

Helios

Helios is a tool that provides insight into customer purchasing habits and trends, as well as browsing history done on StaplesAdvantage.com and Staples.com. Having more insight into customer's purchasing habits allows associates to tailor their conversations based on customers' specific business needs and ultimately drive more sales!

To Do List

The **To Do List** provides an intuitive 'Call List' that allows associates to determine which customers to call next based on priority. These customers are prioritized based on the maximum likelihood of a customer who would soon be placing an order.

The likelihood of placing an order is based on the following below 6 criteria:

- » **User Online Activity:** Number of sessions on StaplesAdvantage.com in a given time period, last active date
- » **Order History:** Frequency of orders, last order date
- » **Last Contacted Date:** Number of days since an associate last contacts the customer
- » **Account Qualification Score:** Weighting on existing frequency based on account growth potential
- » **Dotcom Activity:** Browsing/purchasing activity on Staples.com
- » **Monetary Value:** Previous purchasing history/spend

Helios enables associates to be a true business consultant by providing data science driven insights on the customers who must be contacted on a daily basis through the 'To Do List'.

CHERYL SANDMAN'S TO DO LIST

Filter by Action: ALL Sub Filters: All selected (21)

Show 1 entries

Search: Enter Company Name OR Customer Number

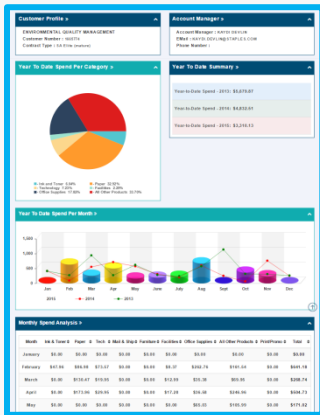
Customer Number	Customer Type	Company Name	Call Order	Play Segment
1019470	CUSTOM	BEL RED HEATING	1	Growth

1	Customer Number – The Customer Number associated to the customer's account
2	Customer Type – The name of the Staples Advantage contract that the customer is a part of
3	Company Name – The name of the company
4	Call Order – The priority of customers likelihood they will place an order, which is based on spend amount, last contacted date, purchase and account activity
5	Play Segments – Identified as areas of growth opportunity within an account in which an associate should call the customer to discuss, with an effort to increase sales; The 3 Play Segments are: Retention, Growth and Expansion.

Customer Dashboard

The **Customer Dashboard** provides a complete overview of the respective customer account and their spending history, which is depicted in the following components:

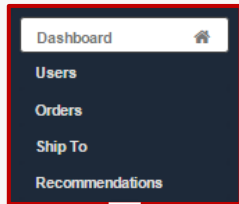
- » **Dashboard Sections**
- » **Dashboard Tab Sections**
- » **Call to Action**



Dashboard Sections

Primary customer information is displayed in six sections on the main Dashboard that provide a 360 degree view of the account and purchasing history based on the last 3 years of purchasing data:

- » **Customer Profile**
- » **Account Manager**
- » **Year to Date Spend Per Category**
- » **Year to Date Summary**
- » **Year to Date Spend per Month**
- » **Monthly Spend Analysis**



Dashboard Tab Sections

Dashboard Tab Sections on the left sidebar of the Dashboard, access and open up additional sections of the Dashboard, which highlight additional customer purchasing information categories.

Users

The **Users Section** shows all order contacts (customer users) on the account that have either ordered or browsed through StaplesAdvantage.com or Staples.com

Orders

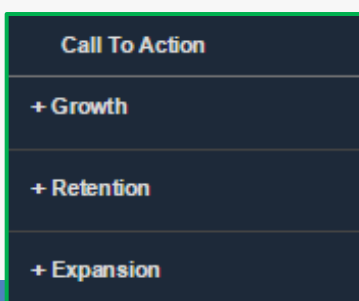
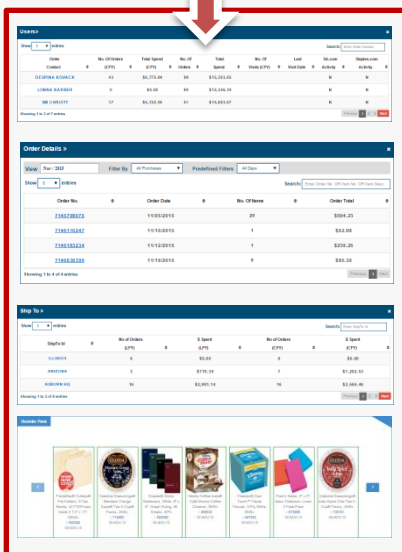
The **Orders Section** provides information regarding the customers' orders, including Order Number, Order Date, Number of Items and Order Total

Ship To

The **Ship To Section** provides details on the customers Ship to Address or Addresses

Recommendations

The **Recommendations Section** provides information on recently purchased items and offers suggestions for additional product recommendations based on customer purchasing trends



Call to Action

The **Call to Action** tabs located on the left sidebar column of the **Dashboard**, provide suggested sales tactics for the Account Manager to leverage with the goal of retaining and growing accounts. The three **Call to Actions** are:

- » **Growth**
- » **Retention**
- » **Expansion**