

(19) World Intellectual Property Organization
International Bureau



(43) International Publication Date
4 May 2006 (04.05.2006)

PCT

(10) International Publication Number
WO 2006/047790 A3

(51) International Patent Classification:
G06F 7/00 (2006.01) G06F 17/00 (2006.01)

(21) International Application Number:
PCT/US2005/039675

(22) International Filing Date: 27 October 2005 (27.10.2005)

(25) Filing Language: English

(26) Publication Language: English

(30) Priority Data:
60/622,552 27 October 2004 (27.10.2004) US

(71) Applicant (for all designated States except US): CLIENT DYNAMICS, INC. [US/US]; Suite 420, 100 Pacifica, Irvine, CA 92618 (US).

(71) Applicants and

(72) Inventors: LUCAS, Scott G. [US/US]; 264 Metate Place, Palm Desert, California 92260 (US). LEE, David S. [US/US]; 6 Skycrest, Mission Viejo, California 92692 (US). FRANCIS, Adel M. [US/US]; 28362 Millwood Road, Trabuco Canyon, California 92679 (US).

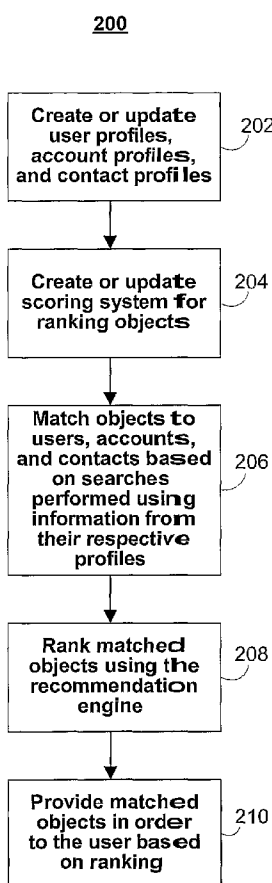
(74) Agents: INGERMAN, Jeffrey H. et al.; FISH & NEAVE IP GROUP, ROPES & GRAY LLP, 1251 Avenue Of The Americas, New York, New York 10020 (US).

(81) Designated States (unless otherwise indicated, for every kind of national protection available): AE, AG, AL, AM, AT, AU, AZ, BA, BB, BG, BR, BW, BY, BZ, CA, CH, CN, CO, CR, CU, CZ, DE, DK, DM, DZ, EC, EE, EG, ES, FI, GB, GD, GE, GH, GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KM, KN, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, LY, MA, MD, MG, MK, MN, MW, MX, MZ, NA, NG, NI, NO, NZ, OM, PG, PH, PL, PT, RO, RU, SC, SD, SE, SG, SK, SL, SM, SY, TJ, TM, TN, TR, TT, TZ, UA, UG, US, UZ, VC, VN, YU, ZA, ZM, ZW.

(84) Designated States (unless otherwise indicated, for every kind of regional protection available): ARIPO (BW, GH, GM, KE, LS, MW, MZ, NA, SD, SL, SZ, TZ, UG, ZM, ZW), Eurasian (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European (AT, BE, BG, CH, CY, CZ, DE, DK, EE, ES, FI, FR, GB, GR, HU, IE, IS, IT, LT, LU, LV, MC, NL, PL, PT,

[Continued on next page]

(54) Title: ENHANCED CLIENT RELATIONSHIP MANAGEMENT SYSTEMS AND METHODS WITH A RECOMMENDATION ENGINE



(57) Abstract: The present invention relates to an enhanced customer relationship management systems and methods for receiving information objects in a variety of formats from a variety of information sources and communicating the objects to contact. A CRM application may be provided for storing contact-associated information (e.g., keyphrases related to contact interests, contact holdings, etc.), user-associated information in an application database and used to search for objects in at least one information source. Objects retrieved from a search may be presented to the user according to their relevance to the search. The relevance of an object may be determined in accordance with a scoring system where objects are scored and provided in order of their score.

WO 2006/047790 A3



RO, SE, SI, SK, TR), OAPI (BF, BJ, CF, CG, CI, CM, GA, GN, GQ, GW, ML, MR, NE, SN, TD, TG).

(88) Date of publication of the international search report:
10 May 2007

Published:

— with international search report

For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.

INTERNATIONAL SEARCH REPORT

International application No.

PCT/US05/39675

<p>A. CLASSIFICATION OF SUBJECT MATTER IPC: G06F 7/00(2006.01),17/00(2006.01)</p> <p>USPC: 707/104.1 According to International Patent Classification (IPC) or to both national classification and IPC</p>														
<p>B. FIELDS SEARCHED</p> <p>Minimum documentation searched (classification system followed by classification symbols) U.S. : 707/104.1</p> <p>Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched</p> <p>Electronic data base consulted during the international search (name of data base and, where practicable, search terms used) Google Scholar</p>														
<p>C. DOCUMENTS CONSIDERED TO BE RELEVANT</p> <table border="1"> <thead> <tr> <th>Category *</th> <th>Citation of document, with indication, where appropriate, of the relevant passages</th> <th>Relevant to claim No.</th> </tr> </thead> <tbody> <tr> <td>Y</td> <td>US 2003/0195877 A1 (FORD et al) 16 Oct. 2003 (16.10.2003), Abstract, paragraphs [0009], [0062], [0125]-[0126], and [0143], and Figures 2-4.</td> <td>1-54</td> </tr> <tr> <td>Y</td> <td>US 6,598,046 B2 (GOLDBERG et al) 22 Jul. 2003 (22.07.2003), column 4 lines 9-11, column 8 lines 40-46, column 9 lines 9-17, Figure 3, and Figure 6a-b.</td> <td>1-54</td> </tr> <tr> <td>A</td> <td>PRETSCHNER, A., Ontology Based Personalized Search, Proceedings of the 11th IEEE Conf. on Tools with Artificial Intelligence, Chicago, IL, Nov. 9-11, 1999, pp. 391-398, especially pages 392 and 395.</td> <td>1-54</td> </tr> </tbody> </table>			Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.	Y	US 2003/0195877 A1 (FORD et al) 16 Oct. 2003 (16.10.2003), Abstract, paragraphs [0009], [0062], [0125]-[0126], and [0143], and Figures 2-4.	1-54	Y	US 6,598,046 B2 (GOLDBERG et al) 22 Jul. 2003 (22.07.2003), column 4 lines 9-11, column 8 lines 40-46, column 9 lines 9-17, Figure 3, and Figure 6a-b.	1-54	A	PRETSCHNER, A., Ontology Based Personalized Search, Proceedings of the 11th IEEE Conf. on Tools with Artificial Intelligence, Chicago, IL, Nov. 9-11, 1999, pp. 391-398, especially pages 392 and 395.	1-54
Category *	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.												
Y	US 2003/0195877 A1 (FORD et al) 16 Oct. 2003 (16.10.2003), Abstract, paragraphs [0009], [0062], [0125]-[0126], and [0143], and Figures 2-4.	1-54												
Y	US 6,598,046 B2 (GOLDBERG et al) 22 Jul. 2003 (22.07.2003), column 4 lines 9-11, column 8 lines 40-46, column 9 lines 9-17, Figure 3, and Figure 6a-b.	1-54												
A	PRETSCHNER, A., Ontology Based Personalized Search, Proceedings of the 11th IEEE Conf. on Tools with Artificial Intelligence, Chicago, IL, Nov. 9-11, 1999, pp. 391-398, especially pages 392 and 395.	1-54												
<p><input type="checkbox"/> Further documents are listed in the continuation of Box C. <input type="checkbox"/> See patent family annex.</p> <table border="1"> <thead> <tr> <th>* Special categories of cited documents:</th> <th>"T"</th> </tr> </thead> <tbody> <tr> <td>"A" document defining the general state of the art which is not considered to be of particular relevance</td> <td>later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention</td> </tr> <tr> <td>"E" earlier application or patent published on or after the international filing date</td> <td>"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone</td> </tr> <tr> <td>"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)</td> <td>"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art</td> </tr> <tr> <td>"O" document referring to an oral disclosure, use, exhibition or other means</td> <td>"&" document member of the same patent family</td> </tr> <tr> <td>"P" document published prior to the international filing date but later than the priority date claimed</td> <td></td> </tr> </tbody> </table>			* Special categories of cited documents:	"T"	"A" document defining the general state of the art which is not considered to be of particular relevance	later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention	"E" earlier application or patent published on or after the international filing date	"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone	"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)	"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art	"O" document referring to an oral disclosure, use, exhibition or other means	"&" document member of the same patent family	"P" document published prior to the international filing date but later than the priority date claimed	
* Special categories of cited documents:	"T"													
"A" document defining the general state of the art which is not considered to be of particular relevance	later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention													
"E" earlier application or patent published on or after the international filing date	"X" document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone													
"L" document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)	"Y" document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art													
"O" document referring to an oral disclosure, use, exhibition or other means	"&" document member of the same patent family													
"P" document published prior to the international filing date but later than the priority date claimed														
<p>Date of the actual completion of the international search 20 December 2006 (20.12.2006)</p>		<p>Date of mailing of the international search report 25 JAN 2007</p>												
<p>Name and mailing address of the ISA/US Mail Stop PCT, Attn: ISA/US Commissioner for Patents P.O. Box 1450 Alexandria, Virginia 22313-1450 Facsimile No. (571) 273-3201</p>		<p>Authorized officer Jacqueline A. Whitfield Special Project Asst. John E Breene Telephone No. (571) 272-4107</p>												