PandaDoc®

Ask me anything...

THE SMB AI TOOLKIT

BUSINESS-TESTED PROMPTS TO HELP GET MORE DONE

Introduction

Running a small business means wearing a lot of hats.

One minute you're selling, the next you're doing admin work, then you're staring at a spreadsheet trying to figure out if your cash flow is thriving... or just surviving.

AI can help with all of that. But most online advice assumes you have time to become an expert — and you don't.

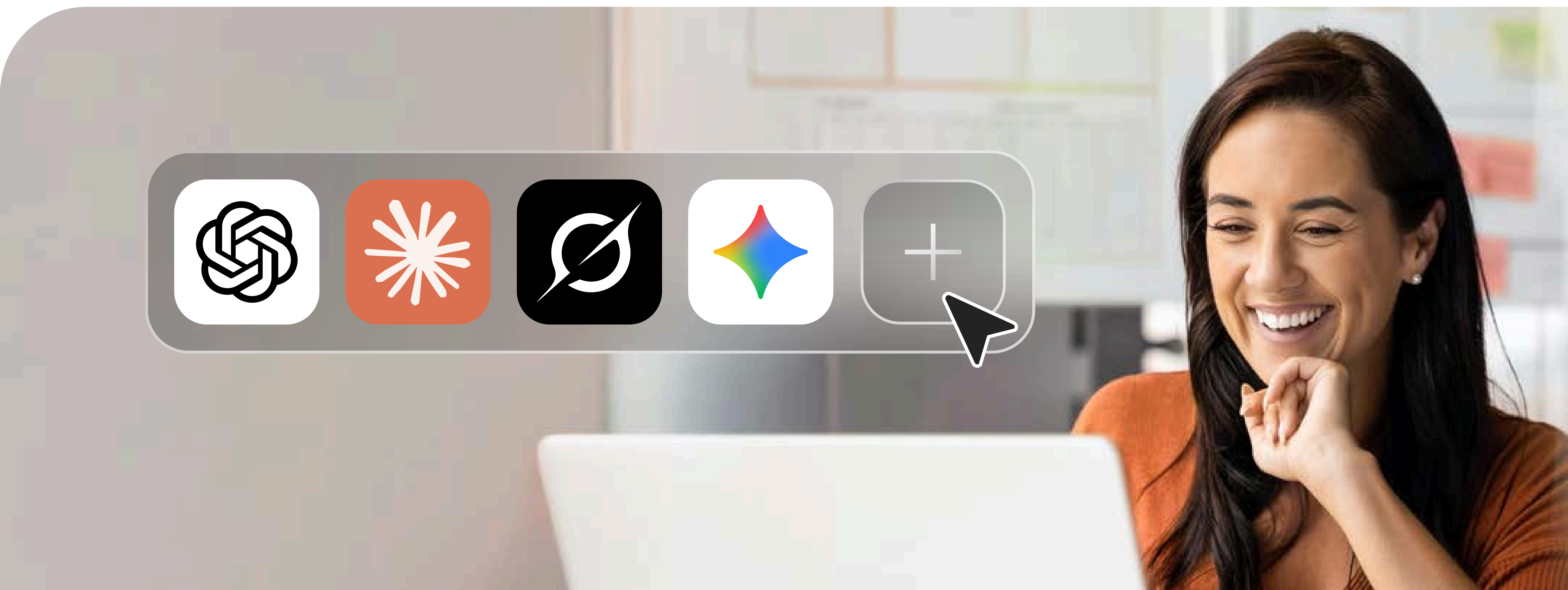
You need to focus on what actually keeps the lights on: generating new business and closing deals, not mastering the art of prompting.

That's where this toolkit comes in. We've done the heavy lifting, so you don't have to.

This toolkit gives you copy-paste prompts for five everyday areas where AI can actually save you time:

- Selling and closing deals
- Running daily operations
- Making sense of your data
- Leading your team
- Managing contracts and agreements

You don't need additional software or a dedicated AI person. Most of these work with tools you can access today — ChatGPT, Claude, Gemini, or the AI built into your CRM and document tools.



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What is AI? (and why it matters for your work)

AI tools like ChatGPT, Claude, Grok, Gemini, and the seemingly endless list of similar tools are trained on massive amounts of text from the internet. They predict what words should come next based on patterns they learned during training. That's it. They don't "think" or "know" things the way people do. They're really good at recognizing patterns.

What makes them useful is that they can take a number of basic inputs and turn them into polished drafts, summarize information quickly, or restructure content in seconds.

They're not replacing your judgment — they're just handling the grunt work so you can focus on the decisions that actually matter.

For small business owners with minimal headcount, that means you can get quality starting points without the time drain of creating everything from scratch.

What is a prompt?

Ask me anything

A prompt isn't as technical as you might think. It's just the instructions you give an AI tool. In basic terms, it's how you tell it what you want.

Think of it as delegating to an incredibly smart assistant. The clearer your instructions are, the better the result. "Write an email," for example, will get you something pretty generic. The following example, however, will produce something far more useful:

> Write a three-paragraph follow-up email to a prospect that liked our demo but hasn't responded in a week. Keep it friendly, casual, and include a clear next step.

Let's explore some core best practices so you can better understand the prompts we share later.

AI prompting best practices

Be specific about who you are and what “good” looks like

Tell the tool your role, who the output is for, and the format you want.

PROMPT EXAMPLE

I’m a RevOps lead at a 50-person SaaS company. I’m sending this to our VP of Sales.

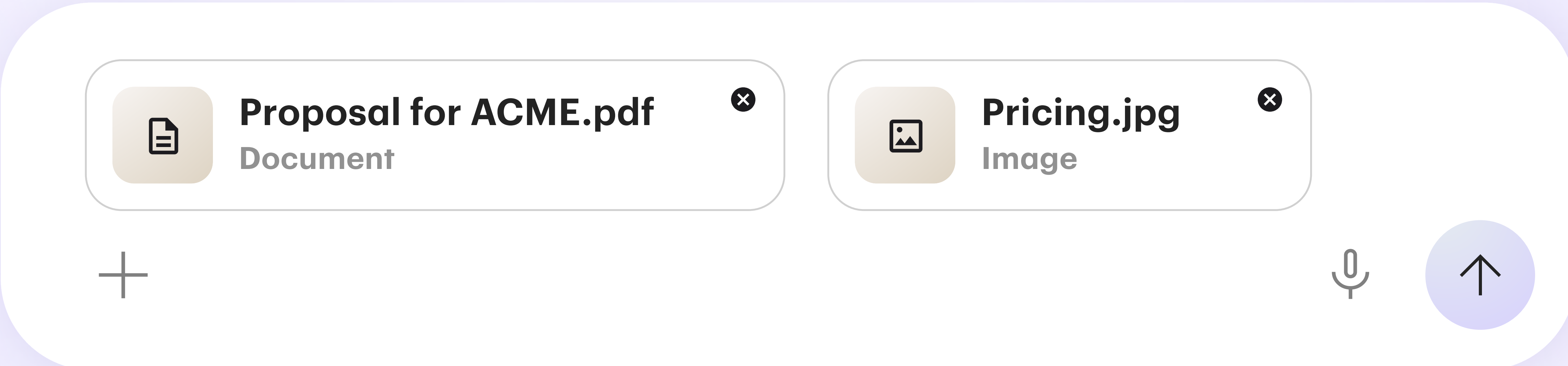
Turn the notes below into three bullets:

- **what changed**
- **why it matters**
- **what we should do next.**

That is much clearer than “summarize this for leadership.”

Give AI examples to work from and a clear reference

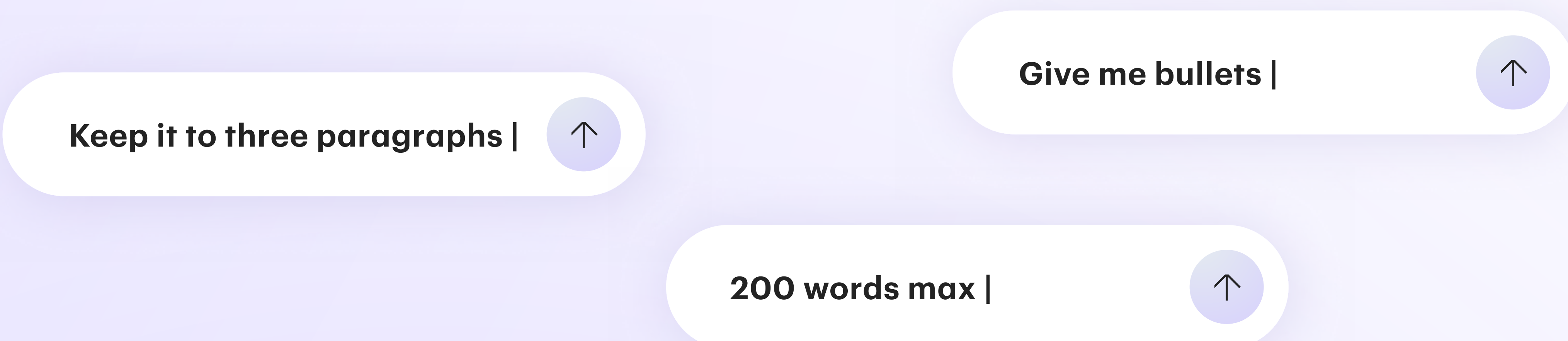
Paste a real example — a call note, a rough draft, a screenshot of your data — and share an example you want to emulate (like a past proposal that worked). Then ask AI to rewrite, summarize, or tighten it up. AI is usually better at improving what's already there than guessing from a blank page.



Give the AI one job at a time

You'll get better results if you keep each request focused. Instead of asking it to rewrite, shorten, and change the tone all at once, start with one clear request, check the result, then stack the next change.

Mention what format and length you're looking for



Otherwise, you get walls of text that you'll have to cut down yourself.

Tell the AI what NOT to do

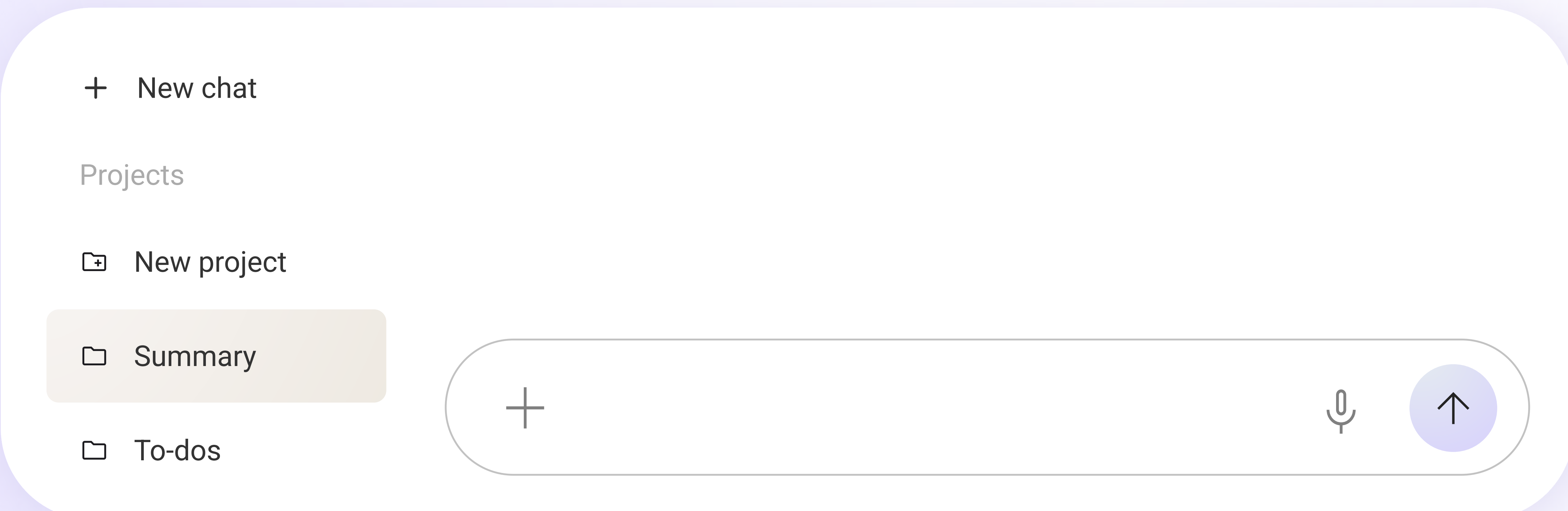
Sometimes it's easier to say **"❌Don't use buzzwords like 'synergy' or 'leverage,'"** or **"❌Don't make assumptions about pricing,"** than to describe exactly what you want.

If the first output isn't right, tell the AI what to fix

Most people paste once, get mediocre results, and give up. Instead, say **"Make this less formal,"** or **"Focus more on the pricing conversation,"** and Let the AI refine. Good output usually takes a few tries.

Chain tasks together instead of starting fresh

Once you use AI to help with one task, like summarizing a call, ask it to handle the next related task, such as drafting the follow-up email or creating an internal task list. The AI already has your context, so chaining tasks means you don't have to re-explain everything. It's the fastest way to turn one chat into multiple finished outputs.



Don't paste sensitive data into free AI tools

Customer names, pricing details, contract terms — if it's confidential, either use your company's secure AI tools or anonymize it first. Replace names with **[Customer A]**, actual prices with **[X amount]**, etc.

PROMPT EXAMPLE

We offered **[Customer A]** a **[X amount]** annual contract. The agreement included standard terms and conditions, with a proposed start date in **[Month]**.

Always fact-check

AI is great at structure and speed, but not-so-great at judgment. It'll sound confident even when it's wrong. If you ask an AI for statistics, ask for sources and verify them yourself. If it generates contract language, make sure the terms are accurate. If it drafted something customer-facing, read it like you're the customer.

Save the prompts that work

Once you find a prompt that consistently gives you good output, save it. Reuse it. Tweak it over time. A good prompt can be a reusable asset, not just a one-off.

Each section outlines when to use the prompt, why it helps, and provides a copy-and-paste prompt you can drop into your AI tool of choice. Use them as starting points, tweak them as needed, and save the versions that work best for your business.

Now, let's dive in.

SELLING AND CLOSING DEALS

BETHANY VELOSA

Sales Process and Contract Solutions Analyst,
Aviation Performance Solutions

EXPERT ADVICE

Write a closing statement that motivates action

Sometimes the hardest part of a proposal isn't the details, it's wrapping it up with something that actually motivates someone to sign.

Use the following prompt when you need a closing statement that reminds the prospect why you're different and worth their time, without sounding generic or overconfident.

PROMPT EXAMPLE

I’m a **[your role]** at a **[your company size/type]**, selling **[short description of your product or service]**.

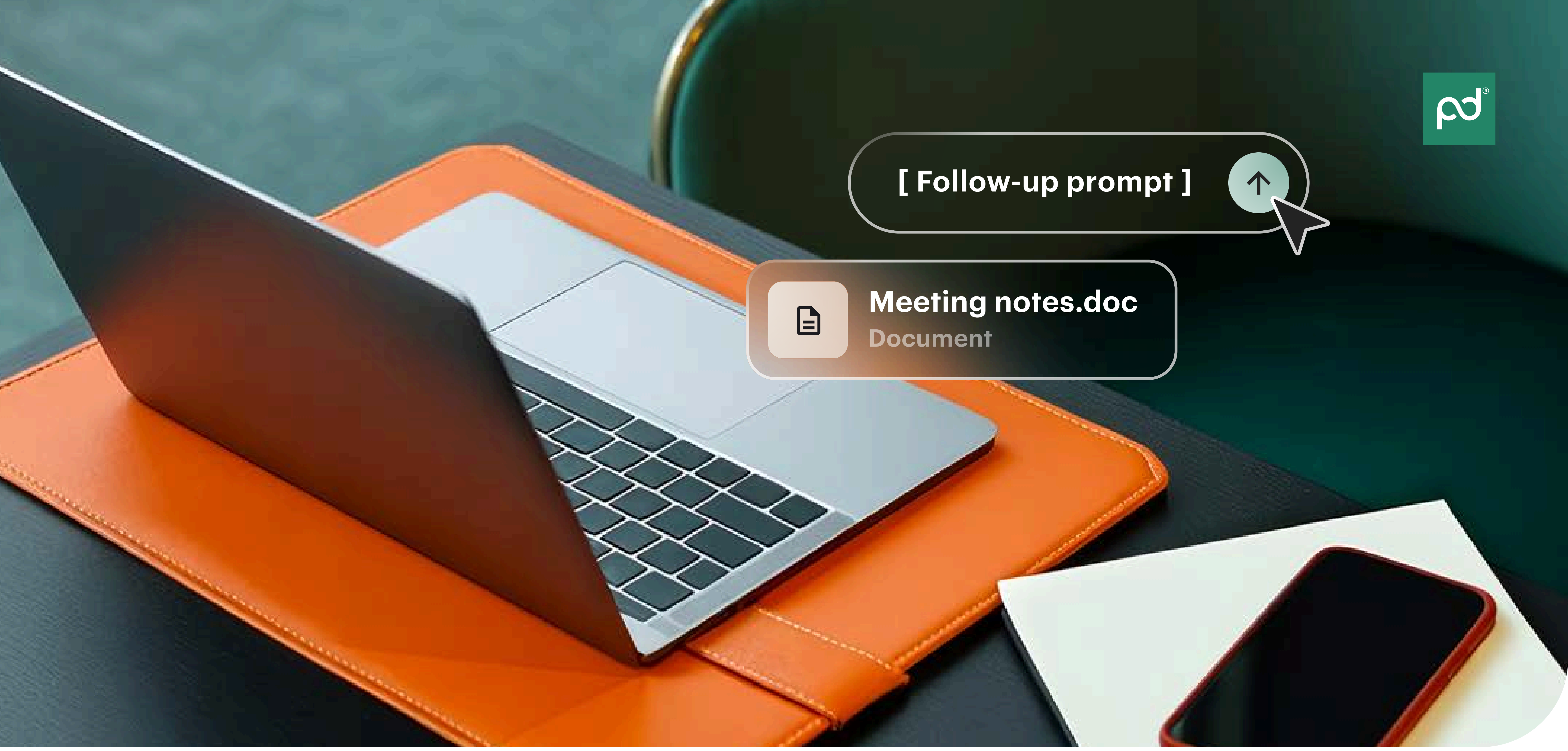
I’m sending a proposal to a customer who likes our solution but does not see the proposal as important or urgent.

Please write a short closing statement I can add to the end of the proposal that:

- Clearly explains why our proposal is a better choice than most alternatives
- Emphasizes practical value, long-term fit, and partnership
- Stays confident but not pushy
- Fits in 2–3 sentences

Write it in clear, simple language I can reuse and adapt for future proposals. The proposal is attached.

PRO TIP: Once you get a version that consistently lands, save it as a reusable snippet in your proposal template (PandaDoc or your document tool), and tweak a few word for each customer instead of starting from scratch.



EXPERT ADVICE

Writing follow-ups in 2 minutes

DOUG WENDT

Growth Specialist,
Wendt Partners

You finish a good call, and now you owe a follow-up email, but your notes are messy, and turning them into something clear always takes longer than it should.

Use this prompt when you want to turn raw bullets or a transcript snippet into a short, ready-to-send follow-up in a few minutes.

PROMPT EXAMPLE

I'm a **[your role]** at a **[your company size/type].**

I just had a call with a prospect about **[brief description of product/service].**

Here are my raw notes from the call:
[Paste your bullets or transcript snippet]

Please draft a concise follow-up email that:

- Recaps the prospect's goals and main pain points in plain language
- Has a professional, enthusiastic tone
- Keeps it short (2–3 paragraphs)
- Confirms what we agreed to do next (including dates/times)

  If we didn't confirm next steps, propose one reasonable next step based on the sales stage I'll specify (for example: demo scheduled, proposal sent, or in negotiation).

  We are currently in this stage of the sales process: **[brief description, e.g. "proposal sent, waiting on feedback"]**.
- Ends with one clear call to action

PRO TIP: Add a short line about your voice (e.g., "I'm informal and direct — avoid buzzwords") to get something closer to how you actually write. Over time, paste in a version you edited and ask the AI, "What did I change?" to help it learn your style.

EXPERT ADVICE

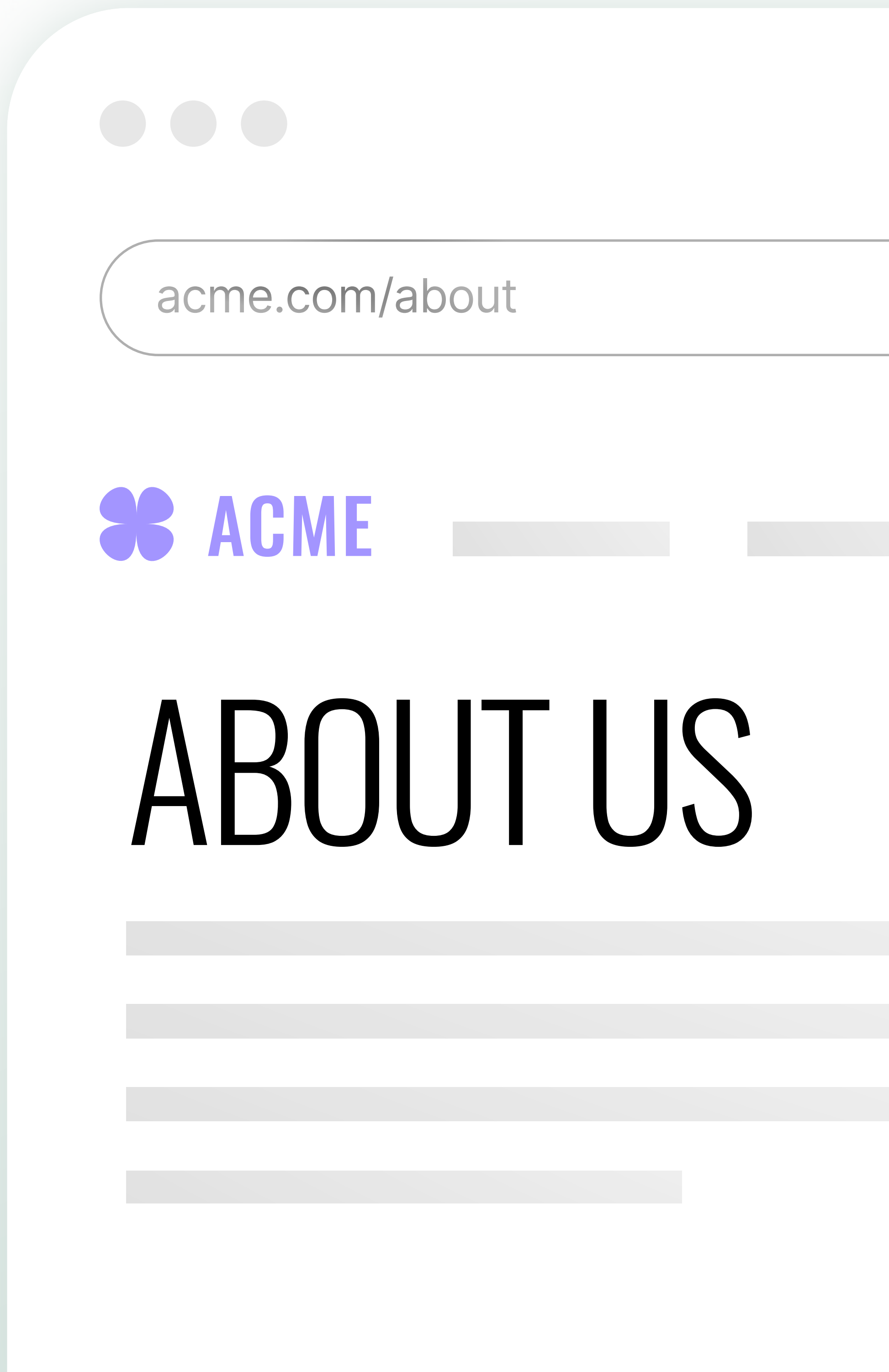
Turn your About Us page into a persuasive proposal intro

MATT FEHRMANN

Sales Team Lead, RevPartners

You already have an About Us page that explains who you are and why people choose to work with you.

Instead of rewriting that story for every proposal, use this prompt to turn that page into a short, client-friendly introduction that makes your value obvious from the start and does the early heavy lifting for your proposal.



PROMPT EXAMPLE

I'm creating a proposal introduction page for **[type of clients].**

Here is our About Us page for reference: **[Paste your About us page text, or copied content from that page]**

You are an expert B2B copywriter. Here is a sample email from **[name and role of the person sending the proposal]** so you can match their voice:

[Paste a short email they've actually sent]

Please write a short proposal introduction that:

- Explains who we are and what we do in clear, simple language
- Highlights the main reasons customers choose to work with us
- Keeps the tone consistent with the sample email above (or, if no sample is provided, use this tone instead: **[brief tone description, e.g. "clear, straightforward, and confident, not overly salesy"]**)
- Resonates with busy decision-makers
- Fits on one proposal page (2–3 short paragraphs)

Use a professional but human tone. Avoid buzzwords and overly salesy language.

PRO TIP: Once you like the intro, you can reuse the same pattern for other proposal sections — for example, ask the AI to draft a "Problem / Solution" or "Next steps" section using your website copy, case studies, or PDFs as input.

RUNNING DAILY OPERATIONS

MONIQUE LEMIEUX

Director, Revenue Operations — Customer Acquisition, PandaDoc

EXPERT ADVICE

Create a process document everyone can follow

You know how the process works when a quote needs approval, a deal moves from sales to CS, or a renewal comes up. But it's never been formally documented because there are just not enough hours in the day.

Use this prompt when you need to turn "Here's how I do it" into a simple process document that anyone on the team can follow, saving time and reducing avoidable mistakes.

PROMPT EXAMPLE

I'm documenting an internal process for our team.

Here's my rough brain dump of how we actually do it today: **[Paste bullets, Slack thread, or a rough description]**

Please turn this into a clear Standard Operating Procedure (SOP) with:

- A short description of when this process is used and why it matters
- Who is responsible (role, not name)
- Step-by-step instructions, each starting with a verb
- Any tools/systems we use at each step
- A short checklist at the end for "Did we do this right?"

Keep the language simple so anyone on the team can follow it.

PRO TIP: Once you have the SOP, ask the AI for a "quick-start version" for new hires — a one-page checklist or "first week" version that sits in your onboarding documents. You can also ask it to add a simple troubleshooting section with common issues and how to handle them.

MAKING SENSE OF YOUR DATA

ALI SPINELLI

Vice President of Revenue Operations, PandaDoc

EXPERT ADVICE

Turn a KPI report into a clear performance update

You can export pipeline, quota attainment, win rates, or renewal metrics from your CRM in a few clicks — but turning that into a clear update for a deal review, RevOps sync, or leadership meeting is a time-consuming process.

Use this prompt when you want a short, plain-language update you can share with your team or leadership.

PROMPT EXAMPLE

Role: Act as a strategic advisor and RevOps expert. Your goal is to synthesize complex CRM data into a high-level narrative for leadership that balances data-driven facts with strategic intuition.

Task: Analyze the following performance snapshot from **[Time Period].**

[Paste Data Here]

Instructions:

The Executive Summary: Call out the 3–5 most significant shifts. Use plain language, but emphasize the impact of these changes (e.g., "A 5% drop in win rate here puts our Q3 goal at risk").

- Pattern Recognition: Identify trends or anomalies. Specifically, look for correlations between **[Metric A]** and **[Metric B]**. If the data allows, segment these insights by tier (SMB vs. Enterprise) or region.
- The "Check Engine" Light: Flag any data points that look statistically improbable or suggest a breakdown in the sales process that requires immediate investigation.
- Strategic Narrative: End with three concise talking points designed for a leadership audience. Focus on the "So what?" and the "What's next?"

Tone: Professional, direct, concise and insightful. Avoid corporate buzzwords.

PRO TIP: Save a standard report view for this — same fields, same time window — and reuse it with this prompt each week or month. Over time, you can compare the summaries side by side to spot real trends faster and keep leadership focused on what actually changed.

LEADING YOUR TEAM

NORA HANAGAN-BREEN

Senior Director of Sales, SMB, PandaDoc

EXPERT ADVICE

Lock in next quarter's priorities

You know what needs to happen this quarter, but turning that into a structured plan keeps getting pushed to “later.”

Use this prompt when you’re clear on the big goals and need a one-page plan your team can actually act on.

PROMPT EXAMPLE

I'm planning priorities for next quarter for my team.

Here are the main goals and ideas I've been collecting: **[Paste bullets, notes, or draft OKRs]**

Please organize this into a simple one-page plan that includes:

- 3–5 clear priorities written as outcomes, not tasks
- Why each priority matters and how we'll know they're working
- A short list of "not this quarter" items we'll explicitly de-prioritize

Keep it concise and written so my team can read it quickly and understand what we're focusing on.

PRO TIP: Once you like the structure, ask the AI to turn it into a short Slack or email announcement explaining the plan in plain language.

DRAFTING AND SUMMARIZING AGREEMENTS

JOHNATHAN FOX

Founder,
ByteSizedSolutions LLC

EXPERT ADVICE

Create an independent contractor agreement and SOW starter

Bringing in contractors is often one of the fastest ways to move work forward. This pair of prompts helps you spin up a clear independent contractor agreement and statement of work (SOW) you can reuse — even if you don't have in-house legal support.

Note: Just be sure to have your attorney or legal advisor review anything before you send it out or sign it.

PROMPT 1: INDEPENDENT CONTRACTOR AGREEMENT

Use this when you want a reusable master agreement and only want to update the SOW for each new project.

Act as a legal consultant specializing in business contracts.

Draft an Independent Contractor Agreement between **[Client Name]** (the "Client") and **[Contractor Name]** (the "Contractor"). Use clear headings and plain language. Include:

- Services defined by an attached Statement of Work (SOW), so this agreement can cover multiple projects
- A clear independent contractor clause stating the Contractor is not an employee and is responsible for their own taxes, insurance, and business expenses
- A clause that gives the Client ownership of all work product and deliverables created under the agreement
- Standard confidentiality protections for business information and customer data
- Term and termination, including a mutual "termination for convenience" option with **[X]** days' written notice
- Liability and indemnification, where the Contractor is responsible for their work and indemnifies the Client for related third-party claims
- A non-solicitation clause preventing the Contractor from soliciting the Client's employees or customers for **[12]** months after the contract ends
- A governing law section specifying the state of **[Your State]**

Use placeholders where specific names, dates, pricing, and notice periods should go.

PROMPT 2: STATEMENT OF WORK TEMPLATE

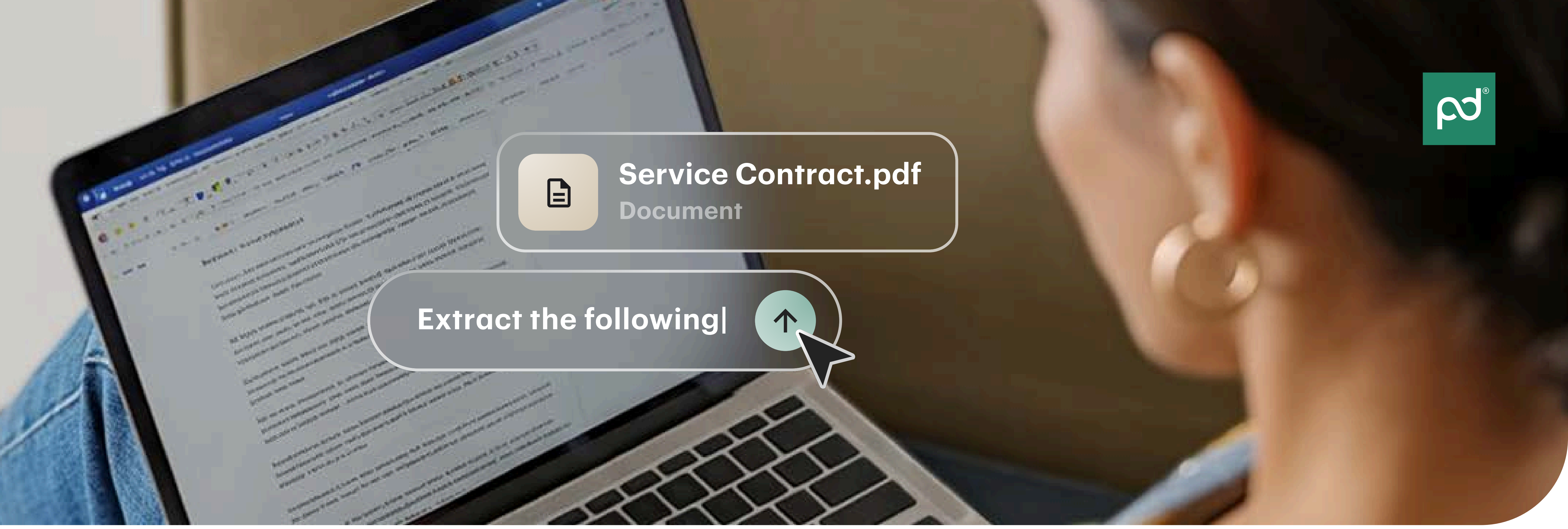
Once you've generated and reviewed your master Independent Contractor Agreement from Prompt 1, use this prompt to create the project-specific SOW you'll attach as Exhibit A, which you can plug into your master agreement.

Draft a simple Statement of Work (SOW) template to use as "Exhibit A" to an Independent Contractor Agreement. Use a clean layout with clear headings and bracketed placeholders. Include sections for:

- Header information: SOW number, effective date, and a reference to the master agreement
- Project description: a brief summary of the engagement
- Scope of services: the Contractor's responsibilities and tasks
- Deliverables and acceptance: a list or table for deliverables and the criteria the Client will use to accept them
- Timeline and milestones: key dates, deadlines, or phases
- Pricing and payment: space for fixed fee, hourly, or milestone-based pricing, plus invoicing instructions
- Authorized representatives: who on each side can approve changes to this SOW
- Additional terms: room for project-specific requirements not covered in the master agreement (for example, software access, travel, or security requirements)

Use clear headings and obvious placeholders (for example, [Client Name], [Effective Date]) so the template is easy to reuse.

PRO TIP: Once your attorney signs off, turn the agreement and SOW into templates. That way, you can pull them into proposals and contracts quickly while keeping the core language consistent.



ANETA WOŹNIAK

RevOps Lead, Luigi's Box

EXPERT ADVICE

Pull contract details in minutes

Contracts usually show up as PDFs, but RevOps still needs structured data — what was sold, for how long, how it’s billed, and which tier it’s in. Most teams solve that by re-reading the contract and typing those details into the CRM or a spreadsheet. It works, but it’s slow, easy to miskey, and hard to keep consistent across deals.

This prompt is built for the middle step: Read the contract once, pull the key fields into a structured format, and let your tools handle the rest.

PROMPT EXAMPLE

Extract the following information from this service agreement PDF:

1. Contract type (define period or indefinite)
2. Contract length in months
3. Termination notice period in months
4. Billing cycle (monthly or annual)
5. Auto-renewal status
6. Contracted services (list all)
7. Pricing tier and threshold
8. Contract effective date (MM-DD-YYYY format)
9. Contract end date (MM-DD-YYYY format)

Return your response as valid JSON only. No markdown, no backticks, no extra text.

- "contract_type": "string",
- "contract_length_months": number,
- "termination_notice_period_months": number or null,
- "billing_cycle": "string",
- "auto_renewal": boolean or null,
- "contracted_services": ["string"],
- "contracted_tier_threshold": number,
- "contract_effective_date": "MM-DD-YYYY",
- "contract_end_date": "MM-DD-YYYY"

PRO TIP: This is the core of the workflow Aneta built in n8n with Google Gemini: the contract triggers the workflow, Gemini runs this prompt, and the JSON output automatically updates deals, billing, and other fields. If you're using a document management tool like PandaDoc, you can take this even further by integrating it with your CRM, so key contract details sync straight into the right records.

Accelerating what you do every day

You don't need to become an "AI expert" to get value from these prompts. Start with one or two that apply where you're feeling the most friction. Use them for a week, tweak what doesn't sound like you, and save what works.

Try it in your own workflow

If you're curious about what "easy" could look like in your own proposals and agreements, the next step is to try a tool that's built to simplify that part of the process.

Start a free PandaDoc trial and see how much easier it is to create, send, and sign proposals and contracts using reusable templates and streamlined workflows — no long setup, no commitment.

START A FREE TRIAL →