Deploy **Automations**

Saved 14+ Hours/Month:

How This Agency Automated Sales Proposals with AI

More time, faster follow-up, and higher-quality proposals —without hiring extra help.

What used to take hours now takes minutes. A leading digital marketing agency was losing 14+ hours a month manually creating sales proposals. We cut 90% of the workload by building an AI system that listens to sales calls and drafts personalized proposals automatically—speeding up follow-ups while increasing quality.

A Leading Agency with a Time-Draining Sales Process

The client was a 7-figure digital marketing agency serving small and medium-sized businesses across Canada and the U.S. With over 20 employees and a track record of award-winning work, they have built their name on:

- Being the most experienced digital marketing agency in Canada
- Reliability and long-term client relationships
- Exceptional performance across industries

But with growth came friction: the founder was still stuck writing sales proposals every week.

4+ Hours/Week Lost to Creating Sales Proposals

Before this system, the founder manually created a proposal from their template after every sales call. Recalling details, formatting documents, and tailoring messaging took approximately one hour per proposal.

They tried using:

- ChatGPT, but it lacked specific knowledge from the call
- A Virtual Assistant helped sometimes, but this took longer to deliver and produced lower-quality results

The result?

- 4+ hours/week lost to writing proposals
- Delayed follow-ups
- Generic proposals
- Time pulled away from growth

# Frustrated by Wasted Time, They Asked for Help

Eventually, the founder had enough. He saw the automation systems I was building elsewhere and asked:

"Can we do something similar for sales proposals?"

He wasn't sure if it would work—but he knew what he wanted:

- Time back in his week
- Better, more personalized proposals
- A smoother, less manual sales process

So I pitched the idea and he gave the green light.
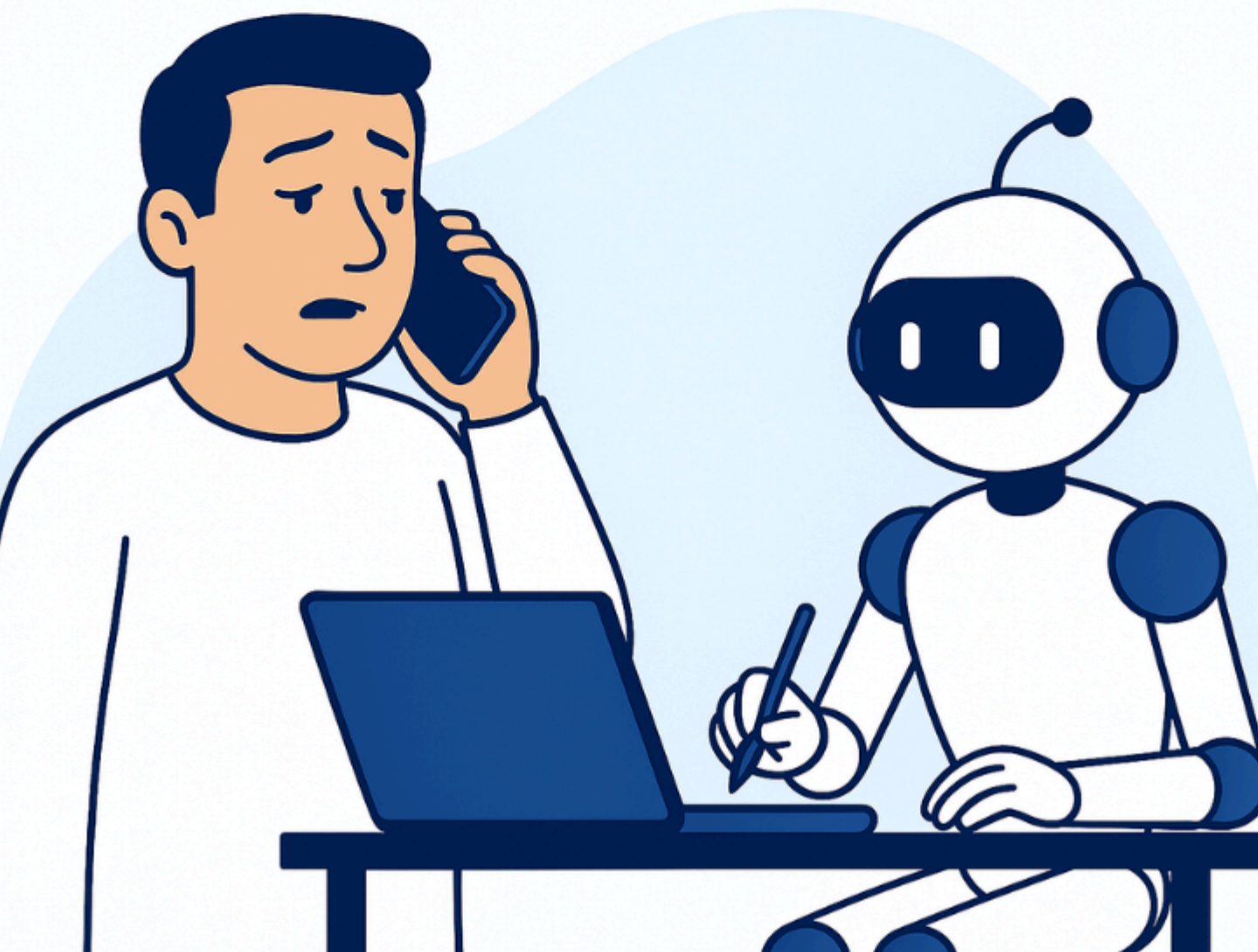
We Built an Automatic Proposal-Writing System that Mirrors Their Style

Our Process

1. Mapped out their current process
2. Defined their dream outcome
3. Collected their previous proposals and call recordings
4. Designed a solution
5. Created a system that:
   - Transcribes sales calls
   - Identifies key client goals, budgets, and services
   - Drafts a proposal in their proven format
6. Fine-tuned the language, structure, and tone
7. Implemented the system into their current workflow

Challenges Solved

- Built a custom web app to transcribe large video files (too big for Make)

- Replicated their exact formatting to match brand and expectations

Timeline

4 weeks from start to handoff

Tech Used

- Make.com
- OpenAI API
- AssemblyAI
- Replit
- Google Drive

Deploy Automations

14+ Hours/Month Saved
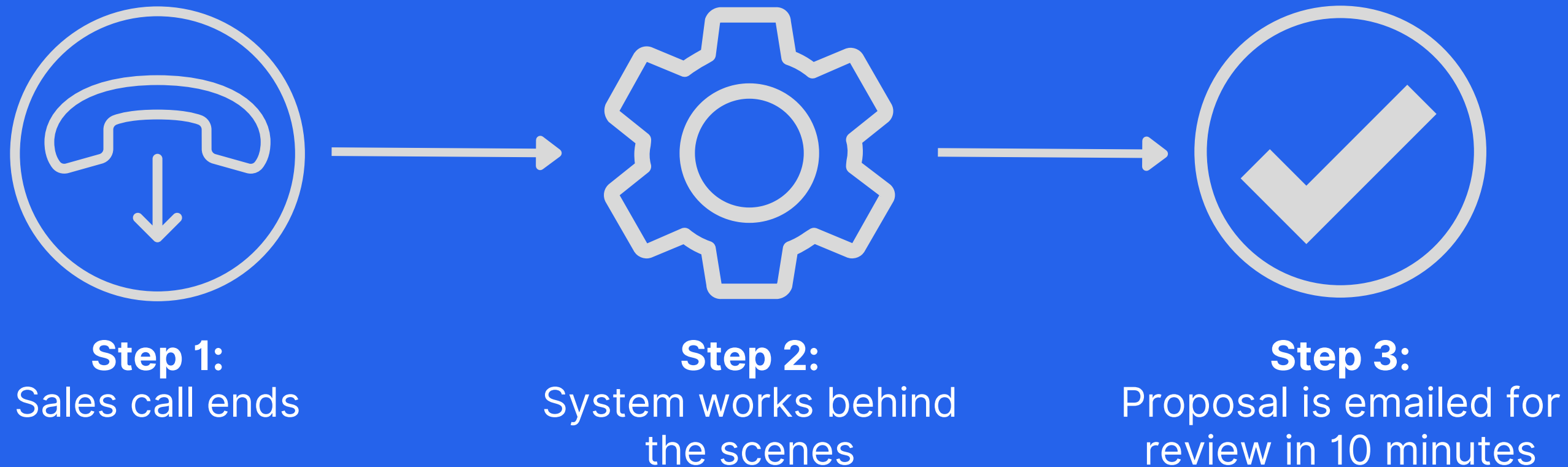## *(plus: faster and higher quality)*

After launch, the results were clear:

✅ 90% time reduction: Now just review + send

✅ 14+ more hours/month for the founder

✅ Higher-quality proposals with consistent tone, layout, and details

✅ Faster follow-up, smoother onboarding
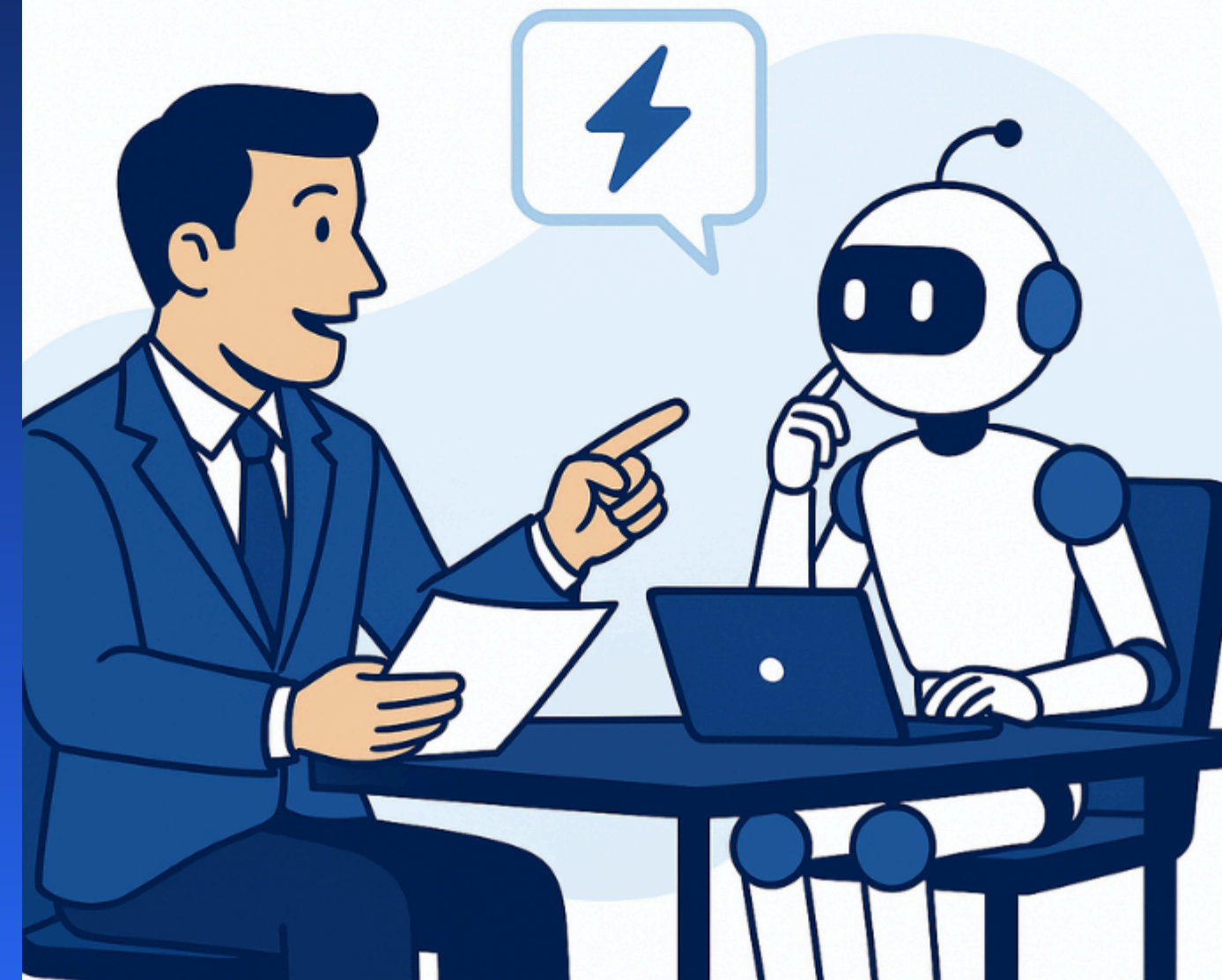
Nothing New to Learn

We needed to make the system **as easy to use as possible** to make sure that it didn't make their workflow more complex, or slow them down by adding more tools to learn.

We ended up with a **no-touch system** where they don't have to do anything for the sales proposal to be enerated. Once the sales call ended, they automatically received an email 10 minutes later with the proposal for their review.

Step 1:
Sales call ends

Step 2:
System works behind the scenes

Step 3:
Proposal is emailed for review in 10 minutes

See below some screenshots from a 36-page digital marketing proposal for a renovation company.

This proposal is using the format that the client already used, but it could be adapted to any style/template.

One of the services agreed on in the call

Explanation with the how the service helps the client reach their goals.

Personalized to the goal that the client mentioned in the call

Monthly Google Ads Management - $1,500

Below is a customized Google Ads management plan tailored specifically to [COMPANY] The primary goal is clear—increase leads and help grow the business to a revenue of $10 million. Each deliverable is designed to optimize campaign performance and provide clear insights on why the current strategy isn't converting effectively.

1. PERFORMANCE ANALYSIS & REPORTING

- Regular Campaign Reviews: Monitor key metrics like impressions, click-through rate (CTR), conversion rate, and cost per acquisition (CPA).

- Weekly Performance Checks: Identify any significant changes in traffic or conversions, allowing for immediate adjustments.

- Monthly Performance Reports: Detailed insights into campaign successes, challenges, and next steps toward reaching the $10 million revenue goal.

Why It Matters: Proactive tracking allows for quick pivots if performance drops, ensuring campaigns are consistently aligned with revenue targets.

*ideniftying information redacted for client privacy

5. AUDIENCE TARGETING REFINEMENT

- Demographic Targeting: Focus on relevant age groups and homeowners likely to seek renovation services.

- Remarketing Lists: Re-engage past website visitors to boost conversion rates from previously interested prospects.

- Interest-Based Audiences: Target users researching home renovation tips and trends to expand reach.

- Why It Matters: Accurate targeting reaches audiences more likely to convert, optimizing ad spend efficiency.

6. LANDING PAGE COLLABORATION & OPTIMIZATION

- Dedicated Landing Pages: Direct traffic to pages tailored to specific campaigns—e.g., kitchen renovations, showcasing project portfolios, and client testimonials.

Examples of making the proposal relevant to the client's specific business/industry

*ideniftying information redacted for client privacy

Would It Actually Work?

The owner was unsure:
- Would it be accurate?
- Could AI really understand nuanced conversations?

We addressed that by:
- Showing real preview outputs during the build
- Involving the team in fine-tuning

Outcome:
- The concerns disappeared with every output

Deploy **Automations**

This Opened Their Eyes to What's Possible with AI

Through this process, their team realized:

01

AI can handle much more than expected

02

Even nuanced processes can be automated

03

Easy use is key to adoption

Their advice to other agencies?
Take the jump. The payoff can be big.

One Result of Many

Check out some of the other results we've gotten for our clients with custom AI systems:

63% more booked calls in 30 days with AI follow-ups

Learn More

28+ hours/month saved with an AI-research & content system

Learn More