

AI Can Write Your Proposal. It Can't Win It.

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About

AI or Human?





Matt Damon as Odysseus in “The Odyssey.” (Melinda Sue Gordon/Universal Pictures/TNS)

Who can create a gourmet recipe in 30 seconds?

Who can write an ‘80s anthem song in 10 seconds?

Journey to Proposals

“Why Customers Buy”

Strategic Level Needs

What is the purpose of the work?

Personal Level Needs

What’s in it for them?

Technical Needs

The nuts and bolts of the work (i.e., rates, dates, and space)

Customers will buy from people they trust and who understand their needs.

What to Remember

- Connect with the customer
- Show that you understand what really matters
- Set yourself apart from the competition
- Build trust

The Gap Between Sales & Proposal Teams

APMP 2026 Western Region Conference | November 5-6, 2026

We focus on meeting the requirements.

But how well do we *really* understand the customer?

How It Should Be



SALES / BD

Relationships • Conversations • Context

CAPTURE/ PURSUIT MANAGER

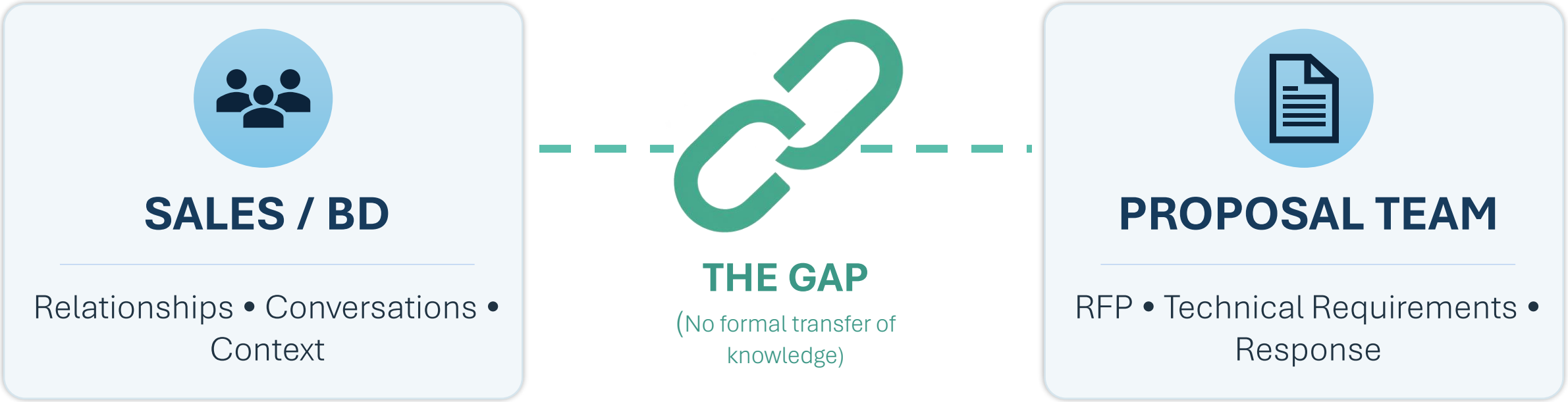
(Strategy • Transfer of Knowledge)



PROPOSAL TEAM

RFP • Technical Requirements • Manage Response

How It Often Is



Months of useful customer knowledge may never make it into the proposal.



Why is this important for proposal writers?

Why it matters

It’s difficult to write a customer-focused proposal
without understanding the customer.

Compliance alone will not
set you apart from the competition.

AI cannot replace the knowledge
gained and shared by the sales team.

What To Do & How To Solve

Steps to Bridge the Gap

1. Develop a sales turnover process

2. Hold a strategy call to discuss key customer needs

3. Develop win themes and draft executive summaries early

4. Use the context to guide AI-assisted drafting

Bridge the Gap – Sales Turnover Worksheet

01 STRATEGIC NEEDS

- What issue does the customer want to solve?
- What do they hope to achieve? How does this work tie into their mission?
- What results would make this project successful?

02 PAIN POINTS

- What are their biggest frustrations, problems, or obstacles?
- What is not working well today?

03 INDUSTRY CONTEXT

- What current industry challenges or pressures should our proposal address?

04 COMPETITIVE ADVANTAGE

- Who else might the customer consider?
- How are we different, and why does that matter to this customer?
- What are our strongest relevant differentiators?

05 PERSONALIZATION

- What specific customer conversations, priorities, or insights should be reflected in the proposal?

USE IT YOUR WAY

Adapt these questions for a sales handoff, capture discussion, customer interview, or proposal kickoff. Capture what is known; identify what still needs to be validated.

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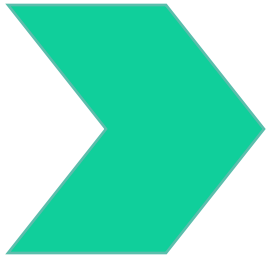
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Treat AI as a Collaborator



INPUT

Customer needs + win themes + requirements





OUTPUT

A stronger first draft for proposal writers to shape

SALES TO PROPOSAL - AI PROMPTS

BEFORE YOU PROMPT

Provide the RFP requirements, your solution details, differentiators, and the customer intelligence collected on page one. Remove confidential information unless your AI tool is approved for it. Ask AI to flag missing information rather than invent it.

01 Build a customer-centered executive summary

Using the customer intelligence, RFP requirements, and proposed win themes below, draft a concise executive summary. Open with the customer's most important challenge or desired outcome—not our company's qualifications. Connect our verified solution strengths to the results the customer wants. Use a natural, confident, customer-focused tone. Do not invent facts. Avoid "We are pleased to submit," "Thank you for the opportunity," and generic thank-you closings.

02 Turn insights into win themes

Using the customer intelligence and competitive information below, propose three customer-focused win themes. For each: (1) identify a specific customer priority or problem; (2) connect it to a verified strength or differentiator; and (3) state the resulting customer value or outcome. Avoid "industry-leading," "best-in-class," and unsupported claims. Do not invent customer needs, differentiators, or evidence. Flag missing information to validate.

03 Remove generic proposal language

Revise the proposal opening and closing below to demonstrate a clear understanding of this customer's priorities and desired outcomes. Replace generic phrases such as "We are pleased to submit," "Thank you for your consideration," and boilerplate thank-you endings with specific, relevant messaging. Preserve accurate facts; do not add unverified promises or differentiators.

HUMAN CHECK

Does the draft reflect what the customer actually cares about? Is every differentiator relevant and supported? Does it sound like it was written for this customer—not any customer?

Q&A

Final Question

Was this presentation created by AI or Human?

Thank you!

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