

The six moves

01

Name the Deliverable

Start with the output.

02

Point to the Source

Tell it where the data lives.

03

Draw the Blueprint

Hand it the shape, page by page.

04

Set the Guardrails

Say what it is not allowed to do.

05

Prove It on One

Build the first draft on one real client.

06

Invite Questions

Make it a conversation.

01

Name the Deliverable

What is the thing you want in your hands when this is done?

I want to create a client proposal doc.

02

Point to the Source

Tell it where the data lives. Be specific about the system, the client, and what matters most inside it.

Use the Zocks connector for the data source, go pull that client's whole meeting history out of Zocks, and turn it into a PDF. Prioritize the meeting results and the meeting summary.

Draw the Blueprint

Hand Claude the shape, page by page. Drill into the details.

I can hand them:

- a cover page with a few facts about them
- a page with the numbers we discussed
- a page on next steps
- a page on what my firm will provide and what I expect from them
- a page on fees
- a closing section on how to proceed

Have a legacy proposal? Attach it here and ask for a revamp instead of a build from scratch.

04

Set the Guardrails

Say what it is not allowed to do. A blank field is a better answer than a confident guess.

Only use what's actually in the meetings. If we never talked about a number, leave it blank, don't guess.

05

Prove It on One

Pick one real client and build the first draft there.

Run a build of this first draft using Jamie Taylor from Zocks.

06

Invite Questions

One last line turns a command into a conversation. This is the line most people leave out.

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Ask me any follow-up questions you might have to get us started.
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Combine into One Big Prompt

I want to create a client proposal doc.

Use the Zocks connector for the data source, go pull that client's whole meeting history out of Zocks, and turn it into a PDF. Prioritize the meeting results and the meeting summary.

I can hand them:

a cover page with a few facts about them

a page with the numbers we discussed

a page on next steps

a page on what my firm will provide and what I expect from them

a page on fees

a closing section on how to proceed

Only use what's actually in the meetings. If we never talked about a number, leave it blank, don't guess.

And look at every page yourself before you hand it to me.

Run a build of this first draft using {client name} from Zocks

Ask me any follow-up questions you might have to get us started.