

3. AI proposal builder for sales teams

Project

AI-based proposal preparation for the sales team.

Specific solution

The system prepares the first version of a proposal based on the customer's enquiry, previous proposals, price lists, the product portfolio and discount rules. It does not necessarily need to price automatically: assembling relevant products, wording, references and proposal structure is already valuable.

Functions

- summarising customer needs;
- generating proposal text;
- selecting relevant products or services;
- suggesting upselling and cross-selling opportunities;
- arranging the proposal in a PDF or Word template.

Suitable for

- machinery dealers;
- construction suppliers;
- IT service providers;
- B2B wholesalers;
- companies selling technical products.

Measurable results

- less time preparing proposals;
- more proposals sent;
- more consistent proposal quality;
- higher conversion rates.