
B.A.O Strategies Ltd

(A Member of The BAO Group)

Official Workflow: Appointment to Contract

Issued by:

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Introduction

This workflow outlines the end-to-end process through which B.A.O Strategies Ltd engages with Telcos, Equipment Vendors, Government institutions, and Hospitals. It captures each step from the first point of engagement through to contract signing, invoicing, execution, and long-term partnership renewal. The workflow ensures protection of B.A.O Strategies Ltd's trade secrets, financial discipline, and the establishment of win-win partnerships.

Workflow Stages

1. Appointment Booking Stage

Trigger: Prospect expresses interest (Telco, Vendor, Government, Hospital).

Actions:

- Client submits Appointment Booking Request (form/email/phone).
- BAO sends Appointment Confirmation & Fee Invoice (as per appointment fee structure).
- Client pays non-refundable Appointment Fee (credited to future contract if signed).

Outputs:

- Appointment confirmed.
 - Receipt issued.
 - Engagement slot secured.
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2. Discovery & Needs Assessment

Trigger: Appointment confirmed and paid.

Actions:

- Conduct Introductory Consultation (online or onsite).
- Gather client objectives, pain points, and opportunities.
- Map client needs against BAO's proprietary GTM framework and trade secrets.
- Record insights in a Client Discovery Report.

Outputs:

- Discovery Report produced.
 - Needs alignment documented.
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3. Proposal Development

Trigger: Discovery completed.

Actions:

- Draft Tailored Proposal & Pricing Sheet (aligned to BAO's GTM Strategy).
- Include BAO Value Proposition, service scope, timelines, and responsibilities.
- Attach Revenue Model Options (subscription, managed service, performance-based).
- Submit Proposal Pack with official cover letter to client decision-makers.

Outputs:

- Official BAO Proposal Pack (Word/PDF).
 - Submitted to client.
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4. Negotiation & Alignment

Trigger: Client reviews proposal.

Actions:

- Conduct feedback and clarification meetings.
- Adjust proposal scope, pricing, and deliverables for mutual benefit.
- Document changes in a Proposal Addendum.

Outputs:

- Agreed draft terms.
 - Alignment achieved.
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5. Contract Drafting & Signing

Trigger: Terms agreed.

Actions:

- BAO prepares GTM Advisory Agreement (including confidentiality, IP protection, and Zero-Trust clauses).

- Send draft to client for legal review.
- Finalize and arrange signing ceremony (digital or physical).

Outputs:

- Signed contract (BAO & Client).
 - Effective date established.
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6. Invoicing & Payment

Trigger: Contract signed.

Actions:

- BAO issues Initial Invoice (mobilization fee or first subscription).
- Client pays as per contract (bank transfer or digital payment).
- BAO issues Receipt and records in financial system.

Outputs:

- Invoice settled.
 - Revenue recognized.
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7. Project Execution & Reporting

Trigger: Payment received.

Actions:

- BAO begins service delivery (advisory sessions, managed rollout, partner coordination).
- Provide progress reports (monthly/quarterly).
- Track KPIs and client satisfaction.

Outputs:

- Reports delivered.
 - Client trust reinforced.
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8. Partnership Expansion / Renewal

Trigger: Milestones achieved.

Actions:

- Conduct review meeting with client.
- Explore scale-up opportunities (new regions, hospitals, Telcos).
- Renew or expand contract.

Outputs:

- Extended partnership.
 - New revenue opportunities.
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Visual Workflow (Summary)

Appointment Booking 'n Discovery 'n Proposal 'n Negotiation 'n Contract Signing 'n Invoicing & Payment 'n Execution & Reporting 'n Renewal/Expansion

Key Principles Ensured by This Workflow

- **Protection of Trade Secrets** – Appointment fees and NDA clauses secure BAO's intellectual property.
 - **Financial Discipline** – Fees collected at every stage ensure sustainability.
 - **Win-Win Partnerships** – Negotiation loops and renewal opportunities foster trust and long-term impact.
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