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3660 U.S. PTO

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PTO/SB/16 (3-97)

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PROVISIONAL APPLICATION FOR PATENT COVER SHEET

This is a request for filing a PROVISIONAL APPLICATION FOR PATENT under 37 CFR 1.53 (b)(2).

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<input checked="" type="checkbox"/> Additional inventors are being named on the <u>1</u> separately numbered sheets attached hereto (back)					
TITLE OF THE INVENTION (280 characters max)					
CUSTOMER LEAD MANAGEMENT SYSTEM					
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OR					
<input type="checkbox"/> Firm or Individual Name	Fish & Richardson P.C.				
Address	225 Franklin Street				
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City	Boston	State	MA	ZIP	02110
Country	USA	Telephone	617-542-5070	Fax	617-542-8906
ENCLOSED APPLICATION PARTS (check all that apply)					
<input checked="" type="checkbox"/> Specification Number of Pages	<input type="text" value="14"/>	<input type="checkbox"/> Small Entity Statement			
<input checked="" type="checkbox"/> Drawing(s) Number of Sheets	<input type="text" value="5"/>	<input checked="" type="checkbox"/> Other (specify)	<input type="text" value="Appendix A (190 pgs)"/>		
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Respectfully submitted,

SIGNATURE J. Robin Rohlicek

Date

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REGISTRATION NO.
(if appropriate)

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Docket Number:

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SCANNED

Number 1 of 1

CUSTOMER LEAD MANAGEMENT SYSTEMBackground

5 This invention relates to a system for processing
customer leads.

 Today, lead management is largely a paper-based manual
process in which customer leads are received as a result of
marketing activities, and distributed to particular sales
10 organizations. For example, names and other information
about customer leads may be obtained at a trade show. A
subset of these leads may then be selected and passed to
sales groups based on the geographic region of the lead,
the product or service involved, or other lead-related
15 criteria. In general, there is little or no automated
feedback regarding the outcome of the lead, such as whether
a sale actually occurred or if the lead was not properly
routed.

Summary

20 In a general aspect, the invention provides an
automated system for accepting, prioritizing and routing
customer leads. The system provides feedback regarding the
routing and ultimate outcome of a lead, thereby allowing
lead tracking and performance measurement. The invention
25 can feature a hierarchical delegation approach in which
users specify rules according to which leads routed to them
are processed, for example, by routing the lead to other
users. The invention can also feature a distributed
architecture in which several servers are coupled, for
30 example, over the Internet. Leads are provided from one

server to another, and feedback regarding the disposition of the lead is provided in return.

In one aspect, in general, the invention is a method for processing customer leads. The method includes
5 accepting a lead that includes a number of data fields, such as the lead name, the lead's address, or a marketing campaign associated with the lead. The method also includes inputting, or otherwise accepting, a number of rule specification for each of a number of users. The lead
10 is routed to a first of the users, and one or more of the rules that were inputted for that user are applied to the lead. Based on application of those rules, the lead is routed to a second of the users. The second user is notified of the routed lead. Then an acceptance of the
15 lead is received from the second user.

The invention has the advantage of providing feedback regarding the processing of a lead, thereby allowing tracking and, if necessary, re-routing of a lead that is not being handled effectively.

The hierarchical delegation of rule specification
20 allows users to more precisely tailor the rule for their particular circumstances, rather than relying only on a centralized administration approach.

Coupling of multiple servers allows different servers
25 to be administered by different organization, such as a vendor and multiple resellers. When leads are passed from one server to another, the configurable amount of feedback provides desirable security and privacy to the organizations which maintaining efficient processing of the
30 leads. By maintaining the leads on multiple servers administered by different organizations, each organization can make use of its own leads database, while maintaining a degree of sharing of information between the organizations.

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