

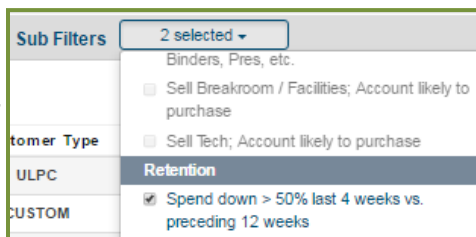
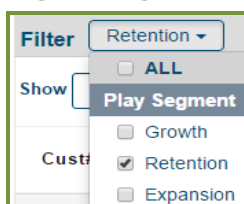
## 2017 CALL TO ACTION GUIDE

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.

### VIEW MULTIPLE ACCOUNTS WITH SAME

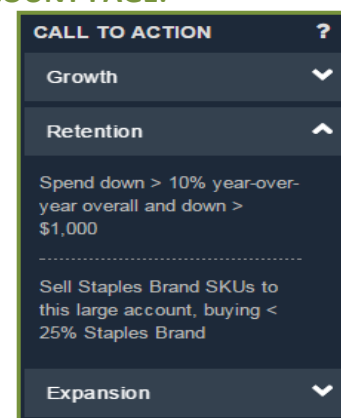
#### CALL TO ACTION:

- VIEW FROM "TO DO" LIST ON THE HOME PAGE
- FILTER BY ACTION TYPE (GROWTH, RETENTION, EXPANSION), CUSTOMER SEGMENT, QUALIFICATION SCORE.
- SUB FILTER BY CALL TO ACTION NAME



### VIEW CALL TO ACTION FOR SPECIFIC COMPANY FROM ACCOUNT PAGE:

- THE CALL TO ACTION TABS ARE LOCATED ON THE LEFT SIDEBAR COLUMN OF THE DASHBOARD.
- CLICK THE (V) TO EXPAND THE ASSIGNED CALL TO ACTIONS FOR AN ACCOUNT



TYPE	CALL TO ACTION NAME	FREQ	DEFINITION
Expansion	Cart Abandonment	Weekly	Customer has abandoned carts, check users tab to find the SKUs abandoned.
	Caffeinate Your Breakroom: K-cup Promo	List Load	K-Cup Promo for accounts that purchase coffee and have a breakroom.
	Customers that are lapsed on SA.com HP Toner	List Load	HP Toner Promo For Lapsed HP Toner customers.
	Exclusive Whitebox Promo	List Load	Exclusive White Box Promotion for no/low spend paper buyers.
Growth	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 Tech Spend	Monthly	Technology sales are less than Last Fiscal Period. This account is likely to purchase based on historical spend.
	Break room - Ship To Targets	Monthly	Breakroom / Facilities sales are less than Last Fiscal Period. This account is likely to purchase based on historical spend.
	Vertical Market Growth - Retail	Monthly	Resides in "Retail Industry" but Retail (Furniture) spend is less than Last Fiscal Period. This account is likely to purchase based on historical spend.
	Grow Furniture Spend	Monthly	Resides in "Retail" or "Furniture" Industry but Furniture spend is less than other categories Last Fiscal Period. This account is likely to purchase based on historical spend.
	Grow Paper Spend at Ink/Toner Buyers	Monthly	Ink/Toner Sales are greater than Paper Last Fiscal Period. This customer is likely to purchase Paper based on need for Ink/Toner.
	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.
	Grow Office Prods at Paper & Toner Buyers	Monthly	Paper & Ink/Toner Sales are greater than Office Product Sales Last Fiscal Period. This customer is likely to purchase Office Products based on need for Paper/Ink/Toner.
Retention	Declining Rolling 90 Day Sales	Daily	Account sales < \$ 850 rolling 90 days
	Declining Facilities Spend	Monthly	Total Facilities Spend has decreased > 50% Last 3 Periods.
	Declining Paper Spend	Monthly	Total Paper Spend has decreased > 50% Last 3 Periods.
	Declining Ink/Toner Spend	Monthly	Total Ink/Toner Spend has decreased > 50% Last 3 Periods.
	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.
	Ship To Compliance	Daily	Account ShipTos ordering less compared to LFY; Check ShipTo grid for more details
	Year-over-Year Decliner	Monthly	Total Spend has decreased > 10% year-over-year overall and decreased > \$1,000 Last 2 Fiscal Year Average.