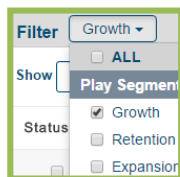


## 2017 CALL TO ACTION GUIDE

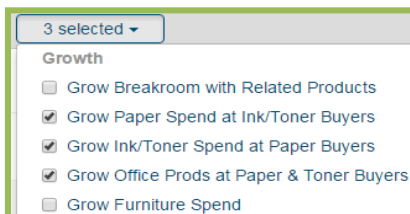
THIS DOCUMENT PROVIDES A LIST OF CALL TO ACTIONS, DETAILED PARAMETERS AND INSTRUCTIONS ON HOW TO FILTER/VIEW EACH ACTION. CALL TO ACTIONS ARE SIMPLE SALES TACTICS FOR THE ACCOUNT MANAGER TO LEVERAGE WITH A GOAL OF GROWING, RETAINING, AND/OR EXPANDING AN ACCOUNT.

### HOW TO FILTER, VIEW & DISPOSITION CALLS TO ACTIONS (CTAS):

**1 FROM THE "TO LIST", FILTER BY ACTION TYPE (GROWTH, RETENTION, EXPANSION), CUSTOMER SEGMENT, ETC.**

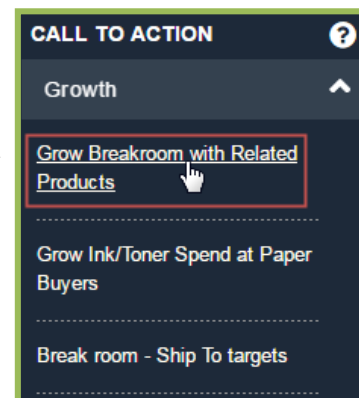


**2 SELECT SUB FILTER BY CTA NAME. MULTIPLE CTAS CAN BE SELECTED.**



**3 FROM THE HELIOS ACCOUNT PAGE, CLICK THE CTA NAME.**

- THIS WILL:
- POPULATE A DIALOGUE BOX WITH TALKING POINTS
  - ALLOW FOR SFDC DISPOSITIONS



TYPE	CALL TO ACTION NAME	FREQ	DEFINITION
Expansion	Cart Abandonment	Weekly	Customer has abandoned carts, check users tab to locate the SKUs.
Growth	Business Review	Weekly	Will help continue to drive growth and enhance rep's relationship while reinforcing program value and uncovering new opportunities/DMs.
	Grow Breakroom with Related Products	Monthly	Purchased Facilities last fiscal period. Grow facilities by bundling other Facilities / Breakroom SKUs not being purchased with those already being purchased.
	Grow Ink/Toner Spend at Paper Buyers	Monthly	Paper Sales are greater than Ink/Toner Last Fiscal Period. This customer is likely to purchase Ink/Toner based on need for Paper.
	ShipTo for AM2	Daily	Customer Ship-To behavior insights for top locations with biggest spend decline over last 90 days, new locations that ordered in past 2 weeks, and product insights to increase growth within Ship-To locations.
Retention	Declining Rolling 90 Day Sales (CAM)	Daily	Account sales < \$ 850 rolling 90 days
	Make More Staples Brand Happen	Monthly	Large Account (Star Potential, Stars, Supernova) with less than 25% Staples Brand Products of Total Sales Last Fiscal Period.
	Retention Alert: Declining 4 Week Spend	Weekly	Total Spend has decreased > 50% last 4 wks vs. preceding 12 wks.
	Declining Rolling 90 Day Sales	Daily	Account sales < \$ 850 rolling 90 days