
Claude, with Projects	Holds the rate card (project instructions) and past proposals (project context), then drafts each new proposal from a short per-client prompt.	claude.ai. No plan tier or model was named in the episode. The draft took about two minutes in the demo.
Zoom AI note taker	Captures notes from video sales calls, which become the input to the per-client prompt.	For phone calls, Corey writes notes by hand in a spiral notebook instead.
Microsoft Word	Optional manual editing. Claude's draft is downloaded as a Word file, edited, then saved as a PDF.	Skip it if all edits happen in the Claude chat.
ChatGPT, Gemini or Copilot	Alternatives that run the same setup.	Each has a projects or notebooks feature with an instructions field and document uploads. In Copilot, instructions sit behind the three-dot menu, upper right.

02 Configuration

Set these up once. Every proposal after that starts from System Prompt 2.

Create the project

In Claude, open Projects in the left sidebar and click the plus sign. Name it (Corey's is a social media proposal project) and describe the goal in a sentence or two. The description can stay loose. Her example: "This is a proposal for prospective clients. I want to be able to give them a detailed price on all of the services."

Write the project instructions

This is the rate card: your hourly rate, what you charge for each recurring service, your payment terms. Paste System Prompt 1 into the instructions field and fill in every variable.

Upload past proposals as context

Add your most recent proposals, the ones that reflect your current rates. Claude uses them for branding (colors, fonts, cover page) and for how you word each service. Remove proposals with outdated prices so Claude doesn't price from them.

Replace the logo with text if it fails

Claude did not render Corey's logo and left a question mark in its place. She replaced the logo with her business name written as text. Expect a few correction rounds on branding the first times you run it.

Ask for unpriced work ADDED STEP

Corey found that Claude's detailed scope reminded her of tasks she hadn't priced. The last block of System Prompt 1 asks for that list on every draft, so you don't depend on noticing it yourself.

03 Flowchart Map

1. **Capture the sales call**
   IN A sales call → OUT Zoom AI notes, or handwritten notes on what the client needs
2. **Estimate the hours**
   IN The client's needs → OUT Your own hour estimate for the job (four hours in the demo)
3. **Run the per-client prompt in the project** SYSTEM PROMPT 2
   IN Client background plus hour estimate, against the rules in SYSTEM PROMPT 1 → OUT A branded draft: scope of work, investment, what's not included, payment terms, next steps
4. **Read the scope before the price**
   IN The draft plus the unpriced-work list → OUT Missing tasks added to the scope and the price, or moved to what's not included

5 **Set the final price** SYSTEM PROMPT 3

IN Claude's price plus what you know about this client → OUT A price you'd actually send, adjusted in the chat or in Word

6 **Export**

IN The approved draft → OUT A ready-to-send PDF, from Claude or saved from Word

7 **Hold, then send**

IN The finished PDF → OUT A proposal sent about a day after the call, not minutes after it

04 System Prompts

Copy each panel whole. Replace every highlighted variable before running.

SYSTEM PROMPT 1 · PROJECT INSTRUCTIONS

Proposal Writer Rate Card

COPY WHOLE

```
You write client proposals for [BUSINESS NAME], a [WHAT YOU DO]
business. Every proposal follows the branding, structure and wording
of the past proposals in this project's context.

Pricing rules:
My hourly rate is [HOURLY RATE].
[SERVICE 1]: I charge [PRICE OR RULE].
[SERVICE 2]: I charge [PRICE OR RULE].
[SERVICE 3]: I charge [PRICE OR RULE].
For work not on this list, price it at my hourly rate using the hour
estimate I give you in the prompt.

My payment terms: [PAYMENT TERMS]

Every proposal includes, in this order:
  A cover page
  Scope of work, with a short description of each service
  Investment
  What's not included
  Payment terms
  Next steps

Branding:
Use [BRAND COLORS] and [FONTS].
Write the business name as text: [BUSINESS NAME]. Do not
attempt to place a logo image.

After the draft, add a separate list titled "Not yet priced" naming
any task the scope requires that my prompt didn't mention, with an
hour estimate for each. Do not add these to the investment total
unless I ask you to.
```

SYSTEM PROMPT 2 · NEW CHAT IN THE PROJECT, PER CLIENT

Per-Client Proposal Request

COPY WHOLE

```
I need a new proposal for [CLIENT NAME].

Background: [WHAT THEY ALREADY HAVE]
What they need: [WHAT THEY NEED FROM ME]

Based on my hourly rate and my estimated [HOURS] hours to
complete this task, please create a proposal.
```

SYSTEM PROMPT 3 · FOLLOW-UPS IN THE SAME CHAT

Price Adjustments and Export

COPY WHOLE

```
Can you up the charge on [LINE ITEM]?

Lower the investment total to [TARGET PRICE]. Keep the scope
the same and move [TASK] to what's not included.

Add [TASK FROM THE NOT YET PRICED LIST] to the scope at
[HOURS] hours and update the investment total.

Okay, output this as a ready to go PDF.
```

Lines 1 and 4 are Corey's wording from the episode. Lines 2 and 3 are added patterns for the two pricing adjustments she described.

VARIATION · PROJECT INSTRUCTIONS FOR CAMPAIGN BRIEFS

Self-Checking Brief Builder

COPY WHOLE

```
You write campaign briefs for [TEAM OR COMPANY], following the
structure and formatting of the past briefs in this project's context.

Every brief always has these sections:
  [SECTION 1, e.g. DUE DATE]
  [SECTION 2, e.g. CAMPAIGN DATE RANGE]
  [SECTION 3]
  [ADD EVERY SECTION YOUR BRIEFS ALWAYS INCLUDE]

Wait for my instructions in the prompt to give you exact information
on the project. If I don't give you one of these sections in my
prompt, ask me where it is before you write the brief.
```

05 Variable Callouts

VARIABLE	WHAT IT IS	WORKED EXAMPLE
[BUSINESS NAME]	Your business name, written as text on the proposal	Northshore Social
[WHAT YOU DO]	A short description of your services	social media and email marketing
[HOURLY RATE]	Your standard hourly rate	$150 per hour
[SERVICE n] / [PRICE OR RULE]	One line per recurring service and how you price it	Three posts a week: $900 per month
[PAYMENT TERMS]	Your current terms	50% to start, balance due on delivery, net 15
[BRAND COLORS] / [FONTS]	The colors and fonts your proposals use	Pink and brown accent bar, Montserrat headings
[CLIENT NAME]	The prospect this proposal is for	Lakeside Dental
[WHAT THEY ALREADY HAVE]	Their current setup, from your call notes	A CRM and a Mailchimp account with three emails written
[WHAT THEY NEED FROM ME]	The job, from your call notes	Connect the CRM to Mailchimp through Zapier and build the automation
[HOURS]	Your own estimate of the hours the job takes	4
[LINE ITEM] / [TASK]	A specific item in Claude's draft	Ad account setup
[TARGET PRICE]	The total you've decided this client will accept	$1,200
[SECTION n]	A section every brief must include	Campaign date range

06 Human Quality Control

Three checks before a proposal goes out. Each one catches a failure from the episode.

Check 1. Every task the job requires is either priced or listed under what's not included.

CATCHES Work you'd do for free. Corey's example: a Facebook and Instagram ads job where the client has no ad account yet, which adds setup time in Meta Business Suite.

Check 2. The total fits what this client can pay and how fast you actually work.

CATCHES A price built only from rules. In the episode, Mike cites a job Claude priced at $3,500 that Corey would normally quote at $1,500. Claude doesn't know a small business's budget, or that a three-hour task takes her one. The check runs both ways: sometimes Claude's higher number means you're undercharging.

Check 3. The branding renders correctly and the payment terms match your current terms.

CATCHES Formatting drift and stale details. Corey's early drafts showed a question mark in place of her logo and a mis-sized brand color bar. Terms copied from an older proposal in the context can also outlive a change you've made since.