(AUTOMATIC) LEAD GENERATION

purchased from a vendor for 42,000+ public and private companies

200,000+ Officers (Feed)

just need company name and billing partner/executive

Company Billing (no fees)

basic taxonomy, nothing private like employee number or SSN

if employee data added, you can use additional taxonomy to build more "dimensions" for connection algorithms

examples: employee level employee role employee industry etc.

Employee Data (optional)

only the "send to" name of fellow employees; no outside correspondence or details

Pin ultimate implementation is to segregate all billing execs from same company "friends and associates" of user

Example: If user sends frequent emails to employee in Seattle, any connections with this friend are given a higher algorithm score

Email Processing (optional)

ENTITY EXTRACTION (ALGORITHM)

In addition to matching executive-to-executive (see six degrees) read biography for entities outside of major corporations. For example, algorithm will search for entities like:

Furbacher was named to The **National Council for the College of Engineering** at Valparaiso. He is a past President of the **Gas Processors Association** and a past Chairman of the **Natural Gas Supply Association** Steering Committee. Furbacher is active with the **Junior Achievement** (JA) Southeast Texas, currently serving on the JA Board and Executive Committee and formerly serving as Board Chairman. He also serves on the Board of **Concordia Lutheran High School** in Tomball, Texas and has been an active participant in the Houston Chapter of **Habitat for Humanity**.

SIX DEGREES OF SEPARATION (ALGORITHM)

All officers are connected to a company
All billing partners/executives are connected to a company
System connects the two companies (thus the two executives)

Builds multiple degrees:
You know a client executive who knows the target executive (zero)
Or you know a fellow employee who knows the target executive (zero)
You know exec who knows fellow exec at same company who knows target (one)

Note: zero and one degree results in thousands of matches and usually anything beyond this is not necessary to make a connection to target

SEQUENCING ENGINE (ALGORITHMS)

Leads are delivered to user using a "relevance" algorithm. Different leads are recommended to each user based on the following:

LEVEL OF CONNECTION:
1- Does the lead know a close associate of targeting executive?
   (Example: A partner down the hall knows my lead personally)
2- Does the lead know someone in the office?
3- Does the lead know someone in the firm?
4- Does the lead know someone who knows someone in firm?
   (Example: Lead knows and exec at client who knows me)

CURRENT LEVEL OF NEWS ACTIVITY:
1- High news levels (identified buy cycle)
   (Example: single event covered by 50+ sources)
2- News cycle starting to build
   (Example: could be just before company announces earnings)
3- Over a "crest" of news and diminishing news coverage
4- No noticeable news (period of latency)

PROXIMITY TO INDUSTRY (SPECIALIZATION):
1- Lead works in same industry as most of your current clients
2- Lead works in same industry as some of your clients
3- Lead works in similar industry (share major classification)
4- Lead has no connection to any of your client's industries

NEURAL (WATCH ACTIVITY ON SYSTEM):
Watch leads user subscribes to and suggest similar leads
   (Example: current leads include 10 oilfield services, 8 in Houston, and 12 are CFOs -- it makes sense to recommend leads that are CFOs with an oilfield service company in Houston

each algorithm produces a score important: score is "specific" to each user on the system

8.6

2.9

4.6

0.6

scores are not a straight "add" each algorithm can be weighted differently and change by user

LEAD SCORE
96.1

CONFLICT OF INTEREST CHECKING

System pre-processes any client acceptance issues that would prevent a firm from taking on a new client.

For example, if two companies were involved in a lawsuit and one was a client, the system would immediately notify the user of the potential conflict and direct them to discuss it with the client billing partner.

In addition to leveraging six degrees of separation, the system also looks for any mention of an entity, company or organization in the text of news articles. It then notifies the users of any dealings the target may have had with any client in the past 4-5 years.

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if page does not automatically populate, user has option to complete the second page manually

Page Two: Field automatically populate

key is to ask user to fill out very little information user can select from 200K+ leads with no data input

Page One: Please fill out these fields:
Last Name:
First Name:
Title:
Company Name:
`LOOKUP IN DATABASE`

system automatically fills out additional fields, based on entity lookup

examples: industry revenue employees website etc...

before user can "hand enter" a company name, user tries to find company in master entity file

Master Entity File

SEARCH TO SEE IF LEAD ALREADY IN SYSTEM
By Last Name:
By Company Name:
`SEARCH`

no, create a new one

in some cases, company may exist, but user wants to add a non-executive

yes, choose from list

all leads (my leads, teams, recommended) are presented to user in sequenced order based on sequencing engine

quick popup of all notes on lead

edit "lead" information or edit "contact" if account exists

takes user to account section of sales system (if account exists)

takes user to opportunity pipeline section of sales system

shows all "connections" between company employees and contact

user can add non-obvious organization memberships, like nonprofits, arts, etc.. (will be used for connections)

none of these leads are "owned" by anyone in organization

user can add notes to any "team" target

Over 200,000 leads are presented in sequenced order; user only sees top matches based on potential connection, industry, location, etc.

system can alert user when officers start or change their position at company

For example, Scott just started at Millipore as the General Counsel and is #4 recommended lead for this user

based on limited user activity, neural component is already starting to favor "legal" officers in "oilfield service" companies; but note this is not the only criteria

System will offer different recommended leads each day out of the possible 200,000+ executives, based on news coverage

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Daily email for users that do not have time to access system daily

TO: David Jones
FROM: Sales System
DATE: Monday, January 12, 2007

area reserved for tracking accounts, opportunities, news, etc. on user's target (not discussed on this placemat)

My Leads (activity in last 24 hours)
Dan Thompson   Seacrest Exploration   1 New Update
Peter Dextman   ABC Oil & Gas Co.   Left Position

Team Leads (activity in last 24 hours)
Lyndsay Hanes   Shaw Environmental   2 New Updates
Nora Quinn   Tetra Tech   1 New Update

← Back → ⊗ 🗘 🏠 🔍 Search   Address http://legalportal.com/sales/leadgeneration.htm ▼ | 🗘 Go

Jump to Anywhere in Sales System ▼

My Leads

Click on a header to sort the leads

[add my own lead] [group leads by company] [search all leads]

AGE	MY LEAD	TITLE	COMPANY	NEWS	CONNECTION	INDUSTRY EXP.	STATUS
+ 7 days	Thomas Synder	General Counsel	ABC Oil & Gas Company	Yes (4)	Yes (Bledsoe+3)	Yes (Oilfield Services)	Qualified
− Today	Dan Thompson	VP, Operations	Seacrest Exploration	Yes (2)	Yes (Dole)	Yes (Oilfield Services)	Open

`ALL NOTES` `EDIT LEAD` `ACCOUNT` `OPPORTUNITY` `AFFILIATIONS`

Left a message for Dan; invited him to attend the Houston Open with our team next month; understand he is a golfer

◉ OPEN   ○ CONTACTED   ○ QUALIFIED   ○ CLIENT   ○ UNQUALIFIED (remove from my list)   `SAVE`

AGE	MY LEAD	TITLE	COMPANY	NEWS	CONNECTION	INDUSTRY EXP.	STATUS
+ 4 weeks	Peter Dextman	COO	ABC Oil & Gas Company	No	Yes (Tanner+1)	No	Open
+ 2 weeks	Charlie House	CFO	ABC Oil & Gas Company	No	No	No	Open
+ 7 days	Alexa Harrison	General Counsel	Seacrest Exploration	Yes (4)	No	Yes (Oilfield Services)	Qualified
+ 1 day	Leslie Salkeld	General Counsel	Shale E&P Services	No	No	Yes (Oilfield Services)	Contact

[more leads]

Four "status" sections:
Open | No contact has been made
Contacted | Made connection to lead
Qualified | Lead express interest
Nonqualified | Tried, but did not make connection

system can alert user when officers leave or change their position at company

while there is an "account" page that lists all contacts for a specific target company, some users will prefer to group companies here

Searches for my leads, team leads and recommended leads are presented all on a single categorized page

My Team Leads

Click on a header to sort the leads

AGE	MY LEAD	TITLE	COMPANY	NEWS	CONNECTION	INDUSTRY EXP.	PRIMARY CONTACT
+ 2 days	Chris Anderson	Controller	Shaw Environmental	No	Yes (Roberts)	Yes (Oilfield Services)	Mary Smith
+ today	Lyndsay Hanes	CFO	Shaw Environmental	No	No	Yes (Oilfield Services)	Mary Smith
+ 3 weeks	JD Robb	Geologist	Seacrest Exploration	Yes (4)	No	Yes (Oilfield Services)	Julie Summers
+ 1 day	Nora Quinn	General Counsel	Tetra Tech	No	Yes (Warren)	Yes (Oilfield Services)	Kurt Brady

[more leads]

user sees who the primary "owner" is for each team lead

primaries can be color-coded to denote staff level or success of current relationship, etc.

Congratulations! You are adding a lead to your list.

Note: By clicking below, this lead will be removed from the recommended list.

`ADD TO MY LEADS ONLY`   `LET MY TEAM SEE THIS LEAD`

note: when user "activates" lead, it is removed from the recommended list, so no two users can select the same lead; also, a user cannot select a lead on behalf of a team member

it is critical that each user "agrees" to own the relationship

Recommend Leads

Click on a header to sort the leads

AGE	MY LEAD	TITLE	COMPANY	NEWS	CONNECTION	INDUSTRY EXP.	ADD LEAD
+ 4 weeks	Joel Pepper	President and CEO	Onyx North America	Yes(60)	Yes (Tanner+6)	Yes (Oilfield Services)	ADD TO MY LEADS
+ 2 weeks	Brad Ramirez	CFO	Onyx North America	Yes(60)	Yes (Tanner+5)	Yes (Oilfield Services)	ADD TO MY LEADS
+ 7 days	Diane LaGrange	General Counsel	Phillip Services	Yes (74)	Yes (Tanner+1)	Yes (Oilfield Services)	ADD TO MY LEADS
+ 1 day	Scott Ferguson	General Counsel	Millipore Corporation	Yes(35)	Yes (Tanner+1)	Yes (Oilfield Services)	ADD TO MY LEADS

[more leads]