

SOLUTION PROPOSAL

SOLUTION PROPOSAL & QUOTATION

26 SEPTEMBER 2026



AI Sales CRM and Proposal Automation

Industrial air-conditioning system seller with 150 leads a month and 10 salespeople.

SAMPLE PROPOSAL



PROJECT
AI Sales CRM and Proposal Automation

DRAWN BY
**DNA Maker AI
Engineer**

CHECKED BY
DNA Maker engineering team

DATE
26 September 2026

SHEET
01 / 09

REV.
A

Executive Summary

The client sells industrial air-conditioning systems and receives about 150 leads a month from the website, LINE and trade shows, but 10 salespeople spend 2–3 days per proposal and track the pipeline in Excel. We will build an AI sales CRM that captures every lead, reads customer requirements, and drafts scope, itemised pricing and terms, with a suggested next action for each deal. The system replaces manual Word proposal work and Excel tracking with one pipeline, reducing proposal turnaround and giving sales visibility. The outcome is faster quotations, fewer missed follow-ups, and more selling time for the team.

SPECIFICATIONS

CLIENT

Industrial air-conditioning system seller with 150 leads a month and 10 salespeople.

PROJECT

AI Sales CRM & Proposal Automation System

OVERALL TIMELINE

5 weeks

DELIVERY PHASES · SYSTEM COMPONENTS

4 · 6

150/month

Leads received

10

Salespeople

2–3 days

Proposal writing time

OUR DIRECTION

The system captures leads from website, LINE and trade shows into one CRM pipeline. AI reads each customer requirement and drafts the proposal, scope, itemised pricing and terms, while suggesting a next action for every deal. Salespeople work from one pipeline instead of Word and Excel, turning 150 monthly leads into faster quotations and clearer follow-up.



Problem Analysis

Analysis found four distinct problems in the current lead-to-proposal process.

1

FINDING 01

Manual Proposal Writing

Each proposal takes 2–3 days to write in Word, covering scope, itemised pricing and terms. With 10 salespeople, this consumes days of selling time and delays response to 150 monthly leads.

2

FINDING 02

Fragmented Lead Sources

Leads arrive from the website, LINE and trade shows with no single intake path. Without central capture, enquiries can be missed, duplicated or left without an owner.

3

FINDING 03

Excel Pipeline Limits

The pipeline lives in Excel, so deal stages and follow-ups depend on manual updates. Managers lack real-time visibility, and deals can stall without a clear next action.

4

FINDING 04

Inconsistent Quotations

Manual Word documents make scope, pricing and terms prone to variation and error. This creates rework, slows approvals and can weaken customer trust.



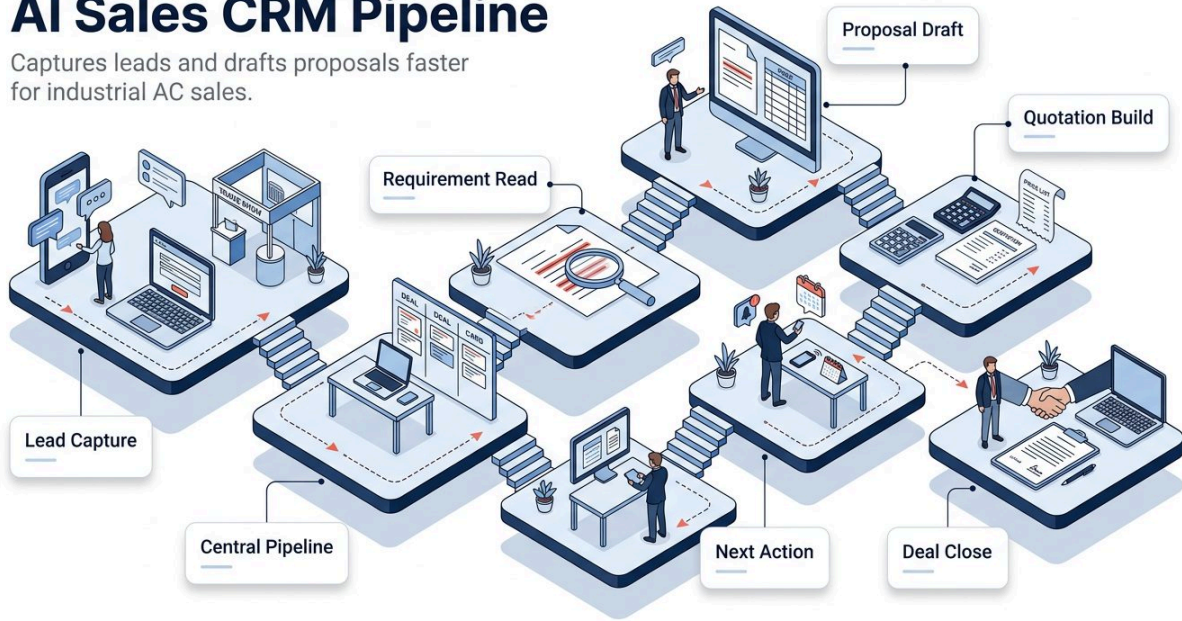
Solution Architecture

AI Sales CRM & Proposal Automation System

DETAIL A – HOW THE SYSTEM WORKS

AI Sales CRM Pipeline

Captures leads and drafts proposals faster for industrial AC sales.

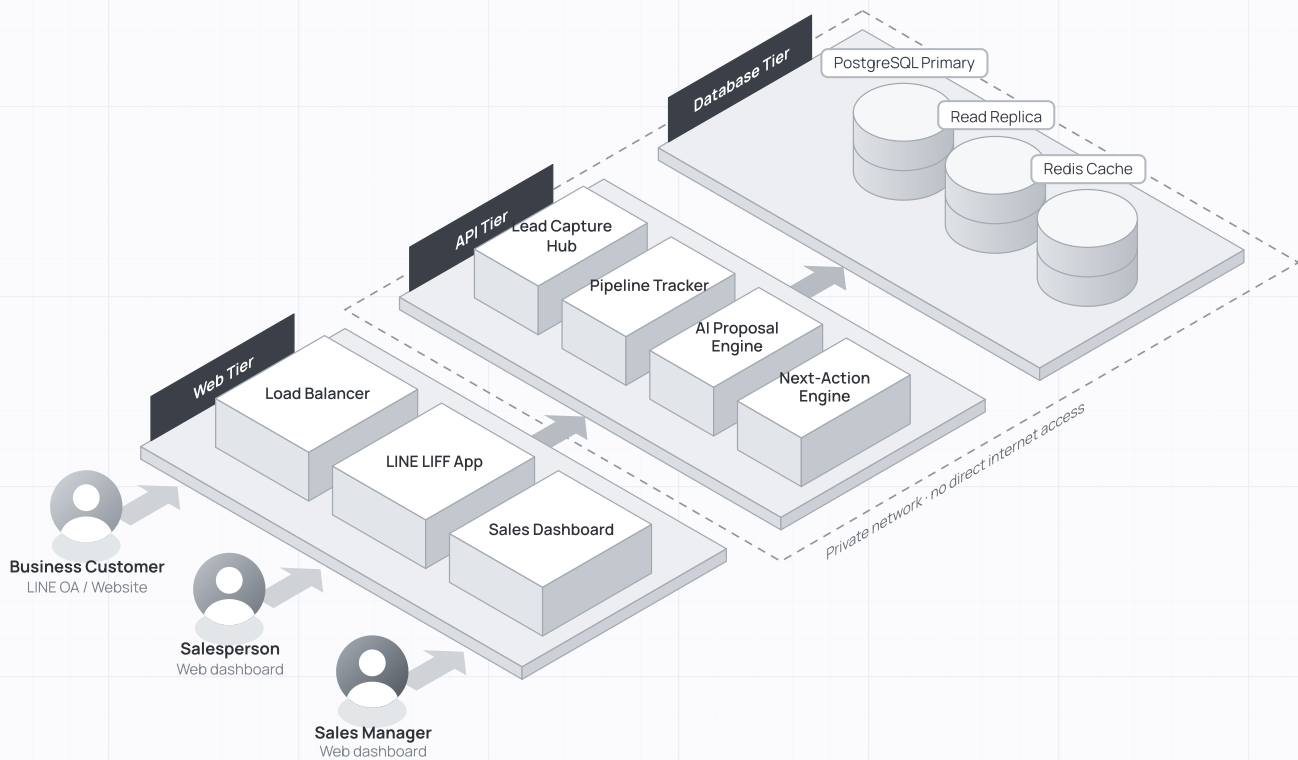


AI Sales CRM Pipeline – Captures leads and drafts proposals faster for industrial AC sales.



Deployment Architecture

A true 3-tier deployment — web, API and database on separate tiers, with the database in a private network, never exposed to the internet.



Who uses the system



Business Customer

LINE OA / Website

Submits lead and requirement details



Salesperson

Web dashboard

Works pipeline, reviews AI drafts, sends proposals



Sales Manager

Web dashboard

Monitors pipeline, assigns leads, tracks performance

Traffic estimate

Daily volume

~5 leads/day

Peak load

~0.1 req/s, business-hours peak

Concurrent users

~10 salespeople

Capacity plan

2 app servers behind load balancer, auto-scaling to 4; PostgreSQL primary + replica, Redis cache

150 leads/month $\approx$ 5/day; 10 salespeople $\times$ 20 updates = 200 transactions/day; 25% peak hour $\times$ 5 API calls $\approx$ 0.07 req/s. Launch 2 app servers sustain >5 req/s, $>50\times$ headroom.

Server and cloud hosting costs are not included in this proposal; they are billed by the provider directly to you.



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Scope of Work

BILL OF MATERIALS

NO.	KEY COMPONENTS	ROLE
1	Lead Capture Hub	Collects enquiries from website, LINE and trade shows into one pipeline.
2	Pipeline Tracker	Tracks every lead and deal stage, replacing the Excel pipeline.
3	AI Requirement Reader	Reads the customer requirement and extracts scope details for the proposal.
4	Proposal & Quotation Generator	Drafts scope, itemised pricing and terms as a ready-to-review proposal.
5	Next-Action Engine	Suggests the next action for every deal so follow-ups are not missed.
6	Sales Dashboard	Gives managers and 10 salespeople visibility over pipeline, activity and proposal status.

INCLUDED

- ☒ Lead capture from website, LINE and trade shows
- ☒ Central sales pipeline CRM
- ☒ AI proposal, scope and quotation drafting
- ☒ Suggested next action for every deal
- ☒ Sales dashboard and reporting
- ☒ Migration of existing Excel pipeline

NOT INCLUDED IN THIS SCOPE

- ☐ Legal review of proposal terms
- ☐ Hardware procurement
- ☐ Sales content and collateral creation
- ☐ Server and cloud hosting costs

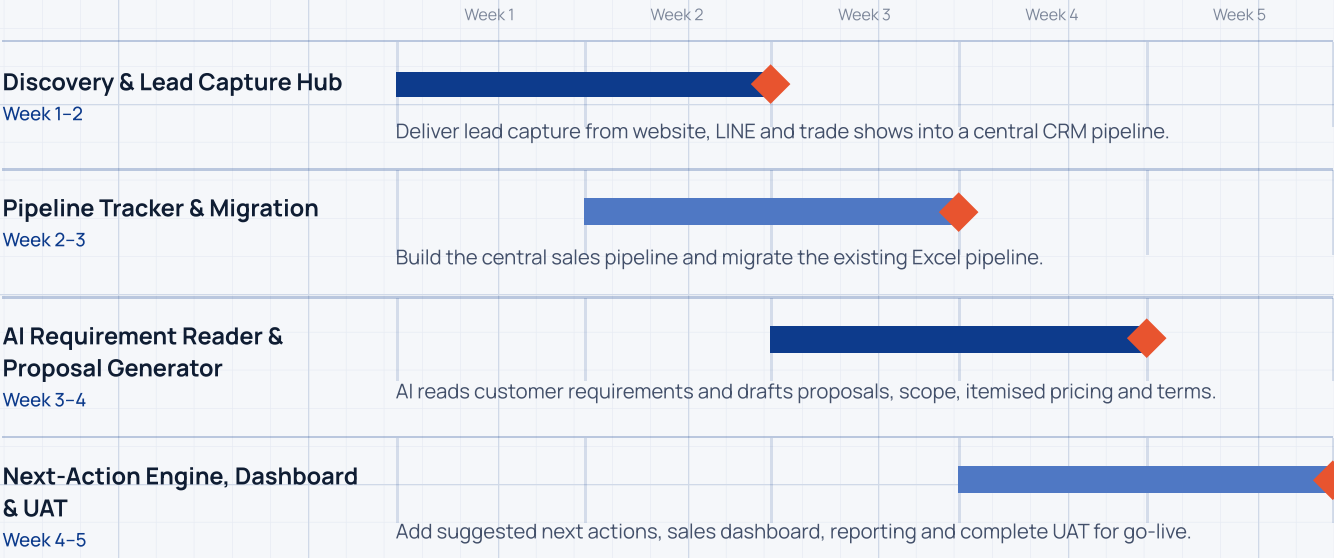
RISKS & MITIGATION

Excel data may be inconsistent or incomplete.	Data cleansing workshop during discovery.
AI proposal accuracy depends on requirement clarity.	Human review step before sending proposals.
LINE API changes may affect lead capture.	Use official LINE Messaging API and monitor updates.



Delivery Plan

Overall timeline	Delivery phases	System components	Deliverables
5 weeks	4	6	6



Estimated Investment

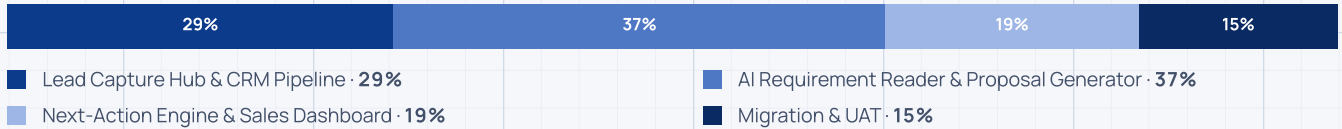
ESTIMATED TOTAL

฿90,000–250,000

Overall timeline

5 weeks

BUDGET BREAKDOWN



ITEM	PRICE RANGE (THB)	DURATION
Lead Capture Hub & CRM Pipeline Website, LINE and trade show lead capture into one pipeline.	฿30,000–70,000	2 weeks
AI Requirement Reader & Proposal Generator AI drafts proposal, scope, itemised pricing and terms from requirements.	฿35,000–90,000	2 weeks
Next-Action Engine & Sales Dashboard Suggested next action for every deal plus sales dashboard and reporting.	฿15,000–50,000	1 week
Migration & UAT Migrate existing Excel pipeline and complete user acceptance testing.	฿10,000–40,000	1 week
Estimated total	฿90,000–250,000	5 weeks

PAYMENT TERMS



ESTIMATE ASSUMPTIONS

- Client provides access to website, LINE OA and existing Excel pipeline.
- Client provides sample proposals and pricing rules for AI training.
- Client sales team is available for weekly reviews and UAT.
- Server, hosting and third-party license costs are paid by the client directly to providers.

NOTE Every figure in this document is a preliminary estimate based solely on the information shared in conversation. Final pricing and timing are confirmed after a detailed requirements and systems review. Server and cloud hosting costs are not included in this proposal; they are billed by the provider directly to you.



Why DNA Maker

Thailand's leading banks, enterprises and government agencies trust us with systems that have to go live — and stay live.

500+
projects delivered since 2012

01 Chosen by Thailand's leaders

SCB, KBank, Krungsri, AIS, SCG, BDMS, the Treasury Department (Ministry of Finance) and Sony Device Thailand chose DNA Maker for systems where failure is not an option.

02 Bank-grade security, proven

A true 3-tier architecture (Web · API · Database) keeps your database off the public internet, validated by penetration and stress testing. Our Bluweo Engine is security-certified and runs at multiple bank groups.

03 You own 100% of it

Full source code and IP are handed to you — no plugin lock-in, no surprise licence fees, no limits on future changes.

04 Clears every go-live gate

We know bank and enterprise IT governance from the inside: every requirement in your TOR is covered, with no gaps and no surprises at acceptance.

05 Ready for the AI era

Content, search and data are structured for AI search engines and ChatGPT-style assistants, so the system grows with you instead of being rebuilt.

06 A partner long after launch

Multi-year client relationships, and a Bangkok team that stays on to improve the system and solve problems after go-live.

TRUSTED BY

SCB

Banking

KBank

Banking

Krungsri

Banking

AIS

Telecom

SCG

Industry

BDMS

Healthcare

Treasury Department

Ministry of Finance

Sony Device Thailand

Electronics

NEXT STEPS

- 1 Scoping session with the engineering team to confirm requirements and finalise scope.
- 2 Sign contract and pay 40% deposit to start the project.
- 3 Kick-off and discovery workshop within one week of signing.

Built to go live. Built to last.



CEO & Solution Provider

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