

PROFESSIONAL SERVICES

Across 10 Professional Services Workflows · owneroperated.ai

Proposals & Pitches — 10

- SOW proposal writing
- RFP response frameworks
- Proposal follow-up sequences

Client Onboarding — 10

- Welcome & kickoff sequences
- Discovery question guides
- Contract & process overviews

Service Delivery — 10

- Status update templates
- Deliverable presentation scripts
- Quality review checklists

Client Retention & Growth — 10

- Quarterly review formats
- Upsell conversation scripts
- Contract renewal strategies

Marketing & Thought Leadership — 10

- LinkedIn content strategy
- Blog & newsletter topics
- Speaking & PR pitches

Billing & Collections — 10

- Invoice follow-up scripts
- Scope change billing
- Late payment escalation

Team & Operations — 10

- SOPs & process documentation
- Hiring & onboarding plans
- Delegation frameworks

Sales & Prospecting — 10

- Cold outreach sequences
- Discovery call frameworks
- Objection handling scripts

Pricing & Positioning — 10

- Value-based pricing scripts
- Packaging your services
- Raising your rates

Business Development & Partnerships — 10

- Strategic partnership pitches
- Award & certification submissions
- Industry event strategies

PROPOSALS & PITCHES

10 prompts

- 1 Write a proposal for {service_type} services to {client_name}. Scope: {scope}. Timeline: {timeline}. Price: \${price}.
- 2 Create a statement of work (SOW) for a {project_type} engagement: deliverables, timeline, assumptions, exclusions.
- 3 Draft an RFP response for a {service_type} contract with {client_type}. Our differentiators: {differentiators}.
- 4 Write a proposal follow-up email 5 days after submission with no response. Value-add, not a chase.
- 5 Create a pricing table for our {service_type} offerings: Basic, Professional, Enterprise. Clear differentiation.
- 6 Draft a case study section for a proposal: how we helped {similar_client} achieve {result} using {approach}.
- 7 Write an executive summary for a \${value} engagement proposal: the problem, our solution, the outcome.
- 8 Create a competitive comparison section: why choose us over {competitor_type}. Honest, confident.
- 9 Draft a proposal objection response for 'your price is too high': value reframe, payment options, reduced scope.
- 10 Write a scope expansion proposal for an existing client: current engagement, new opportunity, added value.

CLIENT ONBOARDING

10 prompts

- 1 Write a new client welcome email: project kick-off details, what to expect, key contacts, first steps.
- 2 Create a discovery questionnaire for a new {service_type} client: goals, current state, constraints, definition of success.
- 3 Draft a kick-off meeting agenda for a new {project_type} engagement: introductions, scope review, timeline, Q&A.
- 4 Write an onboarding checklist for our team: what to set up, what to send, what to confirm before day 1.
- 5 Create a client communication agreement: frequency, channels, response time expectations, escalation path.
- 6 Draft a 'how we work' overview document for new clients: our process, your role, key milestones, review cycles.
- 7 Write a data and access request email to a new client: what we need, why, how to share securely.
- 8 Create a 30-day onboarding plan for a retainer client: week-by-week, what gets done, check-in schedule.
- 9 Draft an NDA explanation email to a new client: what it covers, why it protects both parties, signing instructions.
- 10 Write a project management tool onboarding guide for clients new to {tool_name}: how we'll use it, what they'll see.

SERVICE DELIVERY

10 prompts

- 1 Write a weekly status update email for {project_name}: completed this week, in progress, blockers, next week.
- 2 Draft a deliverable presentation email: {deliverable_name} attached — here's what we did and why.
- 3 Create a quality review checklist before sending any client deliverable: {deliverable_type}. Don't miss a thing.
- 4 Write a scope creep conversation script: how to address out-of-scope requests professionally and bill for them.
- 5 Draft a project milestone completion email: {milestone} achieved, what it means, what comes next.
- 6 Create a client feedback request for a completed deliverable: specific questions, easy to respond to.
- 7 Write a project delay notification: {task} is {days} behind due to {reason}. New timeline and mitigation plan.
- 8 Draft a 'here's what we'll need from you' request email with clear deadline and what happens if delayed.
- 9 Create a project retrospective agenda: what went well, what to improve, client's experience, next phase.
- 10 Write an end-of-engagement summary: objectives met, outcomes, key wins, recommendations going forward.

CLIENT RETENTION & GROWTH

10 prompts

- 1 Write a quarterly business review (QBR) agenda: results vs. goals, case studies, roadblocks, next quarter plan.
- 2 Draft a contract renewal conversation script: value delivered, new pricing if applicable, ask for renewal.
- 3 Create an upsell conversation script for adding {new_service} to an existing client's engagement.
- 4 Write a client at-risk save script: they've gone quiet, engagement seems low — how to re-engage before they churn.
- 5 Draft a year-end impact report for a retainer client: KPIs, projects completed, ROI, recommendations for {year}.
- 6 Create a client success story request email: ask for permission to write a case study about their results.
- 7 Write a referral request email to a satisfied client: timing, language, make it easy to refer.
- 8 Draft a service expansion proposal: current scope is {current}, we recommend adding {new_scope} because {reason}.
- 9 Create a client health scorecard: engagement, responsiveness, satisfaction, usage, risk level.
- 10 Write a 'here's what's new with us' quarterly email to your full client list: new services, team updates, wins.

MARKETING & THOUGHT LEADERSHIP

10 prompts

- 1 Write a LinkedIn post sharing a lesson learned from a recent {project_type} engagement. Authentic, professional.
- 2 Create a 90-day LinkedIn content calendar for a {specialty} consultant: posts, articles, engagement plan.
- 3 Draft a blog post outline for '{topic}': audience, key points, CTA, and internal link opportunities.
- 4 Write a newsletter issue for {month}: industry insight, quick tip, case study teaser, personal note.
- 5 Create a speaking proposal for a {industry} conference: topic, why you're qualified, audience takeaways.
- 6 Draft a podcast guest pitch to {podcast_name}: why your story fits, 3 topic angles, your bio.
- 7 Write a PR pitch for a '{practitioner} in {city} helps {client_type} achieve {result}' story angle.
- 8 Create a lead magnet outline: '{title}' guide for {target_audience}. Chapters, key takeaways, CTA.
- 9 Draft a webinar promotion email: {webinar_topic}, {date}, what attendees will learn, register CTA.
- 10 Write a thought leadership article intro: 'The {number} things most {industry} companies get wrong about {topic}.'

BILLING & COLLECTIONS

10 prompts

- 1 Write a friendly invoice reminder for an invoice {days} days past due. Keep the relationship intact.
- 2 Draft a firm payment demand for an invoice {days} days overdue: professional, clear consequences.
- 3 Create a scope change order for additional work outside the SOW: description, cost, timeline, approval request.
- 4 Write a retainer renewal invoice cover letter: thank them for the year, new terms if applicable, CTA.
- 5 Draft a payment dispute response: client claims they didn't authorize the work described in invoice #{num}.
- 6 Create a collections escalation letter for an invoice {amount} days overdue: legal options referenced, final notice.
- 7 Write a payment plan proposal for a client facing cash flow issues: terms, timeline, documentation needed.
- 8 Draft an invoice explanation email for a higher-than-expected invoice: what drove the increase, line by line.
- 9 Create a billing FAQ for clients: payment terms, what 'net 30' means, how to pay, how to dispute.
- 10 Write a contract termination for non-payment: formal notice, work stoppage date, final invoice demand.

TEAM & OPERATIONS

10 prompts

- 1 Write an SOP for our {process_name} process: who does it, how, tools used, quality check, exceptions.
- 2 Create a new hire onboarding plan for a {role}: week 1 (orientation), weeks 2–4 (training), month 2 (solo).
- 3 Draft a job posting for a {role} at a {service_type} firm. Skills, culture fit, growth opportunity.
- 4 Write a delegation framework for a founder/owner who needs to stop being the bottleneck: what to hand off first.
- 5 Create a team meeting agenda for a weekly all-hands: metrics, wins, blockers, priorities, shout-outs.
- 6 Draft a performance improvement plan for a team member with {specific_issue}: clear expectations, timeline, support.
- 7 Write a remote team communication protocol: async norms, meeting cadence, response time expectations.
- 8 Create a capacity planning model: we have {num_staff} people, {num_projects} projects — are we over or under capacity?
- 9 Draft a freelancer/contractor agreement outline: scope, rate, IP ownership, confidentiality, termination.
- 10 Write a 90-day performance review for a new hire in a {role}: strengths, development areas, goals for next 90 days.

SALES & PROSPECTING

10 prompts

- 1 Write a 5-email cold outreach sequence for {target_client_type}. Each email shorter and more direct than the last.
- 2 Create a discovery call framework: opening, questions to ask, how to identify fit, how to close to proposal.
- 3 Draft a LinkedIn connection request message to a {title} at a {company_type}. 3 sentences max.
- 4 Write an objection handling script for 'we're handling this in-house': acknowledge, reframe, present value.
- 5 Create a follow-up email sequence after a discovery call: same day, 3 days, 7 days. No fluff.
- 6 Draft a cold email for {service_type} to {target_company_type}. Subject line, body, CTA — under 100 words.
- 7 Write a referral partner outreach to a {complementary_service} provider about mutual referrals.
- 8 Create a proposal debrief script for lost deals: gather intel, stay in the pipeline, plant a return seed.
- 9 Draft a reactivation sequence for prospects who went dark after a proposal 3+ months ago.
- 10 Write a case study-based outreach email: 'We helped {similar_company} achieve {result} — worth a 20-min call?'

PRICING & POSITIONING

10 prompts

- 1 Write a value-based pricing justification for a \${price} {service_type} engagement. Tie it to client outcomes.
- 2 Create 3 service package options: Done-With-You, Done-For-You, and Advisory. What goes in each, and why.
- 3 Draft a rate increase announcement to existing clients: effective {date}, new rates, appreciation for loyalty.
- 4 Write a pricing page for our website: packages, what's included, what's excluded, FAQ, and CTA.
- 5 Create a 'why we're not the cheapest option' narrative for sales conversations and the website.
- 6 Draft a project minimum policy explanation: we don't take projects under \${minimum} because {reason}.
- 7 Write a price anchoring script: present the premium option first, make the mid-tier feel like the smart choice.
- 8 Create a productized service description for a {deliverable_type} with a fixed scope and fixed price.
- 9 Draft a discount request response: why we don't discount, what we can offer instead, preserve the relationship.
- 10 Write a testimonial that demonstrates ROI for our {service_type}: '{client} invested \${price} and got {result}.'

BUSINESS DEVELOPMENT & PARTNERSHIPS

10 prompts

- 1 Write a strategic partnership proposal to {company_name}: what we each bring, how it works, what clients get.
- 2 Draft an award submission narrative for '{award_name}': our qualifications, client results, why we deserve it.
- 3 Create a conference sponsorship proposal pitch from a speaking angle: our topic, audience fit, what we ask for.
- 4 Write an industry association membership justification memo for our firm to join {association_name}.
- 5 Draft a joint venture proposal with {partner_type}: combined offering, revenue split, client acquisition strategy.
- 6 Create a speaking application for a {conference_type} conference: bio, topic, abstract, what attendees gain.
- 7 Write an outreach email to a potential white-label client: offer our {service_type} under their brand.
- 8 Draft a media kit for our {service_type} firm: services, team, case studies, speaking topics, press mentions.
- 9 Create a 'strategic advisor' pitch to a PE-backed {industry} company looking for outside expertise.
- 10 Write a business development plan for {year}: target revenue \${goal}, target clients, channels, activities.