How to be a Smarter Education Marketer
A Comprehensive Guide on Education

By Ashish Gupta
Manager Customer Success
Before we Start...

• Join the Webinar using Computer’s microphone & Speaker. **A headset is Recommended**

• Questions
  ✓ Type in your questions in the question box in your Gotowebinar interface
  ✓ we would take them at the end of the webinar
  ✓ Webinar is being recorded
  ✓ It may take to 60 to 75 minutes

• We will email you a link to view the recording by next week.
Agenda for the Webinar

✓ Capturing students from Various campaigns
✓ How to Create Hierarchy in LeadSquared
✓ What is “Smart View” and how we use it
✓ Generic Workflow for Education
✓ Smart Ways to handle different micro processes by “Automation”
✓ Facebook Retargeting and Google Adword Data Sync
✓ LeadSquared Umbrella for Education Use Cases
✓ Report You should be looking at
Capture prospective student inquiries from all your online & offline campaigns

Cut your lead leakage to zero
Capture and engage applicants' interest from all channels

➢ Importing Prospective Students
➢ Manual Addition of Lead by Web or Mobile App
➢ Enquiries from Landing Pages
➢ Leads by Website Forms
➢ Enquiries from 3rd Party Sources Like HT Campus, Shiksha etc.
➢ Enquiries from Admission portal Via APIs
➢ Leads by Telephony Provider
➢ Leads by Chat
➢ Leads by Google, FB Ads
➢ Emails
➢ Zapier
Creation of Hierarchy

Chairman/Director/Founder

Admission Head for North
- Center Head Delhi
  - 5 Team Members
- Center Head Chandigarh
  - 4 Team Members

Admission Head for South
- Center Head Bangalore
  - 10 Team Members
- Center Head Chennai
  - 6 Team Members
How to create different segments by “Smart View”

- My Daily Leads
- My Pending Task
- Lead Assigned in a particular time range
- Course Specific View
Generic Education Work Flow

1. **API Push**
   - LeadSquared

2. **Qualifying Process by Call**
   - Yes: Calling/Email Process
   - No: Counseling Team

   - No: Not Interested

3. **Interested/Not Interested**
   - Interested: Application Form Fill
   - Not Interested: Nurturing Bucket

4. **Payment Process**
   - Instalment 1
   - Instalment 2
   - Instalment 3

5. **Refund**

**Shiksha, Database, HT, Campus, Facebook, Google Adword, Website etc.**
Micro Process 1

- Distribution of Inquiries
- Escalation Flow
- New Inquiry Nurturing Flow
- Priority Lead Notification to Counsellor
Lead Distribution Methods

Different logics
- Availability of User
- Lead Capping based on performance
- Round Robin
- Course
- Center
- City
- Team/Group
- Campaign Specific
Automatically distribute leads to different locations & counsellors

Make sure each lead is attended to, based on their program preferences, locations, and qualifications.
Use advanced distribution, redistribution and capping logic

Round Robin

Availability based distribution

Performance based distribution

User 1

User 2

User 3 Not available

Stop allocation when leads/user/day = 20
Use marketing workflows to enroll more students

Automate marketing actions and sales notifications

New inquiry

Send program details

If clicks email

Yes → Notify counsellor

No → Wait for 2 days

Send scholarship details
Micro Process 2

- Proper Activity for Qualification
- Rejection Bucket Flow
- No Response Flow
- Qualification email/SMS flow
- Course Specific Flow
Micro Process 3

- Activity based on Interest and Not Interested
- Priority Lead Flow for Counselling Team based on web visits and email response
- Lead Life Cycle Tracking
- Auto Email/SMS to Student post call completion
Recommend the next best action for the counsellors

<table>
<thead>
<tr>
<th>Location</th>
<th>Grade</th>
<th>Stage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kolkata</td>
<td>12th</td>
<td>Opportunity</td>
</tr>
</tbody>
</table>

**Suggested action**
- Call within 30 minutes
- Email program brochure

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<table>
<thead>
<tr>
<th>Location</th>
<th>Qualification</th>
<th>Device</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bangalore</td>
<td>B.Com</td>
<td>Mobile</td>
</tr>
</tbody>
</table>

**Suggested action**
- Send fee structure of MBA Program
LEAD LIFECYCLE TRACKING
Track your students from inquiry to admission
Engage and track your prospective students

Complete web activity and engagement tracking

Jasmeen Singh
Student, 8mango college
Lead Score 23

9:34 AM  Visited Liberal Arts page for 3 mins 9 secs +7
8:21 AM  Opened email with Subject Here are the.. +3
8:09 AM  Sent email with Subject Here are the.. +7
7:30 AM  Spent 2 minutes on Contact us page +3

Web pages visited
Track the program pages being visited by your prospective students, the time spent on each page, and the offers they find most interesting.

Communications tracking
Track the links being clicked by students on the emails and SMSs, and trigger further marketing and sales actions accordingly.

Counsellor notifications
Notify the counsellor when prospective students visit an important page, like enrollment details page, applications page, or program fee breakup page.
Capture all counsellor interactions with the prospective students
Micro Process 4

- Nurturing Bucket for Application Cycle and Counselling
- Based on Payment for Application and Offer made intimation
- Enrollment Notification and intimation on Fee Structure
- Recommendation to Counsellor
- Payment Remainder Nurturing Flow for Counsellor
Using the exact mode of communication they opt for

*Few modes of communication need integration

- Push Notification
- Emails
- Facebook Retargeting
- Google Remarketing
Automate your application cycle
Manage the application process till completion

Application form viewed
- Yes: Send counselling invite
- No: Completess application

Completess application
- Yes: Notify Counsellor to follow-up and complete application
- No: Wait till the day of counselling

Wait till the day of counselling
- Yes: Counselling attended
- No: Suggest other dates for counselling

Counselling attended
- Yes: Qualifies
- No: No offer + Notify counsellor to suggest other courses

Qualifies
- Yes: Make Offer
- No: Suggest other courses
Create sales workflows to get more enrollments

1. Lead captured in LeadSquared
2. Email sent “Thanks for your interest”
3. Wait 2 day(s)
   - If/else Email opened
     - Yes
       - Notify counsellor
       - Create task “Follow up with lead” in 15 minutes
         - (If) Lead activity is ‘Positive phone call’
           - Yes
             - Update Lead stage to ‘Hot lead’
             - (If/else) Email opened
               - Yes
                 - End Automation
               - No
                 - Track website usage
             - No
               - Notify counsellor
     - No
       - (If/else) ‘Courses’ page visited on website
         - Yes
           - Notify counsellor
         - No
           - (If/else) ‘Application’ page visited on website
             - Yes
               - Notify counsellor
             - No
               - Wait 1 day(s)
                 - Email sent “Courses at ABC University”
Facebook Retargeting
GCLID Tracking in Google AdWords

- Source
- Medium
- Campaign
- Ad Group
- Keyword
- Match type
- Ad Creative
- Etc.
Education Specific Reports

- Course Specific
- Counsellor Specific performance
- Submission log Summary
- Sales Activity Analysis
- Task Analysis Report
- Lead Assignment Report
- User Productivity Summary
- Lead Dashboard
- Lead Distribution Analysis - 2 fields
- Lead Distribution Analysis - 3 fields
- Leads Not Contacted
- Group wise Report
### Complete LeadSquared Touchpoints for Higher Education Institutes

<table>
<thead>
<tr>
<th>Touchpoint</th>
<th>Services</th>
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</thead>
</table>
| **STUDENT ACQUISITION**        | ✔ Marketing Campaigns  
                                 | ✔ Marketing Automations  
                                 | ✔ Multi-Channel Communication |
| **STUDENT ADMISSIONS**         | ✔ Lead Management / Lead Tracking  
                                 | ✔ Marketing Campaigns  
                                 | ✔ Application Management  
                                 | ✔ Performance Analytics |
| **STUDENT SERVICES**           | ✔ Multi-Channel Communication  
                                 | ✔ Student Counseling  
                                 | ✔ Student Landing Pages  
                                 | ✔ Retention Activities |
| **ALUMNI SERVICES**            | ✔ Marketing Campaigns  
                                 | ✔ Alumni Donation/Scholarship Campaigns  
                                 | ✔ Alumni Connect.  
                                 | ✔ Performance Analytics |
| **PLACEMENT SERVICES**         | ✔ Placement Emails  
                                 | ✔ Employer Marketing  
                                 | ✔ Interview emails |
"LeadSquared helped us to get a deeper insight into our customer's behavior and their need. LeadSquared is not just limited to lead management but is a great assist for automation of post sales services as well. It is crucial for us to efficiently manage the database of our leads. LeadSquared made it easy for us to segment, filter and generate reports."

Smiti – Product Manager
Attract and recruit applicants more effectively

Capture Interest | Engage Applicants | Build Workflows
Segment Applicants | Create Campaigns | Analyze Results

Some of our clients

LAUNCHPAD ACADEMY  |  Aptech  |  COMPUTER EDUCATION  |  TIMESPRO  |  NIIT  |  DM3  |  iiNURTURE  |  CAREER LAUNCHER
STUDENT ENROLLMENT MANAGEMENT SYSTEM

Fill seats faster and more efficiently

- Inquiry Capture
- Student Prioritization
- Inquiry Distribution
- 360 Degree View
- Enrollment Signals
- Tasks and Reminders

India’s most loved Customer Acquisition Platform

[View LeadSquared reviews]
Thank You !!!