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INTRODUCTION

The Retail BSD Lead Program is designed to identify existing or new SMB customers that are interested in receiving more information about our BSD account options.

I. Overview

- The Retail BSD Lead Program is designed to identify existing or new customers that qualify in opening an Office Depot BSD Account to ultimately drive cross channel revenue.
- A Lead opportunity can exist with new and existing customers. Office Depot's total solution value proposition is our opportunity to drive additional business through all channels. To drive success in the program:
 - Stores will be expected to qualify customer before submitting any leads.
 - Store associates will be required to submit new leads on a weekly basis.
 - The sales team member will make contact with the customer.
 - The stores will have access to view status of submitted leads via the store portal by reviewing the general report titled CPD _Leads under [CPD General Reports](#).

II. Lead Program Process

- Store Process
 - All stores will be required to submit a minimum of one CPD lead **(1) lead per week** via the Retail BSD leads Webtop button under the CPD view.

Office DEPOT V5.0

Customers, Please Note: You can reach the customer menu by selecting the customer link below. Except for accessing the customer menu, this computer system is only to be used by authorized store personnel and is not used by the general public. Any unauthorized access of this system or Office Depot's network security is strictly prohibited and violations of this policy may result in civil and criminal liability.

CUSTOMER / PRODUCTION SERVICES

- PRINT ON DEMAND
- GILLENNIA
- DESIGNIT PLUS
- PRINT JOBS
- THAT'S ME SPORTS
- DESIGN TEMPLATES
- PROMO PRODUCTS TRAINING SITE

DOCUMENT RETRIEVAL / STORAGE

- OD FIND FILE
- SAFELY REMOVE HARDWARE

Outstanding Pickup Orders: 0
Outstanding | Archived

Outstanding Reminder Orders: 0
Outstanding | Archived

ASSOCIATE / MANAGEMENT FUNCTIONS

- XEROX PORTAL
- STORE PORTAL
- WEBTICKET
- INTERNET EXPLORER
- RISK MANAGEMENT
- UPS PACKAGE DROP-OFF
- RETAIL BSD LEADS**

SOFTWARE APPLICATIONS

- MS ACCESS
- MS EXCEL
- MS POWERPOINT
- MS PUBLISHER
- MS WORD

CPD Associate Desktop Customer Log Off Restart Shut Down Backup Links W12

- The form should be used to capture all the required information for the Sales Team to make contact. It is very important that this information is captured so that the lead maybe followed up on by the correct BSD representative. Also include the following details in the note section of the form.
 - Information on recent purchases or requests that you were unable to provide
 - Any other customer information that will lead to a more productive follow-up with the customer (frequency of visits, items purchased, etc.)
- Associates can qualify a lead which may include other opportunities outside Copy & Print Depot. Please include the additional opportunities in the note section of the form.

- **Entering a New Prospect Lead**

- Select **New Prospect** for customers without an OD account

Refer Lead for Existing Customer
 New Prospect

* Business Name

* Address

* City

* State

* ZIP Code
5 Digit Numeric ZIP Code

* Number of White Collar Employees

DUNS Number

* Source

* Contact First Name

* Contact Last Name

* Phone
Phone Number of the Contact

* Contact Email ID
Email ID of the Contact

* Contact Title
Role / Designation of the Contact

OD Store Number

Employee ID

Notes

- Enter Customer Business Address, # of WCE (managers, salaried professionals, office workers & sales personnel) DUNS # (data universal numbering system used for providing a company's history, operating information and financials) if available, Source (drop down option – Store Leads), Contact Information details, OD Store #, your Employee ID & Notes if applicable.

Refer Lead for Existing Customer
 New Prospect

* Business Name Mega Enterprises

* Address 12345 Eastern Lane

* City Greenacres

* State Florida (USA)

* ZIP Code 33463
5 Digit Numeric ZIP Code

* Number of White Collar Employees 25

DUNS Number

* Source Store Leads

* Contact First Name Carla

* Contact Last Name Peterson

* Phone 561-438-1234
Phone Number of the Contact

* Contact Email ID carla.peterson@mega.com
Email ID of the Contact


* Contact Title Office Manager

OD Store Number

Employee ID

Notes

NOTE: to search for your Store Number:

- o Click  next to 'OD Store' on the form
- o Type %store% on the search line and click go
- o Choose your store select Submit

Store Search

Select and

Select	Value
<input type="radio"/>	000371:FORT LAUDERDALE FL
<input type="radio"/>	002371:MURRIETA CA

- In the **“Note”** section include the following details in the form
 - Information on recent purchases or requests that you were unable to provide
 - Any other customer information that will lead to a more productive follow-up with the customer (frequency of visits, items purchased, etc.)
 - Other opportunities outside Copy & Print Depot
- Click **Apply** when all required information has been

Refer Lead for Existing Customer
 New Prospect

* Business Name Mega Enterprises

* Address 12345 Eastern Lane

* City Greenacres

* State Florida (USA)

* ZIP Code 33463
5 Digit Numeric ZIP Code

* Number of White Collar Employees 25

DUNS Number

* Source Store Leads

* Contact First Name Carla

* Contact Last Name Peterson

* Phone 561-438-1234
Phone Number of the Contact

* Contact Email ID carla.peterson@mega.com
Email ID of the Contact

* Contact Title Office Manager
Role / Designation of the Contact

OD Store Number 371

Employee ID

1 Notes

2 Apply

- **Lead Referral Confirmation** screen will appear when the information you entered was submitted successfully!

Office DEPOT
Taking Care of Business
E-Business Suite


Lead Referral Creation Confirmation

Thank You for referring this lead. We will assign it to the right Sales Team for followup.
If you wish to refer another Sales Lead please click on "Refer Another Lead" button.

Refer Another Lead

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[About this Page](#)

• Entering an Existing Customer Lead

Refer Lead for Existing Customer 
 New Prospect

* Customer Number
Please enter Customer AOPS number and Ship To Sequence for

* Ship To

* Business Name

* Address

* City

* State

* ZIP Code
5 Digit Numeric ZIP Code

* Number of White Collar Employees

DUNS Number

* Source

* Contact First Name

* Contact Last Name

* Phone
Phone Number of the Contact

* Contact Email ID
Email ID of the Contact

* Contact Title
Role / Designation of the Contact

OD Store Number

Employee ID

Notes

- Enter Customer Business Address, # of WCE (managers, salaried professionals, office workers & sales personnel) DUNS # (data universal numbering system used for providing a company's history, operating information and financials) if available, Source (drop down option – Store Leads), Contact Information details OD Store #, your Employee ID and Notes if applicable.

Refer Lead for Existing Customer
 New Prospect

* Customer Number
Please enter Customer AOPS number and Ship To Sequence for existing customers. This information can be found in GML

* Ship To

* Business Name

* Address

* City

* State

* ZIP Code
5 Digit Numeric ZIP Code

* Number of White Collar Employees

DUNS Number

* Source

* Contact First Name

* Contact Last Name

* Phone
Phone Number of the Contact

* Contact Email ID
Email ID of the Contact


* Contact Title
Role / Designation of the Contact

OD Store Number

Employee ID

Notes

NOTE: to search for your Store Number:

- Click  next to "OD Store" on the form
- Type %store% on the search line and click go
- Choose your store select Submit

Store Search

Select	Value
<input type="radio"/>	002952:PLANOGRAM LAB 597 - DELRAY BEACH FL
<input type="radio"/>	002597:PALM HARBOR FL
<input checked="" type="radio"/>	000597:DELRAY BEACH FL

- In the "Note" section include the following details in the form
 - Information on recent purchases or requests that you were unable to provide
 - Any other customer information that will lead to a more productive follow-up with the customer (frequency of visits, items purchased, etc.)
 - Other opportunities outside Copy & Print Depot
- Click **Apply** when all required information has been

Refer Lead for Existing Customer
 New Prospect

* Customer Number
Please enter Customer AOPS number and Ship To Sequence for existing customer:

* Ship To

* Business Name

* Address

* City

* State

* ZIP Code
5 Digit Numeric ZIP Code

* Number of White Collar Employees

DUNS Number

* Source


* Contact First Name

* Contact Last Name

* Phone
Phone Number of the Contact

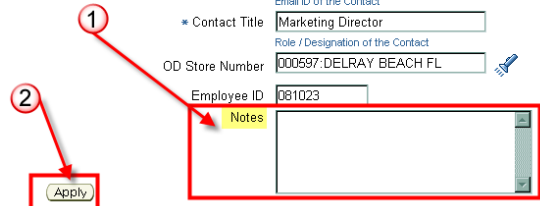
* Contact Email ID
Email ID of the Contact

* Contact Title
Role / Designation of the Contact

OD Store Number 

Employee ID

Notes



- **Lead Referral Confirmation** screen will appear when the information you entered was submitted successfully!



- **BSD Field Sales Process**

- CPD Sales Consultants or representatives are required to make contact with the customer within 48 hours to follow up on a normal lead.
 - If a lead is urgent (i.e. pending an actual sale) please indicate via email to your local CPD & General Line Sales Team via [BSD Retail Alignment Contact List](#). The expectation is that the lead will be followed up within 24 hours. References to time are calculated in business days.
- CPD Sales Consultants will be required to update the lead via Sales Online. The District Managers, Store Managers and associates will have access to the updates by reviewing the general report titled CPD _Leads in the Store Portal under [CPD General Reports](#).
- Each week, the District Managers will receive communication from the Regional Sales Manager regarding field activity related to this program.
 - CPD Sales Consultants will also be expected to share success from the program on weekly calls with District / Store Managers.
- Feedback will also be given to stores regarding the quality of the referrals. Additional training and coaching will occur if needed with store associates.

III. Qualifying a Lead

- Below are some things you should consider or you may be asked by a customer that would indicate you may have an opportunity to refer them to open a BSD account.
 - Does the customer have a BSD account already or is this a new opportunity? A customer with a BSD account may still be a lead or an opportunity that you would want to engage with your CPD Sales Consultant.
 - A large bid or quote request over \$2,500
 - Large recurring orders that you submit to the RPF. This would be a good lead in the event that the customer's spend is growing and they may begin price shopping. This sales approach could preempt price shopping.
 - Large current order or business type that you may think there are other opportunities or departments that the CPD Sales Consultant could target.
 - Review TSA orders and look for signs that this may be a SMB customer

- Any customer who may spend more than \$5,000 in copy and print during a calendar year.
- A customer who purchases frequently and does a lot of pricing or quote requests.
- Customers who requests pricing with Offset or “print” work that we do not fulfill in-house or through the RPF’s. This is referred to Non-Code business.
- A customer who requests “set” pricing or an agreement.
- A customer who makes purchasing decisions for their department or other departments within their business organization.

IV. Engaging the customer

- Below are some quick talk tracks on what and how you should address the option of a customer opening an account.
- Either the Copy & Print Depot Manager or Sales Consultant (depending on relationship and fragility of customer) should make the first call in most cases.

“Good morning, I’m with the Office Depot, Copy & Print team. We’ve had the pleasure of doing print related work for you, and first of all wanted to say thank you, we truly appreciate your business”.

Based on your business needs it may make sense to explore other options through our Business Services Division. Many of our customers have found we provide exclusive features that compliment the way they are doing business. Would it be alright if I could ask you a few questions regarding your business, so way we can see if our options through our Business Service Division (BSD) could be a good solution for you? May I have one of Sales Representative from our BSD team call to discuss which options would be best for you. Is this the best number to reach you?”

- Please avoid using contract pricing in your communication with a potential lead.
- Be sure to capture all the necessary information in the Retail BSD Leads Webtop form to prevent any delays in contacting the customer.
- Familiarize yourself with the Office Depot Rewards Platinum Program as this solution is commonly used with BSD leads. [OD Rewards Platinum Program](#)
- Ask your customer if they are a member of your local Chamber of Commerce. We already have established relationships with most Chambers that will provide them solutions as well.