



AGENT TEMPLATE

The Quote-Ready Brief

Fill this out right after a discovery call — while it's fresh — and you have everything needed to move to a quote or SOW without redoing discovery. This is the exact structure Motion builds automatically inside MotionForAgents.

01 Customer context

Company, industry, size, who's in the room, and the relationship so far.

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02 Business problem

What are they actually trying to solve or change? What happens if they don't?

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03 Technical requirements

Current stack, must-haves, constraints, integrations, sites/seats, timeline drivers.

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04 Missing information

The open questions you still need answered before you can quote with confidence.

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05 Supplier-fit notes

Which suppliers/solutions fit, why, and any disqualifiers or gotchas.

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06 Decision criteria

How they'll decide, who signs, budget signals, competing options, timing.

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07 Likely scope

The shape of the deal: what's in, what's explicitly out, rough size.

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08 Next steps

The single clean next ask, plus the follow-up you owe them and by when.

09 Owner / due date

Who owns the next move on your side, and the date it's due.

Want Motion to build this for every deal — automatically?

Bring one live deal and we'll turn it into a full quote-ready brief, an SOW outline, and the follow-up — in one working session.

Book a Motion Audit !' cal.com/jeramey-james/motion-audit

