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(19) **United States**(12) **Patent Application Publication**
Heiberger(10) **Pub. No.: US 2014/0351066 A1**(43) **Pub. Date: Nov. 27, 2014**(54) **CAMPAIGN SPECIFICATION SYSTEM AND METHOD**(71) Applicant: **Michael Heiberger**, Landenberg, PA (US)(72) Inventor: **Michael Heiberger**, Landenberg, PA (US)(21) Appl. No.: **14/446,679**(22) Filed: **Jul. 30, 2014****Related U.S. Application Data**

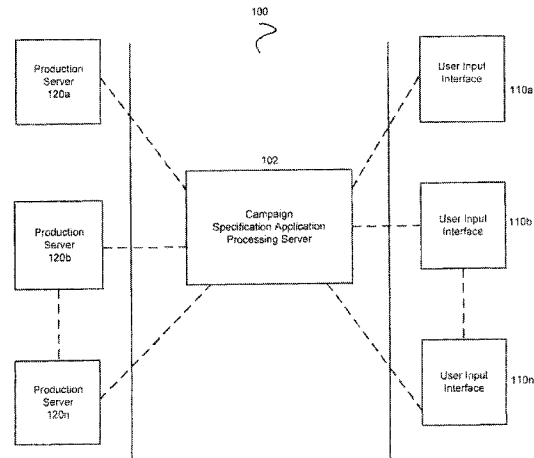
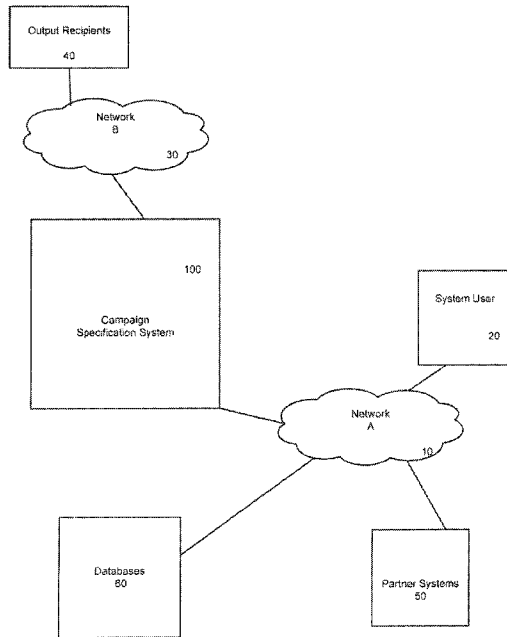
(63) Continuation of application No. 12/466,071, filed on May 14, 2009, now Pat. No. 8,831,974, which is a continuation-in-part of application No. 12/429,319, filed on Apr. 24, 2009, now abandoned.

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(57)

ABSTRACT

The invention is directed to a method and system for automatic management of targeted marketing campaigns. The system may include user interface presentation components for allowing selection of marketing matrix data defining a target population and selection of suppressions for limiting the target population. The system may further include integration components implemented by a processor for integrating the marketing matrix with the suppressions and automatically generating record selection components for automatically selecting records from a database based on the marketing matrix data and suppressions and creating a selection table including the selected records. Additionally, the system may include a list generation engine for generating a campaign list based on the created selection table and transmission components for transmitting the generated campaign list to at least one list recipient.



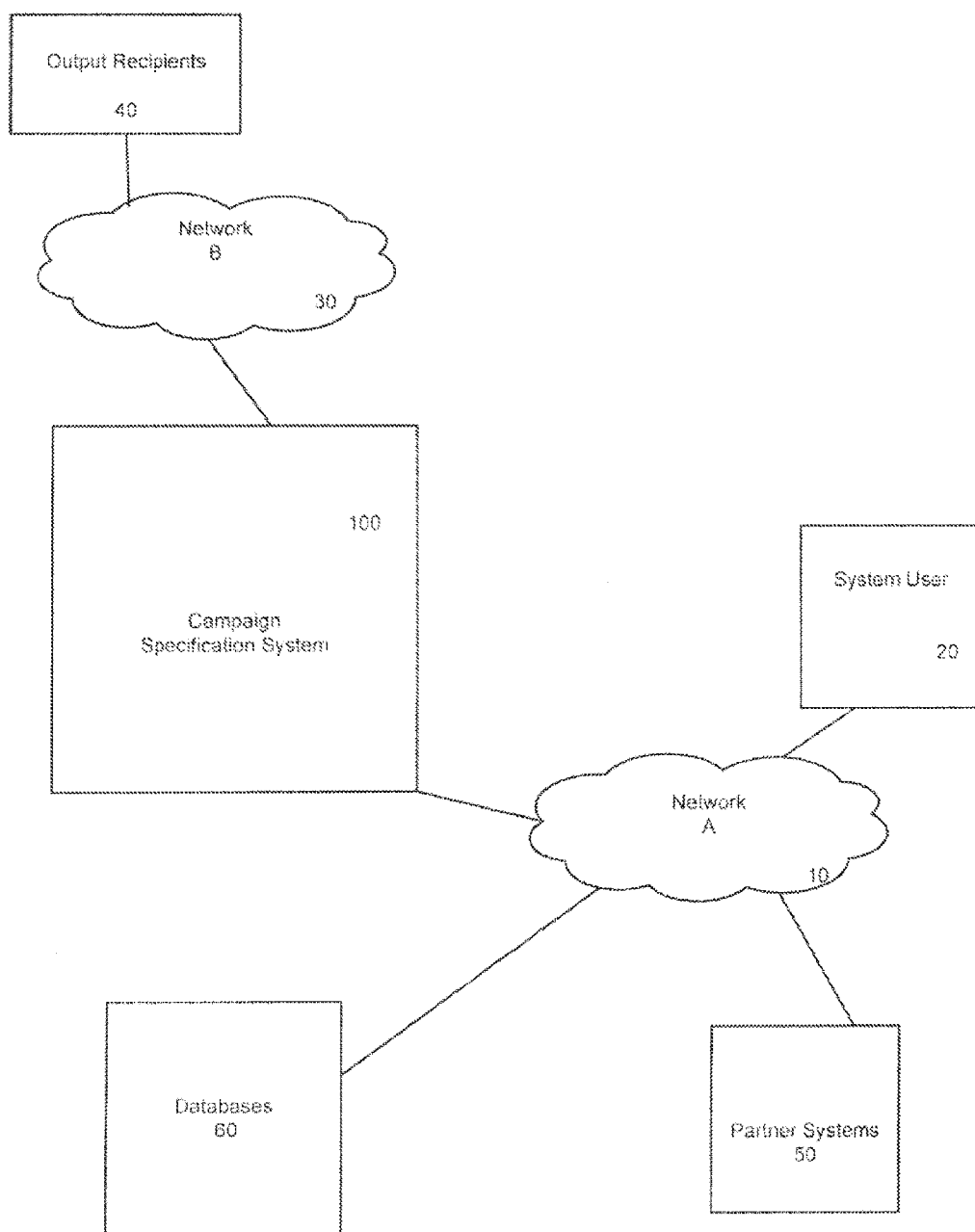


FIG. 1A

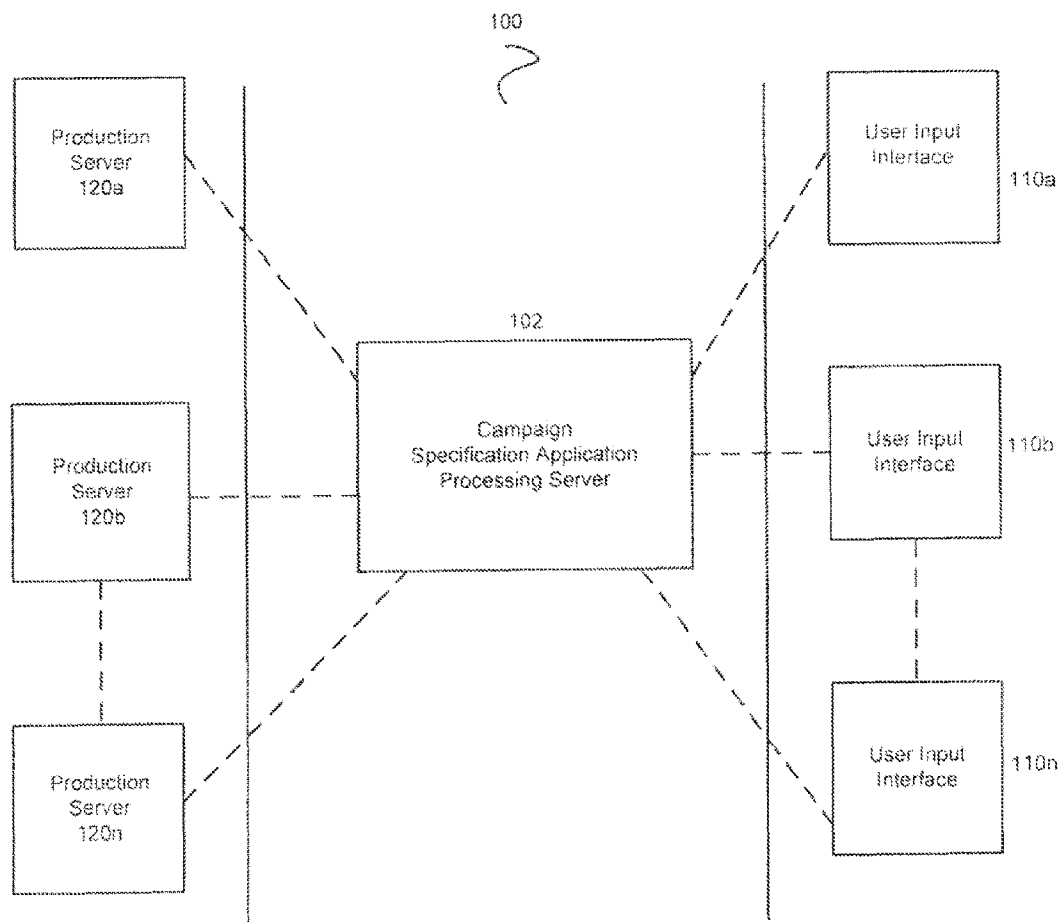


FIG 1B

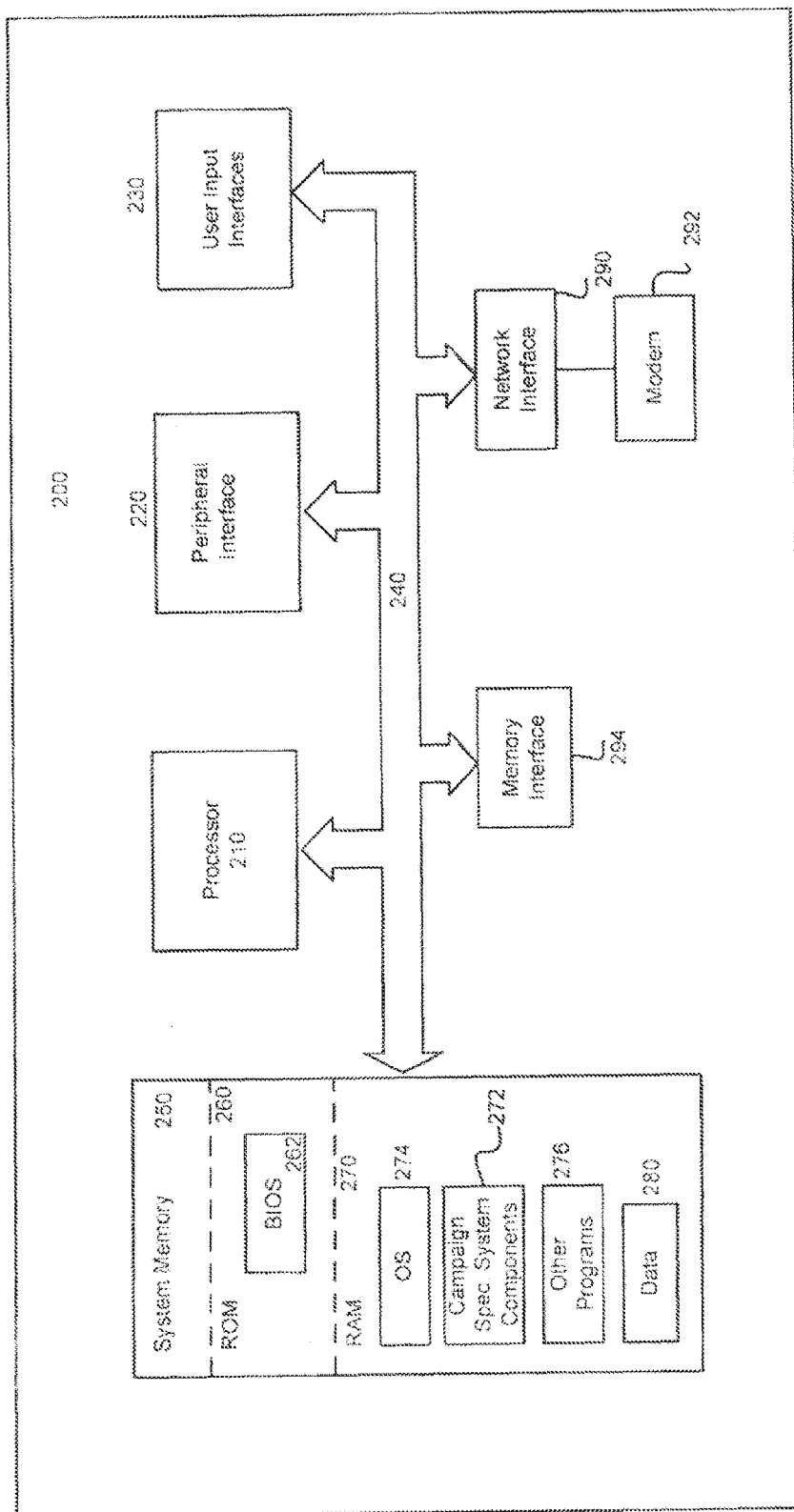


FIG 2

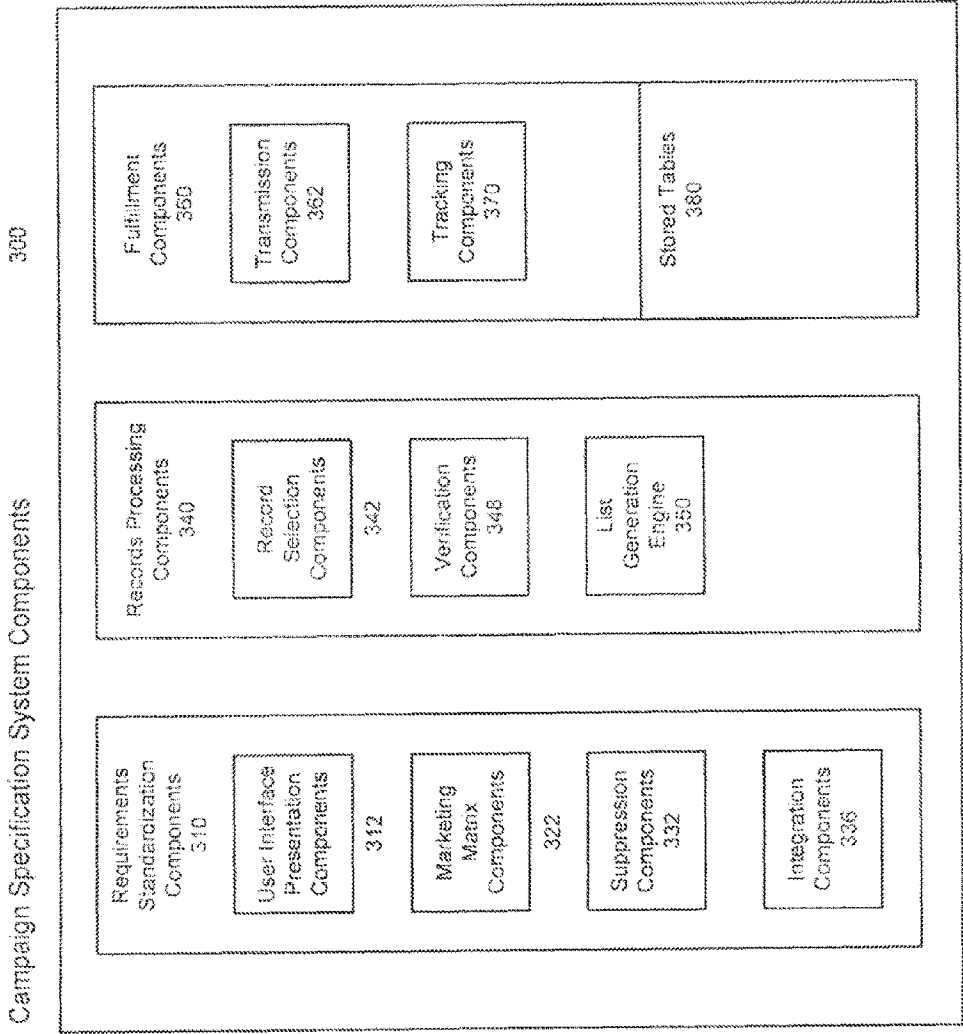


FIG 3

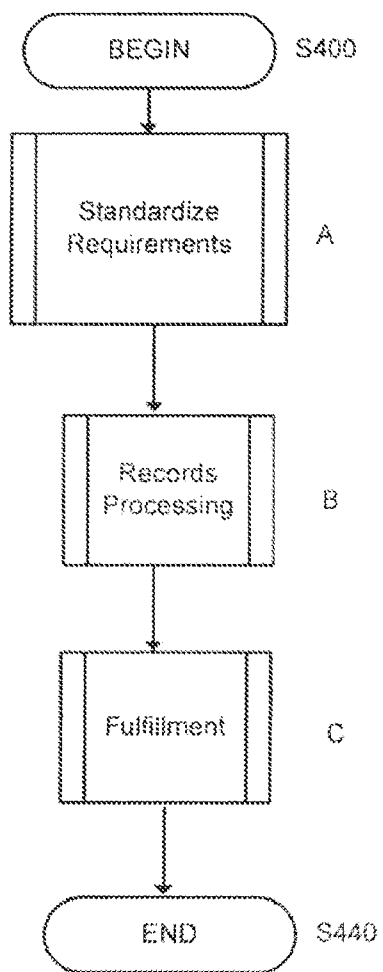


FIG. 4

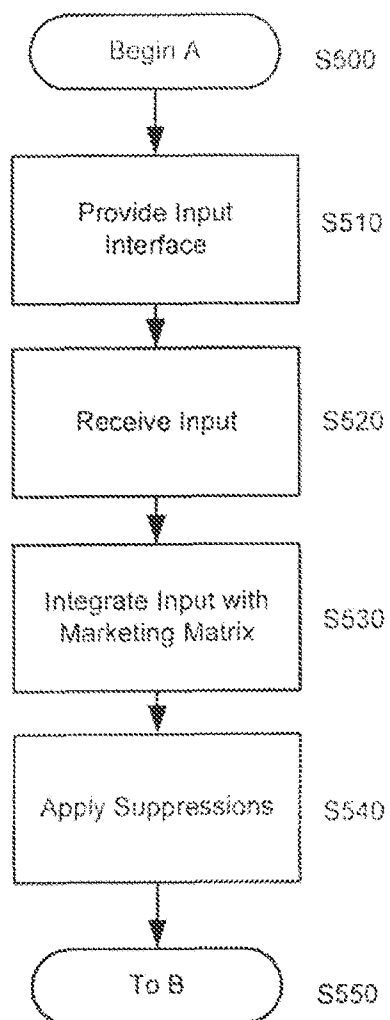


FIG. 5

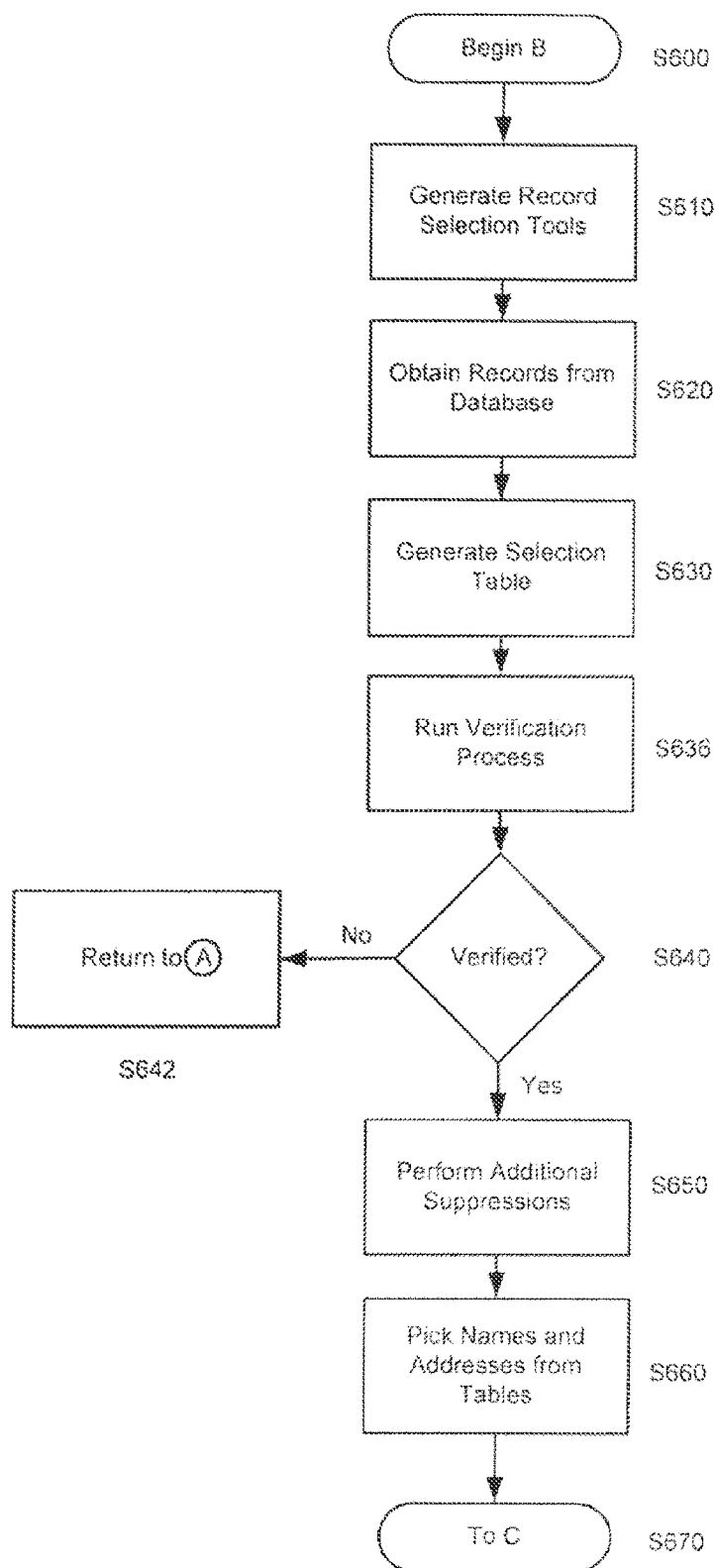


FIG. 6

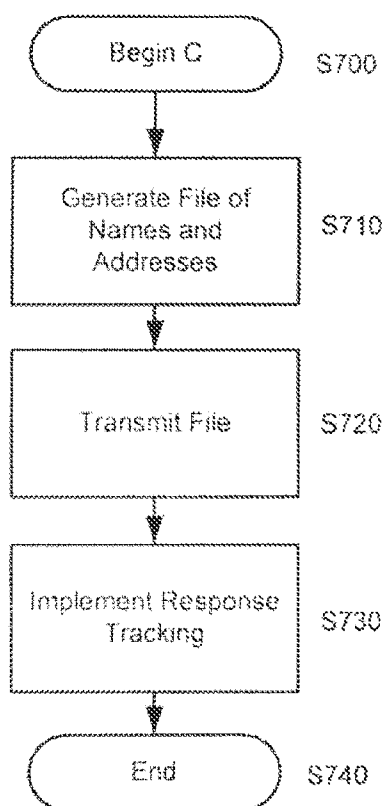


FIG 7

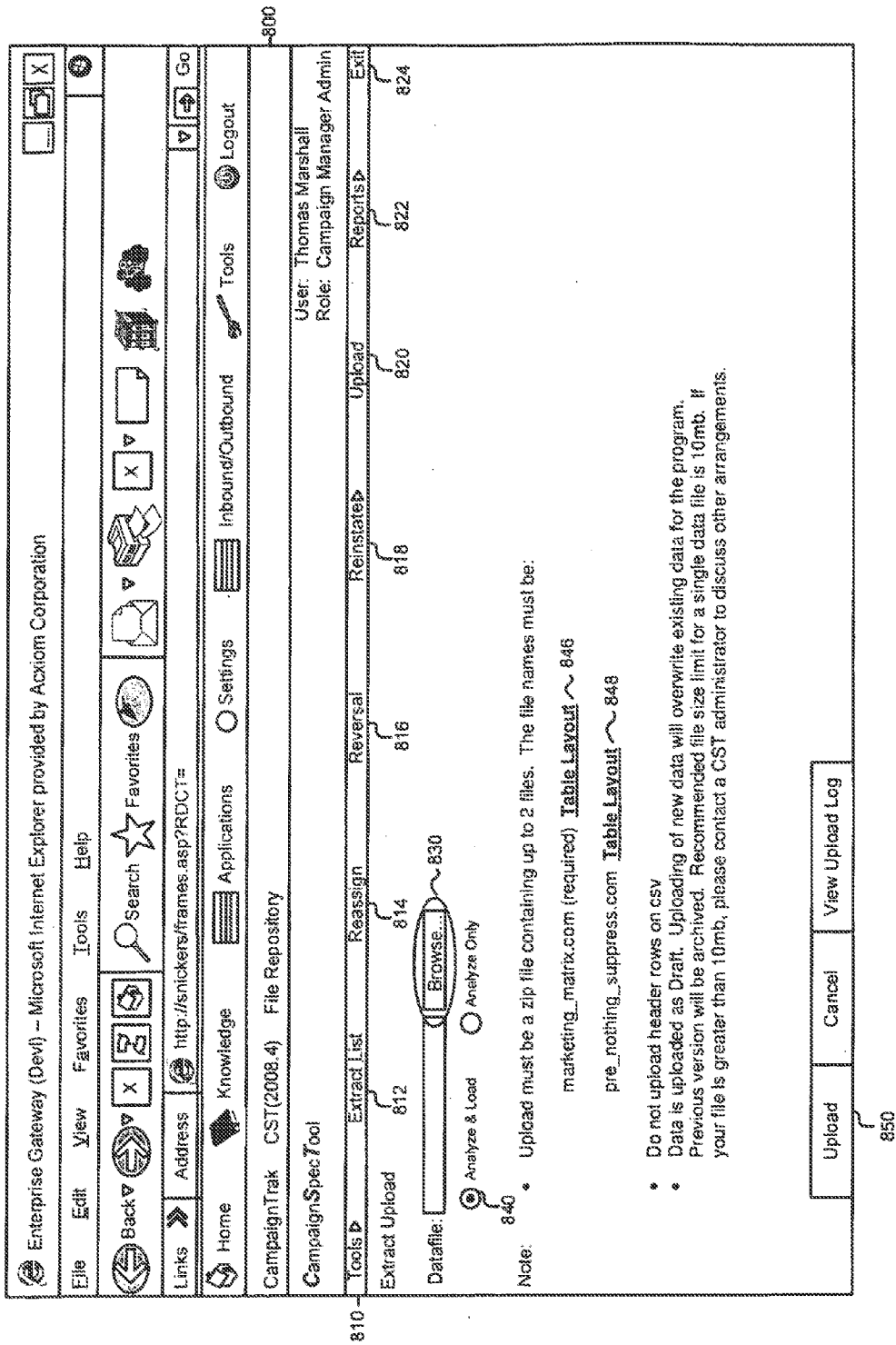


FIG 8

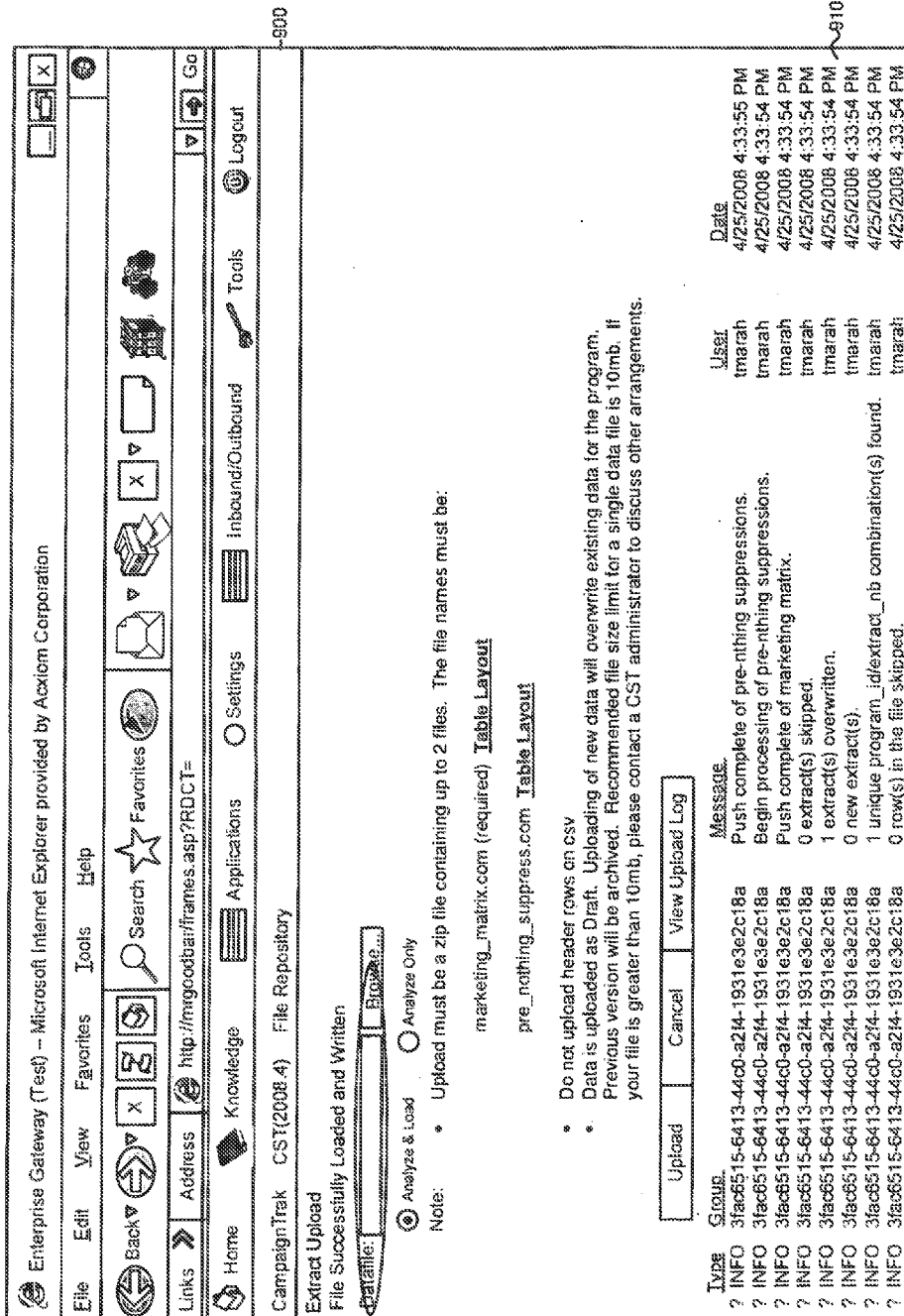


FIG 9

1010		1030		1020	
Upload		Cancel		View Upload Log	
Type	Group	Message		User	Date
? INFO	be18dd59-18074ff0-b64a	Push of marketing matrix failed.		tmarsh	4/25/2008 4:42:53 PM
X ERROR	be18dd59-18074ff0-b64a	Error on record 1: CELL_PRIORITY is invalid.		tmarsh	4/25/2008 4:42:53 PM
? INFO	be18dd59-18074ff0-b64a	Beginning push of marketing matrix.		tmarsh	4/25/2008 4:42:53 PM
? INFO	be18dd59-18074ff0-b64a	Upload complete.		tmarsh	4/25/2008 4:42:53 PM
? INFO	be18dd59-18074ff0-b64a	14 records uploaded.		tmarsh	4/25/2008 4:42:53 PM
? INFO	be18dd59-18074ff0-b64a	14 records in import.		tmarsh	4/25/2008 4:42:53 PM
? INFO	be18dd59-18074ff0-b64a	Starting upload of file [marketing_matrix.csv]		tmarsh	4/25/2008 4:42:53 PM
? INFO	be18dd59-18074ff0-b64a	Begin processing of marketing matrix		tmarsh	4/25/2008 4:42:53 PM

FIG 10

Enterprise Gateway (Test) - Microsoft Internet Explorer provided by Axclom Corporation									
Back		Address		http://snickers/frames.asp?RDCT=					
Go		Links		Knowledge		Applications		Settings	
Inbound/Outbound		Tools		Log out					

CampaignTrak CST(2008.4) File Repository

CampaignSpecTool

User: Thomas Marshall
Role: Campaign Manager Admin

Tools ▶	Extract List	Reassign	Reversal	Reinstate▶	Upload	Reports▶	Exit
Extract List	1110						
<input checked="" type="checkbox"/> Show only My Program Extracts? Filler <90>		<input type="checkbox"/> Show CF Submitted Program Extracts?					
Prog ID	CM Owner	CE Owner	CF Owner	Status	Description	Step Status	Step
77779-1	Thomas Marshall ~1120			Draft			RO #
1 Extracts Found							
Add New	~1160					1150	

www.ck12.org

Enterprise Gateway (Test) - Microsoft Internet Explorer provided by Axiom Corporation

File Edit View Favorites Tools Help

Back Forward Stop Reload Search Favorites

Address http://snickers/frames.asp?RDCT= Go

Home Knowledge Applications Settings Inbound/Outbound Tools Logout

CampaignTrak CST(2008.4) File Repository

CampaignSpecTool

User: Thomas Marshall
Role: Campaign Manager Admin

Tools Extract List Reassign Reversal Upload Reports

Program: 77779 ~1210 Extract: 1 Status: Draft Submit

Extract Call List Timeline Spec Instr Spec Ven Instr Approval Notes Pre-Nthing Suppress Nthing View CF Specs Ad Hoc Reports Status Report

Extract Detail 1230

Specific Description: Replicate Extract ~1220

Extra Description:

Campaign Month/Year: Campaign Type: Campaign Process Type: Estimated Quantity: Segment: Touch: Posting Name: App Processor:

Channel: PA/FA:

☐ TMO Initial Campaign Needed?
☒ Promo Inquiry?
☐ DM Sign-Off Needed?

☐ Partner Opt Out?
☐ DM Sign-Off Received?

Reduced Cycle: Inactivate Delete 1240 1200 Update Cancel

FIG 12

Enterprise Gateway (Test) – Microsoft Internet Explorer provided by Axiom Corporation

File Edit View Favorites Tools Help

Back

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Search

Favorites

Print

Close

Address

http://snickers/frames.asp?RDCT=

Go

Home

Knowledge

Applications

Settings

Inbound/Outbound

Tools

Logout

CampaignTrak CST(2008.4) File Repository

CampaignSpecTool

Tools

Extract List

Reassign

Reinstated

Upload

Reports

Program: 77779

Extract: 1

Status: Draft

Submit

Extract Call List

Timeline

Spec Instr

Spec Ven Instr

Approval Notes

Pre-Nthing Suppress

Nthing View

CF Specs

Ad Hoc Reports

Status Report

Cell List ~ 1310

Multi Cell Update 1320

Select	Cell Code	Split Prefix
Select	7JH	0
Select	7JK	0
Select	7JL	0
Select	7JR	0
Select	7JS	0
Select	7JT	0
Select	7JV	0
Select	7JW	0
Select	7KJ	0
Select	7KT	0
Select	7LM	0
Select	7LQ	0
Select	7LW	0
Select	7MF	0

Add New

14 Calls Found

1300

FIG 13

Enterprise Gateway (Test) - Microsoft Internet Explorer provided by Axiom Corporation

File Edit View Favorites Tools Help

Back X Home Search Favorites

Links Address http://snickers/frames.asp?RDCT= Go

Home Knowledge Applications Settings Inbound/Outbound Tools Logout

CampaignTrak CST(2008.4) File Repository

Program: 77779 Extract: 1 Status: Draft Submit

Extract Call List Timeline .Spec Ven Instr Approval Notes Pre-Nthing Suppress Nthing View CF Specs Ad Hoc Reports Status Report

Cell Detail

1410 Cell Code: 7JH 1412 Split Prefix: 0 1414 Partner Priority Nbr: 1416 Cell Priority Nbr: 6

Replicate Cell Inactivate Cell

1420 NS ID(s)

Available	40247	40248	40249	40251	40253
Selected					

1422 NS Name(s)

Available		UNITED
Selected		

1424 Is ECM? No Yes

Available	P	Q
Selected		

1430 Nothing Offer Type(s)

Available	FA	LP	NA	SP	UA
Selected					

1432 Executed Offer PS

1434 Lookup DM Cells

Available	RSG	00L	00M	00N	00T
Selected					

1400 Price(s) Week

Partner Personalization 25000

FIG 14

Enterprise Gateway (Test) - Microsoft Internet Explorer provided by Axiom Corporation

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites

Links Address http://snickers/frames.asp?RDCT= Go

Home Knowledge Applications Settings Inbound/Outbound Tools Logout

CampaignTrak CST(2008.4) File Repository

Table Match Suppressions 1510

Schema Match Key

Table Name

INDIV_ID
BUS_ID
EN_MEM_ID
NS_NAME
ZIP
SCF

Inclusion Yes

Add Update Delete

1530

Cut Table Selections --- Multiple cut column selections will be executed as an AND statement.

Cut Column

Operator

Value (multiple values should be separated by a pipe |)

5000

1500

Update Cancel Delete

FIG 15

Enterprise Gateway (Test) - Microsoft Internet Explorer provided by Axiom Corporation

File Edit View Favorites Tools Help

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Search

Favorites

Links

Address

http://snickers/frames.asp?RDCT=

Go

Home

Knowledge

Applications

Settings

Inbound/Outbound

Tools

Logout

CampaignTrak CST(2008.4) File Repository

Program: 77779

Extract: 1

Status: Draft

Submit

Extract Call List

Timeline

Spec Instr

Spec Ven Instr

Approval Notes

Pre-Nthing Suppress

Nthing View

CF Specs

Ad Hoc Reports

Status Report

Timeline

1610

Campaign Level:

1620

SIMPLE

MEDIUM

COMPLEX

Drop Date

Specification Handoff

Lettershop IBTM Vendors Assigned

Initial Production Date

Final Nthing Specs Due

Tele. Phone Append Request

Decision Mgmt PA Extract Sign-off Due Date

1630

Scheduled

04/14/2008

Actual

Adjusted

Calculate Dates

1640

1600

FIG 16

Enterprise Gateway (Test) - Microsoft Internet Explorer provided by Axiom Corporation

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites

Links Address http://snickers/frames.asp?RDCT= Go

Home Knowledge Applications Settings Inbound/Outbound Tools Logout

CampaignTrak CST(2008.4) File Repository

Campaign Level: MEDIUM 1710 Calculate Dates 1740

Date	Scheduled	Actual	Adjusted
Drop Date	04/14/2008		1750
Specification Handoff			
Lettershop IBTM Vendors Assigned			
Initial Production Date			
Final Nihing Specs Due	3/17/2008		4/26/2008
Tele. Phone Append Request			4/26/2008
Decision Mgmt PA Extract Sign-off Due Date			4/26/2008
Extract Due at Axiom	3/24/2008		4/26/2008
File Due at Vendor	3/27/2008		4/26/2008
ACAPS File Ship Date	3/28/2008		4/26/2008
ACAPS File Load Date	4/7/2008		4/26/2008
IBTM files due to Vendor	3/27/2008		4/26/2008
Partner Opt-Out / Non-Contract Due Date			4/26/2008
URL Audit Due Date			
Contract Target Delivery Date			
CPLAN Update Date			
Promo Ing Ship Date (Include in Monthly Batch)			

1700

FIG 17

Links: http://snickers/frames.asp?RDCT=	
Home Knowledge Applications Settings Inbound/Outbound Tools Logout	
CampaignTrak CST(2008.4) File Repository	
Program: 77779 Extract: 1 Status: Draft	Submit
Extract Call List Timeline Spec Instr Spec Ven Instr Approval Notes Pre-Nthing Suppress Nthing View CF Specs Ad Hoc Reports Status Report	
Special Instructions 1810	ProgramID: <input type="text" value="037660"/> Extract ID: <input type="text" value="4"/> 1820 NOTE: Please carry the member_id (if available) for all cells to both the lettershop file and ACAPS file.
General Instructions: 1830	FUSA.PARTNER_DNS_TB (FURY) For the NY Life Cell and Countrywide cell, suppress all records whose encrypted member IDs and NS_Name match to FUSA.PARTNER_DNS_TB (FURY) **For Countrywide NS_Name = 'COUNTRYWIDE' or 'COUNTRYWIDE HOME LOANS' Cms4gx.suppress_feb08@fury by indiv_id and ns_name for optimized cells.
Campaign Suppressions: 1840	One per HH per partner.
Special Instructions: 1850	One per HH per partner.
Household: 1860	1800

FIG 18

Enterprise Gateway (Test) - Microsoft Internet Explorer provided by Actixom Corporation

File Edit View Favorites Tools Help

Back

Forward

Stop

Home

Search

Favorites

Address

http://snickers/frames.asp?RDCT=

Go

Home

Knowledge

Applications

Settings

Inbound/Outbound

Tools

Logout

CampaignTrak CST(2008.4) File Repository

Program: 77779 Extract: 1 Status: Draft

Extract

Call List

Timeline

Spec Instr

Spec Ven Instr

Approval Notes

Pre-Nthing Suppress

Nthing View

CF Specs

Ad Hoc Reports

Status Report

Submitted

Added on the page. You must save the page before changes are committed to the database. ~ 1910

Pre-Nthing Suppressions ~ 1920

Suppressions

Table Match EDW DNM IND ~ 1930

Select the Table Match Suppression or Standard Suppression below in the order they should be executed. The order may be adjusted in the list box above.

Table Match Suppression ~ 1930

Schema POSTRF Match Key

Table Name EDW_DNM

Add Save Delete ~ 1940

Standard Suppressions

INDIV_ID INDIV_ID

BUS_ID

EN_MEM_ID

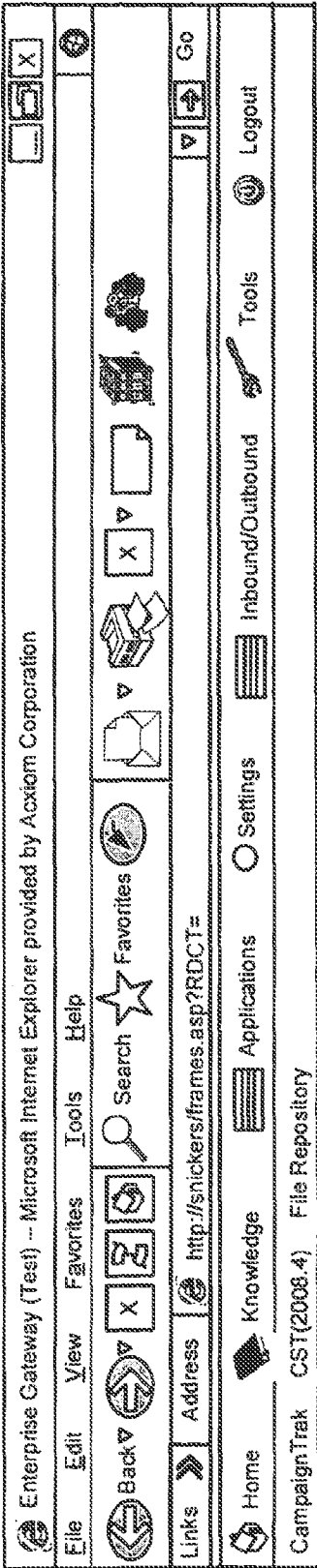
NS_NAME

ZIP

SCF

Inclusion No ~ 1950

FIG 19



Standard Suppressions 2010
☒ State Suppression ~ 2020

AK	AR
AL	DE
AP	
AZ	

Inclusion No ~ 2030

2000

FIG 20

CAMPAIGN SPECIFICATION SYSTEM AND METHOD

CROSS REFERENCE TO RELATED APPLICATIONS

[0001] This patent application is a continuation-in-part of U.S. patent application Ser. No. 12/429,319, filed Apr. 24, 2009. The earlier application is hereby incorporated by reference herein in its entirety.

TECHNICAL FIELD

[0002] Embodiments of the invention are related systems and methods for facilitating targeted marketing campaigns.

BACKGROUND OF THE INVENTION

[0003] In recent years, management of marketing campaigns has become increasingly complex due to vast data collection, storage, and analysis capabilities pertaining to customers and potential customers. Further complicating marketing campaign management is the existence of growing number of channels available for collection of data and for transmission of targeted marketing materials based upon the collected data.

[0004] Targeted marketing messages can be designed to compel individual consumers to purchase specific products or services. Increasingly, organizations are using multiple marketing channels, including outbound channels such as direct mail, telemarketing, e-mail, and direct response television, to deliver these messages to their customers. In some circumstances, organizations are also exploiting inbound channels, such the Web, customer call centers, and point of sale facilities. Such multi-channel integration customer channels, both inbound and outbound.

[0005] The increase in the number of marketing campaigns, the improving ability the market has to capture and retain detailed information on customer transactions, and the fact that all of this data is being managed and used by more and more people, create a greater need for integrated tools and systems to manage the data generated and repeatedly used by these organizations.

[0006] One of the initial steps in organizing a targeted marketing campaign has been the collection of data. As set forth above, data capture has become much more complex and diverse. Data may be captured from POS terminals, online purchases, retailers, etc. After the data is collected, it may be stored in a database accessible to marketers.

[0007] Upon the initiation of a marketing campaign, marketers must formulate requirements for campaign targets. The requirements may relate to purchasing behaviors, demographic characteristics, credit rating, or other factors.

[0008] Based on particular marketing requirements and the collected data, recipients are selected from available databases to create a list of recipients, also known as the campaign list. The list is, at least in part, based on data collected pertaining to customer demographic and behavioral characteristics.

[0009] However, after the initial creation stage, the list is modified based on regulations pertaining to the distribution of marketing materials or other limiting factors known as suppressions. The suppressions may restrict available recipients based on a number of factors including time of transmission, location of recipient, or other factors.

[0010] After creation, the lists are implemented by marketers for distribution of marketing materials. As set forth above, the marketing materials may be distributed through one or more diverse communication channels.

[0011] Data collection, retrieval, and creation of campaign lists have historically been accomplished manually. However, manual list construction and fulfillment often requires several days to one or more weeks. Thus, a system is needed that can automatically perform these functions, but can be adjusted to allow manual intervention when required.

[0012] In recent years, due to the growing complexity and volume of data as well as the size of the marketing campaigns initiated, efforts have been made to automate much of the marketing campaign process. However, the currently available methods and systems have been insufficient for satisfying marketing campaign demands. In particular, current solutions have been unable to handle data volume with adequate speed and additionally have been cumbersome and difficult to use. Automated systems frequently fail to allow sufficient manual intervention to enable correction.

[0013] Furthermore, although existing systems may include automated steps, they generally require computer professionals to create code for records selection based on specific campaign parameters. The time, effort, and resources required for this process significantly reduce campaign efficiency and increase campaign cost.

[0014] Thus, a solution is needed for campaign management that automatically incorporates requirements, selects records based on the requirements and generates a list with all necessary information to facilitate distribution of marketing materials. A solution is further needed that makes user intervention in the automated process simple and accessible.

SUMMARY OF THE INVENTION

[0015] In one aspect of the invention, a computer-implemented method is provided for management of targeted marketing campaigns. The system comprises user interface presentation components for allowing selection of marketing matrix data defining a target population and selection of suppressions for limiting the target population. The system additionally comprises integration components implemented by a processor for integrating the marketing matrix with the suppressions and automatically generating record selection components for automatically selecting records from a database based on the marketing matrix data and suppressions and creating a selection table including the selected records. The system further comprises a list generation engine for generating a campaign list based on the created selection table and transmission components for transmitting the generated campaign list to at least one list recipient.

[0016] In an additional aspect of the invention, a computer-implemented method is provided for management of targeted marketing campaigns. The method implements a computing system including user input components, a processor, and a database. The method may include providing user interface presentation components for allowing selection of marketing matrix data defining a target population and selection of suppressions for limiting the target population. The method may additionally include receiving entered marketing matrix and suppression data entered through the user input components and integrating, using the processor, the marketing matrix with the suppressions and automatically generating record selection components based on the marketing matrix data and suppressions. The method may further include selecting

records from the database using the automatically generated record selection components, creating a selection table including the selected records and generating a campaign list based on the created selection table.

[0017] In a further aspect of the invention, a computer-implemented system is provided for automatic management of targeted marketing campaigns. The system includes a processor, a database, and user input tools, and comprises a standards requirements engine for standardizing requirements for a marketing campaign. The standards requirements engine may include marketing matrix components for storing selectable marketing matrix data and allowing entry of additional marketing matrix data, and suppression components for storing suppressions, the stored suppressions including selectable suppressions and mandatory suppressions, and for allowing entry of additional suppressions. The standards requirements engine may additionally include user interface presentation components for allowing entry of marketing matrix data defining a target population and selection of suppressions for limiting the target population, the selections accomplished through the user input tools. The system may additionally include integration components implemented by the processor for integrating the marketing matrix with the suppressions and generating record selection components for automatically selecting records from the database based on the marketing matrix data and suppressions and creating a selection table including the selected records.

[0018] In this aspect, the system may further include records processing components for processing records stored in the database to provide a campaign list. The records processing components include record selection components for automatically selecting records from the database based on the marketing matrix data and suppression components and creating a selection table including the selected records. The system also includes verification components for running reports validating the selection process, and a list generation engine for generating the campaign list based on the created selection table. The system may additionally include fulfillment components for facilitating fulfillment of the marketing campaign, the fulfillment components comprising transmission components for transmitting the generated campaign list to at least one list recipient and tracking components implementing a stored contact history table to track recipients and responses.

BRIEF DESCRIPTION OF THE DRAWINGS

[0019] The present invention is described in detail below with reference to the attached drawings figures, wherein:

[0020] FIG. 1A is a block diagram illustrating an operating environment for a campaign specification system in accordance with an embodiment of the invention;

[0021] FIG. 1B is a block diagram illustrating a campaign specification system in accordance with an embodiment of the invention;

[0022] FIG. 2 is a block diagram illustrating a computer system implementing campaign specification system components in accordance with an embodiment of the invention;

[0023] FIG. 3 is a block diagram illustrating campaign specification system components in accordance with an embodiment of the invention;

[0024] FIG. 4 is a flow chart illustrating campaign management procedures in accordance with an embodiment of the invention;

[0025] FIG. 5 is a flow chart illustrating a method for standardizing requirements during a marketing campaign in accordance with an embodiment of the invention;

[0026] FIG. 6 is a flow chart illustrating a method for record selection in accordance with an embodiment of the invention;

[0027] FIG. 7 is a flow chart illustrating a method for generating a campaign list in accordance with an embodiment of the invention;

[0028] FIG. 8 illustrates a user interface for uploading requirements in accordance with an embodiment of the invention;

[0029] FIG. 9 illustrates a user interface in accordance with an embodiment of the invention;

[0030] FIG. 10 is a user interfaces illustrating upload errors in accordance with an embodiment of the invention;

[0031] FIG. 11 illustrates an extract list user interface in accordance with an embodiment of the invention;

[0032] FIG. 12 illustrates an extract detail user interface in accordance with an embodiment of the invention;

[0033] FIG. 13 illustrates a cell list user interface in accordance with an embodiment of the invention;

[0034] FIG. 14 illustrates a cell detail user interface in accordance with an embodiment of the invention;

[0035] FIG. 15 illustrates a user interface for displaying suppressions in accordance with an embodiment of the invention;

[0036] FIG. 16 illustrates a timeline user interface in accordance with an embodiment of the invention;

[0037] FIG. 17 illustrates a populated timeline user interface in accordance with an embodiment of the invention;

[0038] FIG. 18 illustrates a special instructions user interface in accordance with an embodiment of the invention;

[0039] FIG. 19 illustrates a suppressions user interface in accordance with an embodiment of the invention; and

[0040] FIG. 20 illustrates a standards suppressions user interface in accordance with an embodiment of the invention.

DETAILED DESCRIPTION OF PREFERRED EMBODIMENTS

[0041] Embodiments of the present invention are directed to a method and system for managing marketing campaigns. A campaign specification system may include an online repository for all campaign management specification documents. The system may allow standard core campaign extracts to be created automatically. Thus, the system allows for running scripts and performing audits with predefined pass/fail criteria without programmer intervention. The campaign specification system standardizes the creation of campaign specifications and allows specification data to pass through the system and into processes, as well as feed databases that drive automated or manual versions of the several aspects of marketing campaigns. The system may, for example, address population selection, suppressions, auditing, population of production tables, and elimination of several previously required manual data-entry steps. In particular, a system is provided that efficiently creates a mailing list and expedites mailing based on parameters submitted through a marketing matrix.

[0042] FIG. 1A is a block diagram illustrating an operating environment for a campaign specification system in accordance with an embodiment of the invention. A campaign specification system 100 may be connected over a network 10 to a system user 20, databases 60, and partner systems 50. The

campaign specification system **100** may be connected over an additional network **30** with output recipients **40**.

[0043] The campaign specification system **100** interacts with the above-described components to facilitate management of marketing campaigns. The campaign specification system **100** may include one or more computing systems programmed with software modules to execute the functions of the system as will be further described below.

[0044] The network **10** may for example include the Internet, LAN, WAN, or other type of network. Optionally, the components may all be connected to the campaign specification system **100** through a single network or alternatively over two or more networks.

[0045] The system user **20** may include a computing system that enables the user to connect with the campaign specification system **100**. The system user **20** accesses user interfaces, to be described below, that allow for efficient control and operation of the campaign specification system **100**. Authorized users may include campaign managers and other campaign personnel. Other campaign personnel may have limited accessibility to the campaign specification system **100** based on their specific campaign roles.

[0046] The distribution channel **30** may also be or include a network. Alternatively, the distribution channel may include a delivery service or other mechanism for providing output to the output recipients **40**. The output recipients **40** may include, for example, printers, vendors, or partners. Output may include a file that goes to the print vendor so that the print vendor is able to print names and addresses on fulfillment pieces. The system may send out another file that goes to inbound telemarketing companies as any mail piece transmitted in the outbound direction that provides the option of an inbound call. Ultimate output recipients receive marketing materials from the initial output recipients. The ultimate output recipients may include those named on the lists as well as seed names, which are names of marketing supply stores included in the prepared mailing list to ensure that mailings were properly assembled.

[0047] Output recipients **40** may also include a credit processing or ACAPs system, which can match output information against the records that come back for fulfillment. Output recipients **40** may also include credit bureaus that are required to be notified regarding others of credit.

[0048] The partner systems **50** may include merchant systems, credit bureau systems, or other systems having data to contribute to the database **60**. Exemplary data may include purchase patterns, demographic characteristics, or other information related to potential targets of marketing campaigns.

[0049] The campaign specification system **100** may access data from the database **60** over the network **10**, which may in preferred embodiments may be the Internet. The database **60** may be capable of processing billions of records per month and may at any given time store several hundred million records. The database may, for example, be or include a Prospect™ database. Information in the database **60** may include target names and addresses as well as information including, but not limited to income, age, family composition, house type, lifestyle, length of residence, and mail responsiveness. Further information in the database **60** may include spending habits by category and credit data. Each target in the database **60** may additionally have previous promotion history appended to it as well as a channel history, which determines if a target purchased an item over the Internet, or via

telephone sales, in person, or through the mail. In preferred embodiments, the database **60** can be updated frequently from appended data and from other sources.

[0050] In embodiments of the invention, a percentage of the processed records may be appended to the database **60**. If the marketer is a financial services provider, the stored information may include credit cardholder information, credit bureau information, files from partners, suppression files from various states, and demographic information.

[0051] FIG. 1B is a block diagram illustrating a campaign specification system in accordance with an embodiment of the invention. The campaign specification system **100** may include a campaign specification application processing server **102** that provides multiple user input interfaces **110**, **100b** . . . **10n**, preferably on system user computing devices. The campaign specification application processing server **102** may further be connected with one or more production servers **120a**, **120b** . . . **120n**. The production servers **120a** . . . **120n** may create the materials for transmission to the output recipients **40** described above with respect to FIG. 1A.

[0052] FIG. 2 is a block diagram illustrating a computer system **200** implementing campaign specification system components in accordance with an embodiment of the invention. This configuration is merely exemplary and should not be construed as limiting. The computing system **200** may include a processing unit **210**, a peripheral interface **220**, a user input interface **230**, a system bus **240**, a system memory **250**, a network interface **290**, a connected modem **292**, and a memory interface **294**. The system bus **240** may be provided for coupling the various system components.

[0053] Computers typically include a variety of computer readable media that can form part of the system memory and be read by the processing unit. By way of example, and not limitation, computer readable media may comprise computer storage media and communication media. The system memory **250** may include computer storage media in the form of volatile and/or nonvolatile memory such as read only memory (ROM) **260** and random access memory (RAM) **270**.

[0054] A basic input/output system (BIOS) **262**, containing the basic routines that help to transfer information between elements, such as during start-up, is typically stored in ROM **260**. RAM **270** typically contains data and/or program modules that are immediately accessible to and/or presently being operated on by processing unit. The data or program modules may include an operating system **274**, campaign specification components **272**, other program modules **276**, and program data **280**. The operating system may be or include a variety of operating systems such as Microsoft Windows® operating system, the Unix operating system, the Linux operating system, the Xenix operating system, the IBM AIX™ operating system, the Hewlett Packard UX™ operating system, the Novell Netware™ operating system, the Sun Microsystems Solaris™ operating system, the OS/2™ operating system, the BeOS™ operating system, the Macintosh™ operating system, the Apache™ operating system, an OpenStep™ operating system or another operating system of platform.

[0055] At a minimum, the memory **250** includes at least one set of instructions that is either permanently or temporarily stored. The processor **210** executes the instructions that are stored in order to process data. The set of instructions may include various instructions that perform a particular task or tasks, such as those shown in the appended flowcharts. Such a set of instructions for performing a particular task may be

characterized as a program, software program, software, engine, module, component, mechanism, or tool. The campaign specification system may include a plurality of software processing modules stored in a memory as described above and executed on a processor in the manner described herein. The program modules may be in the form of any suitable programming language, which is converted to machine language or object code to allow the processor or processors to read the instructions. That is, written lines of programming code or source code, in a particular programming language, may be converted to machine language using a compiler, assembler, or interpreter. The machine language may be binary coded machine instructions specific to a particular computer.

[0056] Any suitable programming language may be used in accordance with the various embodiments of the invention. Illustratively, the programming language used may include assembly language, Ada, APL, Basic, C, C++, COBOL, dBase, Forth, FORTRAN, Java, Modula-2, Pascal, Prolog, REXX, SQL, SAS, and/or JavaScript for example. Further, it is not necessary that a single type of instruction or programming language be utilized in conjunction with the operation of the system and method of the invention. Rather, any number of different programming languages may be utilized as is necessary or desirable.

[0057] Also, the instructions and/or data used in the practice of the invention may utilize any compression or encryption technique or algorithm, as may be desired. An encryption module might be used to encrypt data. Further, files or other data may be decrypted using a suitable decryption module.

[0058] The computing environment may also include other removable/nonremovable, volatile/nonvolatile computer storage media. For example, a hard disk drive may read or write to nonremovable, nonvolatile magnetic media. A magnetic disk drive may read from or writes to a removable, nonvolatile magnetic disk, and an optical disk drive may read from or write to a removable, nonvolatile optical disk such as a CD ROM or other optical media. Other removable/nonremovable, volatile/nonvolatile computer storage media that can be used in the exemplary operating environment include, but are not limited to, magnetic tape cassettes, flash memory cards, digital versatile disks, digital video tape, solid state RAM, solid state ROM, and the like. The storage media are typically connected to the system bus through a removable or non-removable memory interface.

[0059] The processing unit **210** that executes commands and instructions may be a general purpose computer, but may utilize any of a wide variety of other technologies including a special purpose computer, a microcomputer, mini-computer, mainframe computer, programmed micro-processor, micro-controller, peripheral integrated circuit element, a CSIC (Customer Specific Integrated Circuit), ASIC (Application Specific Integrated Circuit), a logic circuit, a digital signal processor, a programmable logic device such as an FPGA (Field Programmable Gate Array), PLD (Programmable Logic Device), PLA (Programmable Logic Array). RFID processor, smart chip, or any other device or arrangement of devices that is capable of implementing the steps of the processes of the invention.

[0060] It should be appreciated that the processors and/or memories of the computer system need not be physically in the same location. Each of the processors and each of the memories used by the computer system may be in geographically distinct locations and be connected so as to communi-

cate with each other in any suitable manner. Additionally, it is appreciated that each of the processor and/or memory may be composed of different physical pieces of equipment.

[0061] A user may enter commands and information into the computer through a user interface **230** that includes input devices such as a keyboard and pointing device, commonly referred to as a mouse, trackball or touch pad. Other input devices may include a microphone, joystick, game pad, satellite dish, scanner, voice recognition device, keyboard, touch screen, toggle switch, pushbutton, or the like. These and other input devices are often connected to the processing unit through a user input interface that is coupled to the system bus, but may be connected by other interface and bus structures, such as a parallel port, game port or a universal serial bus (USB).

[0062] One or more monitors or display devices may also be connected to the system bus via an interface **220**. In addition to display devices, computers may also include other peripheral output devices, which may be connected through an output peripheral interface. The computers implementing the invention may operate in a networked environment using logical connections to one or more remote computers, the remote computers typically including many or all of the elements described above.

[0063] Various networks may be implemented in accordance with embodiments of the invention, including a wired or wireless local area network (LAN) and a wide area network (WAN), wireless personal area network (PAN) and other types of networks. When used in a LAN networking environment, computers may be connected to the LAN through a network interface or adapter. When used in a WAN networking environment, computers typically include a modem or other communication mechanism. Modems may be internal or external, and may be connected to the system bus via the user-input interlace, or other appropriate mechanism. Computers may be connected over the Internet, an Intranet, Extranet, Ethernet, or any other system that provides communications. Some suitable communications protocols may include TCP/IP, UDP, or OSI for example. For wireless communications, communications protocols may include Bluetooth, Zigbee, IrDa or other suitable protocol. Furthermore, components of the system may communicate through a combination of wired or wireless paths.

[0064] Although many other internal components of the computer are not shown, those of ordinary skill in the art will appreciate that such components and the interconnections are well known. Accordingly, additional details concerning the internal construction of the computer need not be disclosed in connection with the present invention.

[0065] Those skilled in the art will appreciate that the invention may be practiced with various computer system configurations, including hand-held wireless devices such as mobile phones or PDAs, multiprocessor systems, microprocessor-based or programmable consumer electronics, mini-computers, mainframe computers, and the like. The invention may also be practiced in distributed computing environments where tasks are performed by remote processing devices that are linked through a communications network. In a distributed computing environment, program modules may be located in both local and remote computer storage media including memory storage devices.

[0066] FIG. 3 is a block diagram illustrating campaign specification system components **300** in accordance with an embodiment of the invention. The campaign specification

components may include a requirements standardization engine 310, a records processing components engine 340, and a fulfillment engine 360. These processing engines may be implemented by one or more processing units such as those described above in order to facilitate campaign specification management. The campaign specification system components 300 may further include stored tables 380 accessible to the aforementioned engines.

[0067] The requirements standardization engine 310 may include user interface presentation components 312, marketing matrix components 322, suppression components 332, and integration components 336. Understanding of the user interface presentation components 312 is facilitated below by FIGS. 8-20 and accompanying descriptions.

[0068] The marketing matrix components 322 facilitate definition of marketing targets by accepting user input through the user interface presentation components 312 and providing criteria for selected targets. In operation, in order to complete a marketing matrix, a marketer might specify a target population using multiple criteria. For example, the marketer might select a population based on geographical region, personal characteristics, demographics, spending habits, or other factors.

[0069] The suppression components 332 may be activated to eliminate specified targets based on specific criteria. The suppressions may be selected from stored selectable options, may be entered by the user, or in some instances may be imposed based on existing laws or regulations. Thus, the specific information from the marketing matrix is loaded into the campaign specification system and the system completes suppressions. For instance, the system may want to suppress the population that has already received the mailing in the last month. Furthermore, some states or jurisdictions may prohibit mailing to predetermined individuals.

[0070] The integration components 336 may integrate the marketing matrix with the suppressions to provide output to the records processing engine 340. Based on the input marketing matrix and suppressions, the integration components 336 automatically generate record selection code to be implemented by the records processing components 340 in order to extract records from the database.

[0071] The records processing engine 340 may include the aforementioned record selection components 342, verification components 348, and list generation components 350. As set forth above, the record selection components 342 may be automatically generated by the integration components 336. Accordingly, once the marketing and suppression information is entered, the system generates code through the integration components 336 to take the entered information and compare it with a table built into the database. The record selection components 342 implement this code to ensure that records that meet the input criteria will go to selection table. The records extracted from the database do not identify individuals by name, but rather by individual IDs.

[0072] The record selection components 342 may include the code generated by the integration components 336 that enables automatic selection of records from the database. Both of these components may operate automatically without operator invention in the absence of special instructions that are further described below. The record selection components 342 thus automatically build a selection table from records extracted from the database.

[0073] The verification components 348 run a verification process on a generated selection table. The verification com-

ponents 348 may then run a series of reports validating the selection process. If the selections are approved, the system may perform last minute suppressions. After all of these are applied, the system goes into tables and picks out names and addresses by matching the individual IDs found for each person.

[0074] If the selection table fails verification, the records processing engine 340 returns the process to the standardization requirements engine 310. The list generation engine 350 generates the output list after the list has been verified.

[0075] The fulfillment engine 360 may include transmission components 362, and tracking components 370. The fulfillment engine 360 may operate to distribute output through appropriate channels.

[0076] The transmission components 362 of the fulfillment engine may generate a file of names and addresses and transmit the file, while the tracking components 370 implement response tracking. Output recipients may be matched with output marketing materials in order to ensure distribution. In the fulfillment stage, the system then generates a file of names and addresses. The output lists may also include seed names, which are names of marketing supply stores want to include in mailing list to ensure mail was sent out with proper offer. Other output may include a file that goes to the print vendor so that the print vendor is able to print names and address on fulfillment piece. The system may send out another file that goes to inbound telemarketing company, because any mail piece that goes out has the option of an inbound call.

[0077] Through the use of the fulfillment components 360 of the campaign specification system, an organization can track responses and match with predictions. Furthermore the system facilitates root cause analysis to determine the cause of undesired results. The system creates all data files for various sites including telemarketing vendors, letter shops, credit bureau, contact history files. The fulfillment components are able to create a layout in a desired order and automate execution, formatting, and shipping.

[0078] The stored tables 380 may include a contact history table. Through the use of the campaign specification system components 300, a search can be conducted on name and address and invitation/solicitation number to go back and find the exact piece that went out. This can be accomplished through the contact history table 380. Contact history allows tracking of how many people had responded and the nature of each response.

[0079] Although the aforementioned components are shown as discrete modules, each of the modules may alternatively be integrated with one another. If the modules are discrete, multiple modules may operate cooperatively as will be further explained below.

[0080] FIG. 4 is a flow chart illustrating campaign management procedures 400 in accordance with an embodiment of the invention. In procedure A, the standardization engine sets the standardization requirements. In procedure 13, the records processing engine 340 processes information to generate a campaign list. In procedure C, the fulfillment engine 360 executes fulfillment procedures. Furthermore, in embodiments of the invention, manual intervention is permitted for one or more of the three major operations performed. The system can be customized so that any selected steps may be performed manually and any selected steps may be performed automatically. The steps involved in each of procedures A, B, and C are more fully described below.

[0081] FIG. 5 is a flow chart illustrating a method for standardizing requirements (procedure A) during a marketing campaign in accordance with an embodiment of the invention. The method begins in S500 and the system provides an input interface in S510. In S520, the system receives user input. For example, a campaign manager may want to market a new product to everyone who lives in a particular state, who has spent a threshold amount of money in the last month in a particular category, and is a frequent flier on a particular airline. This information can be extracted from the database described herein. The information that comes from the marketing matrix may further include cell codes, price points, tests, quantity of records, letter shop identifier, state, money spent, time period, etc. This specific information is loaded into the campaign specification system in S520.

[0082] Upon receiving the user input, the system integrates the user input with the marketing matrix in S530. In S540, the system applies suppressions. For example, in the state of Connecticut, the system may be prohibited from mailing between two and six AM. The system may further implement restrictions on mailing for two consecutive months. In this instance, the system would extract the previous month's mailing files and suppress those records. Customers of a particular partner may also be suppressed. For instance, if no United Airlines customers should be included, these records will be suppressed. Suppressions may also be implemented based on unique characteristics of person, such as physical characteristics, age, gender, etc. The system moves to procedure B in S550.

[0083] As will be more fully explained below, the integrated marketing matrix file contains cell-specific data for a campaign, including selection logic, cell level suppression instructions, seed information, optimized data, and letter shop information.

[0084] FIG. 6 is a flow chart illustrating a method for record selection in accordance with an embodiment of the invention. The method begins in S600. In S610, the system generates record selection tools based on the marketing matrix and applied suppressions. In S620, the records processing engine obtains records from the database. In S630, the system generates a selections table by comparing received information against the table built into the database. Records that meet the input criteria will go to selection table. At this point, the records extracted from the database include individual IDs rather than names and addresses.

[0085] The system runs a verification process in S636. The verification process 636 may include a series of reports validating that the selection was accomplished correctly. Some of the reports may be standard and others may be non-standard. If the selection table fails verification in S640, the records processing engine returns the process to the standardization requirements engine. If the selection table passes verification in S640, the system performs additional suppressions in S650. For example, if the offer is to be mailed to recipients pre-approved for a credit card, last minute credit bureau suppressions may be required.

[0086] In S660, the records processing components pick names and addresses from the tables based on the individual IDs extracted from the database and moves to procedure C in S670.

[0087] FIG. 7 is a flow chart illustrating a method for generating a campaign list in accordance with an embodiment of the invention. The method begins in S700 and the fulfillment

engine generates required files including a file of names and addresses in S710. The fulfillment engine transmits the file in S720 and implements response tracking in S730. The method ends in S740.

[0088] The file generated in S710 may include seed names, which are names of marketing supply stores for inclusion in mailing list to ensure mail was sent out with proper offer. A file for transmission to a print vendor is provided so that the print vendor is able to print name and address on fulfillment piece. Another file may be transmitted to an inbound telemarketing company, because any mail piece that goes out has the option of an inbound call and the inbound vendor should have the same names and addresses as print shop.

[0089] The response tracking of S730 may implement a series of verification reports that files were created accurately to requirements specified. Responses may be tracked and matched with predictions. The contact history table described above with respect to FIG. 3 can facilitate root cause analysis. Searches can be accomplished through a name and address and invitation/solicitation number to go back and find the exact piece that was transmitted. Contact history allows tracking of how many people had responded, what they wanted etc. and can further verify recent offers and amount of offers.

[0090] The campaign specification document created with the system provides the selection instructions for a marketing program as communicated by the campaign managers having access to the system. In preferred embodiments, the campaign specification document is uploaded into the system from two separate .CSV files: including a marketing matrix file and a preliminary suppressions file. These two files are zipped together and loaded through the systems GUI upload function, which is further described below. A process of creating these files is described below with reference to FIG. 8.

[0091] FIG. 8 illustrates a user interface 800 for uploading requirements in accordance with an embodiment of the invention. After the user logs into the system, in order to initiate the process, the user selects an upload tab 820 on a tab list 810. By selecting a marketing matrix table layout option 846 located centrally on user interface 800, a user can open a window containing a marketing matrix layout.

[0092] The tab list 810 of the user interface 800 preferably includes multiple selectable options such as extract list 812, reassign 814, reversal 816, reinstate 818, upload 820, reports 822 and exit 824. The user interface 800 also includes a browse option 830 for locating a file and load or analyze options 840. An upload option 850 may also be provided for uploading data entered on the user interface 850. A table layout option 848 is available for viewing suppressions.

[0093] As set forth above, selection of the upload option 820 from an initial screen (not shown) brings up the user interface 800. Selecting the table layout option 846 for bringing up the marketing matrix will open a window containing the marketing matrix layout. The layout can be configurable through a spreadsheet such as Microsoft Excel spreadsheet. A spreadsheet having the column headers as shown below in Table 1 may be populated.

TABLE 1

COLUMN HEADER	DESCRIPTION
CELL_CODE	Nthing Channel Used (DM, TM, CS, OE, OP)
CHANNEL	Name Source Name
NS_NAMES	RO Number, Numeric only
NTHING_OFFER_TYPEsNS_NAMES	OFFER used for Selection Criteria (PA, FA, LP, SP, UA, US, UZ, ZZ)Name Source Name
NTHING_TYPE_NMNTHING_OFFER_TYPEs	CAP, ALL, SPLIT; must be capitalizedOFFER used for Selection Criteria (PA, FA, LP, SP, UA, US, UZ, ZZ)
NTHING_MIN_NBNTHING_TYPE_NM	Minimum Number of Acceptable Records, Numeric only CAP, ALL, SPLIT; must be capitalized
NTHING_MAX_NBNTHING_MIN_NB	Maximum Number of Acceptable Records, Numeric onlyMinimum Number of Acceptable Records, Numeric only
NTHING_MISC_CUT_COL_1_NMPTNR_PRS_MISC_INFO_TX	Cell Level Nthing Column, to be selected from the CUT table columns/Balance/Mileage add Value, Numeric only
NTHING_MISC_CUT_OPER_1_CDNTHING_MISC_CUT_COL_1_NMNTHING_MISC_CUT_VAL_1_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_2_NMNTHING_MISC_CUT_VAL_1_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_2_CDNTHING_MISC_CUT_COL_2_NMNTHING_MISC_CUT_VAL_2_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_3_NMNTHING_MISC_CUT_VAL_2_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_3_CDNTHING_MISC_CUT_COL_3_NMNTHING_MISC_CUT_VAL_3_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_4_NMNTHING_MISC_CUT_VAL_3_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_4_CDNTHING_MISC_CUT_COL_4_NMNTHING_MISC_CUT_VAL_4_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_5_NMNTHING_MISC_CUT_VAL_4_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_5_CDNTHING_MISC_CUT_COL_5_NMNTHING_MISC_CUT_VAL_5_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_6_NMNTHING_MISC_CUT_VAL_5_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_6_CDNTHING_MISC_CUT_COL_6_NMNTHING_MISC_CUT_VAL_6_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_7_NMNTHING_MISC_CUT_VAL_6_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_7_CDNTHING_MISC_CUT_COL_7_NMNTHING_MISC_CUT_VAL_7_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_8_NMNTHING_MISC_CUT_VAL_7_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_8_CDNTHING_MISC_CUT_COL_8_NMNTHING_MISC_CUT_VAL_8_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_9_NMNTHING_MISC_CUT_VAL_8_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_9_CDNTHING_MISC_CUT_COL_9_NMNTHING_MISC_CUT_VAL_9_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE
NTHING_MISC_CUT_COL_10_NMNTHING_MISC_CUT_VAL_9_DESC_TX (can be pipe delim)	Cell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut Column
NTHING_MISC_CUT_OPER_10_CDNTHING_MISC_CUT_COL_10_NMNTHING_MISC_CUT_VAL_10_DESC_TX (can be pipe delim)	Operator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GECell Level Nthing Column, to be selected from the CUT table columnsValues to be used with Associated Cut ColumnOperator to be used with Associated Cut Column and Values; EQ, NE, LT, GT, LE, GE

[0094] After creation, the marketing matrix file should be saved. In embodiments of the invention, the marketing matrix file may be required to be saved specifically as marketing matrix file in order to later be combined with suppressions.

[0095] Subsequently, a user may add suppressions. To initiate the creation of a suppressions file, the user may select the table layout **848** option as shown in FIG. **8**.

[0096] After a user enters all of the headers into the spreadsheet, the system populates the appropriate values for each column, for example, using the description criteria shown in Table 2 below.

TABLE 2

Column Header	Description
PROG_ID	
EXTRACT_NB	
SPRS_TYPE_CD	TJ, PAFA, DNS, ST, MCIF
SPRS_ORDR_NB	Suppression Order, Numeric only
INCLUDE_EXCLUDE	I (Inclusion) or E (Exclusion)
SCHEMA_NM	Owner of Table
TABLE_NM	TABLE_NAME
MATCH_KEY	Pipe Delimited
SPRS_PROG_ID	
SPRS_EXTRACT_NB	
NS_NAME	Pipe Delimited
STATE_CD	State—Pipe Delimited
WEEK	Optimized Week, Numeric only

[0097] The user may request that the system store preliminary suppressions in file. The preliminary suppressions are defined as campaign level suppression data, including: pre-approved/full application suppression data, retail suppression information, partner names. State suppressions, and ad hoc table suppressions. These preliminary suppressions are applied to either the entire campaign population or to large partner sections of the campaign population.

[0098] When the campaign specification values are entered for each column, the user may be given the opportunity to review the document to insure that all campaign specific data are included. If a circumstance arises in which a campaign does not require preliminary suppressions, the creation of the preliminary suppressions file is not necessary.

[0099] Assuming that preliminary suppressions are necessary, a user, having saved both the marketing matrix file and the preliminary suppressions file, may link the files, for example by zipping the files together.

[0100] In order to upload a campaign specification document from created marketing matrix and suppression files, a system user would select the browse option **830** and identify the created file that combines the marketing matrix and suppressions.

[0101] With reference to user interface **900** of FIG. **9**, once the combined campaign specification file is located and is displayed in browse box **930**, the user may upload the file by selecting an upload button **950**. FIG. **9** illustrates the user interface **900** that may be displayed in accordance with an embodiment of the invention when the user uploads a created campaign specification document. User interface **900** includes an area **910** that displays both successful loads and errors and is further illustrated in FIG. **10**.

[0102] FIG. **10** is a user interface **1000** illustrating upload records **1040** in accordance with an embodiment of the invention. The upload records **1040** may be listed by type **1002**, group **1004**, message **1006**, user **1008**, and date **1012**. Available options upon viewing of the upload errors **1040** may

include an upload option **1010**, a view upload log option **1020**, and a cancel option **1030**. The message section **1006** may contain an explanation of any existing errors. If no errors occur, the user may proceed, but if errors are encountered, the appropriate saved file should be corrected and both files should be re-zipped and re-loaded. Once corrected, in embodiments of the invention, uploading the same program ID/extract number overwrites the original data within the system

[0103] When the marketing matrix and preliminary suppression files are loaded into the system, the user can access the actual campaign specification document and populate the remaining campaign instruction data. Once the required fields across the remaining tabs are populated, the user can submit the campaign for either automated or manual runs through the campaign execution and campaign fulfillment processes.

[0104] FIG. **11** illustrates an extract list user interface **1100** in accordance with an embodiment of the invention. The extract list user interface **1100** may be reached, for example, by selection of an extract list tab **1100** shown in FIG. **8**. The user interface **1100** lists every campaign owned by the user currently logged in and the status of each campaign. As more users with other roles, such as campaign execution (CE) and campaign fulfillment (CF) are assigned to this campaign, the system tool displays their user IDs accordingly. All campaigns report being in Draft Status until the CM submits it for CE and CF processing.

[0105] As set forth above, the extract list user interface **1100** may appear upon selection of the extract list option **1100** from the menu bar **1102**. List results may be provided for example by program ID **1120** and campaign owner **1130**. A filter option **1140** may be provided for determining a number of viewable results. An indicator **1150** may provide the number of results found. Other information for each record in the list may include CE owner, CF owner, status, description, step status, step, due date and roll out (RO) number. By selecting an option **1160**, users are able to add new records to the list. Selection of the program ID/extract number **1120** opens an extract detail page of the campaign.

[0106] FIG. **12** illustrates an extract detail user interface **1200** in accordance with an embodiment of the invention. In order to populated the user interface **1200**, a campaign manager may step through each column of an extract detail section **1230** and enter preferred values or select preferred values from the drop-down menus shown. To save selected values, users must select an update button **1250**. An exemplary field that may be included is campaign month/year, **1212**, which represents the actual campaign mail month and year. Campaign types **1214** may include multiple levels of information such as: 1st Byte: B—Brands, P—Partner; 2nd Byte: P—PA (Pre-Approved), F—FA (Full Application); 3rd Byte: M—Direct Mail, T—Telemarketing, E—Email/Internet; 4th Byte: C—Consumer, B—Small Business; and 5th Byte: C—Core, M—Manual PRM, T—Credit Trigger.

[0107] FIG. **13** illustrates a cell list user interface **1300** in accordance with an embodiment of the invention. The cell list user interface **1300** may appear upon selection of cell list **1312** from tab menu **1302**. Cell list user interface **1300** may include a cell list **1310**, containing a listing of cell codes and prefixes **1330**. The user interface **1300** may include a multi cell update option **1320** and an add new option **1340**. Through the cell list user interface **1300**, a campaign manager can

conduct a multi-cell update for most of the fields. Selecting a link for a particular cell code will open a cell detail user interface **1400** for that cell.

[0108] FIG. **14** illustrates the cell detail user interface **1400** in greater detail. The cell detail user interface **1400** may list the cell code in space **1410**, prefix at **1412**, partner priority number **1414**, cell priority number **1416**, IDs **1420**, names **1422**, flags **1424**, suppression types **1430**, and lookup options **1432** and **1434**. The data loaded from the marketing matrix and suppression files displays within each particular Cell Code.

[0109] FIG. **15** illustrates a user interface **1500** for displaying suppressions in accordance with an embodiment of the invention. The page may include special instructions section **1510**, table match suppressions **1520**, and cut table sections **1530**. Operator values for the Cut Table Selections may include: EQ—Equal to, NE—Not Equal, GT—Greater Than, LT—Less Than, GE—Greater Than or Equal to, LE—Less Than or Equal to. Information on this page can be changed or updated prior to submission of the campaign by revising the information and selecting update option **1540**.

[0110] If no changes or updates are needed within the cell detail pages, a user may continue to timeline user interface **1600**. FIG. **16** illustrates timeline user interface **1600** that may be accessed by selection of a timeline tab **1610**. The timeline user interface **1600** may further include a selectable option campaign level **1620**, and selectable dates for a drop date **1622**. Based on the drop date **1622** selected by the user and the selected campaign level, the system may calculate dates for specification handoff, vendors, and other displayed events. More specifically, components of the system may calculate all of the due dates for campaign specific steps (Extract due, Lettershop due, ACAPS Due, etc.) using the uploaded drop date **1622** and the appropriate date formula based on the campaign complexity level **1620**. To populate the campaign dates, the user selects the campaign level drop-down box **1620** and campaign complexity level (Simple, Medium, Complex) **1622** and subsequently selects a calculate dates button **1640**. Entry blanks (not shown) may also be provided for free form text entry.

[0111] FIG. **17** illustrates a populated timeline user interface **1700** in accordance with an embodiment of the invention. Once the user verifies that all of the dates are populated correctly, the user may select the update button (not shown in FIG. **17**). The timeline user interface **1700** may display campaign level **1710**, and dates for multiple events **1720**. The timeline user interface **1700** may further display scheduled, actual, and adjusted dates **1750**. The adjusted date captures the date that changes are made to a scheduled or actual date. A calculate dates button **1740** may be provided to activate the system to calculate the dates. Furthermore, the system may restrict entry of dates so that specific users or types of users are authorized to set specific dates and other users are restricted.

[0112] FIG. **18** illustrates a special instructions user interface **1800** in accordance with an embodiment of the invention. The special instructions user interface **1800** may be activated by selecting a special instructions tab **1802** and may include identifying data such as program ID and extract number **1820**. The user interface **1800** may include special instructions **1810** encompassing general instructions **1830**, campaign suppressions **1840**, special suppressions **1850**, and householding **1860**. The special instructions tab allows any free form/adhoc instructions to be listed that cannot be built

into one of the various drop-down, table join, or suppression sections. In preferred embodiments, any instructions on the special instructions tab are used for manual campaign processing only. Special instructions can be copied from an existing campaign by using a copy from button **1826** in conjunction with entering the program ID and extract number in the boxes **1820** at the top of the page.

[0113] A special vendor instructions user interface (not shown) may be displayed upon selection of a tab **1804** on the special instructions user interface **1800**. The special vendor instructions tab houses special instructions that affect how an extract output file gets to a vendor, how an extract file needs to be created, or contains extract-specific information to be communicated to the vendor.

[0114] Selection of an approval notes tab **1806** on the list on the top of the user interface **1800** causes an approval notes page to be displayed. The approval notes page displays all stored campaign approvals and/or exception notes, when required, and where the exception submission signoff occurs. If during a campaign something occurs which requires the campaign managers to provide sign off, other users, such as CE or CF may include a notation on this page in the appropriate section. If a note is entered into the notes section, the extract approved should be checked before the campaign can be submitted.

[0115] FIG. **19** illustrates a preliminary suppressions user interface **1900** that may be accessed by selection of suppressions tab **1808** in FIG. **18**. The preliminary suppressions user interface **1900** contains suppression instructions and values uploaded from the saved suppressions file. As previously described, preliminary suppressions may be applied to either the entire campaign population or to large partner sections of the campaign population. The preliminary suppressions user interface **1900** allows preliminary suppressions to be altered, updated, re-ordered, or added.

[0116] The preliminary suppressions user interface **1900** may include tab menu **1910**, a suppressions drop-down menu **1920**, table match suppressions **1930**, and function buttons **1940**. To use the table match suppressions **1930**, a user enters a schema name **1932**. The user may further join fields by selecting one or more match keys **1934**. To do this, the user may select each field from drop down menu **1936** individually. In embodiments of the invention, the user clicks the right arrow key to move the selected field into a keep box **1938**. To remove fields from the keep box **1938**, the user may click on the field to remove and click the left arrow.

[0117] An inclusion field **1942** may be set to either “Yes” or “No”. When the field is set to “Yes” (join), matching records are kept. When the field is set to “No” (anti-join), matching records are dropped.

[0118] After entering and verifying all of the information for this table match, the user can select add button **1950** to complete the table match suppression to the suppressions list at the top of the page.

[0119] FIG. **20** illustrates a standards suppressions user interface **2000** in accordance with an embodiment of the invention. Standard suppressions **2010** may include a checkbox **2012**, state suppressions **2020** along with drop down menus for states **2022** and choice of inclusion **2030**, a keep box **2026**, and navigation arrows **2024**. States may be removed from the keep box by highlighting them within the keep box and clicking the left arrow. The state suppression section **2020** allows any state or combination of states to be used as a limitation to or as a suppression against the entire

campaign population. To apply the state suppression, the user activates the check box **2012** and select one or more states to use in the suppression/limitation. After all of the needed states are highlighted, selection of the right navigation arrow moves the states into the keep box **2026**. Inclusion fields **2030** work similarly to those described above with respect to FIG. **19**.

[0120] Thus, the system and method perform several functions including (1) standardizing requirements; (2) generating code to select records from a database; and (3) automatically generating output files in proper format or completing fulfillment. The user friendly user interlaces are provided that allow entry of requirements into a marketing matrix and guides a user through the process of campaign execution and campaign fulfillment. The disclosed system standardizes requirements and automatically generates a campaign list, while allowing for manual intervention through the use of special instructions.

[0121] While particular embodiments of the invention have been illustrated and described in detail herein, it should be understood that various changes and modifications might be made to the invention without departing from the scope and intent of the invention.

[0122] From the foregoing it will be seen that this invention is one well adapted to attain all the ends and objects set forth above, together with other advantages, which are obvious and inherent to the system and method. It will be understood that certain features and sub-combinations are of utility and may be employed without reference to other features and sub-combinations. This is contemplated and within the scope of the appended claims.

1-29. (canceled)

30. A computer-implemented system for presenting a user interface for automatic management of targeted marketing campaigns, the system comprising:

- an electronic display for presenting information including marketing matrix data and suppression information to a user;

- at least one user input device for allowing manipulation and selection of desired marketing matrix data defining a target population and of suppressions for limiting the target population by eliminating specified targets, wherein the desired marketing matrix data is selectable as a marketing matrix table layout and the selected suppressions are selectable as a suppression table layout;

- wherein the electronic display includes multiple selectable system options, including at least one of the following: extract list option, upload file option, generate report option, display table layout option, and exit system option; and

- computer processing components programmed to integrate the selected marketing matrix with the selected suppressions and automatically generate record selection codes, the record selection codes processed by the computer processing components to automatically select records from a database based on the marketing matrix data and selected suppressions, through at least comparing the record selection codes with recipient entries in the database, the record selection codes identifying recipients using recipient identifiers, the computer processing components being further programmed to implement selection components for creating a selection table including the selected records by matching the

- recipient identifiers for the recipients and list generation components for generating a campaign list based on the created selection table.

31. The system of claim **30**, further comprising marketing matrix components for storing selected desired marketing matrix data and allowing manual entry of marketing matrix data.

32. The system of claim **30**, wherein the selected suppressions include one of selectable suppressions selected by the user from stored options, mandatory suppressions mandated by existing regulations, and manually entered suppressions.

33. The system of claim **30**, wherein the integration is activated by combining a created marketing matrix file with a created suppression file.

34. The system of claim **30**, wherein the marketing matrix data includes at least a campaign date and a campaign type.

35. The system of claim **30**, wherein the electronic display is further capable of presenting a timeline interface for providing a campaign timeline based on a selectable campaign level.

36. The system of claim **30**, wherein a special instructions user interface allows manual entry of the suppressions.

37. The system of claim **30**, further comprising tracking components implementing a stored contact history table to track recipients and responses.

38. The system of claim **30**, further comprising verification components for running reports validating the selection process.

39. The system of claim **30**, further comprising an extract list tab for displaying a list of selectable extracts on the electronic display.

40. The system of claim **39**, further comprising an extract detail page for displaying details of a selected extract.

41. The system of claim **40**, wherein the extract detail page comprises at least one selectable reports tab, a selectable cell list tab, a selectable suppressions tab, and a selectable special instructions tab.

42. The system of claim **41**, further including a cell detail page activated through selection of cell on the cell list page.

43. The system of claim **40**, wherein the special instructions tab enables viewing and editing of special instructions for the selected extract.

44. The system of claim **30**, wherein the computer processing components further transmit the campaign list to at least one list recipient.

45. A computer-implemented method for presenting a user interface for management of targeted marketing campaigns, the method implementing a computing system including user input components, a processor, and a database, the method comprising:

- presenting a user interface to the user;

- entering marketing matrix and suppression data through user input components;

- selecting and manipulating marketing matrix data defining a target population and of suppressions for limiting the target population by eliminating specified targets;

- integrating, using the processor, the selected marketing matrix with the selected suppressions and automatically generating record selection codes for the marketing matrix data and suppressions;

- selecting records from the database by processing, using the processor, the automatically generated record selection codes through at least comparing the record selec-

tion codes with recipient entries in the database, the record selection codes identifying recipients using recipient identifiers;
 creating a selection table including the selected records, using the processor, by matching the recipient identifiers for the recipients; and
 generating a campaign list based on the created selection table.

46. The method of claim **45**, further comprising providing marketing matrix components for storing selectable marketing matrix data and allowing manual entry of marketing matrix data.

47. The method of claim **45**, further comprising providing suppressions components for storing selectable suppressions selectable by the user from stored options, mandatory suppressions mandated by existing regulations, and for allowing manual entry of suppressions.

48. The method of claim **45**, further comprising activating the integration by combining a created marketing matrix file with a created suppression file.

49. The method of claim **45**, wherein the marketing matrix data includes at least a campaign date and a campaign type.

50. The method of claim **45**, further comprising providing a timeline interface on the user interface for providing a campaign timeline based on a selectable campaign level.

51. The method of claim **45**, further comprising a special instructions user interface allowing manual entry of the suppressions.

52. The method of claim **45**, further comprising providing tracking components implementing a stored contact history table to track recipients and responses.

53. The method of claim **45**, further comprising validating the selection process with verification components for running reports.

54. The method of claim **45**, further comprising providing an extract list tab for displaying a list of selectable extracts.

55. The method of claim **54**, further comprising providing an extract detail page for displaying details of a selected extract.

56. The method of claim **55**, wherein the extract detail page comprises at least one selectable reports tab, a selectable cell list tab, a selectable suppressions tab, and a selectable special instructions tab.

57. The method of claim **56**, further comprising providing a cell detail page activated through selection of cell on the cell list tab.

58. The method of claim **55**, wherein the special instructions tab enables viewing and editing of special instructions for the selected extract.

59. The method of claim **45**, further comprising transmitting the campaign list to at least one list recipient.

60. A computer-implemented system for presenting a user interface for automatic management of targeted marketing campaigns, the system comprising:

an electronic display for presenting information including marketing matrix data and suppression information to a user;

at least one user input device for allowing manipulation and selection of desired marketing matrix data defining a target population and of suppressions for limiting the target population by eliminating specified targets, wherein the desired marketing matrix data is selectable as a marketing matrix table layout and the selected suppressions are selectable as a suppression table layout; wherein the electronic display includes multiple selectable system options, including at least one of the following: extract list option, upload file option, generate report option, display table layout option, and exit system option; and

computer processing components programmed to integrate the selected marketing matrix with the selected suppressions and automatically generate record selection codes, the record selection codes processed by the computer processing components to automatically select records from a database based on the marketing matrix data and selected suppressions, through at least comparing the record selection codes with recipient entries in the database, the record selection codes identifying recipients using recipient identifiers, the computer processing components being further programmed to implement selection components for creating a selection table including the selected records by matching the recipient identifiers for the recipients and list generation components for generating a campaign list based on the created selection table,

wherein the computer processing components are further operable to process records stored in the database to provide a campaign list, the processing comprising, automatically selecting records from the database based on the marketing matrix data, suppression components and created selection table including the selected records,

validating the selection process, and

generating the campaign list based on the created selection table;

displaying the campaign list to the user; and

facilitating fulfillment of the marketing campaign, the fulfillment comprising, transmitting the generated campaign list to at least one list recipient, and implementing a stored contact history table to track recipients and responses.

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