

Title (en)

SALES PROCESS SUPPORT SYSTEM AND METHOD

Title (de)

SYSTEM UND VERFAHREN ZUR UNTERSTÜTZUNG DES VERKAUFSPROZESSES

Title (fr)

SYSTEME DE SUPPORT POUR LES TECHNIQUES DE VENTE ET METHODE ASSOCIEE

Publication

EP 0856178 A2 19980805 (EN)

Application

EP 96937677 A 19961017

Priority

- US 9616306 W 19961017
- US 54410295 A 19951017
- US 70203996 A 19960823

Abstract (en)

[origin: WO9715023A2] A sales process support system and method for identifying sales targets using a centralized database to improve marketing success. The system includes a central database that receives comprehensive information from a variety of internal and external feeds, and standardizes and householods the information in the three-level hierarchy (households, customers, and accounts) for use by a financial institution. The comprehensive information stored on the central database is accessed through micromarketing workstations to generate lists of sales leads for marketing campaigns. A database engine is provided for generating logical access paths for accessing data on the central database to increase speed and efficiency of the central database. The system distributes sales leads electronically to branch networks, where the sales leads are used to target customers for marketing campaigns. The central database is accessed by workstations of a central customer information system for profiling customers, enhancing customer relationships with the financial institution, and electronically tracking sales and service performance during marketing campaigns. The system can also include a system for opening an account in a single session that is in communication with the central database, micromarketing centers, central customer information systems and branch systems of the present invention so that data can pass between these systems where legal and appropriate.

IPC 1-7

G06F 17/60; **G06G 7/52**

IPC 8 full level

G06Q 30/02 (2012.01)

CPC (source: EP)

G06Q 30/02 (2013.01)

Cited by

EP1131767A4

Designated contracting state (EPC)

AT BE CH DE DK ES FI FR GB GR IE IT LI LU MC NL PT SE

DOCDB simple family (publication)

WO 9715023 A2 19970424; **WO 9715023 A3 19970515**; AU 7516096 A 19970507; CA 2234026 A1 19970424; EP 0856178 A2 19980805; EP 0856178 A4 19990113; JP H11513826 A 19991124; MX 9802992 A 19980930

DOCDB simple family (application)

US 9616306 W 19961017; AU 7516096 A 19961017; CA 2234026 A 19961017; EP 96937677 A 19961017; JP 51588797 A 19961017; MX 9802992 A 19980416