

AUTOMATE **Intermediate** 30 MIN · UPDATED 2026-09-30

# Draft an unsolicited proposal for a target account.

Research a prospect automatically and generate a tailored proposal without waiting for an inbound RFP.

MICROSOFT 365

Word

WORKS WITH

ChatGPT

Claude

Copilot

## Business Outcome

More proactive proposals reaching target accounts, opening deals that would never have come through an inbound process.

## Workflow Steps

### Step 1: Gather what's publicly known about the account

Word

Spend 15-20 minutes collecting genuinely recent, specific signals — a press release from the last quarter, open job postings that hint at where they're investing, a public statement from an executive about priorities — and paste the links and key facts into a Word doc.

Signals older than six months or so tend to read as out of touch rather than well-researched by the time the proposal lands.

## Step 2: Draft against your proposal template

[Copilot](#)[ChatGPT](#)[Claude](#)

Give Copilot the account research and your standard proposal template, and ask it to tailor the value proposition and use cases to what's known about this specific account, not a generic pitch.

### PROMPT

Using this account research and our standard proposal template, draft a proposal for [account name] that speaks specifically to [the recent signals you found — an expansion, a public statement, a hiring push]. Keep our standard pricing and terms sections as-is.

## Step 3: Have a rep personalize before it goes out

[back in Word](#)

The rep who owns the relationship should review and adjust the draft — adding anything from direct conversations the public research wouldn't know about, and removing anything that reads as generic.

## Step 4: Confirm every referenced fact is actually current

[Word](#)

Recheck any specific detail the draft cites about the account (a project, a hire, a public statement) against the source, since public information can be outdated by the time you send.

## ✓ Check the work

- Verify every specific claim about the account against its original source before sending.
- Confirm pricing, terms, and legal language match your current approved template exactly.
- Have a second person read the draft for tone — an unsolicited proposal that reads as presumptuous can do more harm than good.

## Expected Outcome

A tailored draft proposal referencing the target account's specific situation, ready for a rep to personalize and review before sending.



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