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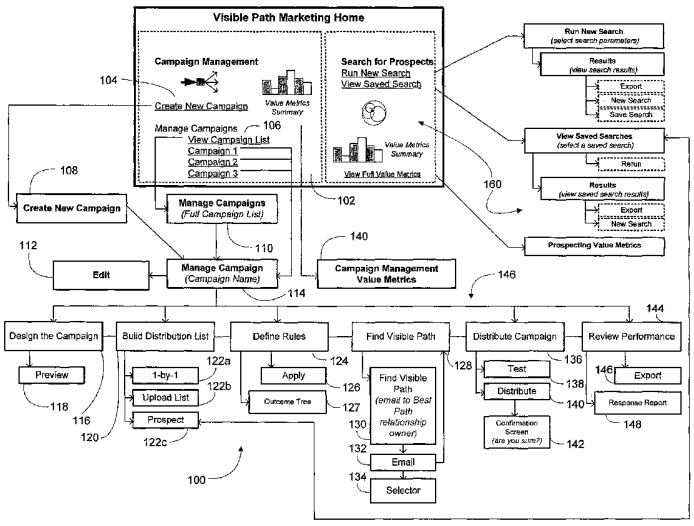
(54) Title: SYSTEMS AND METHODS FOR USING SOCIAL NETWORKS FOR THE DISTRIBUTION OF COMMUNICATIONS



(57) Abstract: The present invention provides methods and systems for facilitating the distribution of a communication, for example, using one or more enterprise applications. According to one embodiment, the method comprises obtaining information regarding one or more entities. Using a software application, hardware device or combination thereof, a given entity is selected from the one or more entities. A given member of the enterprise is selected based on a path between the given member of the enterprise and a given entity, the path identified by the information regarding the given entity. A communication is addressed from the given member of the enterprise to the given entity.

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SYSTEMS AND METHODS FOR USING SOCIAL NETWORKS FOR THE DISTRIBUTION OF COMMUNICATIONS

[0001] Applicants hereby claim the benefit of U.S. Provisional Patent Application Serial Number 60/592,294 entitled, "SALES FACILITATION SYSTEMS AND METHODS IN AN ENTERPRISE RELATIONSHIP MANAGEMENT SYSTEM," filed July 28, 2004, attorney docket number 6613/1C, which is hereby incorporated herein by reference in its entirety. Applicants hereby further claim the benefit of U.S. Provisional Patent Application Serial Number 60/592, 295 entitled, "MARKETING FACILITATION SYSTEMS AND METHODS IN AN ENTERPRISE RELATIONSHIP MANAGEMENT SYSTEM", filed July 28, 2004, attorney docket number 6613/1D, which is hereby incorporated herein by reference in its entirety.

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CROSS-REFERENCE TO RELATED APPLICATIONS

[0003] This application is related to U.S. Patent Application Serial Number 11/132,159 entitled, "SYSTEM AND METHOD FOR ENFORCING PRIVACY IN SOCIAL NETWORKS," filed May 17, 2005, attorney docket number 6613/1US, which is hereby incorporated herein by reference in its entirety (the "RCM software system").

BACKGROUND OF THE INVENTION

[0004] The present invention generally provides methods and systems for facilitating the distribution of communications, such as marketing and marketing related

communications, in conjunction with enterprise software for the end goals of increased productivity, increased revenues, reduced cost of customer acquisition, higher profitability, etc. Particularly, the present invention provides methods and systems that facilitate the distribution of communications by leveraging relationship information of both an enterprise and members of an enterprise, both alone and in combination with other enterprise software applications.

[0005] An enterprise typically uses one or more Enterprise Relationship Management ("ERM") software applications to allow employees to manage personal and professional relationships and information. Messaging software applications ("messaging") typically provide comprehensive automation packages for contact management, note and information sharing, calendaring, email, instant messaging, to-do lists, etc. One example of a messaging application is Outlook sold by MICROSOFT CORPORATION® as part of its Office suite of applications. Other communications systems and software ("communications") found in the enterprise include instant messaging applications, as well as telephone and Voice over IP ("VoIP") applications.

[0006] In addition to ERM, messaging and communications applications, enterprises typically employ other software applications to manage relationships both inside and outside the enterprise. For example, Customer Relationship Management ("CRM") software helps a company manage existing and developing customer relationships in an efficient and organized manner, Sales Force Automation ("SFA") software increases a sales team's efficiency and effectiveness by automating, organizing and tracking the sales process, Partner Relationship Management ("PRM") software facilitates and automates the sales processes across distributors and external sales channels, and Employee Relationship Management ("eRM") improves the management of internal employees. Other applications assist the enterprise in organizing and managing the workflow of

different business processes and automating the presentation of information to users are well known to those of skill in the art.

[0007] For clarity, the above-described applications are collectively referred to herein as "enterprise applications." Enterprise applications store information that may be used to deduce the existence of a relationship or the strength of a relationship. This information, and the relationships and relationship networks that this information describes, is generally referred to herein as "relationship capital".

[0008] The relationships and relationship networks in enterprise software, however, can be difficult to access in an efficient manner. These relationships are often documented, but the relationship capital that identifies these relationships is often distributed across many disparate enterprise applications, with data that is often redundant, outdated or incomplete. Furthermore, the relationships and relationship capital are often not weighted, fail to indicate the strength of a given relationship or piece of relationship capital and do not dynamically adjust weights in response to changing data and events. Some employees, such as sales persons and other executives may also be reluctant to share relationship capital that they own, such as information regarding their personal relationships, with other employees or outside parties without retaining any control with regard to how these parties use the relationship capital. Finally, the relationship capital and relationships identified thereby are rarely aggregated, analyzed, and integrated into a relationship network that describes the full breadth of interconnections between individuals and enterprises.

[0009] These issues and concerns generally limit the amount of relationship capital that is made available and accessible through enterprise software, which negatively impacts the efficiency and productivity of an organization. Thus, business processes that

the organization conducts using enterprise software, such as selling, marketing, hiring, etc., can be ineffective, uncoordinated or inefficient.

[0010] In order to overcome shortcomings and problems associated with enterprise software, embodiments of the present invention provides systems and methods for using Relationship Capital Management ("RCM") software systems and the social networks they provide to facilitate the distribution of communications.

SUMMARY OF THE INVENTION

[0011] The present invention provides methods and systems for facilitating the distribution of communications using enterprise applications, such as RCM software systems that may operate both alone and in conjunction with other enterprise applications. In some embodiments, the invention provides systems and methods, such as computer applications or solutions, which utilize or are built upon RCM software systems, as described in the previously incorporated U.S. Patent Application Serial Number 11/132,159 entitled, "SYSTEM AND METHOD FOR ENFORCING PRIVACY IN SOCIAL NETWORKS," filed May 17, 2005. Specific details regarding the RCM software system may be obtained by reference to such application, which is incorporated by reference herein in its entirety.

[0012] According to one embodiment, a method is provided for facilitating the distribution of communications in an enterprise application. The method comprises obtaining information regarding one or more entities and selecting a given entity from the one or more entities. A given member of the enterprise is selected based on a path between the given member of the enterprise and a given entity, the path identified by the information regarding the given entity. The path may be provided by an RCM software system. A communication is addressed from the given member of the enterprise to the given entity, which may be an individual or an organization, and transmitted to the given

entity. The given member of the enterprise may be selected based on a strength of the path between the given member and the given entity, and the given member may be provided with the communication to personalize the communication.

[0013] Members of the enterprise and entities are related according to one or more social networks. These social networks may identify paths or relationships between members and entities, as well as between members. According to one embodiment, a social, or relationship, network may extend beyond the members of an enterprise to entities outside the enterprise, which is referred to as an extranet portion of the social network. It should be noted that distribution of information regarding the one or more entities to the one or more members of the enterprise may also include distribution to entities in an extranet portion of a given social network.

[0014] The entities may be prioritized, which may include prioritizing according to the one or more paths between the one or more members of the enterprise and the one or more entities. Similarly, prioritization may comprise prioritizing according to a strength for the one or more paths between the one or more members of the enterprise and the one or more entities.

[0015] The method may further comprise presenting a visual representation of the one or more entities, which may be obtained in response to a search. According to one embodiment, the visual representation is based on the information regarding the one or more entities. Relationships between members of the enterprise and entities may be provided as part of the visual representation, which is presented as paths between the members and the entities. The visual representation may also comprise presenting a strength of the one or more paths between the one or more members of the enterprise and the one or more entities. Information regarding the one or more entities may be displayed

in conjunction with an enterprise application including, but not limited to, a CRM application, a SFA application, an HRM application, etc.

[0016] According to some embodiments, the method comprises providing a communication to the given member of an enterprise for approval and a determination is made whether the given member approves the communication. Where the given member does not approve the communication, a second given member of the enterprise is selected based on a path between the second given member and the given entity. The communication is addressed from the second given member to the given entity. A check may also be made to determine if the second given member approves the communication. Where the second given member does not approve the communication, the communication may be addressed from the enterprise to the given entity.

[0017] The method may comprise tracking responses to the communication from the given entity, e.g., as part of a calculating metrics regarding a marketing campaign. Accordingly, the effectiveness of a marketing campaign may be based on the tracked response to the marketing message from the given entity.

[0018] In some embodiments, the invention provides systems and methods for facilitating marketing or marketing-related tasks by utilizing the capability of an RCM software system to determine individual and business relationships, which may include strength for a given relationship. For example, an analysis of marketing contacts may include information about, ranking of, or a depiction of the strength or nature of relationships between members of enterprise and other entities, such as individual (person) or business contacts (group, organization, corporation, etc.). Information regarding one or more of these entities may be utilized, for example, in identifying a member of the enterprise from whom a marketing or marketing-related message to an entity may be addressed. A member of the enterprise may be selected based on a

determination that the sender has a strong or the strongest relationship with a marketing contact or target. Visualization tools, performance assessment tools, and management tools are also provided.

[0019] In some embodiments, systems and methods are provided that facilitate marketing campaigns, such as campaigns in which a particular marketing message is desired to be sent to many different entities. Lists of entities for a particular marketing campaign may be generated. Information about the entities may be obtained, or may be visually displayed, including relationship information. Draft marketing messages may be generated automatically as being from individuals with a determined strongest relationship with each entity provided the relationship owner approves distribution of the message. The draft messages may be presented to the proposed sender or relationship owner for modification, approval, or sending. Efficiency and effectiveness of tasks are increased as compared, for example, to typical mass messaging by leveraging relationships between senders and contacts, causing messaging to appear more personal, and at least partially automatizing the process.

BRIEF DESCRIPTION OF THE DRAWINGS

[0020] The invention is illustrated in the figures of the accompanying drawings which are meant to be exemplary and not limiting, in which like references are intended to refer to like or corresponding parts, and in which:

[0021] FIG. 1 is a system diagram presenting a method for utilizing social networks for the distribution of communications according to one embodiment of the present invention;

[0022] FIG. 2 is a flow diagram presenting a method for creating a campaign for the distribution of a communication according to one embodiment of the present invention;

[0023] FIG. 3 is a flow diagram presenting a method of adding content to a campaign for the distribution of a communication according to one embodiment of the present invention;

[0024] FIG. 4 is a flow diagram presenting a method for determining recipients of a campaign for the distribution of a communication according to one embodiment of the present invention;

[0025] FIG. 5 is a flow diagram presenting a method for determining distributors of a campaign for the distribution of a communication according to one embodiment of the present invention;

[0026] FIG. 6 is a flow diagram presenting a method for creating distribution rules for a campaign for the distribution of a communication according to one embodiment of the present invention;

[0027] FIG. 7 is a flow diagram presenting a method for determining performance metrics for one or more campaigns for the distribution of a communication according to one embodiment of the present invention;

[0028] FIG. 8 is a user interface illustrating a home page for access to controls for creating and managing a campaign for the distribution of a communication according to one embodiment of the present invention;

[0029] FIG. 9 is a user interface for creating a campaign for the distribution of a communication according to one embodiment of the present invention;

[0030] FIG. 10 is a user interface for managing a campaign for the distribution of a communication according to one embodiment of the present invention;

[0031] FIG. 11 is a user interface for designing a campaign for the distribution of a communication according to one embodiment of the present invention;

[0032] FIG. 12 is a user interface for managing a distribution list for a campaign according to one embodiment of the present invention;

[0033] FIG. 13A is a user interface illustrating a pop-up window for one by one selection of recipients of a campaign for the distribution of a communication according to one embodiment of the present invention;

[0034] FIG. 13B is a user interface illustrating a pop-up window for uploading a list of recipients from a data source according to one embodiment of the present invention;

[0035] FIG. 13C is a user interface illustrating a pop-up window for selecting recipients from saved prospecting searches according to one embodiment of the present invention;

[0036] FIG. 14 is a user interface for defining rules of a campaign for the distribution of a communication according to one embodiment of the present invention;

[0037] FIG. 14A is a graphical display illustrating the order of rule processing in an outcome tree according to one embodiment of the present invention;

[0038] FIG. 15 is a user interface display for circulating a list of recipients to members of an enterprise according to one embodiment of the present invention;

[0039] FIG. 16 is an electronic mail message for communicating to a member of the enterprise that maintains a path to a recipient of a communication according to one embodiment of the present invention;

[0040] FIG. 17 is a user interface for a member of an enterprise to approve sending a communication to a recipient according to one embodiment of the present invention;

[0041] FIG. 18 is a user interface for distributing communications according to one embodiment of the present invention;

[0042] FIG. 19 is a user interface for displaying performance metrics for a campaign for distributing a communication according to one embodiment of the present invention;

[0043] FIG. 20 is a user interface for displaying detailed performance metrics according to one embodiment of the present invention;

[0044] FIG. 21 is a user interface for the distribution of communications according to one embodiment of the present invention;

[0045] FIG. 22 is a user interface for selecting content for inclusion in a communication according to one embodiment of the present invention;

[0046] FIG. 23 is a user interface for selecting entities to receive a communication according to one embodiment of the present invention;

[0047] FIG. 24 is a user interface for prospecting for potential recipients of a marketing campaign according to one embodiment of the present invention;

[0048] FIG. 25 is a user interface for selecting members of an enterprise from which communications to entities originate according to one embodiment of the present invention;

[0049] FIG. 26 is a user interface for setting rules for the distribution of communications according to one embodiment of the present invention; and

[0050] FIG. 27 is a user interface for displaying performance metrics according to one embodiment of the present invention.

DETAILED DESCRIPTION OF THE PREFERRED EMBODIMENT

[0051] In the following description of the preferred embodiment, reference is made to the accompanying drawings that form a part hereof, and in which is shown by way of illustration a specific embodiment in which the invention may be practiced. It is to be understood that other embodiments may be utilized and structural changes may be made without departing from the scope of the present invention.

[0052] FIG. 1 presents one embodiment of a system for distributing communications using an RCM software system, such as for performing marketing campaigns. A

campaign management component 102, which may be embodied in hardware, software or combinations thereof, presents user interfaces from which tools and methods for the distribution of communications may be selected or to which a user may navigate. According to one embodiment, the campaign management component 102 presents one or more web pages through which a user may access tools and methods for the distribution of communications. Functional modules or components are provided that allow for the creation of a new campaign 108 for the distribution of communications, such as a marketing campaign, which may include the distribution or sending of one or more marketing or marketing-related messages to a number of entities, such as individual and business contacts. The campaign management component 102 also provides components for the management of a specific campaign 114 or a group of campaigns 110, as well as editing of an existing campaign 112 and calculating value metrics regarding one or more campaigns 140.

[0053] A component for management of a specific campaign 114 provides a number of functions that allow for the creation, distribution and review of communication distribution campaigns, e.g., marketing campaigns. According to the present embodiment, the component 114 provides functions, each of which may comprise one or more steps or actions, including designing a campaign 116, building a distribution list 120, defining rules 124, finding the visible path to a given recipient 128, distributing in accordance with a campaign 136, and reviewing performance of a campaign or group of campaigns 144.

[0054] Designing a campaign 116 includes functions that allow a user to provide data describing a campaign, which may include setting performance targets for one or more campaign metrics, as well as preview campaign information or the content of the campaign 118. Building a recipient list 116 may include functions that include 1-by-1

building of a recipient list 122a, in which entities are added individually to a list, uploading of a list of one or more entities 122b, and conducting searches 122c to identify recipients of a communication, which is also referred to herein as prospecting. Uploading a list 122b may include, for example, uploading list information from a source file or database maintained by an enterprise software application. Prospecting 122c may include searching for recipients or loading saved searches though the use of the RCM software system, which may be a system or platform as described in the RCM application incorporated herein by reference or other RCM systems known to those of skill in the art.

[0055] Rules determine how communications are sent to entities on a recipient list. Defining rules 124 may include setting or specifying rules or parameters governing one or more aspects of a campaign, such as rules governing formulation of communications according to different circumstances with respect to individual entities to which communications are to be delivered. Similarly, when a given member of the enterprise refuses to be an addressee on a communication to one or more entities, rules may be used to identify alternate members of the enterprise from which the communication may be addressed. Controls and sub-routines are also provided for applying the rules to a campaign 126, as well as for graphically displaying one or more rules as a tree or graph 127 to provide the user with a visual representation of the potential origination addresses for a given communication on the basis of one or more rules. This is referred to as an outcome tree.

[0056] The process of finding a path to an entity that is a recipient of a communication 128 may include distributing messages to members of the enterprise with the best path to an entity that is identified to receive a communication 130, e.g., a recipient of a marketing campaign. Distributing according to best path may include, for example, determining, for a given entity in a recipient list, a best path or strongest path

with a member of the enterprise. Draft messages may be sent, which may be automatically or partially automatically generated, to such members for review and distribution. Details regarding determining best paths and relationship strength can be found by reference to the incorporated RCM software system.

[0057] Finding a path 128 may include sending a draft of the communication 132, such as by email, to a member of the enterprise with the best path to the given entity. The member of the enterprise previews the communication 134, which may include modification or revision of the communication. Where a given member of the enterprise receives the communication 132 and refuses to be identified as the sender of the communication, the member of the enterprise with the next best path to the recipient is determined 128 and 130. When a member of the enterprise agrees to be identified as an originating address of the communication or other information to the entity, the member is provided with functionality that allows for the selection of the desired contact information 134, e.g., selecting an electronic mail address from a plurality of addresses associated with an entity. As is explained herein, when no relationship owner assents to sending the marketing campaign, the information may be addressed as coming from the organization itself, as opposed to an individual member of the organization. Presenting a draft communication to be sent from a best path member of the enterprise to an entity provides an effective, efficient marketing campaign technique because communications appear to be personal and originate from members of the enterprise with the strongest relationship with a given entity. Draft messages may be automatically generated and presented to members of the enterprise from which a communication is to be sent, e.g., through the use of templates.

[0058] Distributing a communication 136 according to the present system and method, such as a marketing campaign, includes a review of all entities identified to

receive the communication and the members of the enterprise from which the communication is identified as originating, which may include a communication originating from the enterprise. Testing 138 is provided to ensure the campaign for distribution of the communication is functioning as desired, e.g., proper content, formatting, etc. Testing 138 may include sending the communication from a random sampling of electronic mail addresses to the campaign owner for review; thereby allowing review prior to distribution. After ensuring that the campaign is set up as intended, e.g., by performing a test 138, the communication is distributed to the entities on the recipient list 140. A confirmation interface 142 may also be presented to prior to distribution 140 to confirm the action.

[0059] Performance reviewing functions 144 may include functions for reviewing statistics and analyses regarding the distribution of a campaign or its effectiveness. An exporting function 146 provides for exporting of campaign performance metrics to an external application or file. Exporting 146 may include, for example, exporting campaign performance information to a file, other data store or enterprise application that the enterprise maintains, such as a data file to be uploaded into a spreadsheet or database program. Finally, functionality is provided for generating a response report 148 for one or more campaigns on the basis of the one or more campaigns' performance, e.g., views, click-through rates, etc., which may also include reporting aggregate information across a plurality of campaigns using statistical techniques known to those of skill in the art.

[0060] Also presented in FIG. 1 are functional modules that provide processes for conducting searches 160 (also referred to as prospecting) to identify entities for the receipt of communications, such as marketing messages transmitted as part of a marketing campaign. According to one embodiment, the prospecting process 160 may be used for traversing relationship networks provided by an RCM software system to

identify prospective recipients for a marketing campaign. The prospecting process 160 is described in greater detail in U.S. Patent No. __/___,___ entitled "SYSTEM AND METHOD FOR USING SOCIAL NETWORKS TO FACILITATE BUSINESS PROCESSES," Attorney Docket No. 6613/1C, filed on even date herewith, which application is hereby incorporated herein by reference in its entirety.

[0061] It should be apparent to those of skill in the art that the system diagram presented in FIG. 1, along with the accompanying flow and user interface diagrams presented in the following figures, are functions that may be implemented in software, hardware and combinations thereof for utilizing the functionality provided by an RCM software system, alone or in conjunction with other enterprise applications, to facilitate the distribution of communications. Preferably, the system of the present invention is executed on a server computer and accessed by clients, either running on the same server computer or on remote terminals connected to, and communicating with the server over, a computer network, e.g., a LAN or the Internet.

[0062] One embodiment of a method for campaign creation and distribution is illustrated in the flow diagram of FIG. 2. Processing begins with a user accessing the communication distribution system, step 202, e.g., a home page where the system exposes its functions via a web based interface that may be accessed using a web browser, as is known to those of skill in the art. Where a new campaign for the distribution of a communication is being created, step 212, processing proceeds to step 214 where a process collects information describing a campaign to be created. Regardless of whether or not a new campaign is being created, step 212, processing may continue to one or more campaign management processes, step 216.

[0063] The campaign management processes, step 216, allow for the creation of substantive content for a communication to be distributed according to the campaign, step

218, the selection of or otherwise obtaining information regarding entities to receive communications, step 220, the determination of members of the enterprise from which communications should be sent to given entities, step 222, rules for the distribution of communications, step 224, and performance management, step 226. After performing a given campaign management process, step 216, processing may flow to any other campaign management process, step 216.

[0064] After completing a given campaign management process, step 216, processing may return to a central process for accessing the communication distribution system, step 202. From a central point of access, step 202, a check may be performed to determine if a communication that is the subject of a campaign should be sent to one or more entities, step 204. Where the check evaluates to true, step 204, the campaign is previewed, e.g., presented to a member of the enterprise who "owns" the campaign for approval prior to transmission to the one or more entities, step 206. Where the campaign is approved, it is transmitted to the one or more entities, step 210. The transmission process, step 204, may be canceled if the campaign is not approved, step 208. In both instances, processing returns to the central process for accessing the communication distribution system, step 202.

[0065] FIG. 3 presents a flow diagram illustrating one embodiment of the content selection process. Content selection, step 302, allows a user to select one or more items of content for inclusion in a communication, which may include the generation of text, graphics, audio, video, etc. for inclusion in the communication. A check is performed to determine whether the user wishes to upload a file for inclusion with the communication, step 304. Where the user wishes to upload or otherwise add content to a communication, step 304, the user identifies one or more pieces of content for uploading to the communication distribution system, step 306. The user may identify local content from a

data store on a local client, remote content located on a network, e.g., by providing a URL address for a location on a network, such as a LAN or the Internet, as well as manually enter text and graphics for inclusion as part of a campaign.

[0066] FIG. 4 illustrates a flow diagram of the recipient list creation process according to one embodiment of the invention. The process begins with the presentation to the user of an interface that provides access to recipient list creation control function, step 402. A check is performed to determine if the user wishes to add entities to a recipient list on a 1 x 1 basis, step 404, e.g., select individual entities to include in a recipient list. If the check at step 404 evaluates to true, the user is presented with an interface to browse information regarding one or more entities as well as controls to select individual entities for inclusion in a recipient list, step 406, such as potential targets for a marketing campaign

[0067] Processing returns to the recipient list creation control function, step 404, when the user completes adding entities to the recipient list, step 406. A check is performed to determine whether the user wishes to upload a list of entities for receipt of a communication, step 408. If the check at step 408 evaluates to true, the user is presented with an interface to browse for information regarding one or more entities located on a data store on a local client or located remotely on a network, e.g., by providing a URL address for a location on a network, such as a LAN or the Internet. In addition to checking for commands to identify entities according to 1 x 1 selection and uploading data, steps 404 and 408, respectively, a check is performed to determine if the user wishes to search, or prospect, for entities to receive a communication, step 412. Where the check evaluates to true, step 412, search processes are executed, step 414. Searching for entities is described in the patent applications previously incorporated by reference herein in their entirety. For example, controls may be provided for performing searches or loading

saved searches of one or more relationship networks maintained by the RCM software system whereby entities responsive to the search are added to a list, table, database or other data store of information regarding one or more entities.

[0068] FIG. 5 illustrates a flow diagram of the distribution list creation process according to one embodiment of the invention. The process begins with the presentation to the user of an interface that provides access to a distribution list creation control function, step 502. A check is performed to determine whether the user wishes to add members of an enterprise from which a communication is to be sent to one or more receiving entities, step 508. Where the check at step 508 evaluates to true, the method presents an interface comprising controls that allow the user to manually select members of the enterprise from which a communication is to be sent to a receiving entity. The process of selecting relationship owners may be automated by the present invention by analyzing recipient information in the recipient list with relationship information in the relationship network maintained by the RCM software system.

[0069] Access to distribution list creation control function, step 502, allows users to distribute the communication to members of the enterprise from which the communication to one or more entities is to originate. A check is performed to determine whether the user wishes to distribute the communication to members of the enterprise, step 504. Where the check performed at step 504 evaluates to true, members of the enterprise from which communications are to originate are provided with the communication for previewing purposes, as well as an option to decline to send the communication, step 506. The communications are previewed by the relevant members of the enterprise and, where approved, the communications are sent from the members of the enterprise to the appropriate entities, step 508.

[0070] FIG. 6 is a flow diagram illustrating the rule creation process according to one embodiment of the invention. The process begins with the presentation to the user of an interface that provides access to rule creation control function, step 602. A check is performed to determine whether the user wishes to edit or apply a rule to the distribution of a communication, which may also include the creation of new rules, step 604. Where the user wishes to edit or apply one or more rules to a campaign, e.g., the distribution of a communication, step 604, a rule creation or editing interface is presented to the user. The user creates new rules or edits existing rules regarding the manner in which communications are to be addressed to receiving entities in the event that one or more members of the enterprise refuse to be an addressee on the communication to one or more receiving entities, step 606. After rules are created or edited, step 606, processing returns to the rule creation function, step 602.

[0071] FIG. 7 is a flow diagram of the performance metric process according to one embodiment of the invention. The process begins with the presentation to the user of an interface that provides access to performance control function, step 702, which allows the user to calculate performance and value metrics for a given campaign for the distribution of a communication. A check is performed to determine if the user wishes to export information regarding the performance or value of a campaign, step 704, such as to a file, data structure or data store maintained by the enterprise. If exporting of the information is indicated, the information is exported, step 706. After the information is exported, step 706, processing returns to the performance control function, step 702.

[0072] FIGs. 8 through 27 provide examples of interface display formats, such as Web pages, according to embodiments of the invention.

[0073] FIG. 8 is a user interface illustrating a home page 800 for access to controls for creating and managing a campaign for the distribution of a communication according

to one embodiment of the invention. Options or links or are provided to allow for the creation of a new campaign and managing campaigns, 804 and 806, respectively. Options are provided with respect to managing a selection of existing campaigns 808, including viewing a campaign list from which a campaign is selected, or selecting a campaign from recently edited campaigns. Selection of a given option, 804, 806, 808, presents the user with an appropriate interface that provides controls for the performance of the selected option. A panel 802 that is presented as part of the user interface 800 provides overall or aggregate campaign management metrics, which may take into account all existing campaigns. According to the present embodiment a graphical representation 803 of the metrics is presented to the user, such as in bar graph format, and an option or link 810 is provided to obtain detailed metrics information regarding specific campaigns.

[0074] FIG. 9 is a user interface for creating a campaign for the distribution of a communication according to one embodiment of the invention. An interface display 900 comprises controls that allow the user to provide information describing the campaign, as well as goals regarding the campaign. Using text entry controls provided as part of a panel 902, the user may provide a campaign name 904, a textual description of the objective of the campaign 908, as well as percentage values for metrics that the campaign is intended to meet or surpass, 910 and 912, respectively. According to the present embodiment, information regarding the owner of the campaign may be auto-populated with user information 906. Controls are provided to cancel the creation of the new campaign 914, in addition to creating the new campaign 916.

[0075] FIG. 10 is a user interface for managing a campaign for the distribution of a communication according to one embodiment of the invention. A panel 1004 provided as part of the interface 1000 provides information regarding existing campaigns. The panel

1004 provides detailed information regarding existing campaigns, including, but not limited to, the campaign owner 1006, the campaign name 1008, the campaign objective 1010, the creation date of the campaign 1012, where the communication that is being distributed according to a campaign has been sent, the date of the transmission of the communication is indicated 1016, the campaign status 1018 and response metrics for the campaign 1022. To provide a visual indication of the status of a given campaign, graphical indicators are provided in the status column 1018 or the panel 1004. The interface 1000 provides a status legend 1002 that allows a user to decipher the status of a given campaign from the graphics 1020 in the status column 1018.

[0076] FIG. 11 is a user interface for designing a campaign for the distribution of a communication according to one embodiment of the invention. The interface 1100 presents a number of tabs 1104 in which each tab corresponds and provides access to a given step in the process of creating and distributing a communication according to a campaign. According to the present embodiment, options or links 1104 are provided to allow or facilitate designing a campaign, building a distribution list, defining rules, finding a best path to a recipient, distributing messages of the campaign, and reviewing campaign performance. A campaign design may be manually specified 1706, or selected by browsing campaign designs 1706. Campaign design designs, such as code specifying campaigns or parameters, e.g., XML or HTML code, may be previewed 1108 by the user or submitted 1110 for selection in creating a campaign for the distribution of a communication.

[0077] Another step in the process of creating a campaign for the distribution of a communication involves building a recipient list that identifies one or more entities to which a communication is to be transmitted. FIG. 12 is a user interface for managing a distribution list for a campaign according to one embodiment of the invention. A user

may navigate to the present interface 1200 using the build distribution list tab 1208, or may navigate to other interfaces using the appropriate tab. Options or links are provided to allow selection of recipients through 1 x 1 selection 1206, list importation 1204, and prospecting 1202.

[0078] Entities that are selected for inclusion in a distribution list are presented in a panel that provides an entry for each of the one or more entities. Information presented includes, but is not limited to, best path information 1210, which may be a graphic representing the strength of a path, the name of the entity 1212, title 1214, company 1216, a electronic mail address 1218 and the number of paths that connect a given entity to an enterprise 1220, e.g., the number of members of the enterprise that maintain a relationship with the given entity. Using the controls that the interface provides 1200, a user may create a list of entities to receive a communication according to a campaign.

[0079] As indicated, a list of entities to receive a communication may be created by selecting individual entities, uploading a list of entities or retrieving a list of entities from a search. FIG. 13A is a user interface illustrating a pop-up window for one by one selection of recipients of a campaign for the distribution of a communication according to one embodiment of the invention. Form fields are displayed within a window 1302 for providing information regarding a given entity. Information collected regarding a given entity includes, but is not limited to, the name of the entity 1304, title 1306, company 1308 and electronic mail address 1310. Upon entering the information, the form may be canceled 1312 or submitted 1314 for inclusion as an entry on a distribution list.

[0080] FIG. 13B is a user interface illustrating a pop-up window for uploading a list of recipients from a data source according to one embodiment of the invention. An entry field 1316 is provided in the pop-up window 1324 for inputting the location on a file system where the recipient list is maintained, which may be locally or remotely located.

A control 1318 is also provided that allows the user to browse for the file to be uploaded. Uploading the identified list may be canceled 1320 or submitted 1322 as part of a distribution list by selection of an appropriate control.

[0081] FIG. 13C is a user interface illustrating a pop-up window for selecting recipients from saved prospecting searches according to one embodiment of the invention. A pop-up window 1326 is provided listing the entries from saved searches from which a user may select individual entries 1328 for inclusion in the distribution list. Each entry presents information that includes, but is not limited to, an owner of the search 1330, search name 1332, the date the search was created 1334, the last time the search was viewed 1336 and the number of entities falling within the scope of a search 1338. Upon selecting entries from the saved prospecting search, the selection may be canceled 1340 or submitted 1342 as part of a distribution list.

[0082] Another step in the process of creating a campaign for the distribution of a communication involves defining rules for the distribution. FIG. 14 is a user interface 1400 for defining rules of a campaign for the distribution of a communication according to one embodiment of the invention. According to the present embodiment, the interface 1400 presents templates 1408 and 1412 that may be used according to a given rules. One template 1408 may be used for an individual, such as a member of the enterprise, who may own a relationship with an entity, and another template may be used where the enterprise itself owns the relationship or a member of the enterprise refuses to be an addressee for a communication 1412. An individual template 1408 contains text fields to identify to addressee of the communication 1404, a subject 1406 and the body of the communication 1410. Similarly, a template for communications from the enterprise 1412 may also include text fields to identify the addressee of the communication 1414, a subject 1416 and the body of the communication 1418. According to the present

embodiment, message rules are set by selection of radio buttons to determine to appropriate course of action where a member of the enterprise refuses to be identified as the originator of the communication, which may include, but is not limited to, not sending the communication 1420 or sending the communication from an alternate sender 1422.

[0083] The rules for a given campaign may be visually presented to the user in the form of an outcome tree to provide the user with a visual indication of how communications are to be processed in view of actions by members of the enterprise. Fig. 14A presents an outcome tree illustrating the processing of communication according to one embodiment of the present invention. The graphical illustration 1430 of the rules for a given campaign according to the present embodiment depicts ownership of information regarding one or more entities, which may be owned by a member of the enterprise 1432, jointly owned by a member and the enterprise 1434 and solely owned by the enterprise 1436. The distribution of ownership of information regarding the one or more entities is depicted as a Venn diagram, with circles representing information regarding an entity owned by a member of the enterprise 1432a, jointly owned by a member and the enterprise 1434a and solely owned by the enterprise 1436a.

[0084] Rules, which may consist of conditions and actions to be taken, are graphically presented for each of the ownership classes depicted by the Venn diagram. According to the rule governing information regarding entities that is owned by a member of the enterprise 1432a, a check is performed to determine if the member approves to be identified as the originator of the communication 1438. Where the member approves of being identified as the sending address of the communication 1438, the communication is addressed to appear as if it originated from the member 1440. According to the rule, however, where the member does not approve no message is sent 1442.

[0085] According to the embodiment of the outcome tree illustrated, processing of communications takes places according to a compound rule where information regarding an entity is jointly owned by a member and the enterprise 1434a. According to the rule, a check is performed to determine whether the member agrees to be identified as the originator of the communication 1444. Where the member approves of being identified as the sending address of the communication 1444, the communication is addressed to appear as if it originated from the member 1446. According to the rule, however, where the member does not approve, a check is performed to determine whether the enterprise approves of being identified as the originator of the communication 1448. Where the enterprises approves, the communication is sent identifying the enterprise as the source 1450 and where the enterprise does not approve, no communication is sent 1452. Also according to the rules illustrated in the present embodiment of an outcome tree, all entities that are solely owned by the enterprise1436a are sent communications identifying the enterprise as the source of the communication 1454.

[0086] Another step in the process of creating a campaign for the distribution of a communication involves identifying paths between entities identified on a recipient list and members of an enterprise. FIG. 15 is a user interface display for circulating a list of recipients to members of an enterprise that maintain a path to one or more entities according to one embodiment of the invention. Using the RCM software system that is incorporated by reference herein, a campaign owner may determine those members of an enterprise with paths to or relationships with one or more entities that are identified on a recipient list to receive communications as part of a campaign for the distribution of communications. A table 1508 is provided that lists members of the enterprise with paths to one or more entities that are intended recipients of the communication, e.g., a marketing message.

[0087] The 1508 table provides a number of columns of information regarding members of the enterprise and their relationships. A column 1504 is provided to track whether a communication has been circulated to the relationship owner, as well as the number of paths connecting entities that are intended recipients of a communication and a given member of the enterprise. Another column 1506 is provided to track the number of entities that a given member of the enterprise with a path to a given entity has approved to receive the communication, which information may be stored in and retrieved from a database tailored to maintain such information. A control 1510 allows a user to gather approval of members of the enterprise for given members to be identified as the addressee on one or more communications to entities, e.g., by sending approval emails to members of the enterprise.

[0088] FIG. 16 is an electronic mail message for communicating to the owner of a path to a recipient of a campaign for the distribution of a communication according to one embodiment of the invention. According to one embodiment, an electronic mail message 1600 is sent to members of the enterprise that maintain a path to one or more given entities on a distribution list, which may be a best or strongest path. The electronic mail message 1600 informs the given member of the enterprise that the campaign owner wishes to send a communication to one or more entities on behalf of the member of the enterprise 1602. By selecting a link or other control 1604 contained within the message 1600, the member of the enterprise is presented with an interface that allows the member of the enterprise to select those entities to which they wish to forward the communication.

[0089] A user interface for a member of the enterprise to approve sending a communication to a recipient according to one embodiment of the invention is illustrated at FIG. 17. The entities on a distribution list with a path to the member of the enterprise who received the electronic mail message presented in FIG. 16 are presented in the

interface 1702. The member of the enterprise may select a check box or similar selection control to designate those entities to which the member wishes to transmit the communication 1704, including a control 1706 for designating the desired electronic mail address of the entity that should be used to send the communication to a given entity. The member of the enterprise may also preview the communication 1708 that is to be sent to the entity prior to submitting approval. Advantageously, the relationship owner is provided a mechanism 1710 through which communication to the one or more entities may be personalized, thereby enhancing recipient responsiveness.

[0090] Communications are distributed to entities according to a completed campaign. FIG. 18 is a user interface 1800 for distributing communications according to one embodiment of the invention. Options or links 1802 and 1804 are provided to allow for testing and distribution of the marketing campaign, respectively. Testing a campaign 1802 involves sending a random sampling of communications intended for transmission to receiving entities to the campaign owner for review. The campaign owner, however, may still make changes to a given campaign after testing. Once the campaign is set up as intended, the campaign may be distributed 1804 to the entities on a distribution list.

[0091] FIG. 19 is a user interface for displaying performance metrics for a campaign for distributing a communication according to one embodiment of the invention. A table 1902 provides information regarding metrics for given campaigns, including, but not limited to, an indication 1904 of whether campaign information has been viewed by entities (e.g., by tracking delivery information for the communication) and an indication of whether communications have been clicked on by receiving entities 1906, where appropriate. Campaign aggregate information 1908 information may also be provided, including cumulative percentage viewed, and cumulative percentage clicked on over a plurality of campaigns. Additionally, the display 1900 presents statistics regarding the

campaign view rate 1910 and click through 1912 metrics set against their respective industry averages.

[0092] A user may also view detailed aggregate performance metrics for a plurality of campaigns. FIG. 20 is a user interface for displaying detailed performance metrics according to one embodiment of the invention. The interface display 2000 presents aggregate industry response rates 2008, as well as aggregate view 2002 and click-through 2004 metrics for active marketing campaigns. Industry response rates may be obtained, for example, from third party industry reporting sources. More specifically, metrics are provided for view 2002 and click-through 2004 rates for active campaigns. Industry average information 2006 may be presented overlaying aggregate campaign metrics to provide the campaign owner with an indication regarding how campaigns are performing vis-à-vis industry averages.

[0093] FIG. 21 is a user interface for selecting content for inclusion in a communication accessing functions for the distribution of communications according to one embodiment of the invention. The relationship graphic 2102 represents a depiction of relationship information within a user's relationship network as provided by an enterprise application, such as an RCM software system. A tabular display 2104 provides a list of campaigns that have been previously created. Columns 2106 within the tabular display 2104 provide information regarding the one or more campaigns, such as an indication of the status of the transmission of communications according to a given campaign, as well as a percentage of completion of sending of messages.

[0094] FIG. 22 is a user interface for selecting content for inclusion in a communication to be transmitted as part of a campaign according to one embodiment of the invention. General campaign information 2202 provides information about the campaign and provides controls to select content for inclusion as part of a communication

sent in accordance with the campaign. Controls are provided that allow a campaign owner to browse 2204 and submit 2206 content for a given campaign. A preview pane 2208 provides a control that allows content that comprises a campaign to be viewed by the user, as well as manually add text and graphics, e.g., by cutting and pasting content from other sources or enterprise applications.

[0095] FIG. 23 is a user interface for selecting entities to receive a communication according to one embodiment of the invention. Controls 2302 provides a user with options including prospecting for targets, as described above, and importing a list of targets, for example, from a file or other data structure maintained by an enterprise software application. Display window 2304 provides an option to publish a recipient list, which may include making the list available to other users.

[0096] FIG. 24 is a user interface for prospecting for potential recipients of a marketing campaign according to one embodiment of the invention. In some embodiments, prospecting searches may be performed to identify entities for the receipt of communication according to a campaign. Search visualization tools may be provided, including a graphical representation relating to search results in connection with a campaign. For example, as depicted in the embodiment illustrated at FIG. 24, results of a search are displayed using a Venn diagram 2402. Circles of the Venn diagram 2402 represent groups of entities filtered by specified search criteria. Size of the circles may vary, for example, with the size of the group that is responsive to one of the given search criteria. Overlap between the circles may be used to represent entities in common between the various search criteria after searching using different filter information or criteria. An exterior circle may represent an entire relationship network. Other embodiments and manners of depictions, filtering, presentation, etc, such as bar diagrams, are known to those skilled in the art and may also be used. Filtering criteria can be

specified by a user on all fields available from relationship networks maintained by the RCM software system. Also depicted in FIG. 24 is a table 2406, including information about entities that are identified to receive communications. A button 2404 is provided to allow additional entities to be added to a recipient list for a given campaign.

[0097] FIG. 25 is a user interface for selecting members of an enterprise from which communications to entities originate according to one embodiment of the invention. A table 2502 provides information regarding members of an enterprise that maintain paths to entities on a recipient list defined using the interface provided by FIG. 24. The recipient list is cross-referenced against one or more relationship networks that the RCM software system maintains to identify members of the enterprise that maintain a path to or relationship with entities on the recipient list, and therefore are a preferred originator for the communication. According to embodiments of the invention, the member of the enterprise who owns information regarding a given entity must be consulted before the relationship is utilized. Members of the enterprise that maintain a path to or relationship with one or more entities on the recipient list are presented in a table 2502. The table 2502 includes columns with entries indicating whether a communication according to the campaign has been sent to the member of the enterprise, and whether each member of the enterprise has responded to the request to act as an originator of the communication.

[0098] FIG. 26 is a user interface for setting rules for the distribution of communications according to one embodiment of the invention. As depicted, message templates are provided according to a rule that specifies one template 2604 to be used if an individual is the originator of a communication, and a different template 2602 to be used if the company itself owns the relationship. The templates 2602 and 2604 may be used to provide draft messages to be approved or modified before sending to entities, such as by a member of the enterprise that maintains a path to a given entity. In some

embodiments, if the member of the enterprise with the strongest path to a given entity does not approve sending the communication, then the draft message may be sent to the member of the enterprise with the next strongest path to the given entity and re-drafted to indicate that the member of the enterprise with the next strongest path is the sender. Alternatively, where no member of the enterprise maintains a path to a given entity or approves of the transmission of the communication, the communication may be sent to the entity indicating that the communication is originating from the enterprise as opposed to an individual member of the enterprise.

[0099] FIG. 27 is a user interface for displaying performance metrics according to one embodiment of the invention. Performance metrics are presented in tabular format 2702 and may include information relating to the performance of one or more campaigns, such as information regarding number or percentage of communication that were clicked on or viewed by entities in the recipient list receiving the communication.

[00100] While the invention has been described and illustrated in connection with preferred embodiments, many variations and modifications as will be evident to those skilled in this art may be made without departing from the spirit and scope of the invention, and the invention is thus not to be limited to the precise details of methodology or construction set forth above as such variations and modification are intended to be included within the scope of the invention.

We Claim:

1. A method for facilitating the distribution of a communication using a social network, the method comprising:

obtaining information regarding one or more entities;

selecting a given entity from the one or more entities;

selecting a given member of the enterprise based on a path between the given member of the enterprise and a given entity, the path identified by the information regarding the given entity;

addressing a communication from the given member of the enterprise to the given entity; and

transmitting the communication to the given entity.

2. The method of claim 1 wherein a given entity includes an entity selected from the group comprising an individual and an organization.

3. The method of claim 1 comprising prioritizing the information regarding the one or more entities.

4. The method of claim 3 wherein prioritizing comprises prioritizing according to the path between the one or more entities and the one or more members of the enterprise.

5. The method of claim 4 wherein prioritizing comprising prioritizing according to a strength of the path between the one or more entities and the one or more members of the enterprise.

6. The method of claim 1 comprising generating a visual indication of the path between the one or more entities and the one or more members of the enterprise.

7. The method of claim 6 comprising generating a visual indication of a strength of the path between the one or more members of the enterprise and the one or more entities.

8. The method of claim 1 wherein selecting a given member of the enterprise comprises selecting based on a strength of the path between the given member and the given entity.

9. The method of claim 1 comprising allowing the communication to be personalized by the given member.

10. The method of claim 1 comprising providing the communication to the given member for approval.

11. The method of claim 10 comprising:

determining if the given member approves the communication;

if the given member does not approve the communication, selecting a second given member of the enterprise based on the a path between the second given member and the given entity;

addressing the communication from the second given member to the given entity; and

transmitting the communication to the given entity.

12. The method of claim 11 comprising:

if no member approves the communication, addressing the communication from the enterprise to the given entity; and

transmitting the communication to the given entity.

13. The method of claim 1 comprising tracking a response to the communication from the given entity.

14. The method of claim 13 comprising determining the effectiveness of a campaign based on the tracked response to the communication from the given entity.

15. The method of claim 1 comprising displaying the path between the one or more entities and the or more members of the enterprise in conjunction with an application selected from the group comprising a CRM application, an SFA application, an HRM application and a messaging application.

16. A method for facilitating the distribution of a communication using a social network, the method comprising:

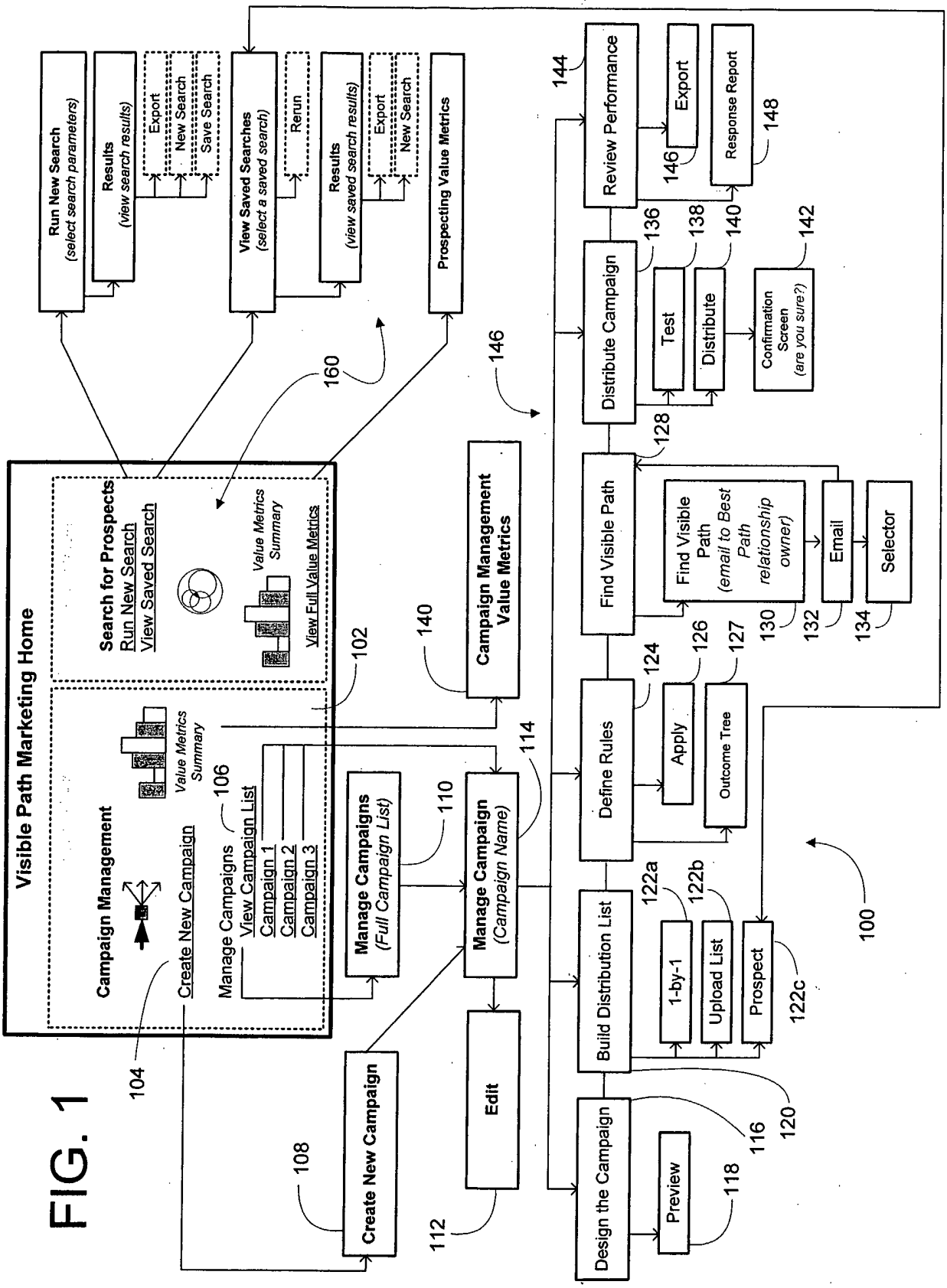
obtaining information regarding one or more entities;

selecting a given entity from the one or more entities;

identifying a path between one or more members of the enterprise and the given entity; and

transmitting a communication through the one or more members of the enterprise to the given entity according to the path.

FIG. 1


Visible Path Marketing Home
Campaign Management
Create New Campaign
Value Metrics Summary
Manage Campaigns
View Campaign List
Campaign 1
Campaign 2
Campaign 3
Search for Prospects
Run New Search
View Saved Search
Value Metrics Summary
View Full Value Metrics
Run New Search (select search parameters)
Results (view search results)
Export
New Search
Save Search
View Saved Searches (select a saved search)
Rerun
Results (view saved search results)
Export
New Search
Prospecting Value Metrics
Campaign Management Value Metrics
Manage Campaigns (Full Campaign List)
Manage Campaign (Campaign Name)
Create New Campaign
Edit
Design the Campaign
Preview
Build Distribution List
1-by-1
Upload List
Prospect
Define Rules
Apply
Outcome Tree
Find Visible Path
Find Visible Path (email to Best Path relationship owner)
Email
Selector
Distribute Campaign
Test
Distribute
Confirmation Screen (are you sure?)
Review Performance
Export
Response Report
100
102
104
106
108
110
112
114
116
118
120
122a
122b
122c
124
126
127
128
130
132
134
136
138
140
142
144
146
148
160

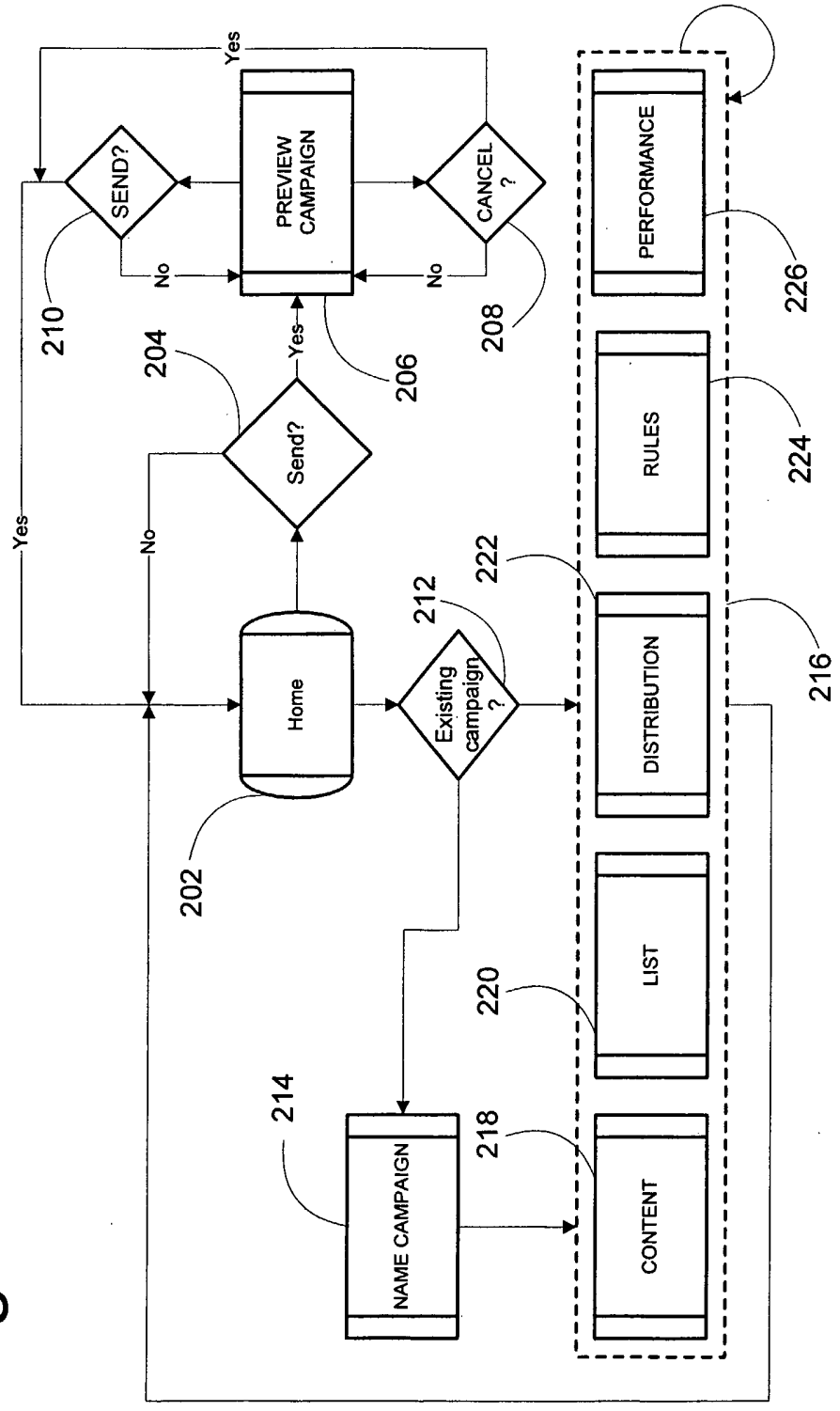

Yes
SEND?
PREVIEW CAMPAIGN
CANCEL ?
No
No
210
206
208
204
Yes
Send?
Yes
No
Home
Existing campaign ?
202
212
222
PERFORMANCE
RULES
DISTRIBUTION
LIST
CONTENT
226
224
216
220
218
214
NAME CAMPAIGN

Fig. 2

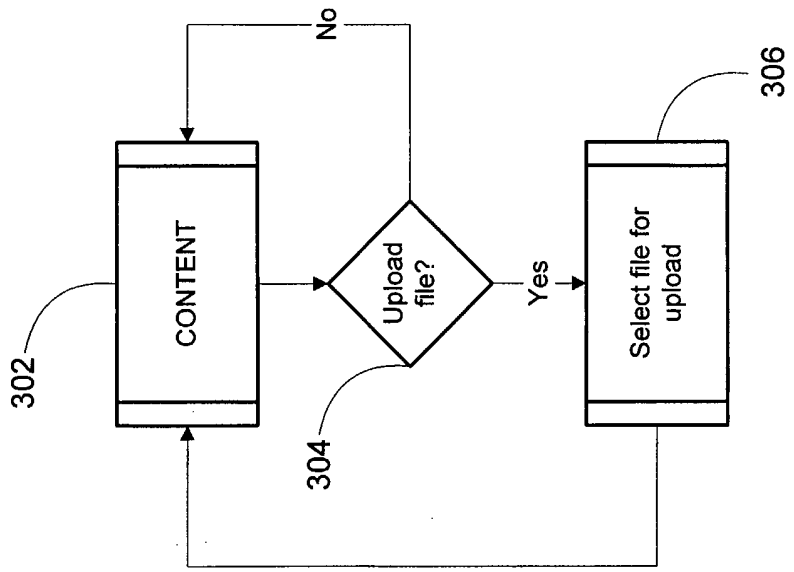

No
306
CONTENT
Upload file?
Yes
Select file for upload
302
304

Fig. 3

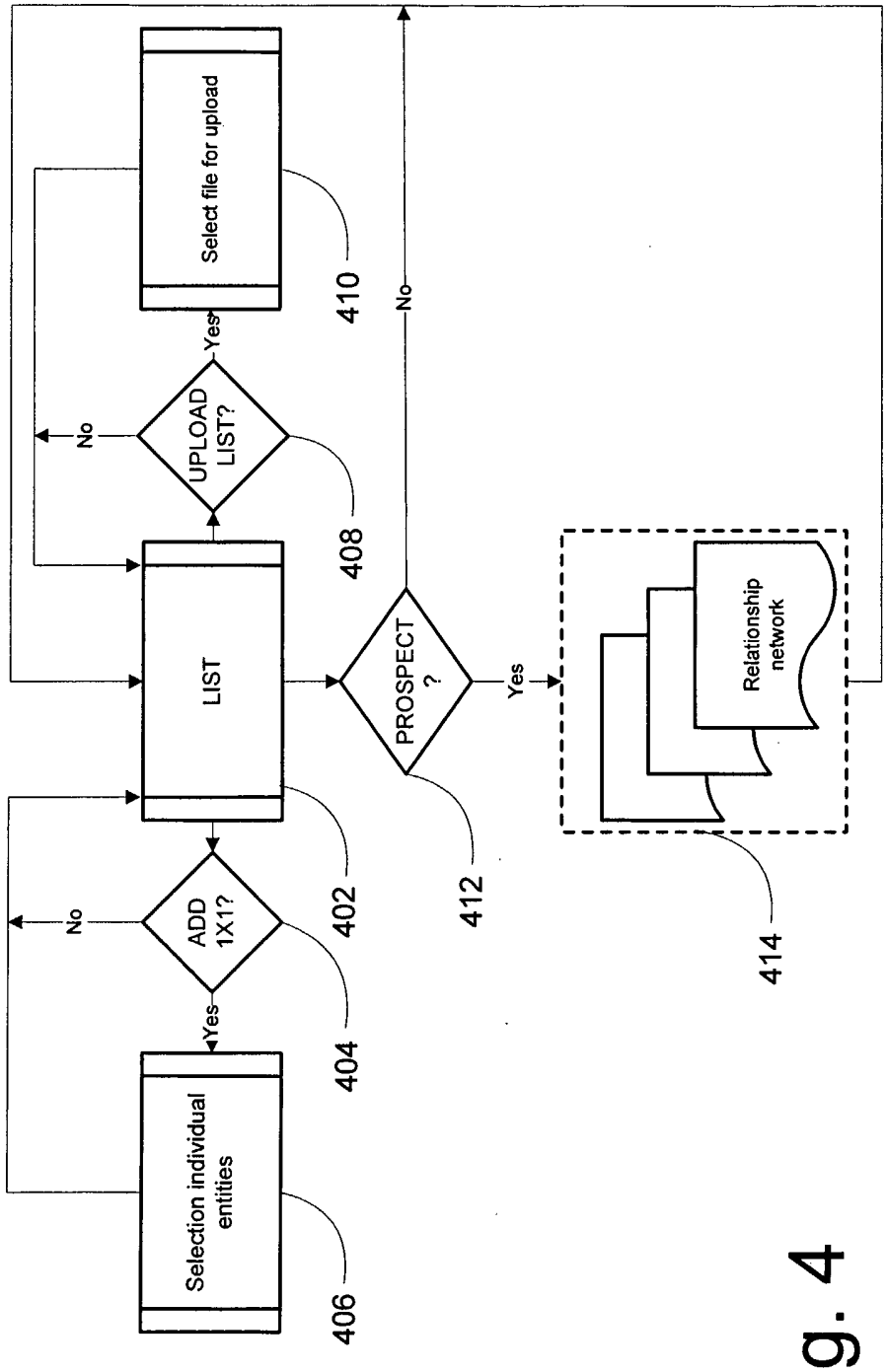

Selection individual entities
406
ADD 1X1?
404
No
Yes
LIST
402
UPLOAD LIST?
408
No
Yes
Select file for upload
410
PROSPECT ?
412
No
Yes
Relationship network
414

Fig. 4

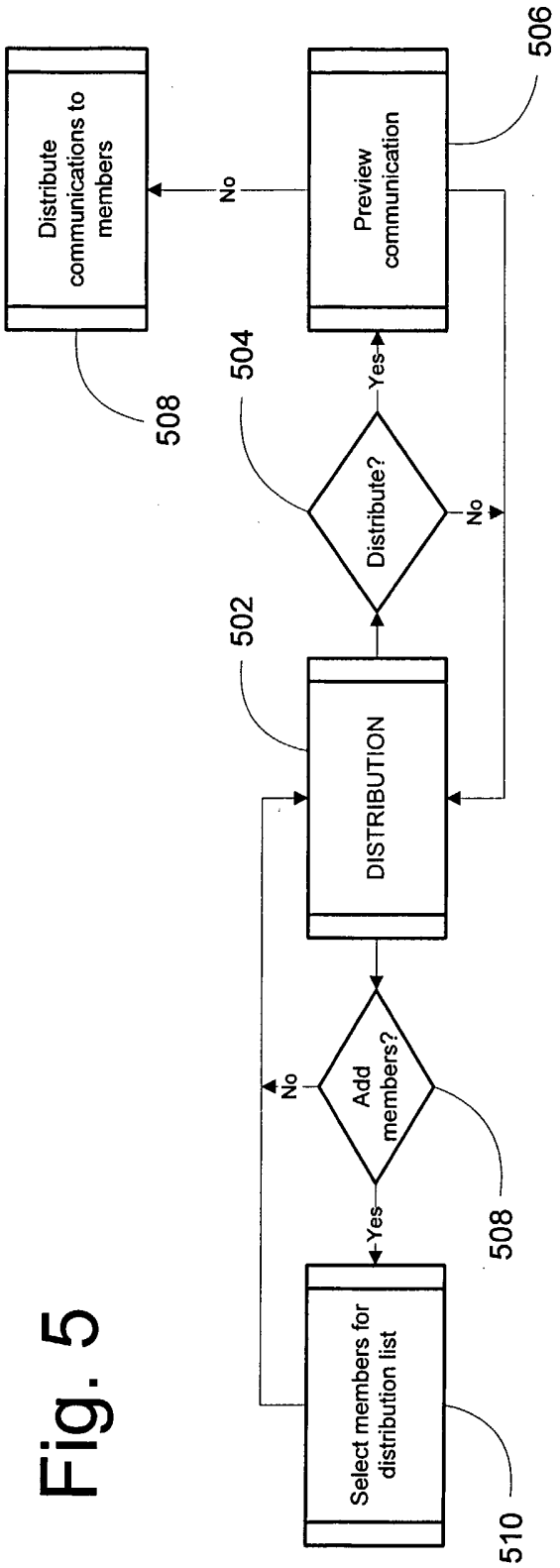

Distribute communications to members
No
Preview communication
506
508
504
Yes
Distribute?
No
502
DISTRIBUTION
No
Add members?
508
Yes
Select members for distribution list
510

Fig. 5

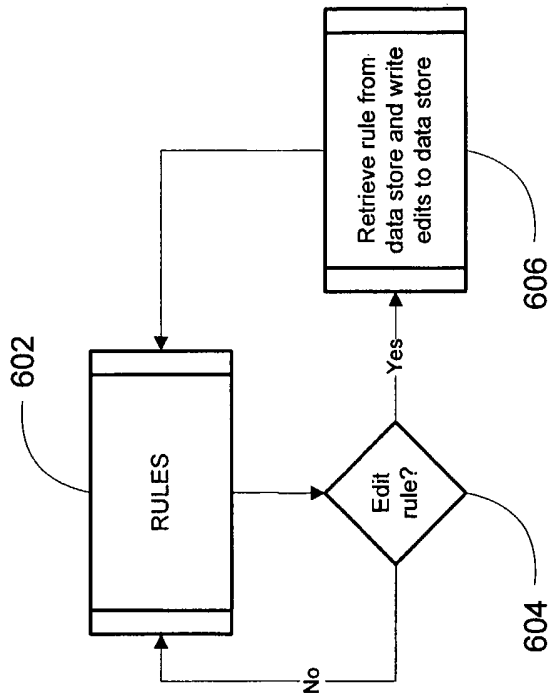

Retrieve rule from data store and write edits to data store
606
602
RULES
Edit rule?
Yes
604
No

Fig. 6

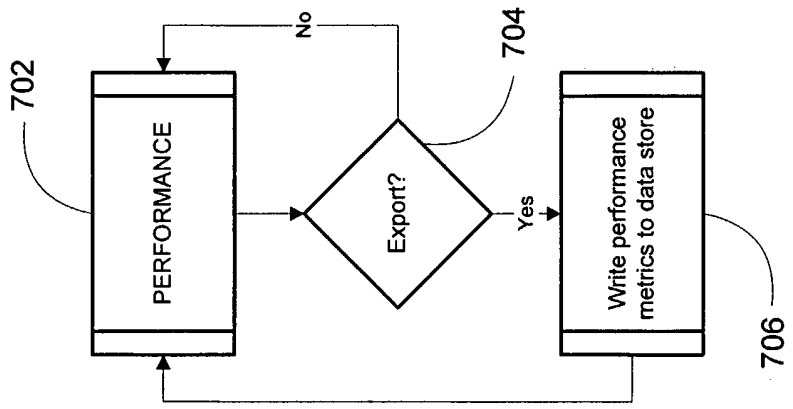
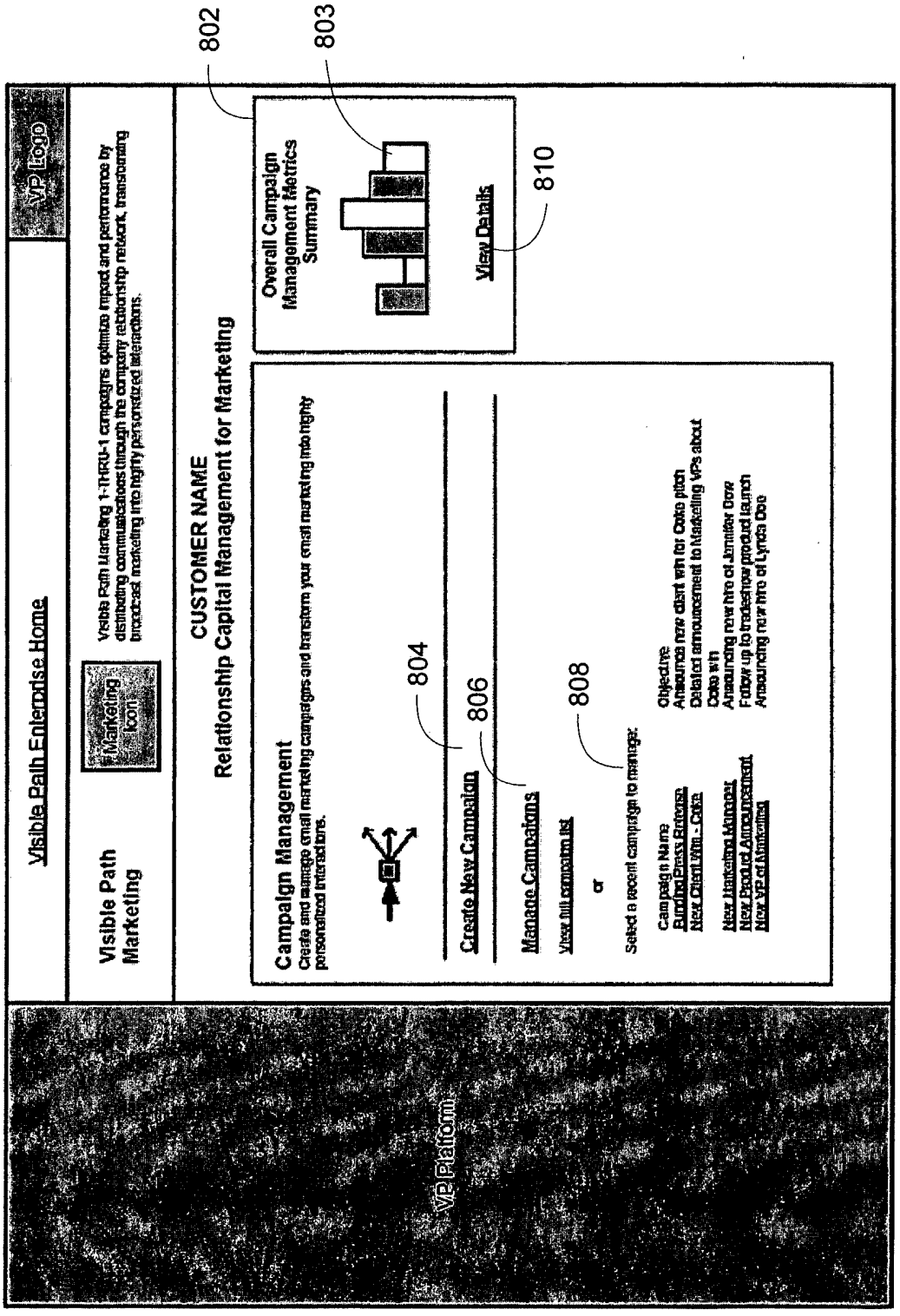

No
704
702
PERFORMANCE
Export?
Yes
Write performance metrics to data store
706

Fig. 7

Fig. 8


800
802
803
804
806
808
810
VP Platform
Visible Path Enterprise Home
VP Logo
Visible Path Marketing
Marketing Icon
Visible Path Marketing 1-THRU-1 campaigns optimize impact and performance by distributing communications through the company relationship network, transforming broadcast marketing into highly personalized interactions.
CUSTOMER NAME
Relationship Capital Management for Marketing
Campaign Management
Create and manage email marketing campaigns and transform your email marketing into highly personalized interactions.
Create New Campaign
Manage Campaigns
View full campaign list
or
Select a recent campaign to manage:
Campaign Name
Objective
Annual Press Release
Announce new client win for Cobb pitch
New Client Win - Cobb
Detailed announcement to Marketing VPs about Cobb win
New Marketing Manager
Announcing new hire of Jennifer Dow
New Product Announcement
Follow up to tradeshow product launch
New VP of Marketing
Announcing new hire of Lynda Doe
Overall Campaign Management Metrics Summary
View Details

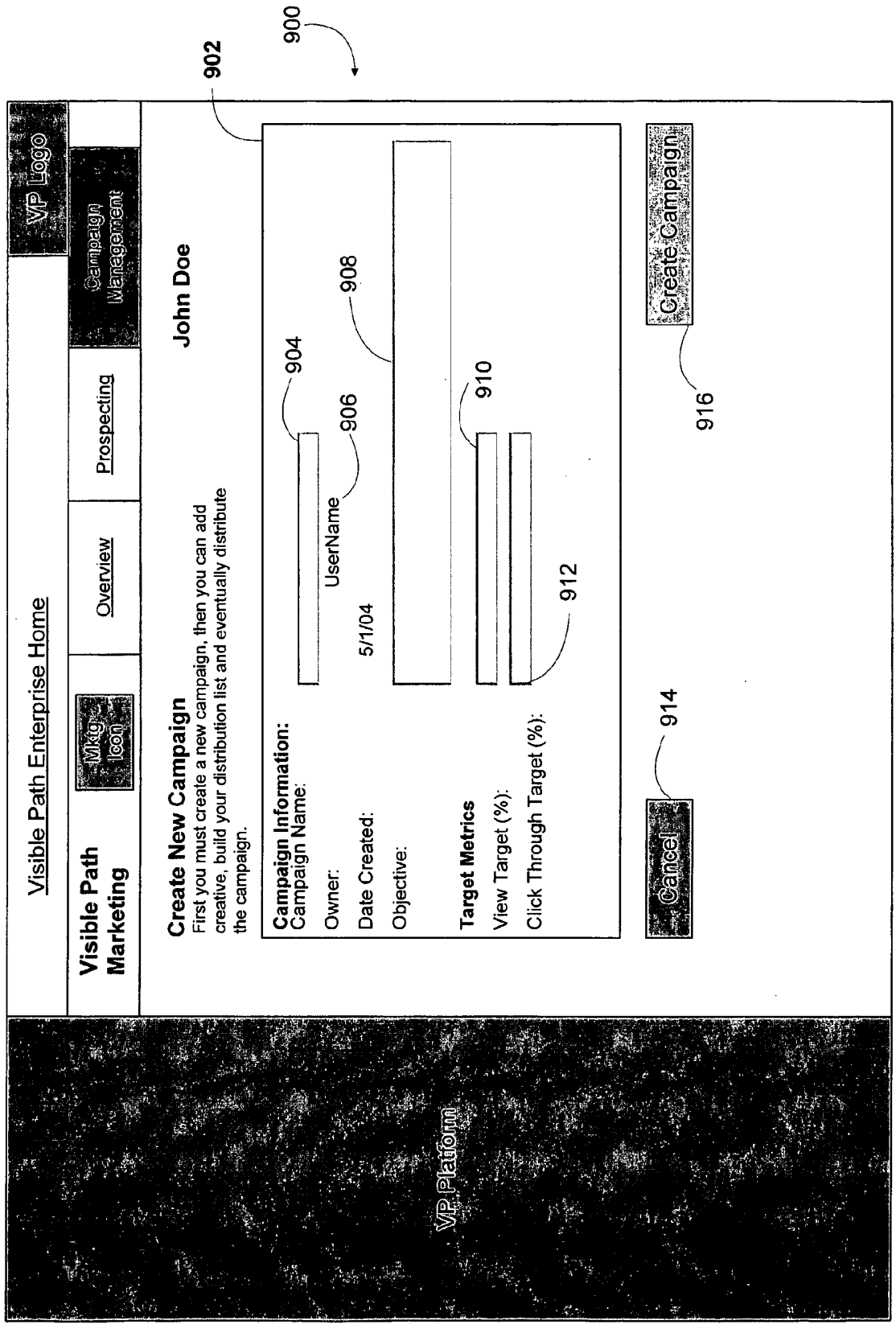

VP Platform
Visible Path Enterprise Home
VP Logo
Visible Path Marketing
Mktg Icon
Overview
Prospecting
Campaign Management
John Doe
Create New Campaign
First you must create a new campaign, then you can add creative, build your distribution list and eventually distribute the campaign.
Campaign Information:
Campaign Name:
Owner:
UserName
Date Created:
5/1/04
Objective:
Target Metrics
View Target (%):
Click Through Target (%):
Cancel
Create Campaign
900
902
904
906
908
910
912
914
916

FIG. 9

FIG. 10

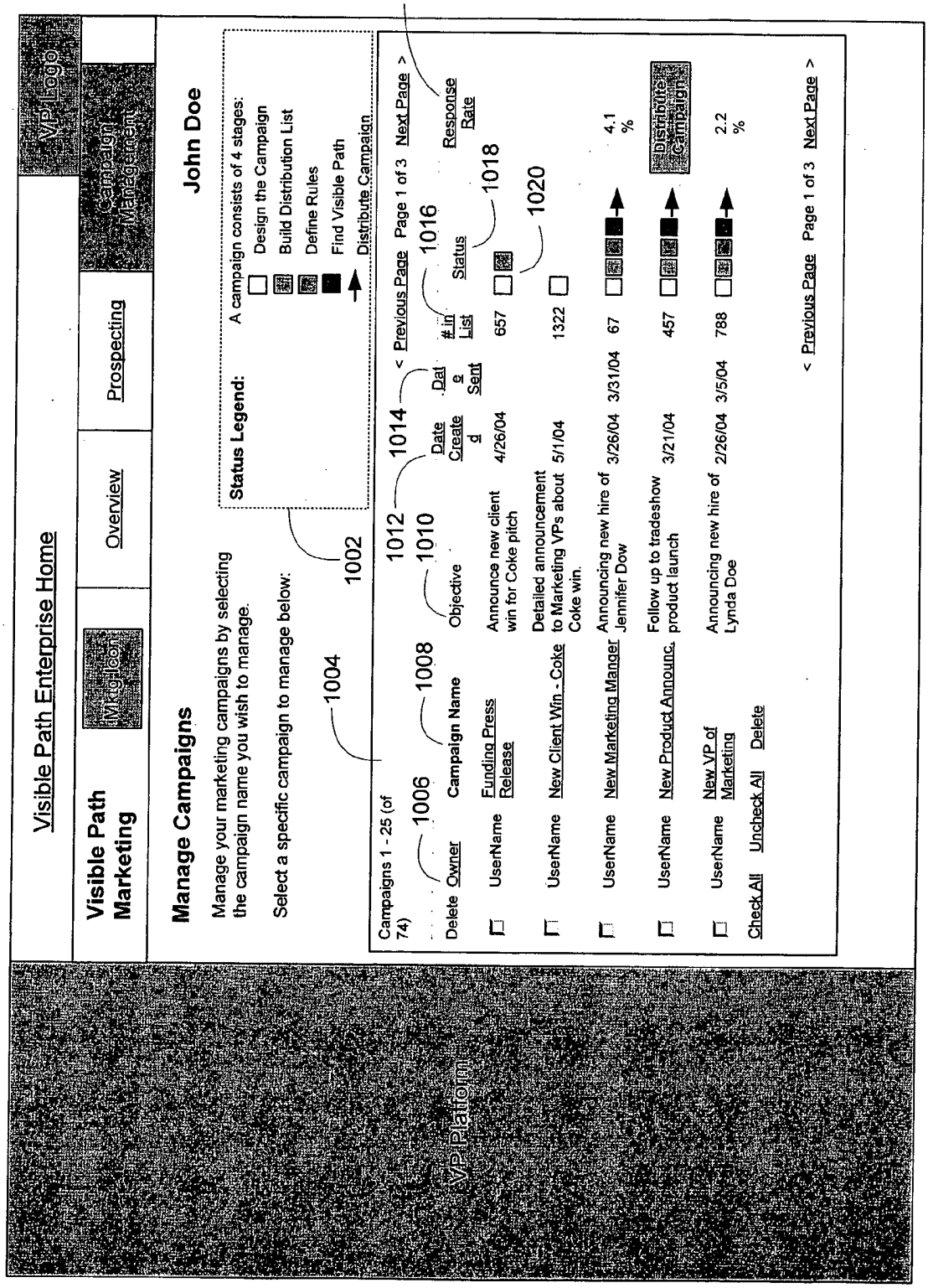
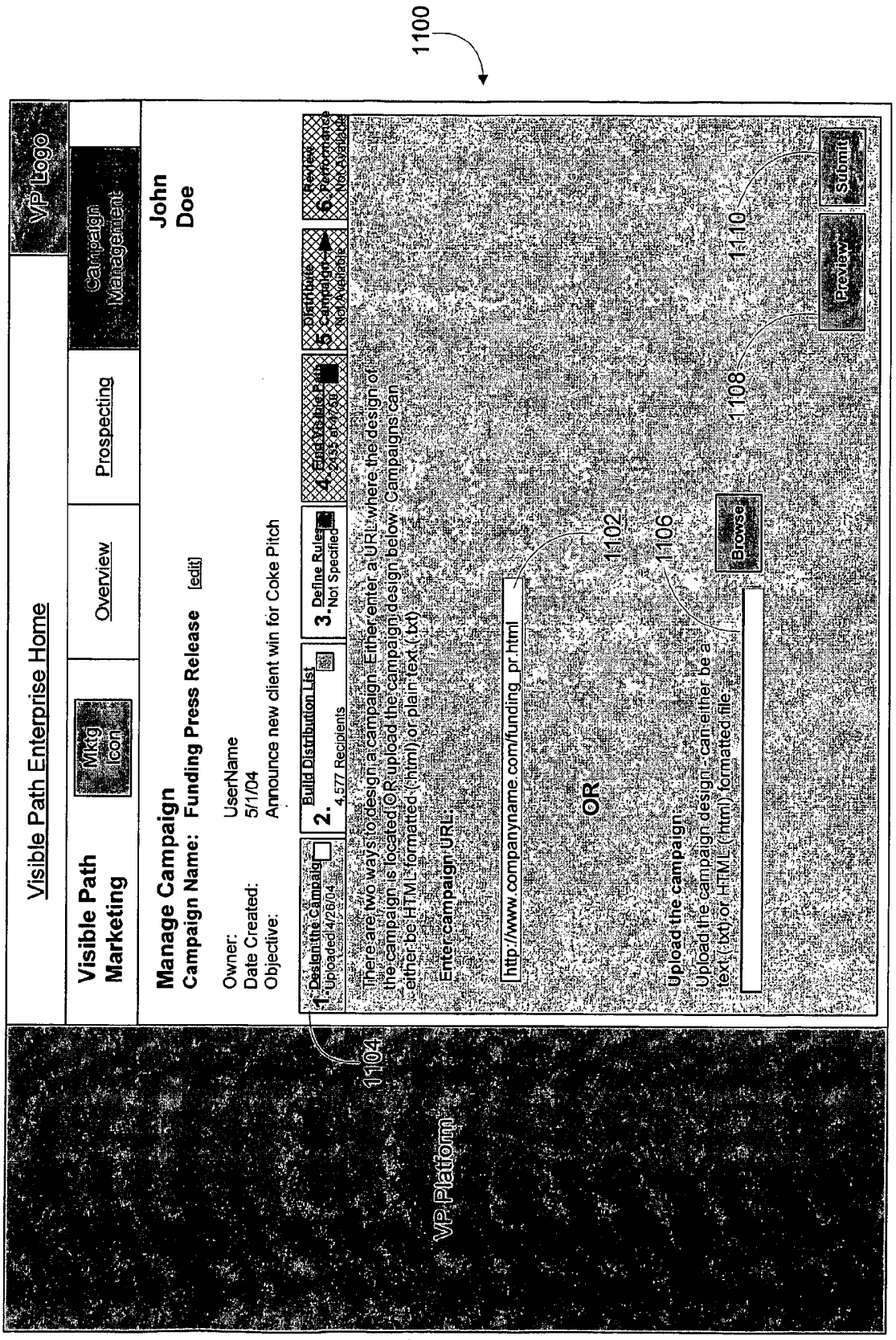

Visible Path Enterprise Home
Visible Path Marketing
Mktg Icon
Overview
Prospecting
Campaign Management
VP Logo
John Doe
Manage Campaigns
Manage your marketing campaigns by selecting the campaign name you wish to manage.
Select a specific campaign to manage below:
Status Legend:
A campaign consists of 4 stages:
Design the Campaign
Build Distribution List
Define Rules
Find Visible Path
Distribute Campaign
1004
1002
1022
1000
Campaigns 1 - 25 (of 74)
< Previous Page Page 1 of 3 Next Page >
1012
1014
1016
1018
1020
1006
1008
1010
Delete Owner Campaign Name Objective Date Created Date Sent # in List Status Response Rate
UserName Funding Press Release Announce new client win for Coke pitch 4/26/04 657 4.1 %
UserName New Client Win - Coke Detailed announcement to Marketing VPs about Coke win. 5/1/04 1322
UserName New Marketing Manger Announcing new hire of Jennifer Dow 3/26/04 3/31/04 67
UserName New Product Announc. Follow up to tradeshow product launch 3/21/04 457 Distribute Campaign
UserName New VP of Marketing Announcing new hire of Lynda Doe 2/26/04 3/5/04 788 2.2 %
Check All Uncheck All Delete
< Previous Page Page 1 of 3 Next Page >
VP Platform

FIG. 11


1100
VP Platform
Visible Path Enterprise Home
VP Logo
Visible Path Marketing
Mktg Icon
Overview
Prospecting
Campaign Management
John Doe
Manage Campaign
Campaign Name: Funding Press Release [edit]
Owner: UserName
Date Created: 5/1/04
Objective: Announce new client win for Coke Pitch
1. Design the Campaign
Uploaded 4/26/04
Build Distribution List
2. 4,577 Recipients
3. Define Rules
Not Specified
4. Email Validation Run
2,455 of 4,577
5. Campaign Not Available
6. Performance Not Available
1104
There are two ways to design a campaign. Either enter a URL where the design of the campaign is located OR upload the campaign design below. Campaigns can either be HTML formatted (.html) or plain text (.txt).
Enter campaign URL:
http://www.companyname.com/funding_pr.html
1102
OR
1106
Upload the campaign:
Upload the campaign design - can either be a text (.txt) or HTML (.html) formatted file.
Browse...
1108
1110
Preview
Submit

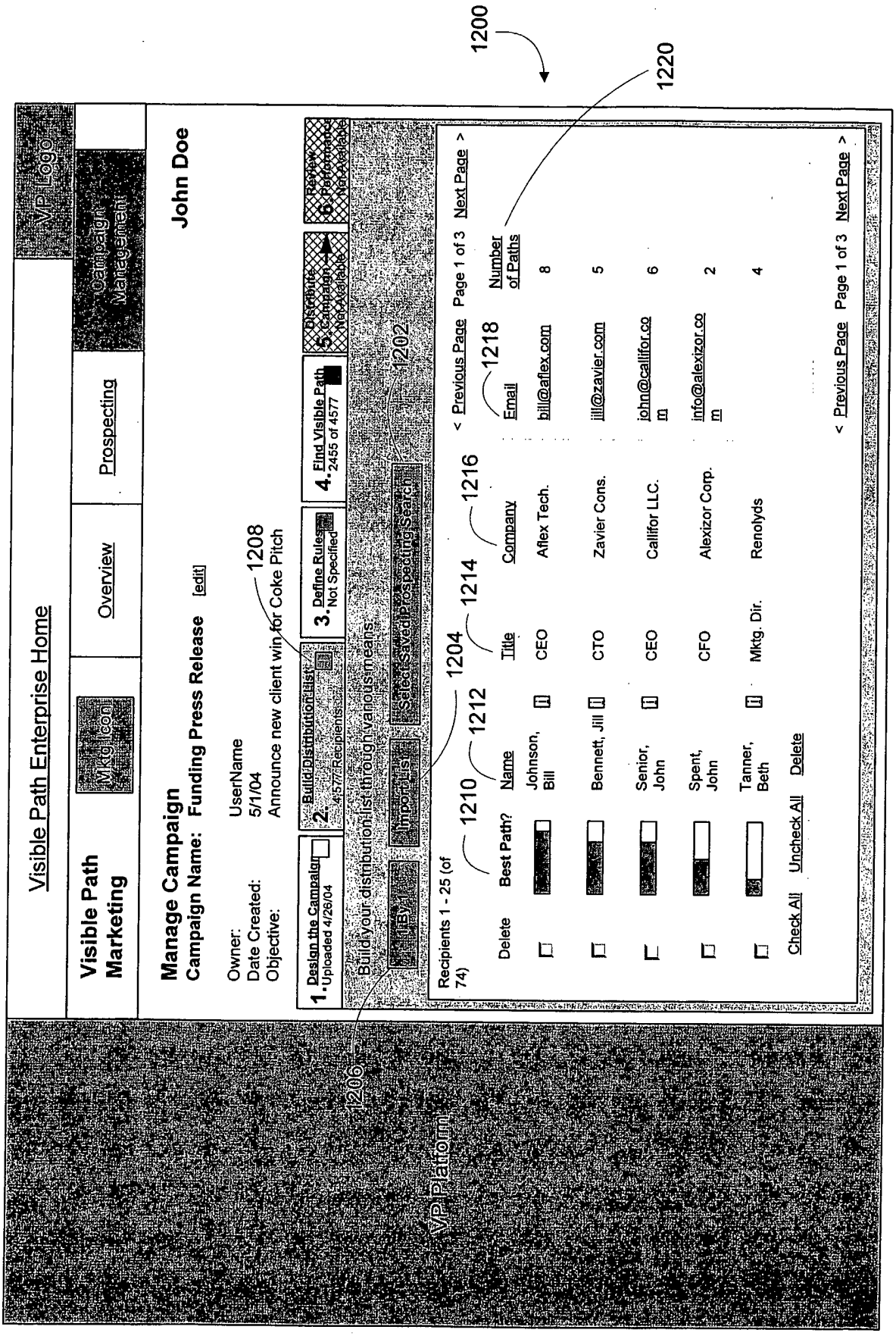

VP Platform
Visible Path Enterprise Home
VP Logo
Visible Path Marketing
Mktg Icon
Overview
Prospecting
Campaign Management
John Doe
Manage Campaign
Campaign Name: Funding Press Release [edit]
Owner: UserName
Date Created: 5/1/04
Objective: Announce new client win for Coke Pitch
1208
1. Design the Campaign Uploaded 4/26/04
2. Build Distribution List 4577 Recipients
3. Define Rules Not Specified
4. Find Visible Path 2455 of 4577
5. Distribute Campaign Not Available
6. Review Performance Not Available
Build your distribution list through various means:
Import List
Select Saved Prospecting Search
1202
1206
1200
1220
Recipients 1 - 25 (of 74)
< Previous Page Page 1 of 3 Next Page >
1210
1212
1204
1214
1216
1218
Delete
Best Path?
Name
Title
Company
Email
Number of Paths
Johnson, Bill
CEO
Aflex Tech.
bill@aflex.com
8
Bennett, Jill
CTO
Zavier Cons.
jill@zavier.com
5
Senior, John
CEO
Callifor LLC.
john@callifor.com
6
Spent, John
CFO
Alexizor Corp.
info@alexizor.com
2
Tanner, Beth
Mktg. Dir.
Renolyds
4
Check All Uncheck All Delete
< Previous Page Page 1 of 3 Next Page >

FIG. 12

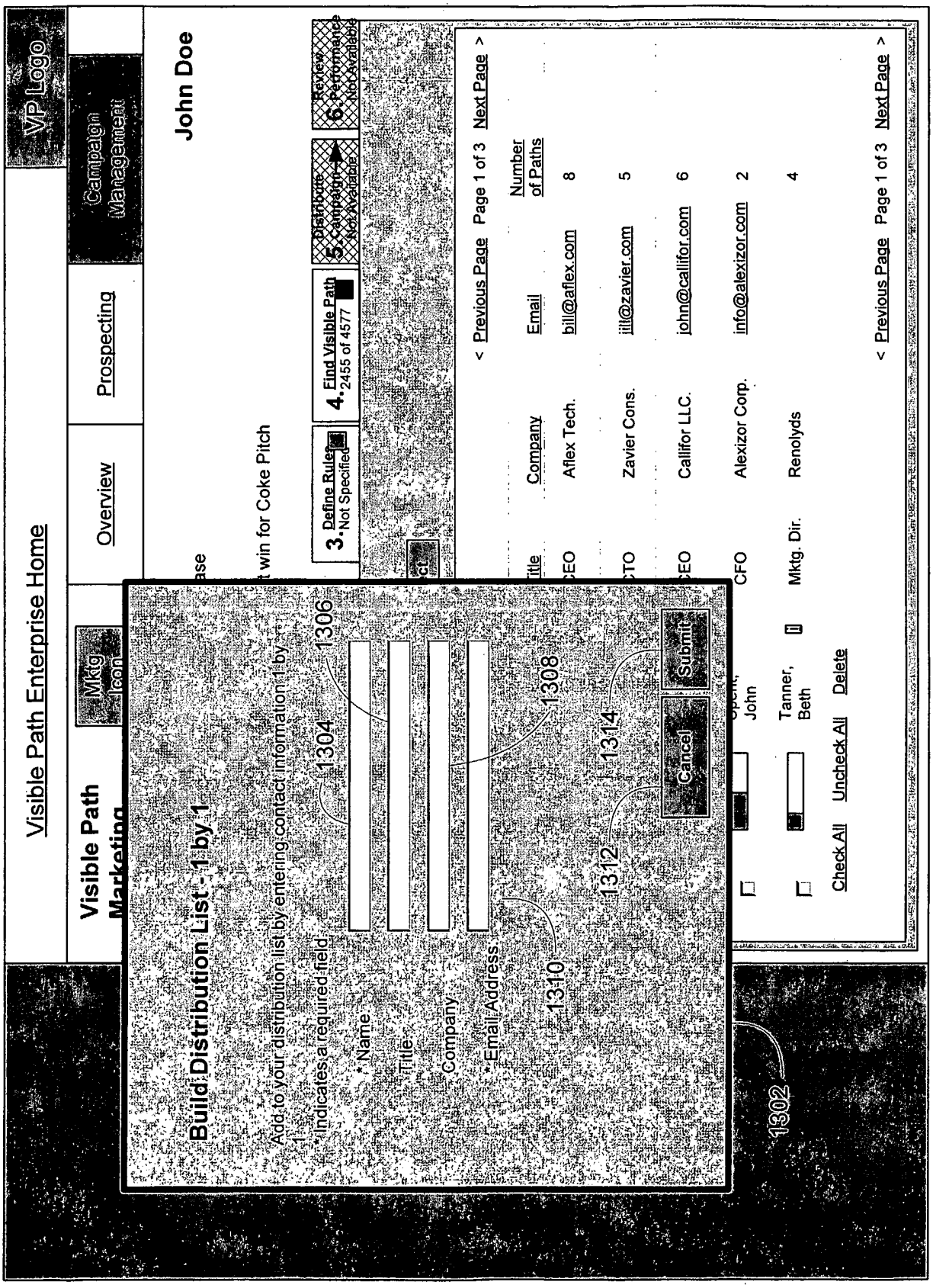

Visible Path Enterprise Home
Visible Path Marketing
Mktg Icon
Overview
Prospecting
Campaign Management
VP Logo
Build Distribution List - 1 by 1
Add to your distribution list by entering contact information 1 by 1.
* Indicates a required field.
1304
1306
*Name
Title
Company
*Email Address
1310
1308
1312
1314
Cancel
Submit
1302
John Doe
win for Coke Pitch
3. Define Rules Not Specified
4. Find Visible Path 2455 of 4577
5. Distribute Campaign Not Available
6. Review Performance Not Available
< Previous Page Page 1 of 3 Next Page >
Title
Company
Email
Number of Paths
CEO
Aflex Tech.
bill@aflex.com
8
CTO
Zavier Cons.
jill@zavier.com
5
CEO
Callifor LLC.
john@callifor.com
6
CFO
Alexizor Corp.
info@alexizor.com
2
Mktg. Dir.
Renolyds
4
Check All Uncheck All Delete
< Previous Page Page 1 of 3 Next Page >

FIG. 13A

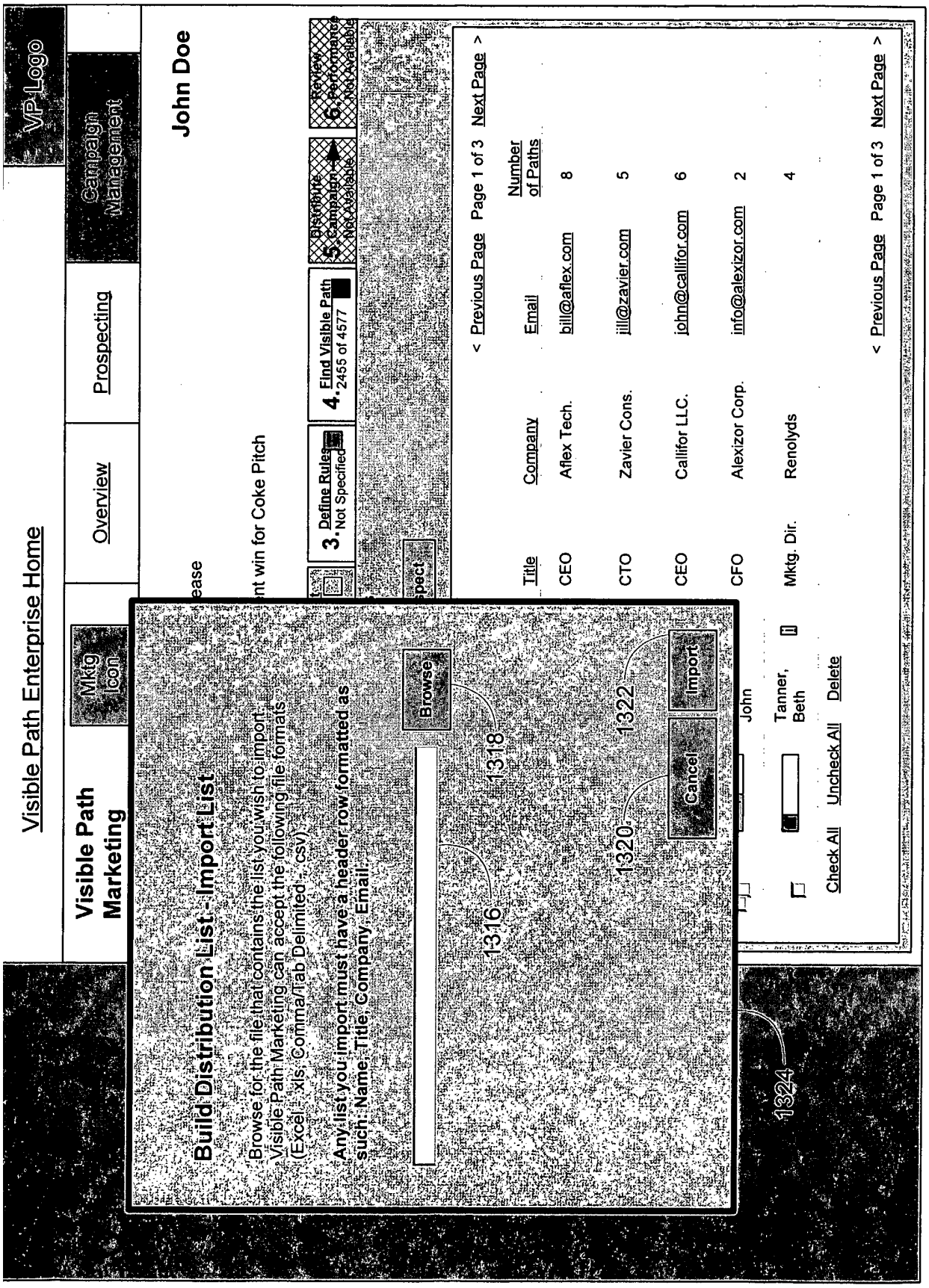

Visible Path Enterprise Home
VP Logo
Visible Path Marketing
Mktg Icon
Overview
Prospecting
Campaign Management
John Doe
Build Distribution List - Import List
Browse for the file that contains the list you wish to import.
Visible Path Marketing can accept the following file formats:
(Excel .xls, Comma/Tab Delimited .csv)
Any list you import must have a header row formatted as such: Name, Title, Company, Email.
Browse...
Cancel
Import
1316
1318
1320
1322
1324
3. Define Rules Not Specified
4. Find Visible Path 2455 of 4577
5. Distribute Campaign Not Available
6. Review Performance Not Available
< Previous Page Page 1 of 3 Next Page >
Title
Company
Email
Number of Paths
CEO
Aflex Tech.
bill@aflex.com
8
CTO
Zavier Cons.
jill@zavier.com
5
CEO
Califor LLC.
john@califor.com
6
CFO
Alexizor Corp.
info@alexizor.com
2
Mktg. Dir.
Renolyds
4
Tanner, Beth
John
Check All
Uncheck All
Delete

FIG. 13B

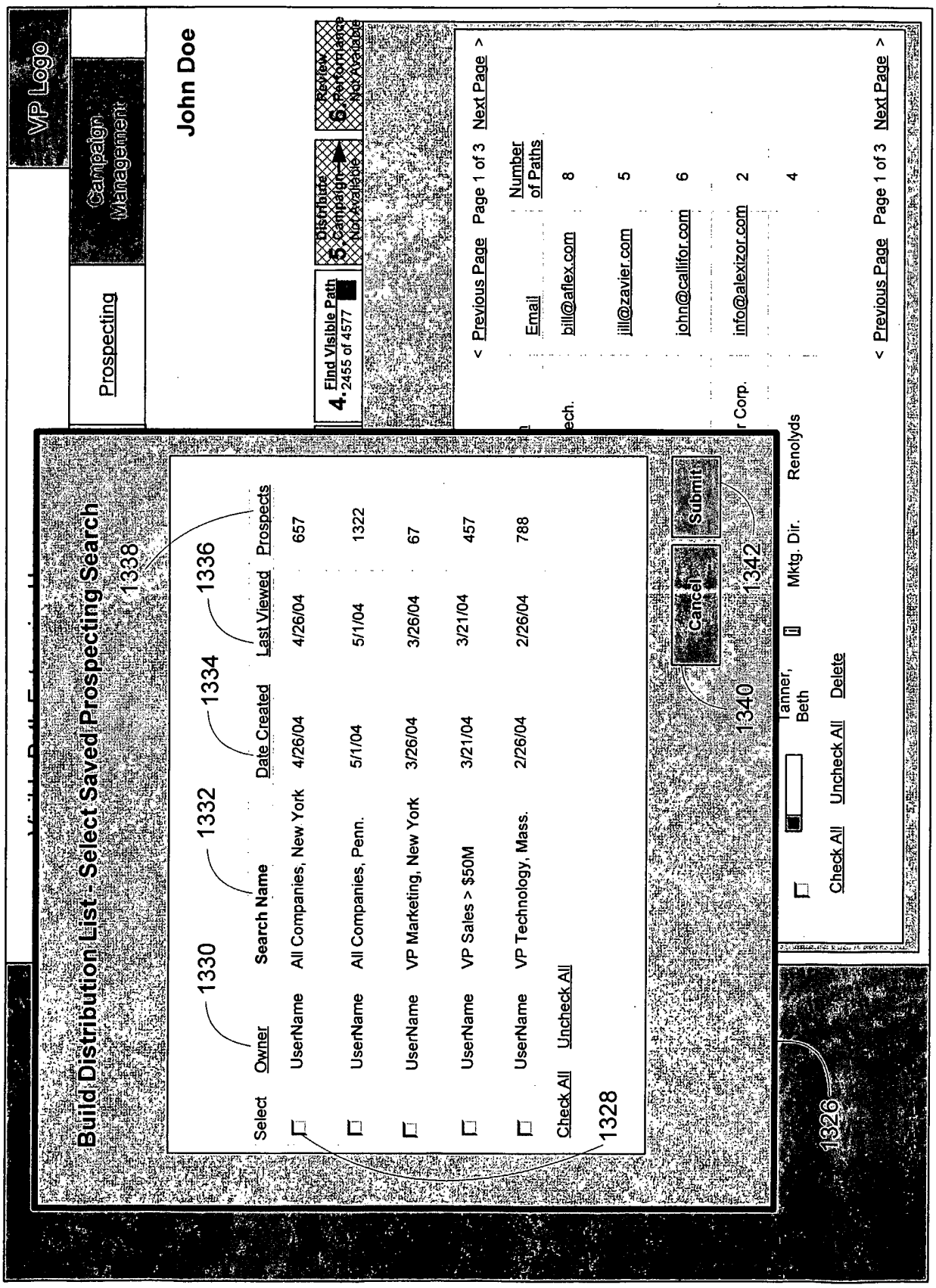

VP Logo
Campaign Management
Prospecting
John Doe
Build Distribution List - Select Saved Prospecting Search
1338
1330
1332
1334
1336
Select
Owner
Search Name
Date Created
Last Viewed
Prospects
UserName
All Companies, New York
4/26/04
4/26/04
657
UserName
All Companies, Penn.
5/1/04
5/1/04
1322
UserName
VP Marketing, New York
3/26/04
3/26/04
67
UserName
VP Sales > $50M
3/21/04
3/21/04
457
UserName
VP Technology, Mass.
2/26/04
2/26/04
788
Check All
Uncheck All
1328
Find Visible Path
2455 of 4577
4
Distribute Campaign
Not Available
5
Review Performance
Not Available
6
< Previous Page
Page 1 of 3
Next Page >
Email
Number of Paths
bill@aflex.com
8
jill@zavier.com
5
john@califor.com
6
info@alexizor.com
2
4
Tanner, Beth
Mktg. Dir.
Renolyds
Check All
Uncheck All
Delete
Cancel
Submit
1340
1342
1326

FIG. 13C

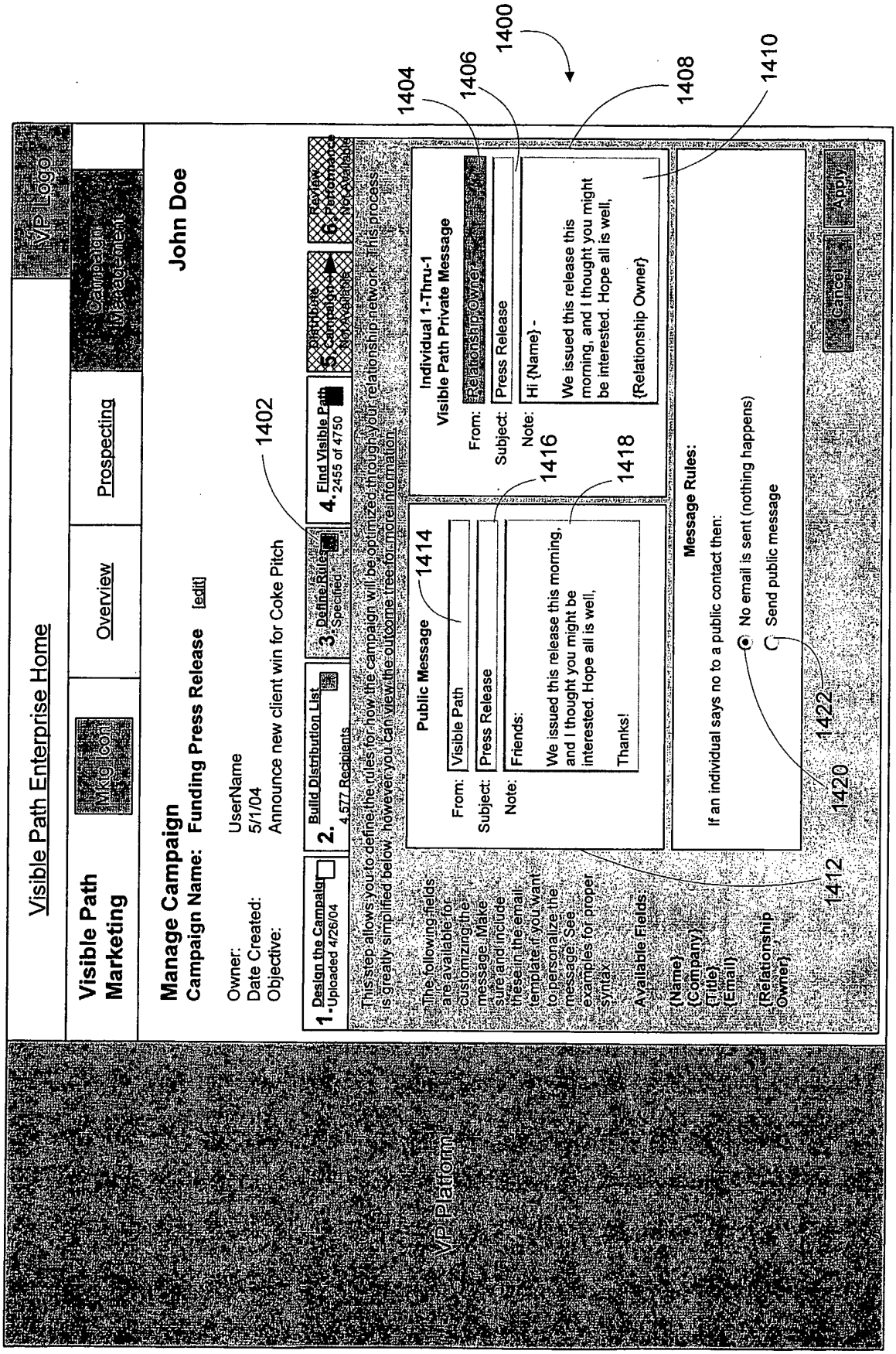

VP Platform
Visible Path Enterprise Home
Visible Path Marketing
Mktg con
Overview
Prospecting
Campaign Management
VP Logo
John Doe
Manage Campaign
Campaign Name: Funding Press Release [edit]
Owner: UserName
Date Created: 5/1/04
Objective: Announce new client win for Coke Pitch
1402
1. Design the Campaign Uploaded 4/26/04
2. Build Distribution List 4,577 Recipients
3. Define Rules Specified
4. Find Visible Path 2455 of 4750
5. Campaign Not Available
6. Review Performance Not Available
This step allows you to define the rules for how the campaign will be optimized through your relationship network. This process is greatly simplified below, however you can view the outcome tree for more information.
The following fields are available for customizing the message. Make sure and include these in the email template if you want to personalize the message. See examples for proper syntax.
Available Fields:
{Name}
{Company}
{Title}
{Email}
{Relationship Owner}
Public Message
1414
From: Visible Path
Subject: Press Release
Note: Friends:
We issued this release this morning, and I thought you might be interested. Hope all is well,
Thanks!
1416
1418
Individual 1-Thru-1
Visible Path Private Message
From: Relationship Owner
Subject: Press Release
Note: Hi {Name} -
We issued this release this morning, and I thought you might be interested. Hope all is well,
{Relationship Owner}
1404
1406
1400
1408
1410
Message Rules:
If an individual says no to a public contact then:
No email is sent (nothing happens)
Send public message
1412
1420
1422
Cancel
Apply

FIG. 14

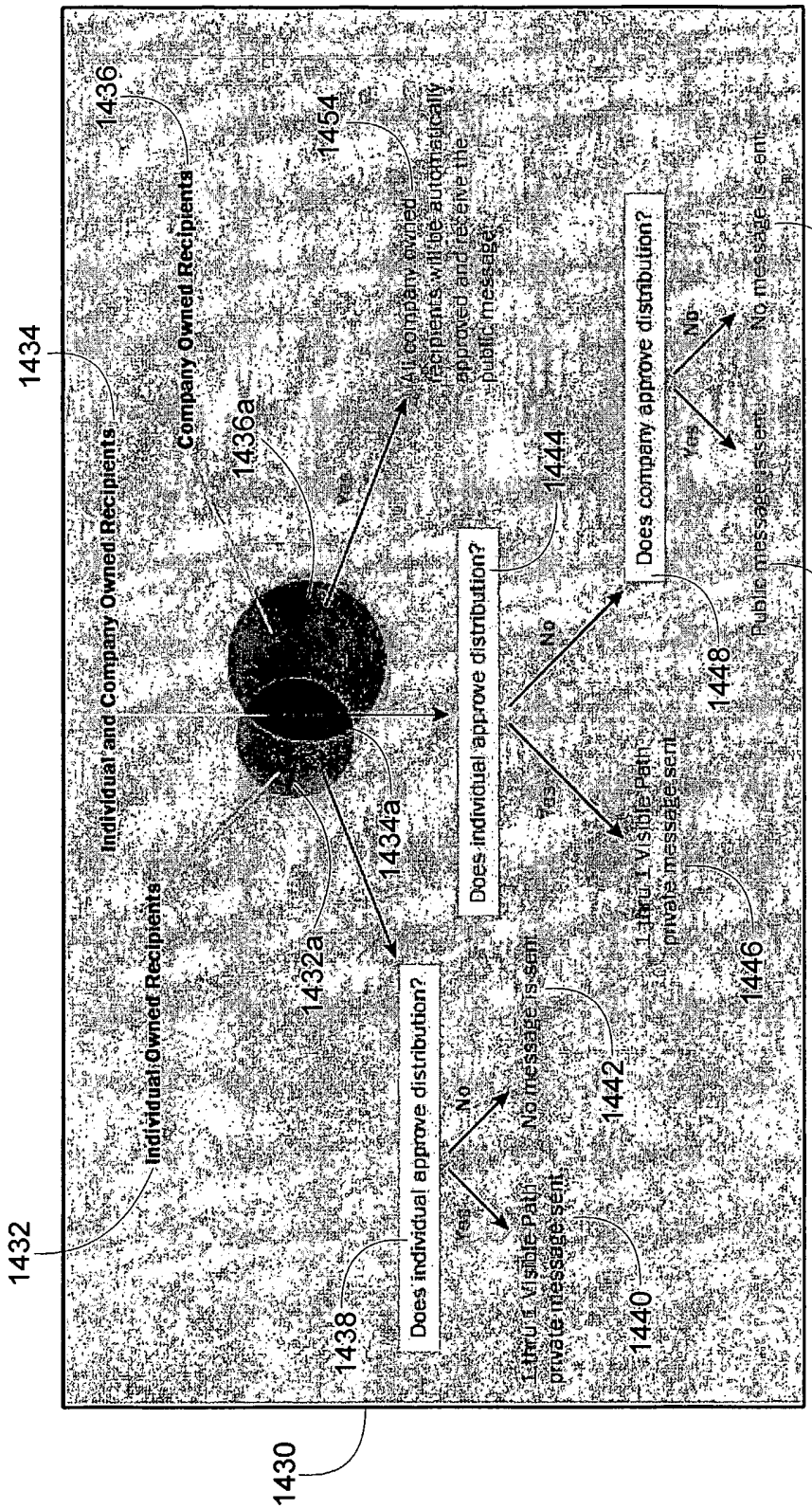

1432
Individual and Company Owned Recipients
Individual Owned Recipients
Company Owned Recipients
1436
1454
1434
1436a
All company owned recipients will be automatically approved and receive the public message
Yes
1434a
1432a
Does individual approve distribution?
1444
No
Yes
Does company approve distribution?
No
Yes
1438
1 thru 1 Visible Path
private message is sent
No message is sent
1442
1440
1 thru 1 Visible Path
private message is sent
1448
1446
Public message is sent
No message is sent
1452
1450
1430

Fig. 14A

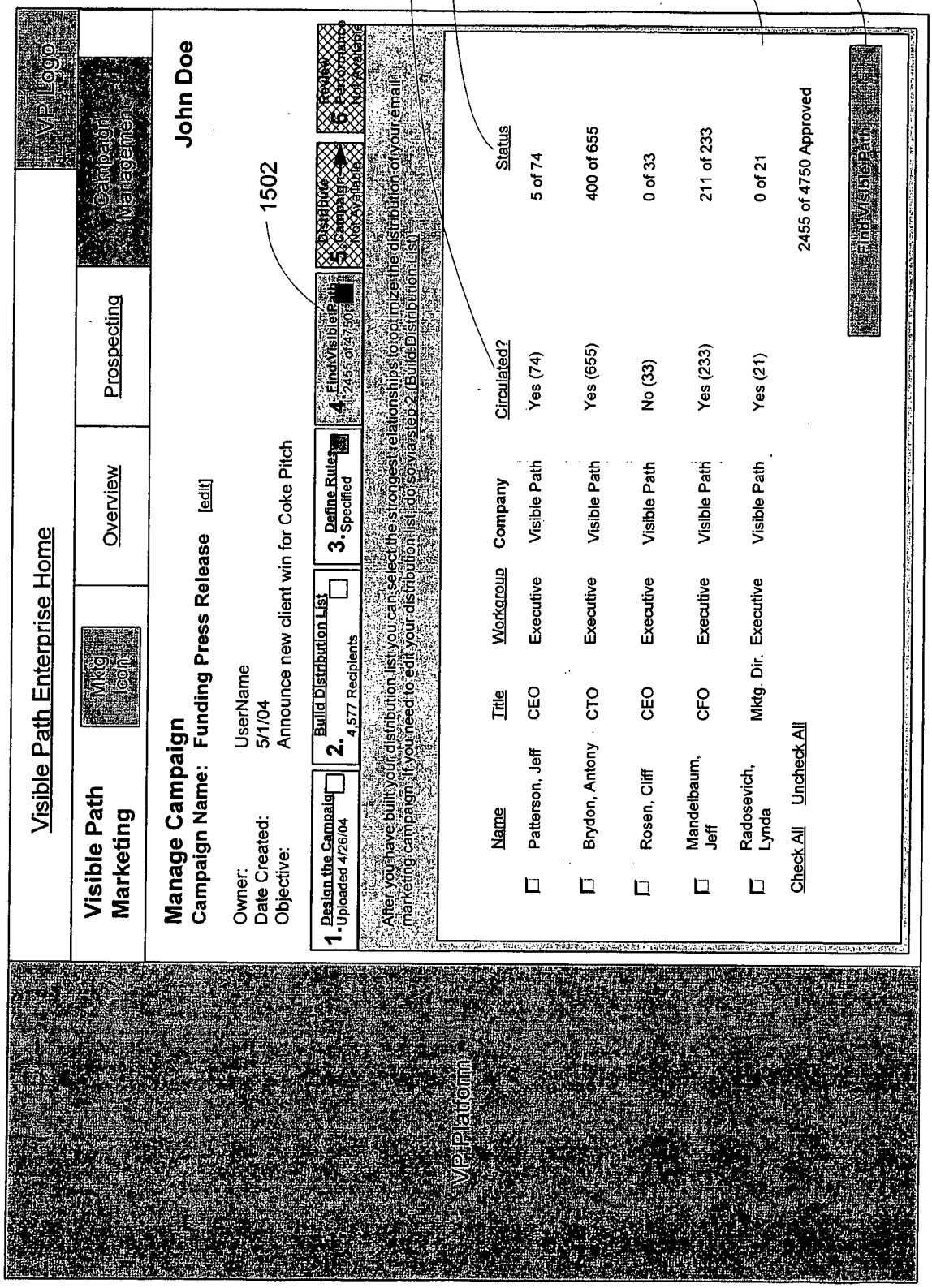

VP Platform
Visible Path Enterprise Home
VP Logo
Visible Path Marketing
Mktg Icon
Overview
Prospecting
Campaign Management
John Doe
Manage Campaign
Campaign Name: Funding Press Release [edit]
Owner: UserName
Date Created: 5/1/04
Objective: Announce new client win for Coke Pitch
1502
1. Design the Campaign Uploaded 4/26/04
2. Build Distribution List 4,577 Recipients
3. Define Rules Specified
4. Find Visible Path 2455 of 4750
5. Distribute Campaign Not Available
6. Review Performance Not Available
After you have built your distribution list, you can select the strongest relationships to optimize the distribution of your email marketing campaign. If you need to edit your distribution list, do so via step 2 (Build Distribution List).
1504
1506
Name
Title
Workgroup
Company
Circulated?
Status
Patterson, Jeff CEO Executive Visible Path Yes (74) 5 of 74
Brydon, Antony CTO Executive Visible Path Yes (655) 400 of 655
Rosen, Cliff CEO Executive Visible Path No (33) 0 of 33
Mandelbaum, Jeff CFO Executive Visible Path Yes (233) 211 of 233
Radosevich, Lynda Mktg. Dir. Executive Visible Path Yes (21) 0 of 21
2455 of 4750 Approved
1508
1510
Check All Uncheck All
Find Visible Path

FIG. 15

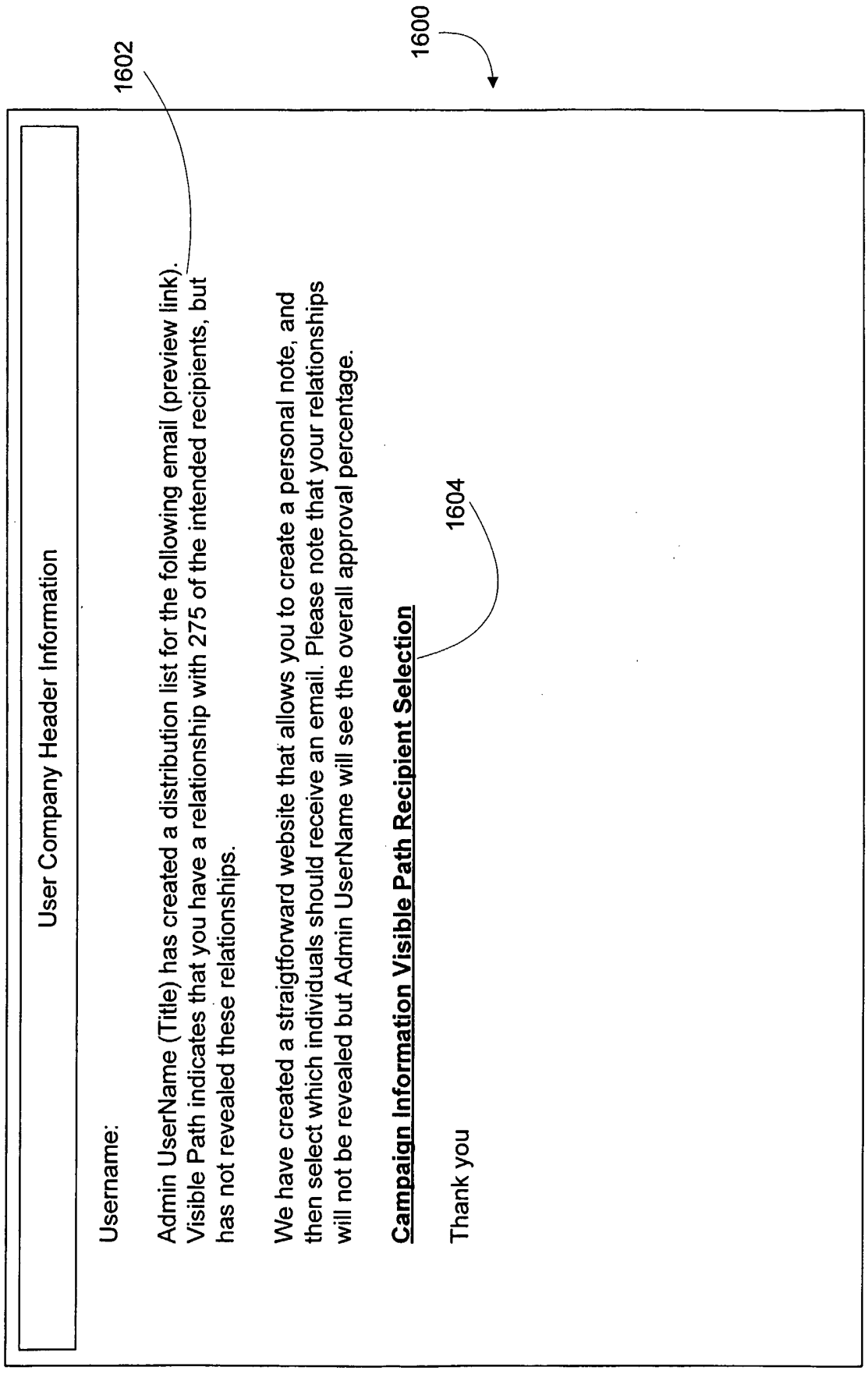

1600
1602
User Company Header Information
Username:
Admin UserName (Title) has created a distribution list for the following email (preview link).
Visible Path indicates that you have a relationship with 275 of the intended recipients, but has not revealed these relationships.
We have created a straigtforward website that allows you to create a personal note, and then select which individuals should receive an email. Please note that your relationships will not be revealed but Admin UserName will see the overall approval percentage.
1604
Campaign Information Visible Path Recipient Selection
Thank you

FIG. 16

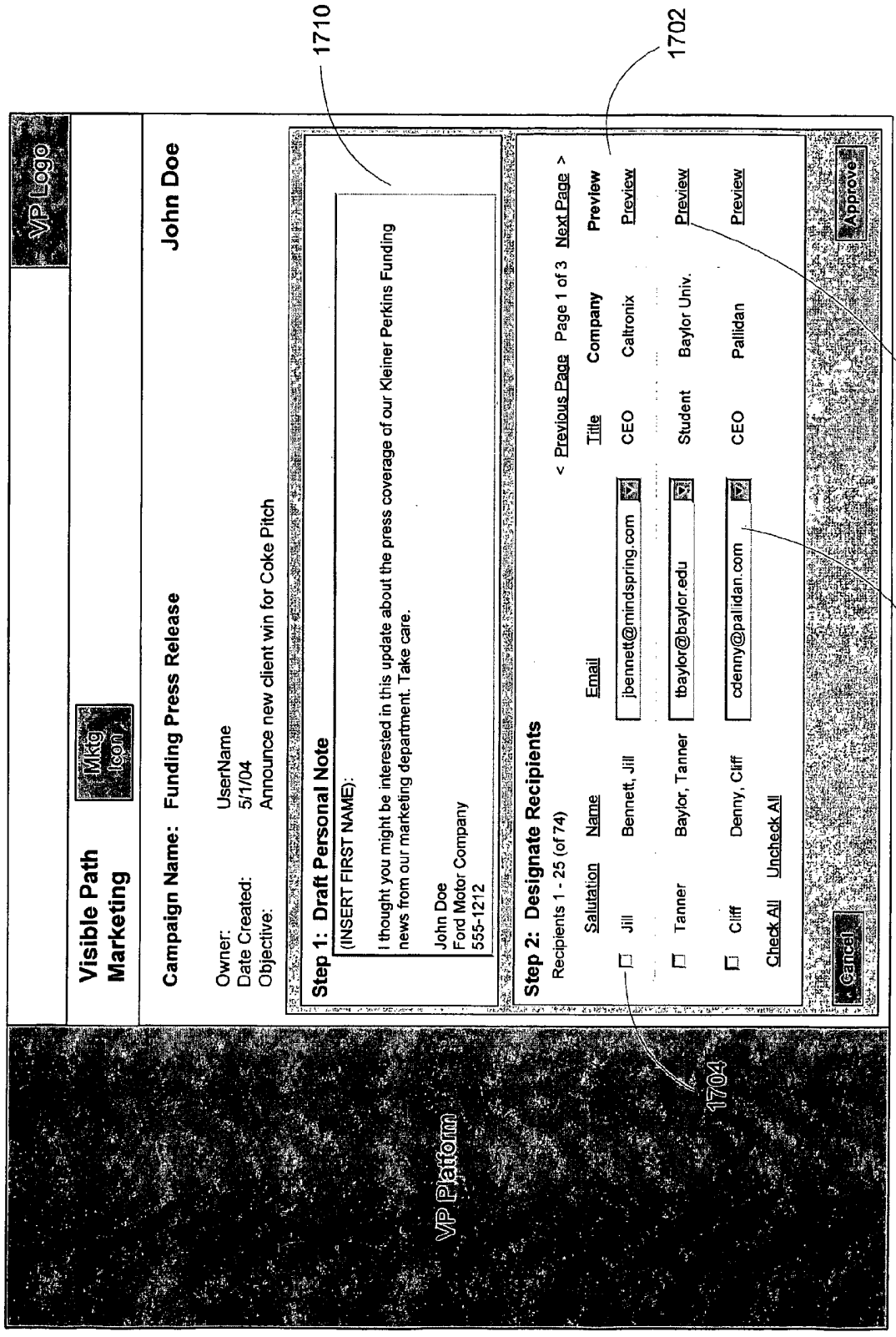

VP Logo
Visible Path Marketing
Mktg Icon
Campaign Name: Funding Press Release
John Doe
Owner: UserName
Date Created: 5/1/04
Objective: Announce new client win for Coke Pitch
Step 1: Draft Personal Note
(INSERT FIRST NAME):
I thought you might be interested in this update about the press coverage of our Kleiner Perkins Funding news from our marketing department. Take care.
John Doe
Ford Motor Company
555-1212
Step 2: Designate Recipients
Recipients 1 - 25 (of 74)
< Previous Page Page 1 of 3 Next Page >
Salutation Name Email Title Company Preview
Jill Bennett, Jill jbennett@mindspring.com CEO Caltronix Preview
Tanner Baylor, Tanner tbaylor@baylor.edu Student Baylor Univ. Preview
Cliff Denny, Cliff cdenny@pallidan.com CEO Pallidan Preview
Check All Uncheck All
Cancel
Approve
VP Platform
1704
1706
1708
1702
1710

FIG. 17

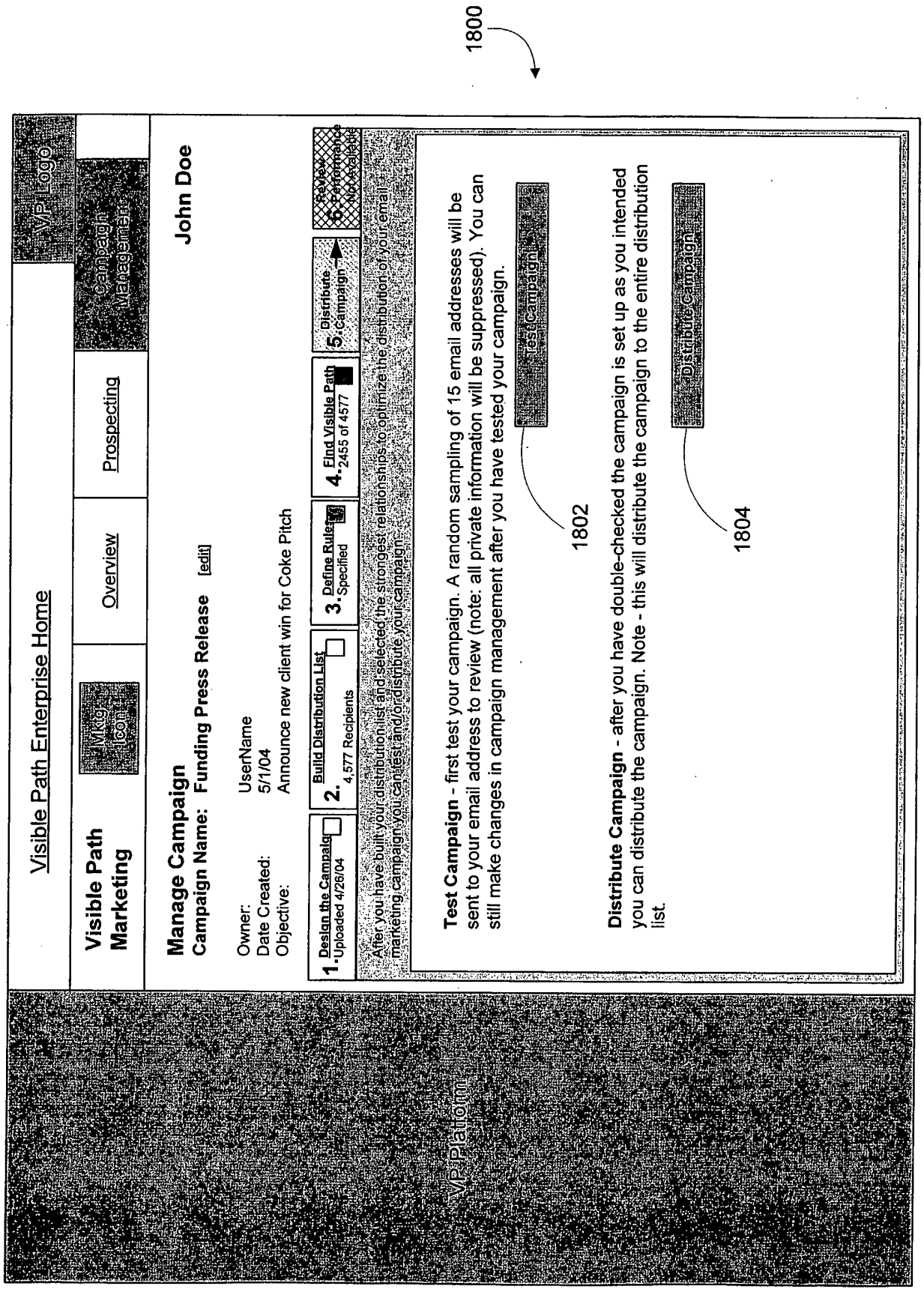

1800
Visible Path Enterprise Home
VP Logo
Visible Path Marketing
Overview
Prospecting
Campaign Management
John Doe
Manage Campaign
Campaign Name: Funding Press Release [edit]
Owner: UserName
Date Created: 5/1/04
Objective: Announce new client win for Coke Pitch
1. Design the Campaign Uploaded 4/26/04
2. Build Distribution List 4,577 Recipients
3. Define Rules Specified
4. Find Visible Path 2455 of 4577
5. Distribute Campaign
6. Review Performance
After you have built your distribution list and selected the strongest relationships to optimize the distribution of your email marketing campaign you can test and/or distribute your campaign.
Test Campaign - first test your campaign. A random sampling of 15 email addresses will be sent to your email address to review (note: all private information will be suppressed). You can still make changes in campaign management after you have tested your campaign.
Test Campaign
1802
Distribute Campaign - after you have double-checked the campaign is set up as you intended you can distribute the campaign. Note - this will distribute the campaign to the entire distribution list.
Distribute Campaign
1804
VP Platform

FIG. 18

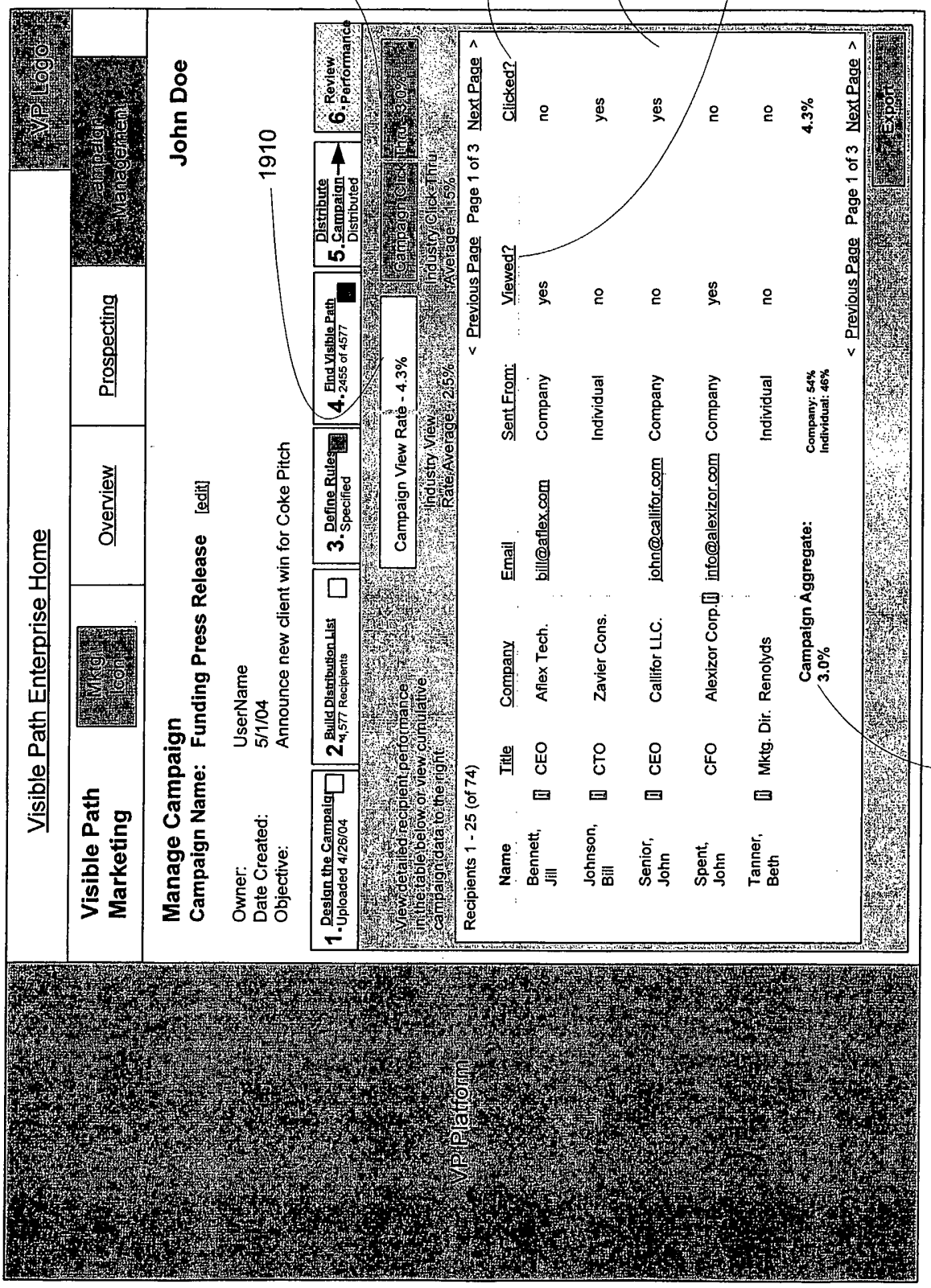

VP Platform
Visible Path Enterprise Home
VP Logo
Visible Path Marketing
MKG Con
Overview
Prospecting
Campaign Management
John Doe
Manage Campaign
Campaign Name: Funding Press Release [edit]
Owner: UserName
Date Created: 5/1/04
Objective: Announce new client win for Coke Pitch
1. Design the Campaign Uploaded 4/26/04
2. Build Distribution List 4,577 Recipients
3. Define Rules Specified
4. Find Visible Path 2455 of 4577
5. Campaign Distributed
6. Review Performance
Campaign View Rate - 4.3%
Campaign Click Thru - 3.0%
Industry View Rate/Average - 2.5%
Industry Click-Thru Average - 1.5%
View detailed recipient performance in the table below, or view cumulative campaign data to the right.
Recipients 1 - 25 (of 74)
< Previous Page Page 1 of 3 Next Page >
Name Title Company Email Sent From: Viewed? Clicked?
Bennett, Jill CEO Aflex Tech. bill@aflex.com Company yes no
Johnson, Bill CTO Zavier Cons. Individual no yes
Senior, John CEO Callifor LLC. john@callifor.com Company no yes
Spent, John CFO Alexizor Corp. info@alexizor.com Company yes no
Tanner, Beth Mktg. Dir. Renolyds Individual no no
Campaign Aggregate: 3.0%
Company: 54%
Individual: 46%
4.3%
< Previous Page Page 1 of 3 Next Page >
Export
1900
1902
1904
1906
1908
1910
1912

FIG. 19

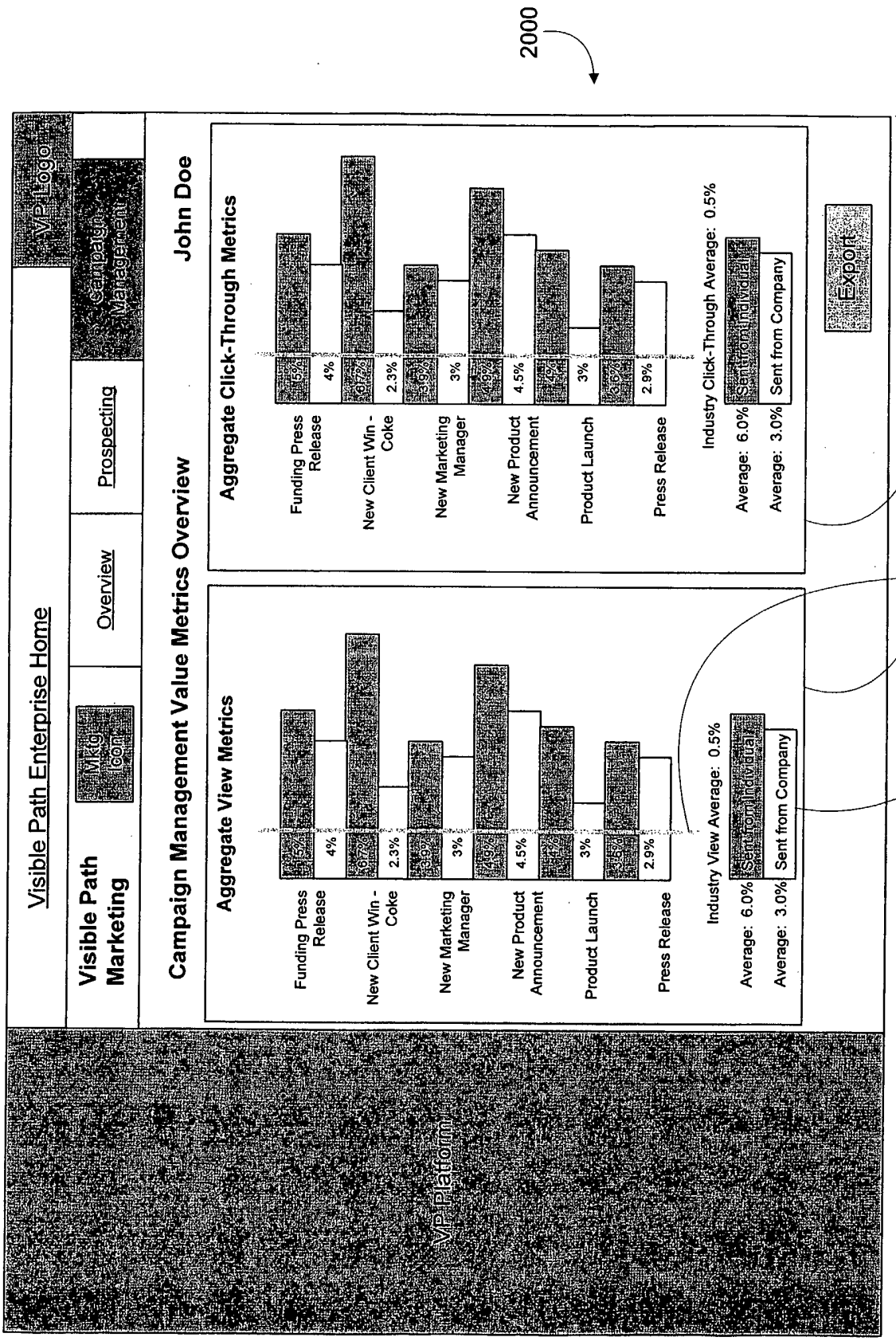

2000
Visible Path Enterprise Home
Visible Path Marketing
Mktg Icon
Overview
Prospecting
Campaign Management
VP Logo
John Doe
Campaign Management Value Metrics Overview
Aggregate View Metrics
Aggregate Click-Through Metrics
Funding Press Release
New Client Win - Coke
New Marketing Manager
New Product Announcement
Product Launch
Press Release
5%
4%
2.3%
3%
4.5%
3%
2.9%
Industry View Average: 0.5%
Industry Click-Through Average: 0.5%
Average: 6.0%
Sent from Individual
Average: 3.0%
Sent from Company
Export
VP Platform
2002
2004
2006
2008

FIG. 20

Fig. 21

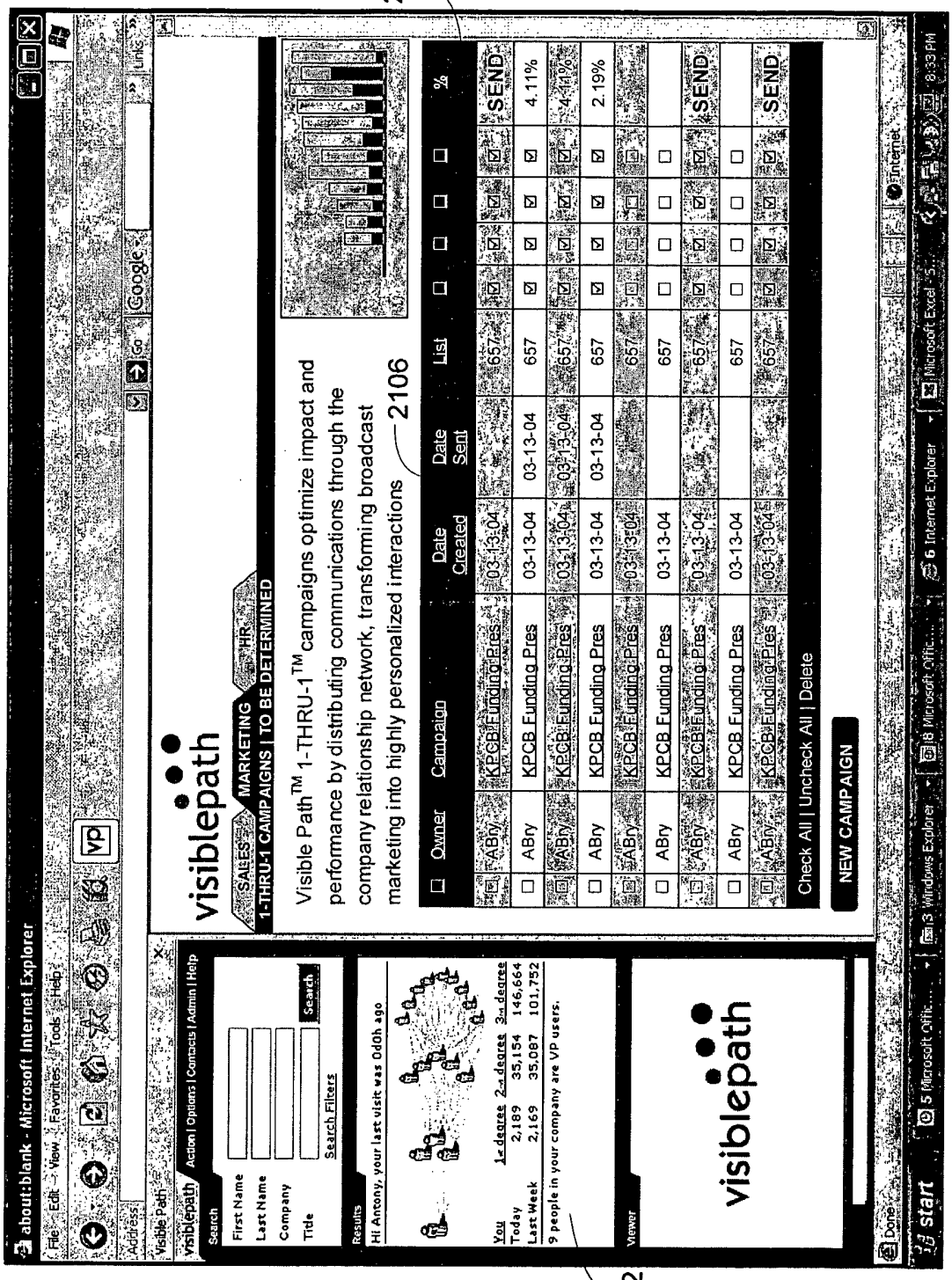

2102
2104
2106
about:blank - Microsoft Internet Explorer
visiblepath
SALES
MARKETING
HR
1-THRU-1 CAMPAIGNS | TO BE DETERMINED
Visible Path™ 1-THRU-1™ campaigns optimize impact and performance by distributing communications through the company relationship network, transforming broadcast marketing into highly personalized interactions
Owner
Campaign
Date Created
Date Sent
List
%
KPCB Funding Pres
03-13-04
657
SEND
4.11%
2.19%
Check All | Uncheck All | Delete
NEW CAMPAIGN
Search
First Name
Last Name
Company
Title
Search Filters
Results
Hi Antony, your last visit was 0d0h ago
You
Today
Last Week
1e degree
2,189
2,169
2nd degree
35,154
35,087
3rd degree
146,664
101,752
9 people in your company are VP users.
Viewer
visiblepath

Fig. 22

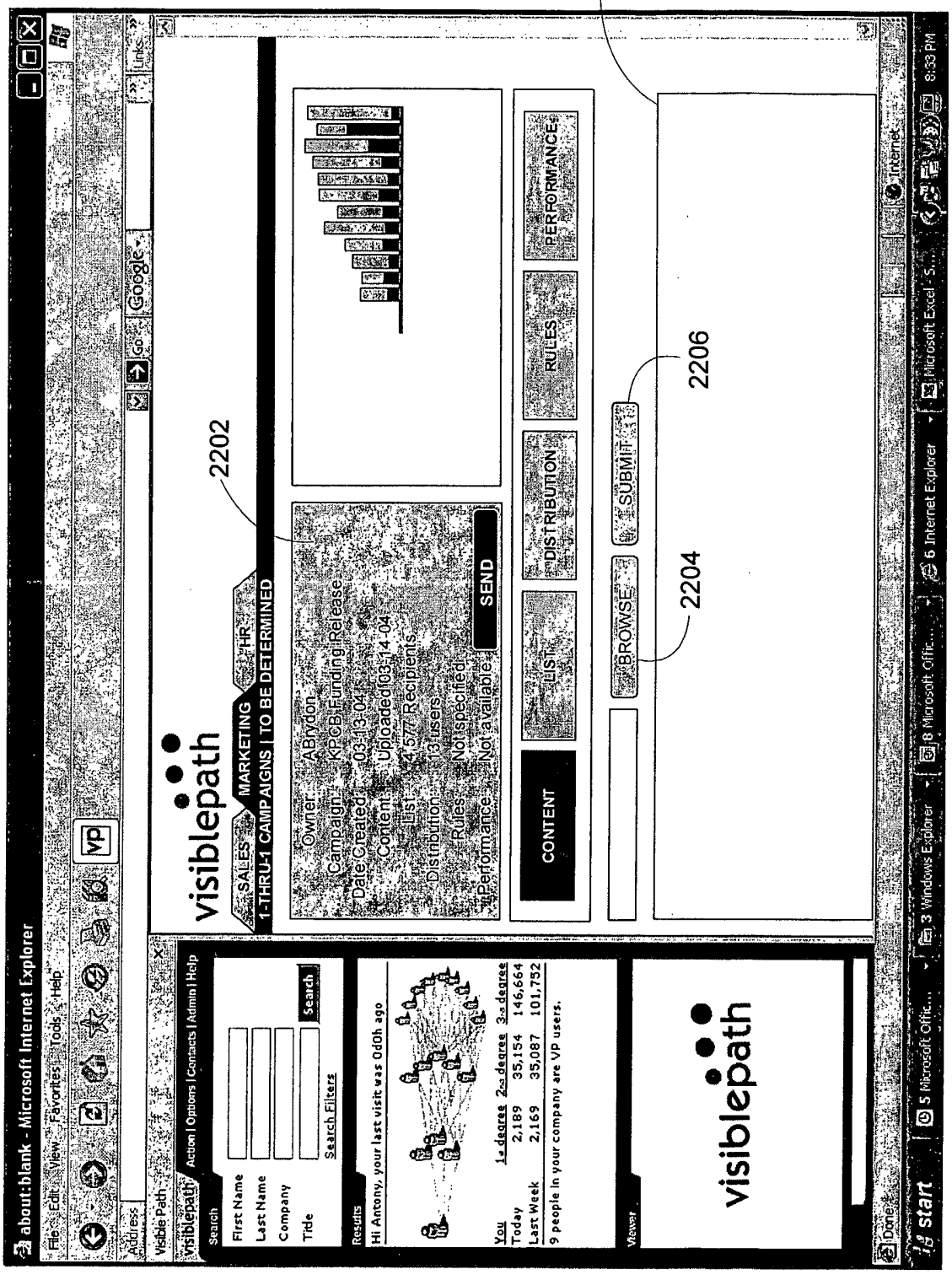

about:blank - Microsoft Internet Explorer
visiblepath
SALES
MARKETING
HR
1-THRU-1 CAMPAIGNS | TO BE DETERMINED
2202
2208
2206
2204
BROWSE
SUBMIT
CONTENT
LIST
DISTRIBUTION
RULES
PERFORMANCE
SEND
Search
Results
Viewer

Fig. 23

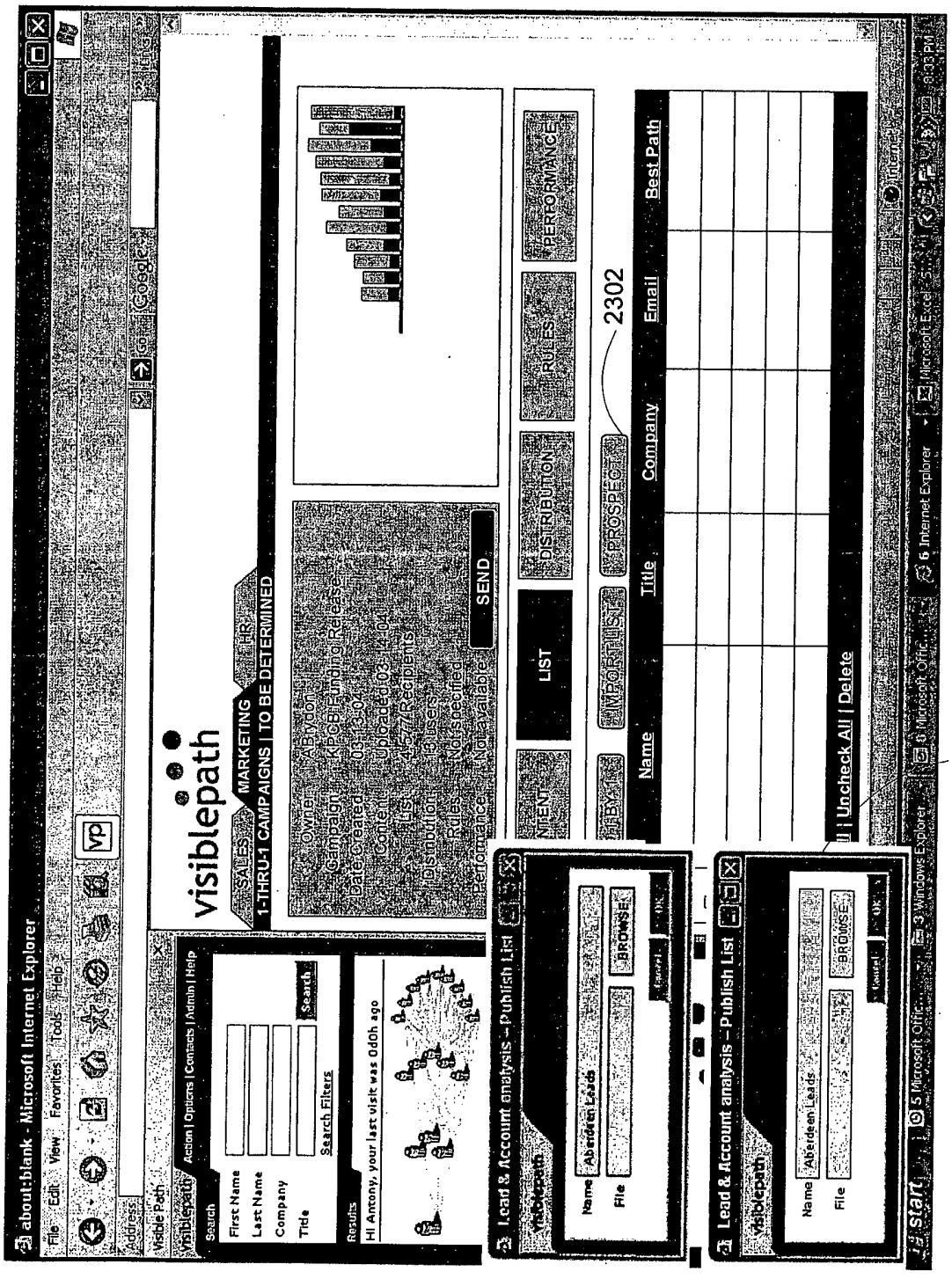

about:blank - Microsoft Internet Explorer
visiblepath
SALES
MARKETING
HR
1-THRU-1 CAMPAIGNS | TO BE DETERMINED
Search
First Name
Last Name
Company
Title
Search
Search Filters
Results
Hi Antony, your last visit was 0doh ago
Lead & Account analysis - Publish List
Name
File
BROWSE
Cancel
OK
LIST
DISTRIBUTION
RULES
PERFORMANCE
IMPORT LIST
PROSPECT
Name
Title
Company
Email
Best Path
Uncheck All | Delete
2302
2304

Fig. 24

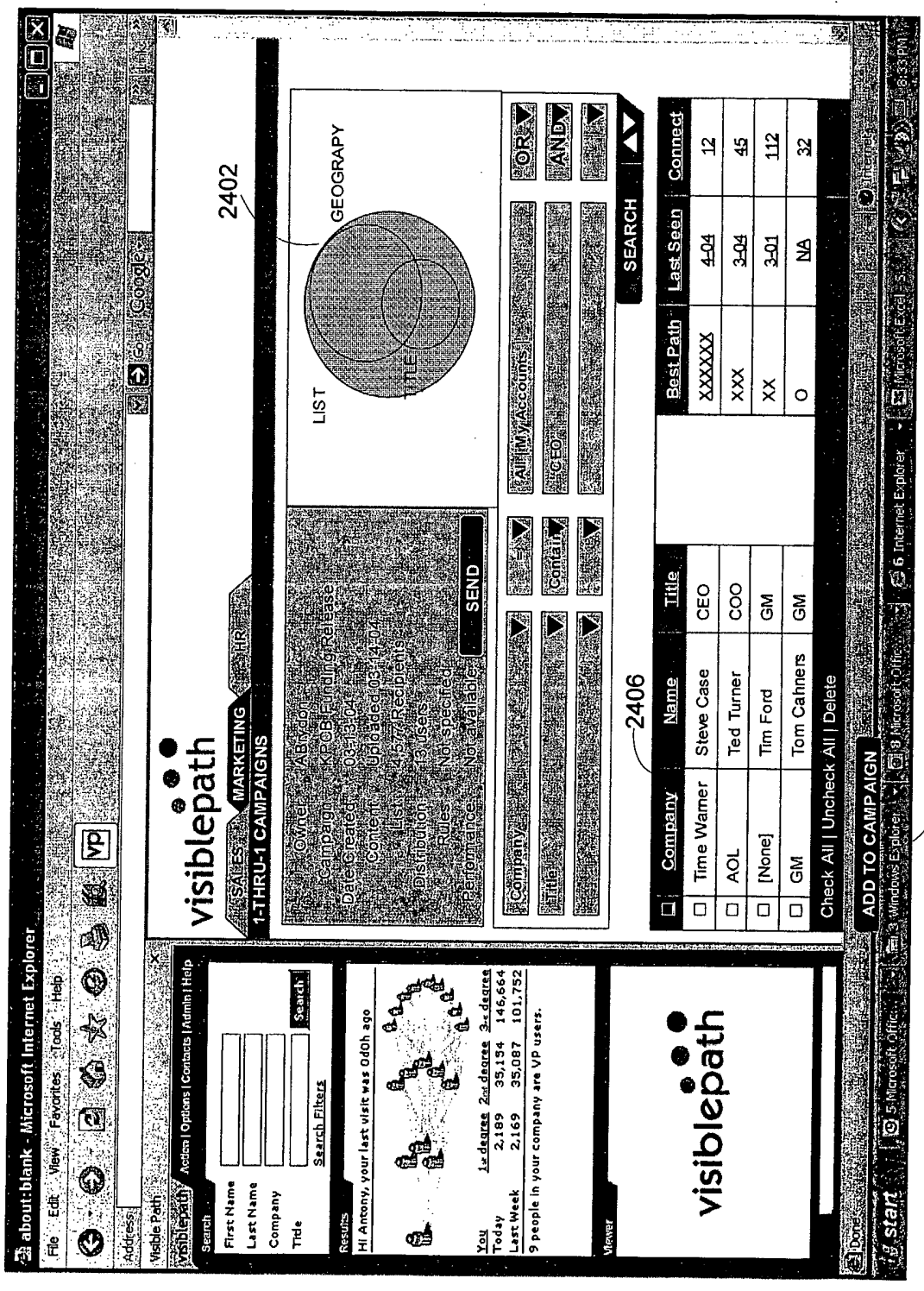

about:blank - Microsoft Internet Explorer
visiblepath
SALES
MARKETING
HR
1-THRU-1 CAMPAIGNS
2402
LIST
GEOGRAPY
TITLE
SEND
SEARCH
Company
Name
Title
Best Path
Last Seen
Connect
Time Warner
Steve Case
CEO
XXXXXX
4-04
12
AOL
Ted Turner
COO
XXX
3-04
45
[None]
Tim Ford
GM
XX
3-01
112
GM
Tom Cahners
GM
O
NA
32
Check All | Uncheck All | Delete
ADD TO CAMPAIGN
2406
2404

Fig. 25

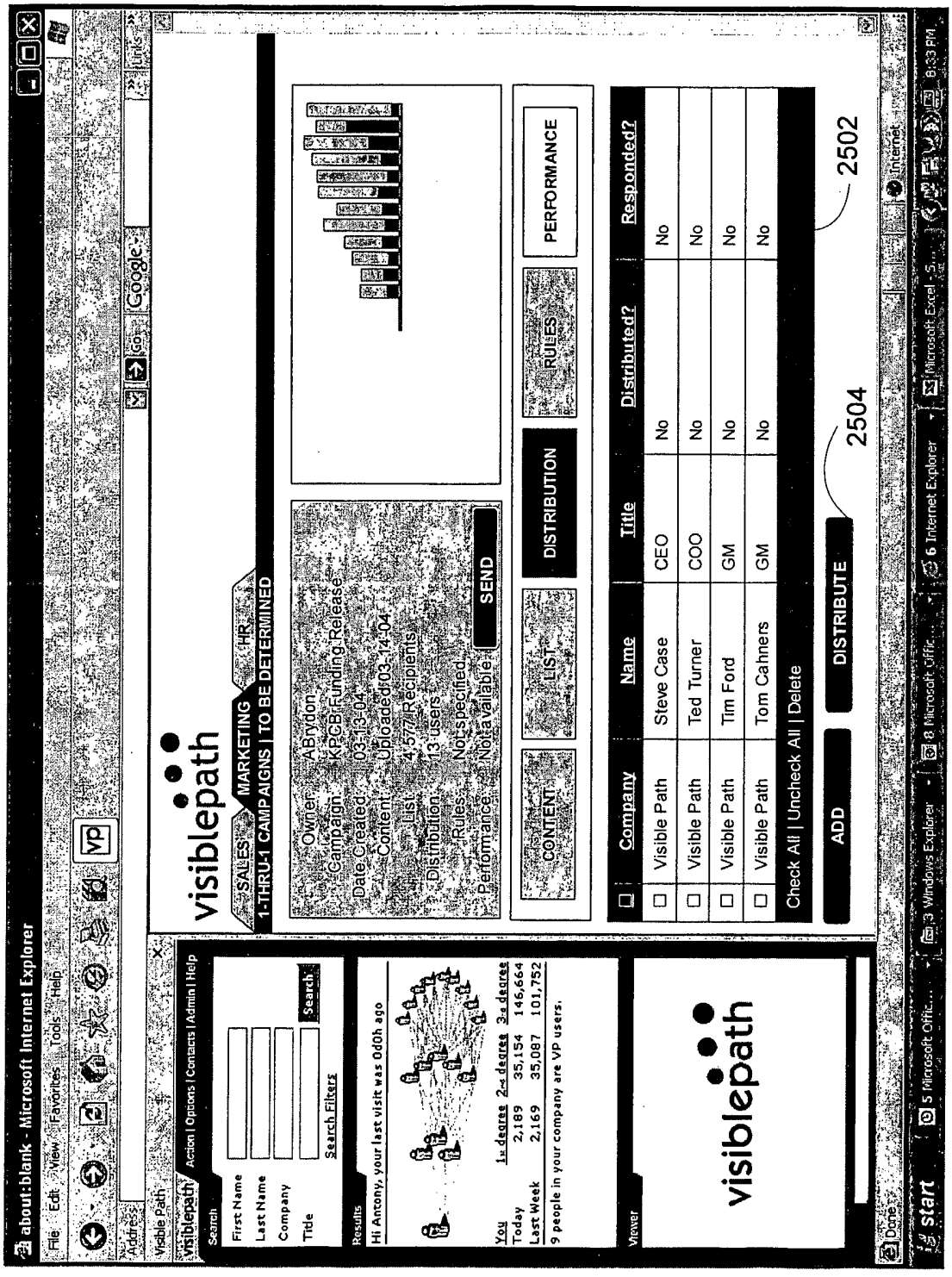

about:blank - Microsoft Internet Explorer
visiblepath
SALES
MARKETING
HR
1-THRU-1 CAMPAIGNS | TO BE DETERMINED
CONTENT
LIST
DISTRIBUTION
RULES
PERFORMANCE
SEND
ADD
DISTRIBUTE
Check All | Uncheck All | Delete
2502
2504

Fig. 26

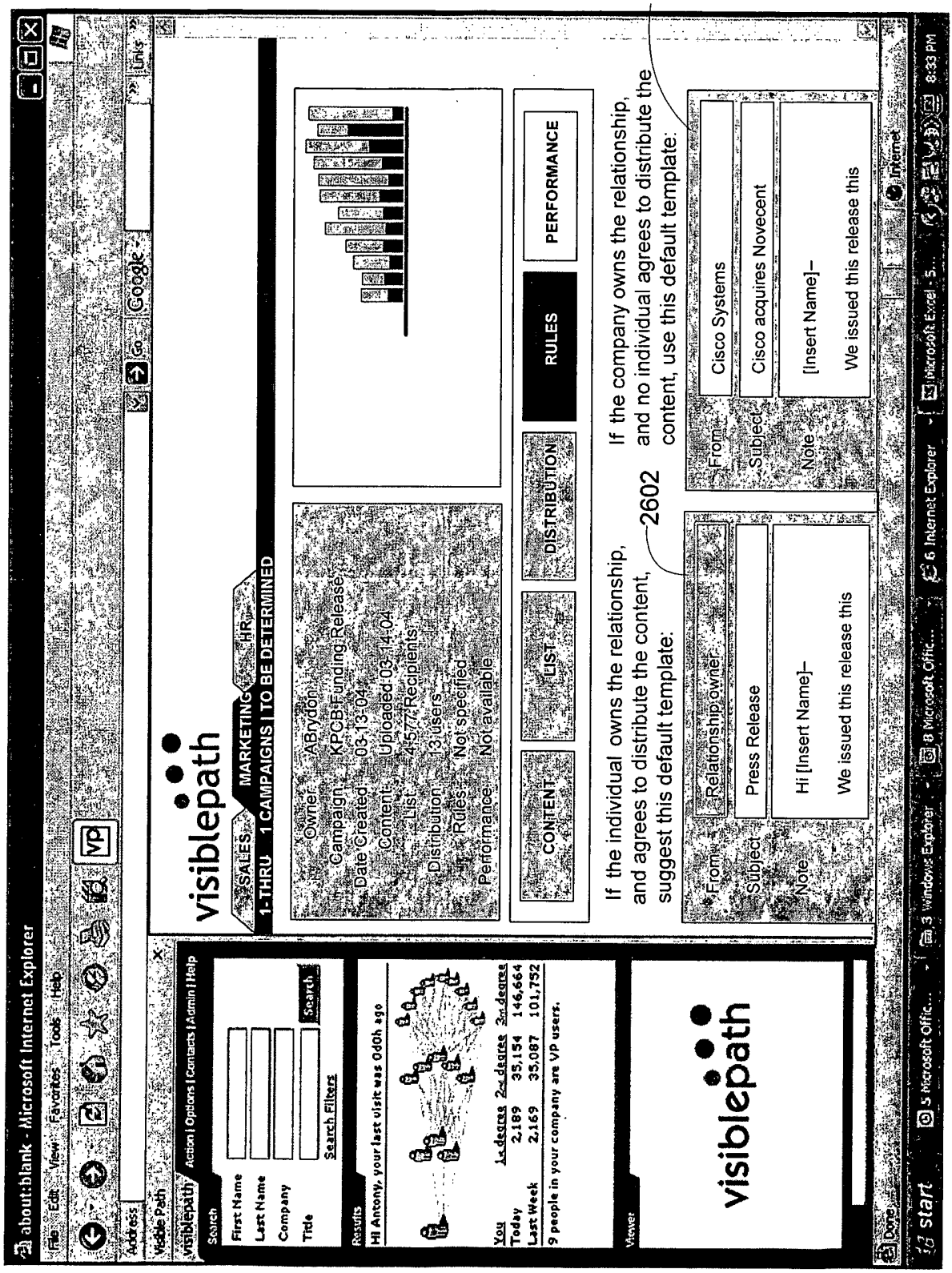
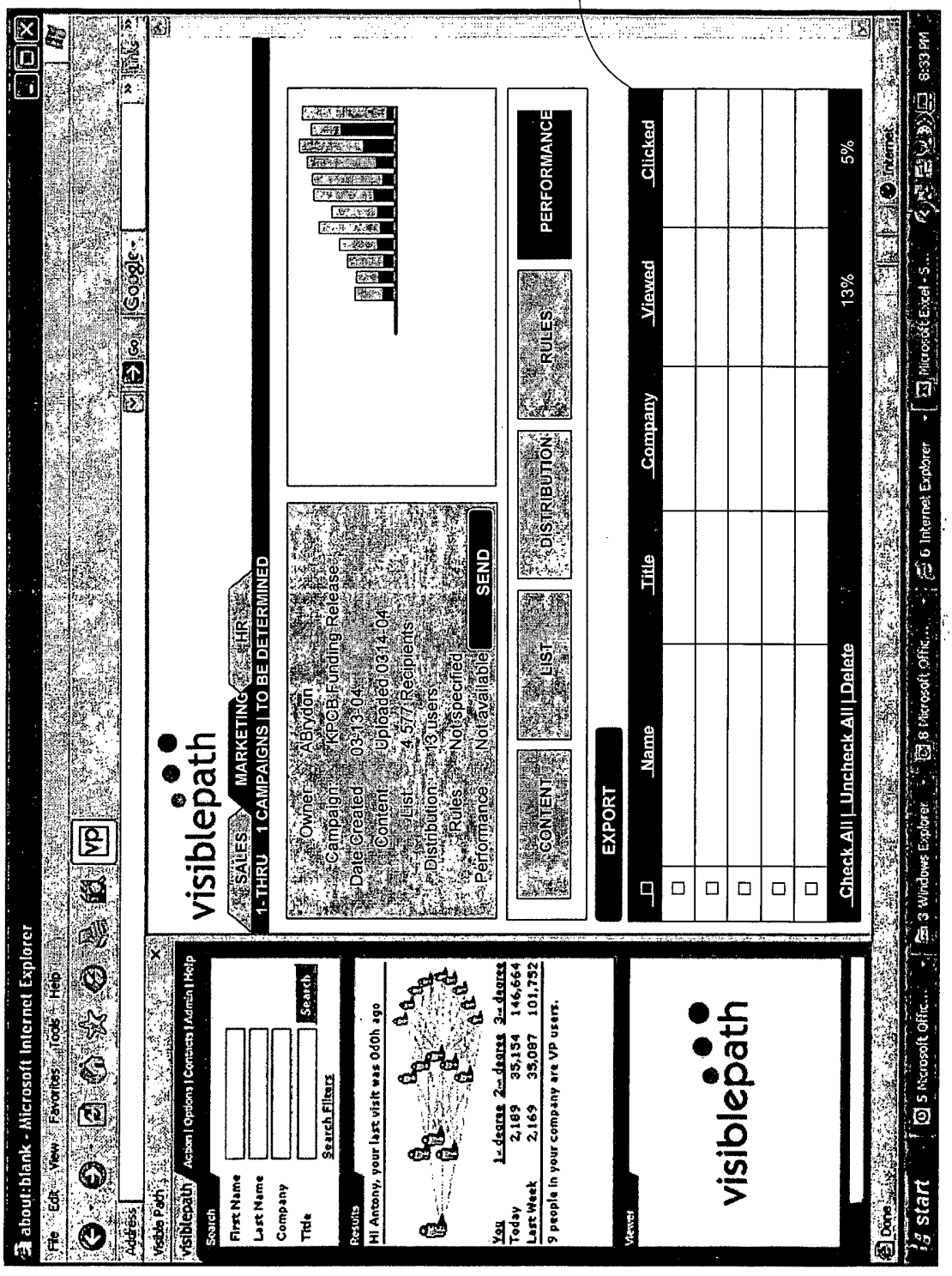

about:blank - Microsoft Internet Explorer
visiblepath
SALES
MARKETING
HR
1-THRU 1 CAMPAIGNS | TO BE DETERMINED
Owner: ABrydon
Campaign: KPCB Funding Release
Date Created: 03-13-04
Content: Uploaded 03-14-04
List: 4577 Recipients
Distribution: 13 users
Rules: Not specified
Performance: Not available
CONTENT
LIST
DISTRIBUTION
RULES
PERFORMANCE
If the individual owns the relationship, and agrees to distribute the content, suggest this default template:
2602
From: Relationship owner
Subject: Press Release
Note: Hi [Insert Name]– We issued this release this
If the company owns the relationship, and no individual agrees to distribute the content, use this default template:
2604
From: Cisco Systems
Subject: Cisco acquires Novecent
Note: [Insert Name]– We issued this release this release this
Search
First Name
Last Name
Company
Title
Search
Search Filters
Results
Hi Antony, your last visit was 00h ago
You 1st degree 2nd degree 3rd degree
Today 2,189 35,154 146,664
Last Week 2,169 35,087 101,752
9 people in your company are VP users.
Viewer
visiblepath

Fig. 27


2702
about:blank - Microsoft Internet Explorer
visiblepath
SALES
MARKETING
HR
1-THRU 1 CAMPAIGNS | TO BE DETERMINED
Owner: Abydon
Campaign: KPCB Funding Release
Date Created 03-13-04
Content Uploaded 03-14-04
List 4,577 Recipients
Distribution: 13 users
Rules: Not specified
Performance: Not available
SEND
CONTENT
LIST
DISTRIBUTION
RULES
PERFORMANCE
EXPORT
Name
Title
Company
Viewed
Clicked
Check All | Uncheck All | Delete
13%
5%
Search
First Name
Last Name
Company
Title
Search Filters
Results
Hi Antony, your last visit was 0d0h ago
You
Today
Last Week
9 people in your company are VP users.
Viewer
visiblepath