HELIOS

Make. Every Sale. Impactful.

Helios Quick Reference Guide

STAPLES Business Advantage

STAPLES Learning & Development

Helios Quick Reference Guide

Helios To-Do List

The Helios To Do List was redesigned to support the primary objectives of the Account Manager I (AMI) role to:

1. Actively prevent account attrition and decline
2. Ensure customer retention by frequent contact with customers
3. Achieve daily activity goals and performance metrics

The AMI To Do List ranks the most critical accounts, in priority order, to contact based off severity of decline and/or likelihood to churn.

Decline = An account in which their purchasing has a negative spend trend over the course of at least 4 months, compared to similar customers. For instance, if similar customers are growing, and the account is declining, then the account is really declining. If similar accounts are declining as well, then the account's decline would be considered in comparison. Seasonality is also taken into consideration.

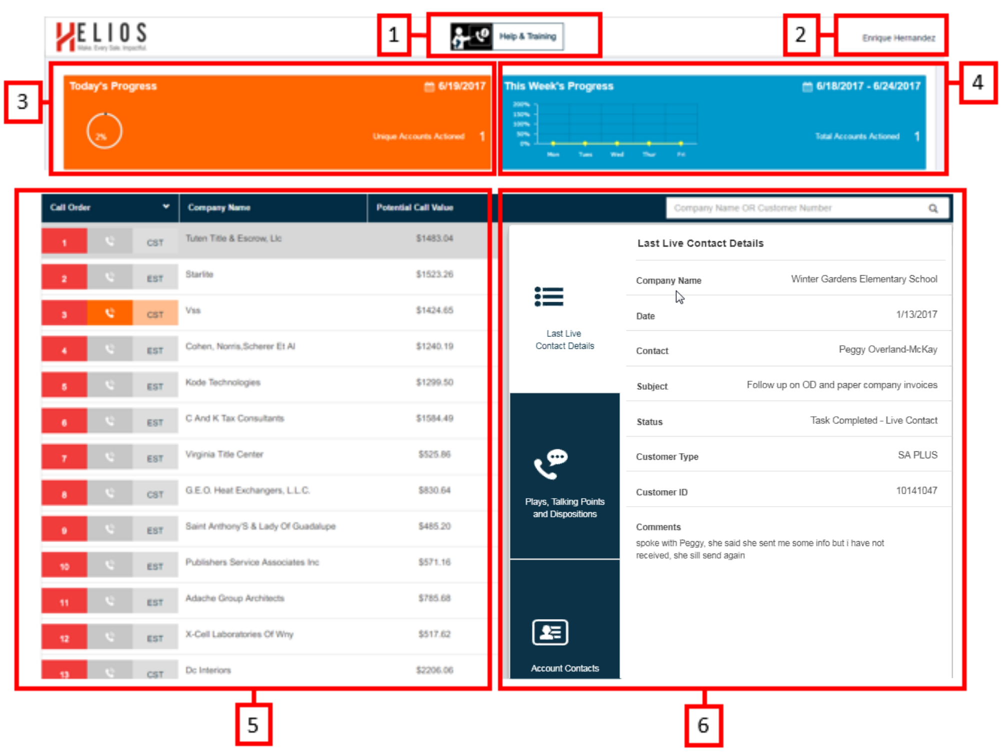
NOTE: *"Similar" customers refers to customers that have a comparable tenure with Staples, industry, contract type with Staples, company size and company sales.*

Churn = An account that is predicted to significantly slow or stop purchasing with Staples. Data is pulled based on customers that order less than 3 times in a 6 month period and used to predict future customers that will behave the same way.

NOTE: *Helios aggregates data from SFDC, Sunrise, Contract Data Mart, Omniture, MRKDM and CustExo. When applicable, source of data is referenced in this guide.*

NOTE: *Google Chrome is the preferred Internet Explorer to access Helios in order to receive the most optimal experience.*

The To-Do List is comprised of 6 main sections: Help & Training, Name of logged in Rep, Today's Progress, This Week's Progress, Prioritized Call List and Account Details.



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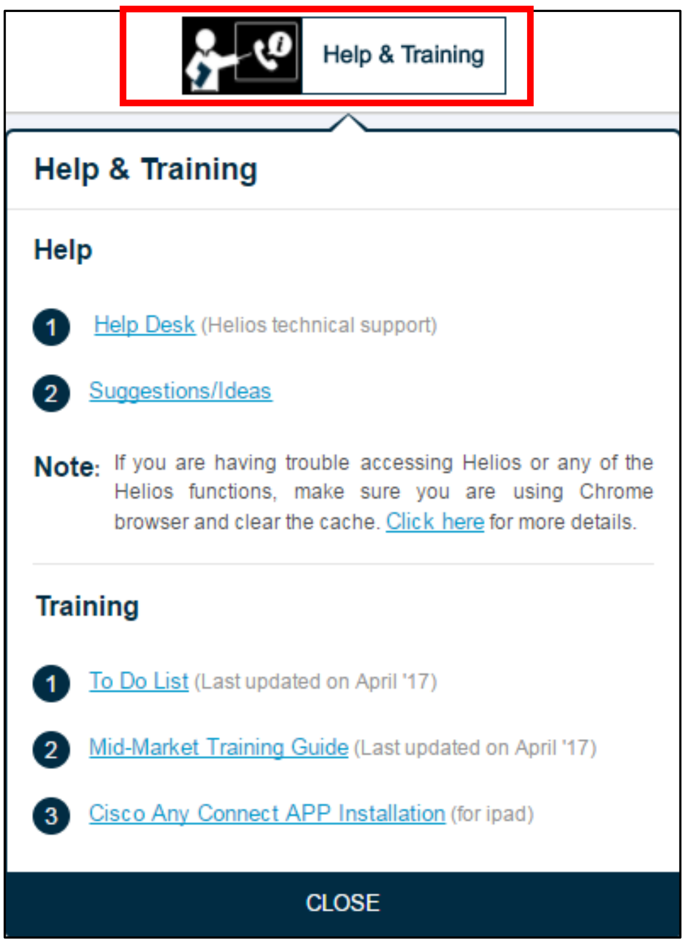
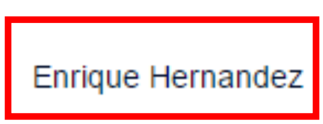
1 **Help and Training:** The Help and Training section provides associates with access to technical support and training guides. To access these, click on the "Help & Training" hyperlink in the top/center of the Helios To-Do List. The dropdown menu will display along with two options for associates to choose from:

- Help: allows the associate to access the Help Desk in the instance that technical assistance is needed and provides them with the ability to submit new suggestions or ideas for future Helios enhancements. The associate also has the ability to directly contact the Helios technical support via email to Helios_SA_appsupt@Staples.com or suggestions/ideas to helios_sa_bussupt@Staples.com.

- Training: Gives associates access to helpful training documents if they need to refer back to or have any questions



2 **Name of Logged in Rep:** The Name of Logged in Rep section displays the name of the individual user that is logged into Helios.



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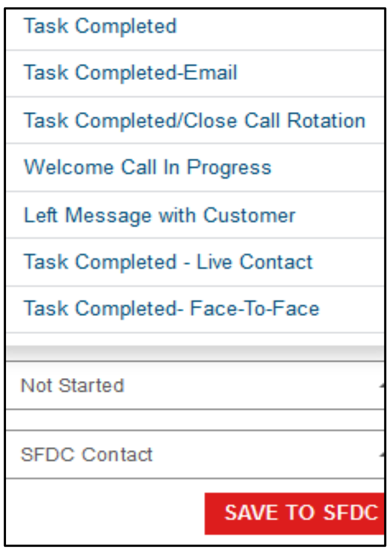
<u>Today's Progress:</u> The Today's Progress section provides the associate with visibility into their progress towards accounts actioned today. An account where a call attempt has been made or email sent and a disposition was logged and saved to Salesforce; as well as opportunities created by clicking on the Create New Opportunity link in Helios. The associate must record the disposition in Helios, as dispositions recorded directly in Salesforce do not count toward the accounts actioned total in Helios.

The following information is displayed within the Today's Progress section:

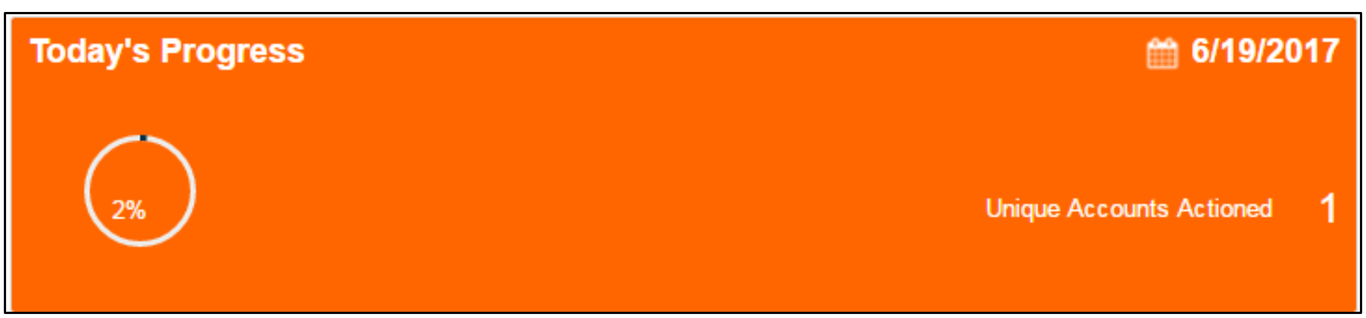
- Real-time progress tracking (%) toward the daily goal of 50 Unique Accounts Action (left side)
- Today's date (upper right corner)
- Daily total of accounts actioned (lower right corner)

Below are the associated dispositions that count as an account actioned.

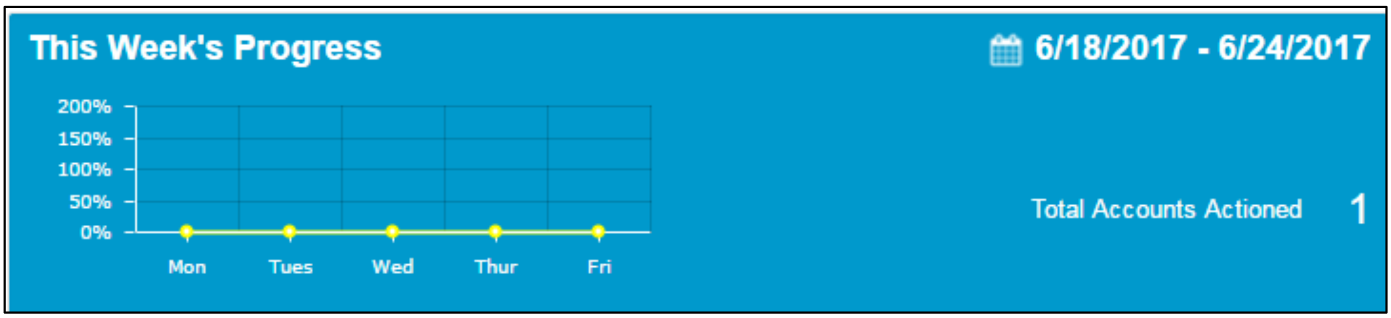


Dispositions

Create New Opportunity



4	**This Week's Progress:** This Week's Progress section displays the associate's weekly progress of accounts actioned. It is a helpful reference point to ensure that the associate is tracking towards performance objectives for the week and ultimately ramping properly for the month. The following information is displayed: • Chart depicting how the associate is trending for the week, from the beginning of the week to the current weekday, based on their daily progress with accounts actioned • Current week date range, Sunday – Saturday (upper right corner) • Total number of accounts actioned for the week (lower right corner)



5	**Prioritized Call List:** The Prioritized Call List is a prioritized ranking list of all the Customers / Companies assigned to the associate, which is their book of business (BOB). It lists customers to be called, based on order of importance.
	• The Prioritized Call List is determined based off of two criteria: Business Rules and Data Science.
	  ○ **Business Rules:** Used to determine if recent contact was made to the account, based on the criteria below. If a business rule applies to the account, it will fall to the bottom of the Prioritized Call List, appearing without a Call Ranking and phone icon
	    ➢ **Last Live Contact in the previous 21 days**
	    ➢ **Two Contact Attempts in the span 14 days**
	      ▪ **Left 2+ Voicemails/Emails within a 14 day span, the last of which was within the past 14 days**

5, Cont.

- ○ **Data Science:** Uses account attributes such as Severity, Responsiveness and Potential Call Value to determine an Account Score
    - ➢ Severity is the rate at which a customer is declining or likelihood of churn compared to similar customers; the higher the value, the more severe is the account's decline/churn status
    - ➢ Responsiveness is the likelihood that a Customer / Company will make a purchase due to contact; the higher the value, the more likely a purchase will occur
    - ➢ Potential Call Value is the amount of sales that may be gained over the next 30 days if the Customer / Company reverses current decline/churn status
    - ➢ Accounts to contact are ranked based off of Account Score which is calculated from severity, responsiveness, and potential call value
- Within the Prioritized Call List, accounts to contact are ranked based off of severity of decline and/or likelihood to churn, as seen in the first image below
- The Prioritized Call List will re-rank accounts every night. Accounts will be color coded as you work them during the day so you do not lose your place
- Accounts that are not declining or at risk of churn are not ranked and will fall to the bottom of the Prioritized Call List, appearing without a Call Ranking and phone icon, as seen in the second image below
- Accounts without a Call Ranking and phone icon do not need to be contacted that day

Prioritized Call List

Call Order		Company Name	Potential Call Value
1	CST	Tuten Title & Escrow, Llc	$1483.04
2	EST	Starlite	$1523.26
3	CST	Vss	$1424.65
4	EST	Cohen, Norris,Scherer Et Al	$1240.19

Non-Prioritized Call List

Call Order		Company Name	Potential Call Value
n/a	N/A	Daily News Record	
n/a	N/A	Faith Assembly Of God	
n/a	N/A	Family Care Ent	

5 The Prioritized Call List has 3 main sub-sections: Call Order, Company Name, and Potential Call Value.

Call Order			Company Name	Potential Call Value
1		CST	Tuten Title & Escrow, Llc	$1483.04
2		EST	Starlite	$1523.26
3		CST	Vss	$1424.65
4		EST	Cohen, Norris,Scherer Et Al	$1240.19
5		EST	Kode Technologies	$1299.50
6		EST	C And K Tax Consultants	$1584.49
7		EST	Virginia Title Center	$525.86
8		CST	G.E.O. Heat Exchangers, L.L.C.	$830.64
9		EST	Saint Anthony'S & Lady Of Guadalupe	$485.20
10		EST	Publishers Service Associates Inc	$571.16
11		EST	Adache Group Architects	$785.68

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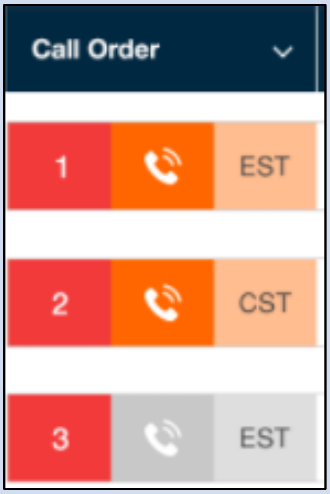
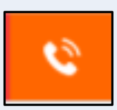
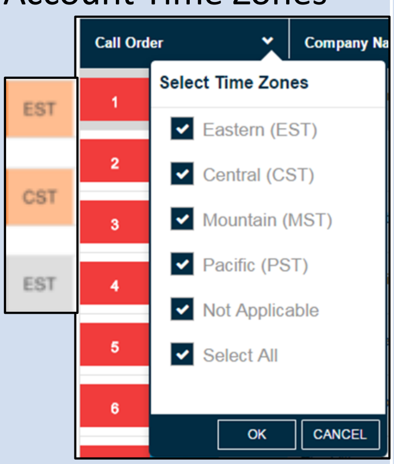
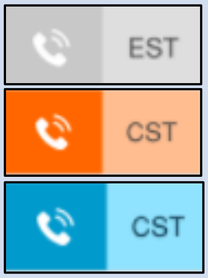
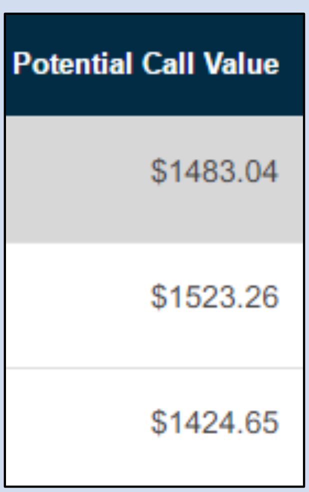
	Category	Description
5.1	Call Order 	The Call Order is based on a pre-defined call order prioritization. The accounts ranked at the top of the list are calculated to be the most critical accounts to contact, thus it is important for associates to follow the numbers by priority when calling customers i.e. the top customer on the list should be called first, then the second customer should be called second, and so on. • Ranking prioritization is based on the applied business rules and data science previously discussed (Refer to page 5 for the "Business Rules) ➢ If any one of the business rules apply to an account, the account will not be ranked. ➢ If an account does not meet a business rule, then the company will be ranked based on Severity of Decline/Risk of Churn, Responsiveness to make a purchase after Contact and Potential Call Value.
	Phone Icon 	The phone icon is clickable and links directly to the main Salesforce Account page for the respective account, which will allow the associate to call the customer directly via the "Click to Dial" functionality.
	Account Time Zones 	The Account Time zone section lists the current time zone for the respective account. It can be filtered by Select Time Zones based off the zip code listed under Company Profile. • The Call Order dropdown contains filters for Eastern (EST), Central (CST), Mountain (MST) and Pacific (PST) time zones as well 'Not Available' when zip code listed under Company Profile is blank. • The default Time Zone will be 'Select All' until a filter is applied. ➢ It is imperative to pay attention to the time zone. Be sure to call the customer when they are available and when the associate will have the highest likelihood of reaching them.

	Category	Description
5.1	Account Time Zones 	***Note:*** *Color Designations within the Phone Icon and Account Time Zone columns are gray, orange and blue and are used to indicate actioned and un-actioned accounts for the day/week.* Gray – Account has not been actioned yet Orange – Account was actioned today, aligns with Today's Progress Tracker Blue – Account was actioned this week, aligns with This Week's Progress Tracker *During the nightly refresh, all orange accounts will drop to the bottom of the list and transition to blue. All previous blue accounts will remain at the bottom of the list and in blue. As a new week begins, all color coding will be cleared and revert back to gray.*
5.2	Company Name 	The Company Name section list the name of the associated account.
5.3	Potential Call Value 	Potential Call Value is based on the account's transactional history (past 13 months for decliner and past 36 months for churn) and projects the potential revenue gained over the next 30 days. It is important for the associate to contact the customer, as they will have the ability to change the customer's behavior by contacting them to influence their spend. ***Note:*** *Potential Call Value will be blank if the account is not at risk of potential revenue loss or meets a business rule* (*Refer to page 5 for the "Business Rules).*

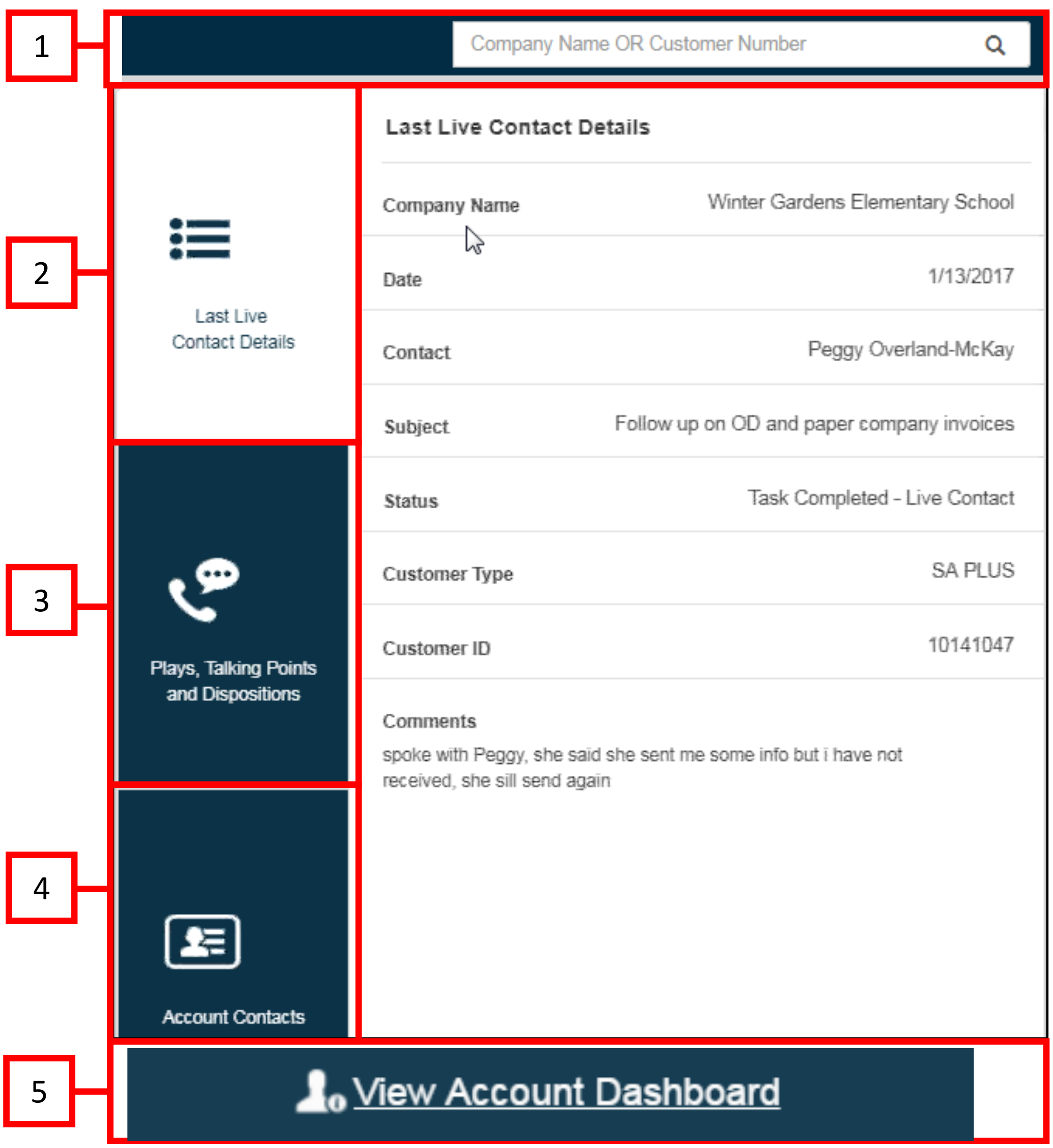
6

<u>Account Details:</u> The Account Details section provides the associate with detailed insight into account information and opportunities that will provide the ability to create a sales game plan prior to calling the customer.

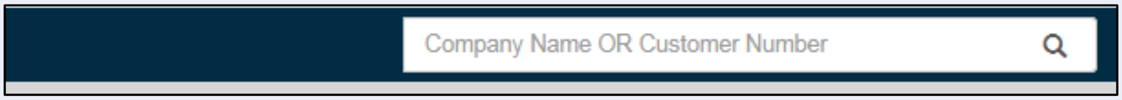
The following is displayed:

- Search Bar
- Last Live Contact Details
- Plays, Talking Points, and Dispositions
- Account Contacts
- View Account Dashboard (which will link to the Helios Dashboard)

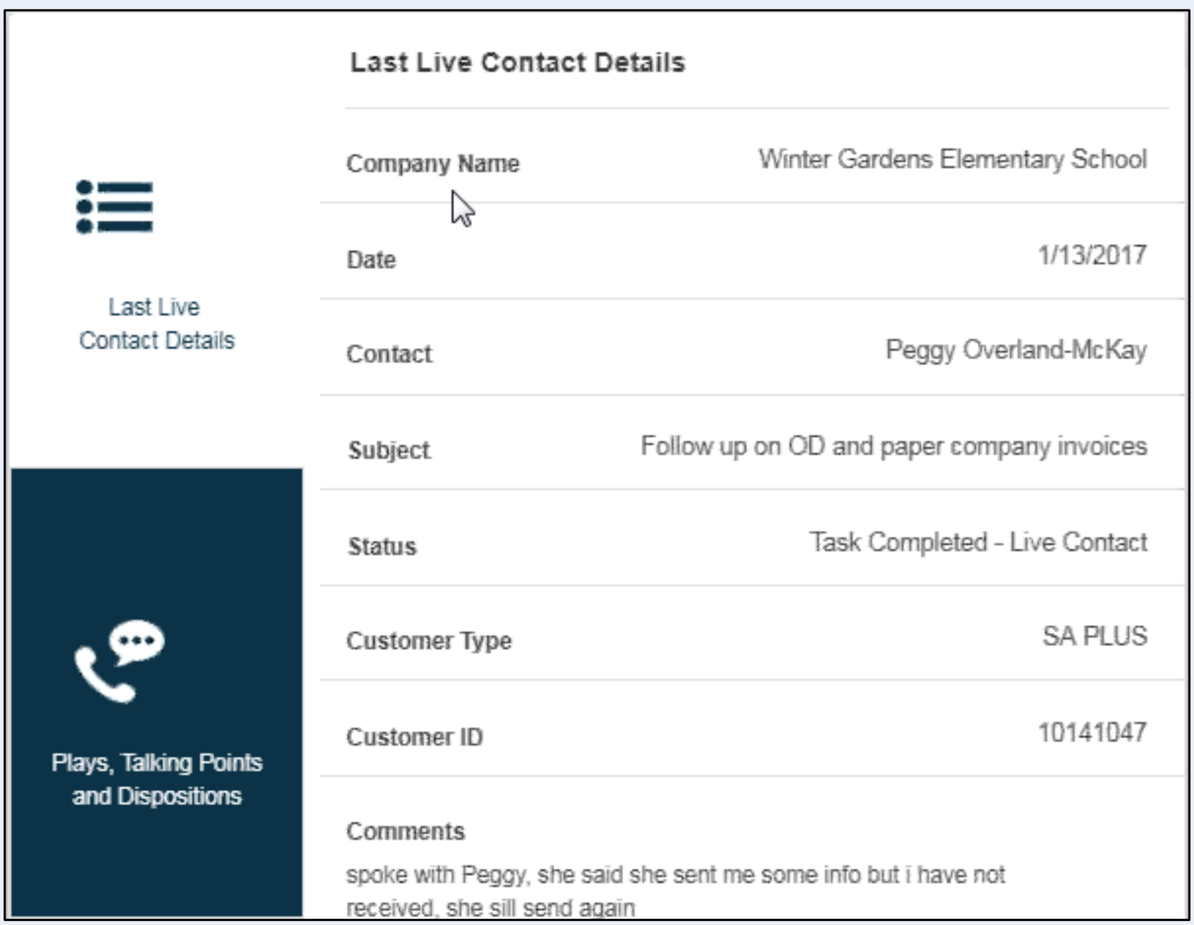
The 5 sections below will be described next.



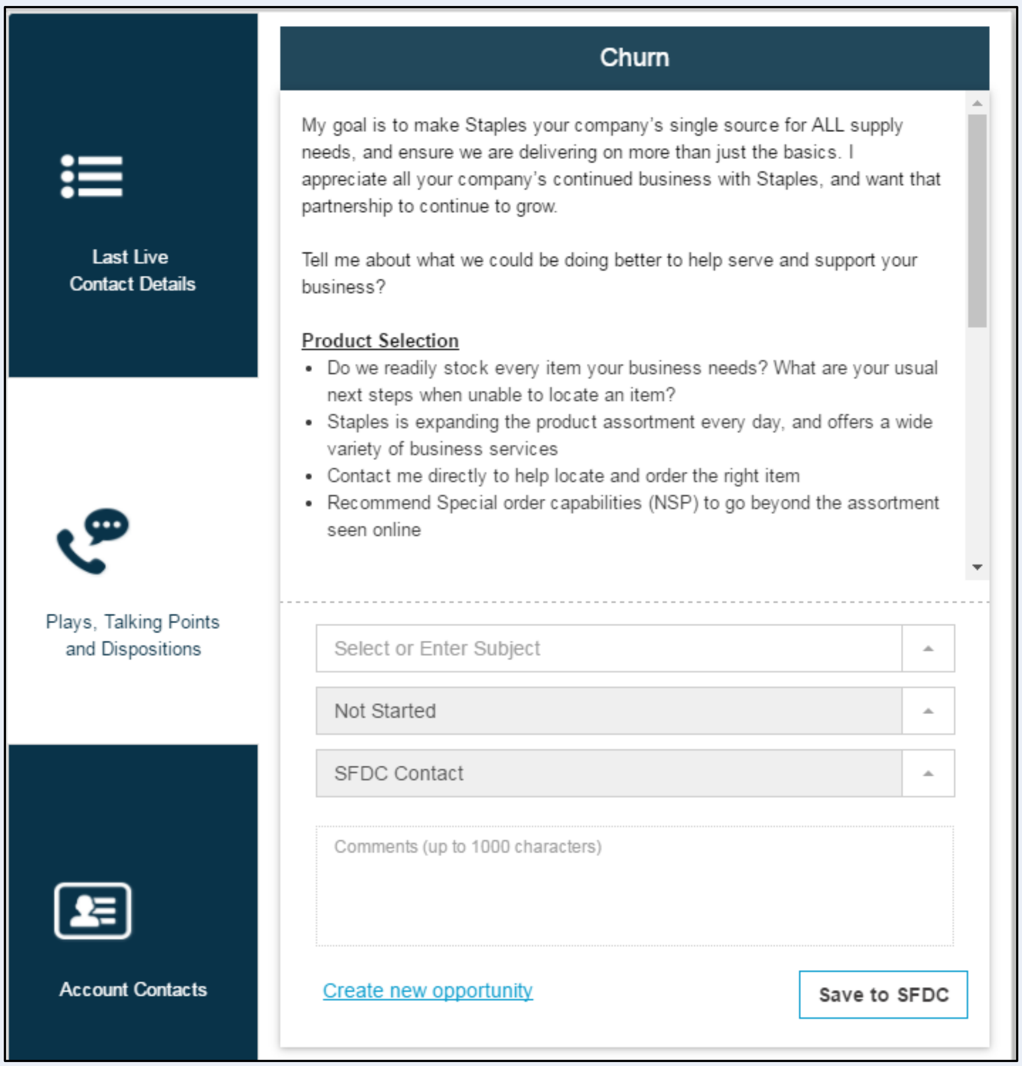
	Category	Description
6.1	Search Bar	The associate has the ability to search for an account by Company Name or Customer Number by utilizing the Search Bar



	Category	Description
6.2	Last Live Contact Details	Last Live Contact Details is the default window for all accounts. It contains the following information, which is extracted from Salesforce: ➢ A snapshot of the Last Live Contact such as Company Name, Date, Contact, Subject, Status and Comments ➢ Customer Type, which is the Membership Program or Contract type on the account ➢ Customer ID, which is the master account number



	Category	Description
6.3	Plays, Talking Points, and Dispositions	Plays, Talking Points, and Dispositions will be present if the account qualifies. This section will outline the specific Call to Action for the Account –Decline and/or Churn. ***Note:** If the account has both a Decline and Churn Call To Action, the Churn call to action should be the priority, as those customers are most severely at risk of being lost.* Based on the Call To Action, it will have an associated call approach that will guide the associate on how to handle the call. It also contains supporting talking points that are to be used as guidance when speaking to the customer about their decline or churn in purchasing.

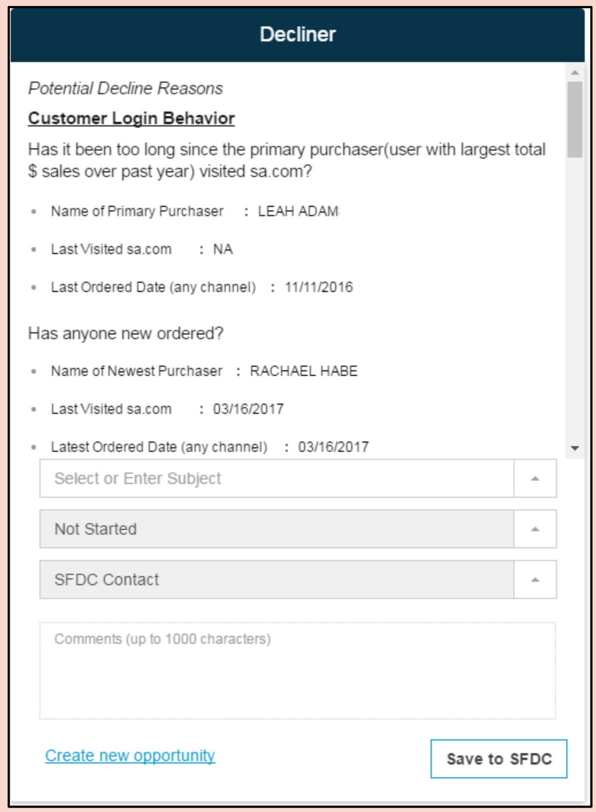


	Category	Description
6.3 Cont.	Plays, Talking Points and Dispositions	The two Call to Actions (CTAs) that will be available are Decliner and Churn.

Decliner

If an account is identified as a decliner, insights about the account will be exposed around the customer's:

- Log In behavior: This information is present to help identify if there is a change in the account purchaser.
  - Is the currently primary purchaser still purchasing?
  - Has there been any new purchasers to the account?
- Ship To behavior: This information is present to help identify a change in other locations inclusive their purchasing trend.
  - Is activity by Ship To declining?
  - Are there any new Ship To addresses for the account?
- Price Sensitivity: This information is present to help determine if price is a driving factor into why the account could potentially be declining.
  - Is the primary purchaser purchasing or browsing on Staples.com?
  - Are they purchasing Staples Brand or other value brands?
  - Does their order history suggest that they are cherry picking based on deals?

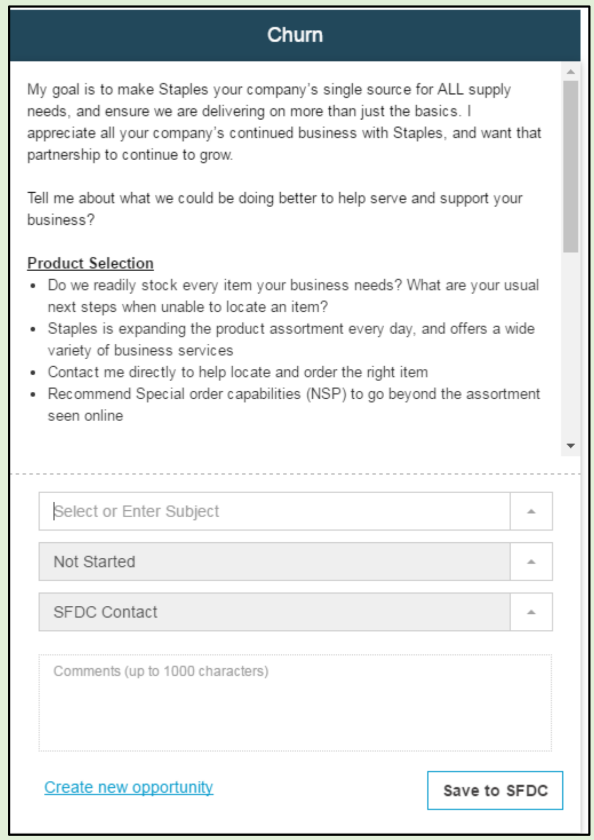


	Category	Description
6.3 Cont.	Plays, Talking Points and Dispositions	The two Call to Actions (CTAs) that will be available are Decliner and Churn.

Churn

Once an account is identified as likely to Churn, the Churn CTA will provide assurance and support to the associate to prevent the customer from actually churning.

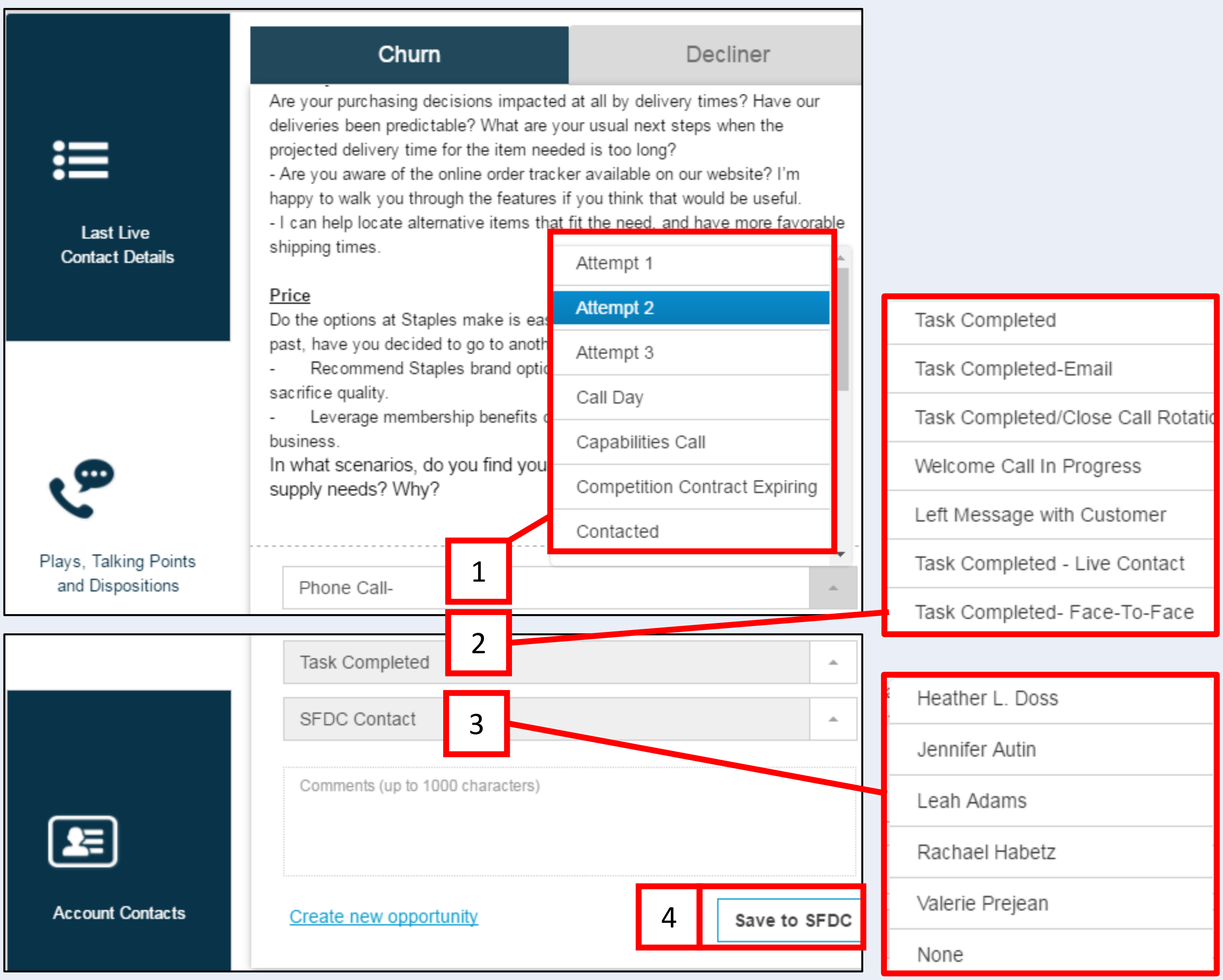
- As such, this CTA is meant to guide the conversation in a positive direction and to un-earth customer discontent in order to address any issues surrounding Product Selection, Delivery and Price.



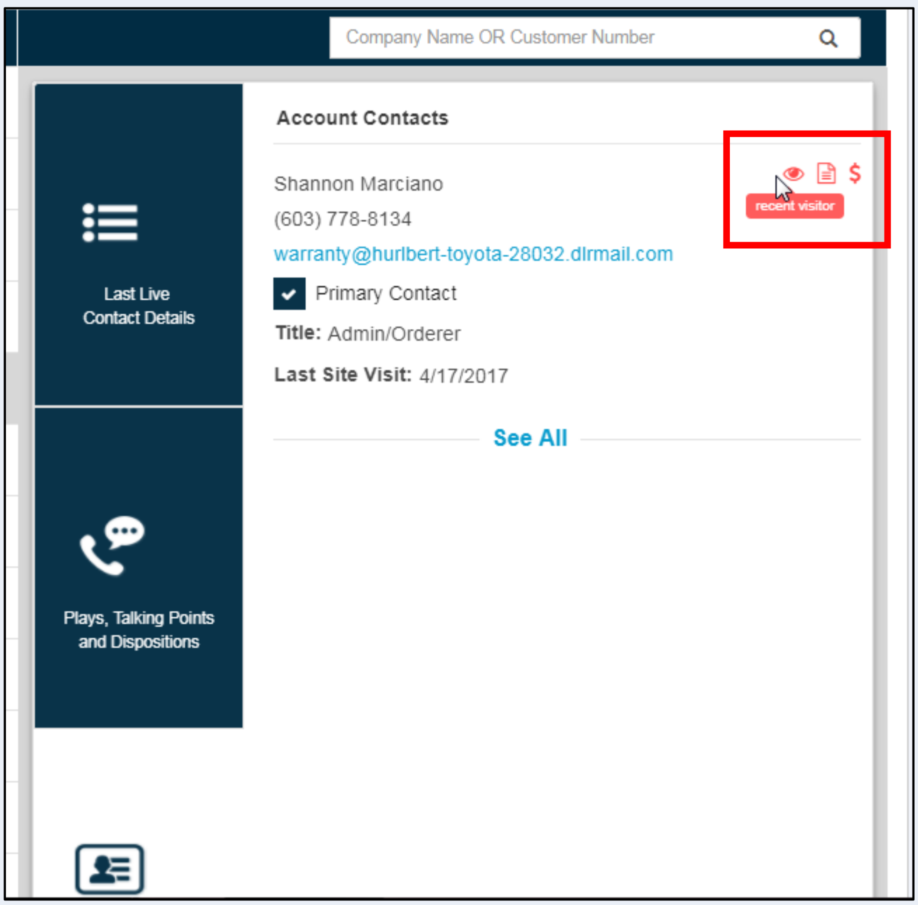
Dispositioning allows the associate to enter the Subject, Disposition, Contact and Comments for the customer interaction and save to Salesforce.com.

- Both the Subject and Disposition field are mandatory
- Contact and Comments fields are optional
- Like the existing Helios disposition screen, the associate has the option to create a new opportunity, which will link to SFDC New Opportunity Select Opportunity Record Type page
- Once the “Save to SFDC” button is clicked, the activity is automatically viewable and editable under the “Activity” tab for the respective account in Salesforce.

	Category	Description
6.3 Cont.	Plays, Talking Points and Dispositions	Follow the steps below to record a disposition: 1. Click the **Subject** dropdown and choose the applicable subject type for the customer interaction i.e. Attempt 1, Attempt 2, Attempt 3, Contacted, etc. 2. Click the **Status** dropdown and choose the applicable status type for the customer interaction based on the action completed i.e. Task Completed, Task Completed E-mail, Left message with Customer, etc. 3. Click the **Contact** dropdown and choose the appropriate account contact that was attempted/interacted with. ***Note:*** *If a contact is not displayed within the Contact dropdown, they must be added to Salesforce via the Add a New Contact link. The newly entered contact will then display in the Contact Dropdown in Helios, within 24 hours.* 4. Then click the **Save to SFDC** button in order to save the disposition in Helios and Salesforce.



	Category	Description
6.4	Account Contacts	Account contacts list up to three primary account users and is pulled from Salesforce. The following information will display when present in Helios or Salesforce: • Phone Address, Email Address, Primary Contact indicator, Job Title and Last Site Visit data, and Contact Name, if the data is available • Last Person to Visit Site, Last Person to Purchase and Biggest Spender Last 365 Days will all be indicated via a Flag icon, if the account possesses these attributes, as shown in the image below. The associate can use the “flags” to target the appropriate contact, plan your conversation, and reduce clicks to SFDC by leveraging contact data in Helios.



Eyeball	Last Person to Visit Site
Paper	Last Person to purchase
Dollar	Biggest Spender Last 365 Days

6.5	View Account Dashboard	Brings the associate to the Helios dashboard page of the selected account which contains historical spend and category sales by year and period as well as modules for users, orders and Ship Tos data