METHOD AND APPARATUS FOR FACILITATING AND TRACKING PERSONAL REFERRALS

INVENTOR: Daniel P. Oran, Cambridge, MA (US)

Correspondence Address:
FOLEY HOAG, LLP
PATENT GROUP, WORLD TRADE CENTER WEST
155 SEAPORT BLVD
BOSTON, MA 02110 (US)

ASSIGNEE: H Three, Inc., Cambridge, MA

APPL. NO.: 11/199,028

FILED: Aug. 8, 2005

Related U.S. Application Data

Continuation of application No. 09/441,191, filed on Nov. 15, 1999, now Pat. No. 6,968,313.

Publication Classification

Int. Cl.
G06F 15/02 (2006.01)
G06F 17/30 (2006.01)
G06Q 30/00 (2006.01)

U.S. Cl. 705/9; 705/26; 707/1

ABSTRACT

The present invention facilitates and tracks personal referrals made via electronic networks. In a preferred embodiment, using electronic mail delivered to a participant interface, a central controller provides a Web page through which an individual may enter the electronic-mail addresses of those whom he or she wishes to refer. This spares the individual the inconvenience of generating his or her own electronic-mail referrals, and also enables the central controller to determine the format and tone of the referral. The address or contents of the Web page includes a unique identifier that is exclusively associated with that individual and a specific offer. In this way, the series of referrals may be tracked, duplicate referrals to the same electronic-mail address may be eliminated, offers may be withdrawn or modified, and referrals about an expired or withdrawn offer may be prevented.
Central Controller 100

Acceptance 130

Referral 140

Offer 120

Opt-out 150

Participant Interface 110

FIG. 1
Central Controller 100

Memory 220
- Mail Server 230
- Web Server 240
- DBMS 250
- Control Program 260

Processor 210

Storage Device(s) 270
- Listings Database 280
- Participants Database 290
- Offers Database 295

Network Connection 200

To Participants

FIG. 2
SELECT ITEM FROM LISTINGS DATABASE 280

SELECT INDIVIDUAL FROM PARTICIPANTS DATABASE 290

IF REFERRED INDIVIDUAL IS NOT ALREADY IN PARTICIPANTS DATABASE 290, CREATE A NEW RECORD 495

IF NECESSARY, SUBSTITUTE THE LATEST VERSION OF THE OFFER 120

CREATE NEW RECORD IN OFFERS DATABASE 295, CONTAINING THE ITEM, THE INDIVIDUAL, AND A UNIQUE IDENTIFIER; UPDATE RECORD IN PARTICIPANTS DATABASE 430

SEND ELECTRONIC MAIL ABOUT THE ITEM TO THE INDIVIDUAL, CONTAINING EITHER (1) A WEB PAGE TAGGED WITH OR INCLUDING THE UNIQUE IDENTIFIER, OR (2) A HYPERLINK TO SUCH A WEB PAGE 440

PROCESS THE INDIVIDUAL'S INTERACTION WITH THE WEB PAGE 450

UPDATE RECORDS IN THE PARTICIPANTS DATABASE 290 AND THE OFFERS DATABASE 295 465

IF OFFER 120 STILL VALID, UPDATE RECORDS IN THE PARTICIPANTS DATABASE 290 AND THE OFFERS DATABASE 295, AND NOTIFY SPONSORING PARTY 475

OPT-OUT 150? 460

ACCEPTANCE 130? 470

REFERRAL 140? 480

OFFER 120 STILL VALID? 487

END 490

END 485

FIG. 4
OPEN ELECTRONIC MAIL FROM CENTRAL CONTROLLER, CONTAINING EITHER (1) A WEB PAGE, OR (2) A HYPERLINK TO A WEB PAGE

IF ELECTRONIC MAIL CONTAINS A HYPERLINK TO A WEB PAGE, FOLLOW THE HYPERLINK TO THAT PAGE

USING WEB PAGE, INDICATE ACCEPTANCE 130 AND/OR REFERRAL 140 OF OFFER 120, OR CHOOSE OPT-OUT 150

END

FIG. 5
METHOD AND APPARATUS FOR FACILITATING AND TRACKING PERSONAL REFFERRALS

CROSS-REFERENCE TO RELATED APPLICATION

[0001] The present application is a continuation of commonly assigned co-pending U.S. patent application Ser. No. 09/441,191, which was filed on Nov. 15, 1999, by Daniel P. Oran for Method and Apparatus for Facilitating and Tracking Personal Referrals and is hereby incorporated by reference.

BACKGROUND OF THE INVENTION

[0002] 1. Field of the Invention

[0003] The present invention relates to the use of electronic networks for personal referrals.

[0004] 2. Background Information

[0005] Word of mouth is a crucial factor in the success of many ventures, including the promotion of books, the sale of real estate, and the identification of job candidates. An appealing product or an interesting opportunity appears, and one person tells another, who tells another, who tells another. Such a series of personal referrals can quickly disseminate news about a product or an opportunity to a wide audience.

[0006] The Internet makes it possible for such personal referrals to reach a significantly wider audience. Unlike other communication media, the Internet presents no physical or financial barriers to personal referrals across vast distances. For example, the cost of sending electronic mail from New York to Boston is the same as the cost of sending electronic mail from New York to Tokyo. In contrast, sending postal mail or making a telephone call across the Pacific is significantly more expensive than doing so within the United States. And a face-to-face personal referral from New York to Tokyo obviously requires the purchase of a costly airplane ticket.

[0007] Although personal referrals via the Internet reach a wider audience than those made via other communication media, there are at least six fundamental limitations on the effectiveness of such referrals as a marketing method: (1) as a referral reaches each additional person, the continuation of the series depends on that person taking the initiative to contact someone else; (2) even if the series of referrals continues unabated, the marketer has no reliable means of identifying individuals who often make an above average number of referrals, or whose referrals often lead to successful outcomes for the marketer; (3) there is the possibility that an individual will receive the same referral from multiple parties, causing annoyance and ill will; (4) there is no way to control the manner in which each additional person in the series is contacted, i.e., the content and tone of the referral is left entirely to the individual; (5) after an offer has been modified, there is no way to prevent further referrals regarding the original version of the offer or to ensure that the latest version of the offer is always presented; and (6) after an offer has expired or has been withdrawn, there is no way to prevent further referrals regarding it.

Objects and Advantages

[0008] Accordingly, several objects and advantages of the present invention are:

[0009] (a) to minimize the effort required to make a referral;

[0010] (b) to allow the marketer to track and to analyze the pattern of referrals;

[0011] (c) to reduce the chance that an individual will receive the same referral from multiple parties;

[0012] (d) to control the content and tone of referrals;

[0013] (e) to prevent further referrals about an earlier version of an offer;

[0014] (f) to ensure that the latest version of an offer is always presented; and

[0015] (g) to prevent further referrals after an offer has expired or has been withdrawn.

Further objects and advantages of the present invention will become apparent from a consideration of the following drawings and description.

BRIEF SUMMARY OF THE INVENTION

[0016] The present invention facilitates and tracks personal referrals made via electronic networks. In a preferred embodiment, using electronic mail delivered to a participant interface, a central controller provides a Web page through which an individual may enter the electronic-mail addresses of those whom he or she wishes to refer. This spares the individual the inconvenience of generating his or her own electronic-mail referrals, and also enables the central controller to determine the format and tone of the referral. The address or contents of the Web page includes a unique identifier that is exclusively associated with that individual and a specific offer. In this way, the series of referrals may be tracked, duplicate referrals to the same electronic-mail address may be eliminated, offers may be withdrawn or modified, and referrals about an expired or withdrawn offer may be prevented.

BRIEF DESCRIPTION OF THE DRAWINGS

[0017] FIG. 1 illustrates one embodiment of the present invention;

[0018] FIG. 2 is a block diagram showing one embodiment of the central controller;

[0019] FIG. 3 is a block diagram showing one embodiment of the participant interface;

[0020] FIG. 4 is a flow chart illustrating one embodiment of the central controller; and

[0021] FIG. 5 is a flow chart illustrating one embodiment of the participant interface.

DETAILED DESCRIPTION OF THE INVENTION

[0022] FIGS. 1 through 3 illustrate the system architecture of one embodiment of the present invention. As shown in FIG. 1, the apparatus of the present invention comprises a central controller 100 and a participant interface 110. Via
electronic mail, an offer 120 is transmitted from the central controller 100 to the participant interface 110. By interacting with a Web page delivered in the electronic mail or by visiting a Web page referenced by a hyperlink included in the electronic mail, the user of the participant interface may indicate his or her acceptance 130 of the offer 120 and/or make a referral 140 of other possible recipients of the offer 120. Alternatively, the user may choose to opt out 150, indicating he or she prefers not to receive (1) any further offers 120, (2) any further offers 120 in this particular category of items, or (3) any further offers 120 that are due to a referral 140 from a specific individual.

[0023] For the sake of clarity, just one central controller 100 is depicted in FIG. 1, but those skilled in the art will appreciate that many such devices may be included in an embodiment of the present invention in order to simultaneously process a large number of transactions. Similarly, although just one participant interface 110 is depicted in FIG. 1, an unlimited number of such devices may be connected to the central controller 100 via a network, an example of which is the Internet.

[0024] FIG. 2 is a block diagram of a computer system that is capable of serving as central controller 100. This system includes a network connection 200, a processor 210, memory 220, and one or more storage devices 270. Stored in memory 220 are software programs for (1) sending and receiving electronic mail (mail server 230), (2) creating and sending requested Web pages (Web server 240), (3) managing the flow of information into and out of databases (database management software, or DBMS 250), and (4) directing the overall activities of the central controller (control program 260). Storage devices 270 contain (1) a listings database 280, which includes items about which offers are tendered (2) a participants database 290, which includes individuals to whom offers are tendered, and (3) an offers database 295, which records the offers made to participants about specific listings. Those skilled in the art will recognize that the central controller 100 may be implemented on any computer system capable of carrying out the central controller’s required functions. In addition, those skilled in the art will appreciate that the information stored in the listings database 280, participants database 290, and offers database 295 may be stored in a lesser or greater number of databases. Similarly, those skilled in the art will appreciate that a lesser or greater number of software programs may be employed to carry out the functions of the mail server 230, Web server 240, DBMS 250, and control program 260.

[0025] FIG. 3 is a block diagram of a computer system that is capable of serving as the participant interface 110. The system includes one or more storage devices 300, a processor 310, a display 320, a pointing device 330, a keyboard 340, memory 350, and a network connection 380. Stored in memory 350 are software programs for (1) requesting and displaying Web pages (Web browser 360) and (2) sending and receiving electronic mail (mail client 370). Those skilled in the art will recognize that the participant interface 110 may be implemented on any computer system capable of carrying out the participant interface’s functions.

[0026] FIGS. 4 and 5 illustrate the steps performed by embodiments of the central controller 100 and the participant interface 110 in the present invention. As depicted in FIG. 4, at step 400, the central controller 100 begins by selecting an item from the listings database 280. For example, the item might be a job description or a house for sale. At step 410, the central controller 100 selects an individual from the participant’s database 290. If the individual has previously received an offer 120 regarding this item or opted out, the central controller 100 ends the process at step 425. Otherwise, the central controller 100 continues to step 430, in which it updates the record in the participant’s database 290 to reflect the selection of the individual for this offer. It also creates a new record in the offers database 295, containing the item, the individual, and a unique identifier. For example, the unique identifier might be the individual’s electronic-mail address paired with an item number, or an alphanumeric sequence, defined arbitrarily or systematically, that is assigned only to the pairing of that individual and that item.

[0027] At step 440, the central controller 100 sends electronic mail about the item to the individual at the participant interface 110. The message contains either (1) a Web page tagged with or including the unique identifier, or (2) a hyperlink to such a Web page. In interacting with the Web page at step 450, the individual may choose one, all, or none of the following responses: (1) opt-out 150, (2) acceptance 130, or (3) referral 140. For example, in the case of a job description, the individual may choose to accept the invitation to apply, and, at the same time, also refer several friends for the same job.

[0028] At step 460, if the individual chooses to opt out, the central controller 100, at step 465, updates the relevant records in the participants database 290 and the offers database 295 to reflect this choice. At step 470, if the individual chooses to receive the offer 120, the central controller 100, at step 475, first determines whether the offer 120 is still valid. If the offer 120 is still valid, the central controller 100 updates the relevant records in the participants database 290 and the offers database 295 to reflect this choice, and also notifies the sponsoring party. For example, in the case of a job description, the central controller 100 might send electronic mail to the prospective employer.

[0029] At step 480, if the individual chooses to refer one or more people, the central controller 100 first determines, at step 487, whether the offer 120 is still valid. If the offer 120 is still valid, the central controller 100, at step 493, substitutes the latest version of the offer. Next, at step 495, the central controller 100 creates new records in the participants database 290 for the referred people, if they are not already included in it. For each of the referred people, the central controller then loops back to step 420, first determining whether he or she has previously received an offer 120 for this item or opted out. In the case of a previous offer 120 or opt-out 150, the central controller ends the process at step 425. Otherwise, the process continues on as described earlier, beginning with step 430.

[0030] As depicted in FIG. 5, from the perspective of the individual at the participant interface 110, the process begins at step 500, by opening electronic mail from the central controller 100. This electronic mail contains either a Web page or a hyperlink to such a Web page. If the electronic mail contains a hyperlink to a Web page, then the individual follows the hyperlink to that page at step 510. At step 520,
by interacting with the Web page, the individual indicates his or her response to the offer 120, as described earlier.

[0031] While the present invention has been described in terms of specific embodiments thereof, those skilled in the art will appreciate that various changes in form and detail may be made without departing from the intended spirit and scope of the invention as defined in the following claims.

1-20. (canceled)

21. An apparatus for facilitating and tracking personal referrals, comprising: a storage device; and a processor connected to said storage device,
said storage device storing a program for controlling said processor; and said processor operative with said program to:
generate a unique identifier that is associated exclusively with the pairing of one individual and one offer;
send to said individual an electronic-mail message that provides a hyperlink to or contains a Web page whose address or contents includes said unique identifier or a transformation thereof;
provide in said Web page a means to allow the individual to input the electronic-mail address of persons whom said individual wishes to refer; and,
provide in said Web page a means of opting out of receiving all such electronic-mail messages.

22. The apparatus of claim 21 wherein said processor is further operative to determine whether said individual has previously been sent an electronic-mail message about said offer.

23. The apparatus of claim 21 wherein said processor is further operative to determine whether said individual has previously opted out of receiving all such electronic-mail messages.

24. The apparatus of claim 21 wherein said processor is further operative to determine whether said individual has previously opted out of receiving electronic-mail messages pertaining to a category of items that contains said offer.

25. The apparatus of claim 21 wherein said processor is further operative to determine the party whose referral caused said offer to be made to said individual and whether said individual has previously opted out of receiving electronic-mail messages pertaining to offers referred by said party.

26. The apparatus of claim 21 wherein said processor is further operative to notify the sponsor of said offer in case of an acceptance by said individual.

27. The apparatus of claim 21 wherein said processor is further operative to send electronic-mail messages to said persons who were referred by said individual in the case when said offer is still valid.

28. A method for distributing an offer, the method comprising:

providing in the Web page an option for allowing the at least one participant to opt out.

29. A method according to claim 28, further including, receiving at least one selection based on the at least one participant's at least one option, and,

updating at least one database based on the received at least one selection.

30. A method according to claim 29, further including providing a central controller in communication with the database, the central controller further including instructions for receiving the at least one selection.

31. A method according to claim 29, further including communicating the at least one selection over a network.

32. A method according to claim 28, wherein providing an offer includes providing at least one of a job offer and employment data.

33. A method according to claim 29, wherein receiving at least one selection further includes receiving a selection to opt out, and

updating the at least one database includes updating at least one of data associated with the at least one participant and data associated with the offer.

34. A method according to claim 29, wherein receiving at least one selection further includes receiving a selection to accept, and,

updating the at least one database includes,
determining whether the offer is valid, and,

updating at least one of data associated with the at least one participant and data associated with the offer.

35. A method according to claim 34, wherein updating the at least one database further includes generating an electronic mail message to an originator of the offer.

36. A method according to claim 29, wherein receiving at least one selection further includes receiving a selection of referral, and,

updating the at least one database includes updating at least one of data associated with the at least one participant and data associated with the offer.

37. A method according to claim 36, wherein receiving a selection of referral includes receiving at least one email address based on at least one referral participant.

38. A method according to claim 36, wherein updating the at least one database includes entering into the database as a participant, at least one email address based on at least one referral participant.

39. A method according to claim 36, further including receiving at least one email address based on at least one referral participant, and,
determining at least one of whether

the at least referral participant opted out of the offer,
the at least one offer is valid,
the at least one offer is updated, and,
the at least one referral participant previously received the offer.
40. A method according to claim 39, wherein determining whether the at least one offer is updated includes substituting the updated offer.

41. A method according to claim 28, further including updating the at least one database to reflect that the at least one participant received an electronic mail message based on the offer.

42. A method according to claim 28, further including associating with the at least one participant, an identity of at least one referring participant who referred the at least one participant.

43. A method according to claim 28, further including determining whether the at least one participant opted-out of the offer.

44. A method according to claim 28, further including determining whether the offer is valid.

45. A method according to claim 29, wherein receiving the at least one selection further includes receiving an option to opt out and at least one further selection to prohibit any further offers, any further offers in a particular category, and any further offers based on at least one participant referral.

46. A method according to claim 28, further including providing an offer database having at least one offer.

47. A method according to claim 28, further including associating an identifier with the offer and one of the at least one participant.

48. A method for tracking an offer, the method comprising:

- providing a Web page based on the offer, the Web page including at least one option to opt out, accept, and refer,
- utilizing a database to determine at least one participant,
- sending an electronic mail message to the at least one participant, the electronic mail message including at least one of the Web page and a hyperlink to the Web page,
- receiving from the at least one participant, at least one option based on a selection to opt out, accept, and refer, and,
- updating the database based on the at least one selection.

49. A method according to claim 48, wherein the offer includes a job description.

50. A method according to claim 48, further including providing an offer database.

51. A method according to claim 48, further including receiving at least one electronic mail address based on at least one referral participant.

52. A method according to claim 48, further including identifying a referring participant associated with a selection to accept.

53. A method according to claim 48, further including identifying a participant who opted out based on the offer.

54. A method according to claim 48, further including associating an identifier with the offer and one of the at least one participant.

* * * * *