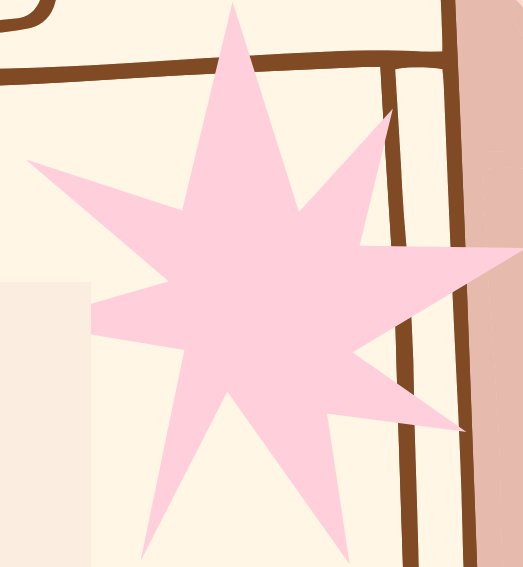


CollEdge Onboarding

Personalized paths for every user!





Mission Statement:

CollEdge empowers students to make informed educational choices by connecting them with colleges and financial resources. The platform bridges gaps between students, college admins, and lenders, democratizing access to higher education.

EdTech Alignment:

CollEdge aligns with EdTech trends in personalization, accessibility, and digital transformation, enhancing the educational journey for all stakeholders.

GOALS

Translating mission into Goals!

BOOST PLATFORM ENGAGEMENT:

Drive active participation across all stakeholders with personalized experiences, aiming for 50% user growth within a year.

ENHANCE STUDENT OUTCOMES:

Improve college matches and financial aid success, targeting a 30% increase in student satisfaction.

STRENGTHEN PARTNERSHIPS:

Expand partner institutions by 40% and improve efficiency by reducing application processing time by 20%.

PROBLEM IDENTIFICATION

Identifying Stakeholder Challenges!

Students (B2C):

- **Problem:** Students face difficulties in finding colleges and financial aid that align with their specific needs, leading to suboptimal decisions.
- **Challenge:** Current onboarding is generic, lacking personalization that could guide students more effectively.

College Admins (B2B):

- **Problem:** College admins struggle with managing the influx of applications efficiently and lack tools for targeted student engagement.
- **Challenge:** The existing system is cumbersome, with limited customization options for different institutions.

Financial Lenders (B2B):

- **Problem:** Financial lenders face challenges in matching their loan offerings to the right students, leading to lower conversion rates.
- **Challenge:** The onboarding process is not tailored to highlight the best loan options for each student, reducing the effectiveness of lender offerings.





PROBLEM STATEMENT

The existing onboarding processes for CollEdge's stakeholders are not sufficiently personalized, leading to inefficiencies in matching students with colleges and financial aid, and difficulties for colleges and lenders in managing and processing applications.



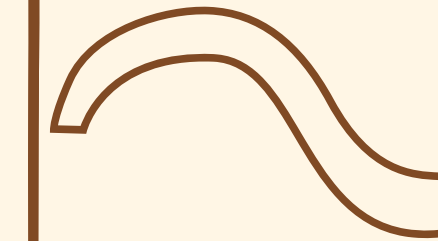
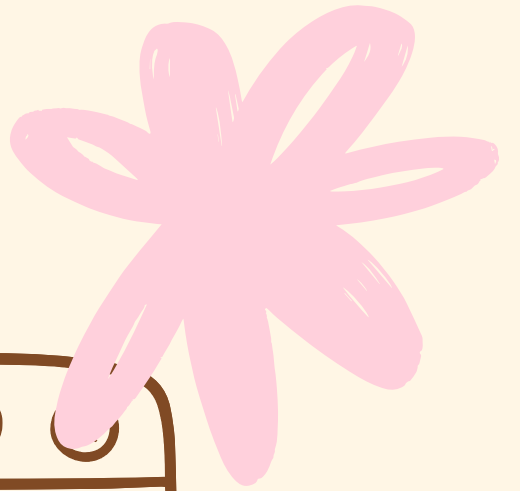
METHODOLOGY

- Conduct user research to identify specific pain points.
- Develop and test personalized onboarding flows.
- Monitor engagement metrics to evaluate the success of the new process.



APPROACH

- **Hypothesis 1:** Implementing a personalized onboarding process will increase user engagement and satisfaction across all stakeholder groups.
- **Hypothesis 2:** Tailored onboarding will lead to more successful student placements and higher conversion rates for colleges and lenders.



USER STORY MAPPING

What? Why? Who?



WHAT?

- **Students:** Need a guided path to find suitable colleges and financial aid options.
- **College Admins:** Require efficient tools to manage and filter applications.
- **Financial Lenders:** Need better ways to connect with students who match their loan criteria.

WHY?

- Personalized onboarding can significantly improve user experience, leading to better outcomes for students, higher efficiency for admins, and increased conversion rates for lenders.

WHO?

- **Students:** Benefit from a more tailored search and application process.
- **College Admins:** Gain tools that streamline application management.
- **Financial Lenders:** Achieve better targeting and higher loan application conversion.



HYPOTHESES AND ASSUMPTIONS

Building on informed predictions to drive strategic decisions!



HYPOTHESES

1. **For Students:** Personalized onboarding will lead to a 25% increase in the number of students successfully finding and applying to their top-choice colleges.
2. **For College Admins:** Improved onboarding will reduce the time spent managing applications by 30%, freeing up resources for more strategic tasks.
3. **For Financial Lenders:** Tailored onboarding will increase the conversion rate of loan applications by 20%.

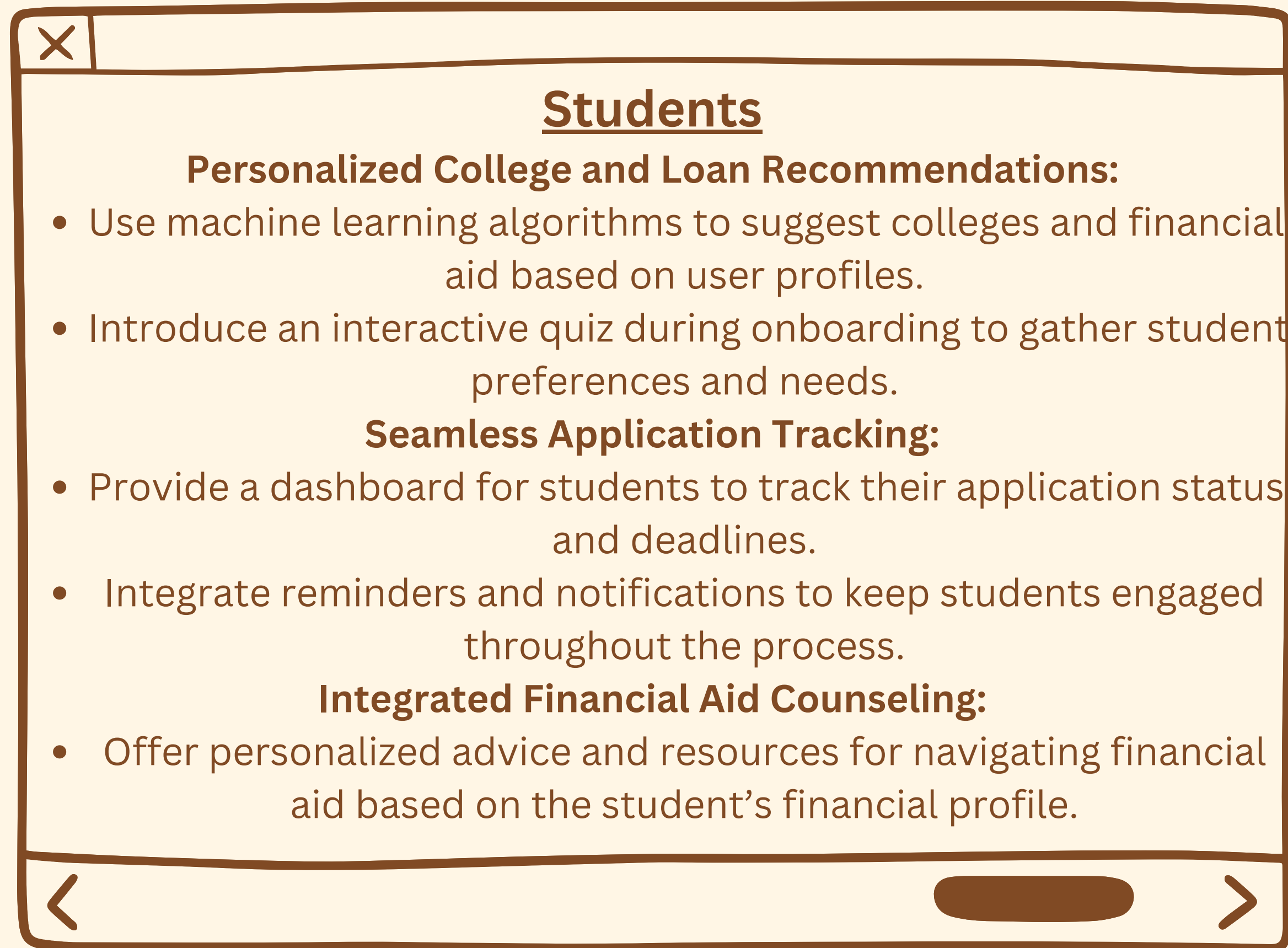


ASSUMPTIONS

- Users are willing to provide detailed information during onboarding in exchange for a more personalized experience.
- Colleges and lenders are open to adopting new tools and processes for better efficiency.
- The new onboarding process will not introduce significant friction that could deter users from completing it.

PROPOSED SOLUTIONS AND FEATURES

Turning Ideas into Action: Tailored Solutions for Every Stakeholder!





College Admins

Advanced Application Management Tools:

- Introduce filters and sorting options to help admins prioritize applications.
- Implement analytics to track application trends and outcomes.

Customizable Student Outreach Campaigns:

- Provide tools for colleges to create targeted outreach campaigns based on student profiles.
- Enable automated messaging and follow-ups to increase engagement.



"Empowering the future of education by seamlessly connecting students, colleges, and lenders through innovative technology and data-driven insights."

-Product Aspirer



Financial Lenders

Tailored Loan Matching:

- Use student data to match them with the most suitable loan offerings.
- Introduce a step-by-step guide for students to understand loan terms and conditions.

Efficient Application Processing:

- Streamline the application process with pre-filled forms and document upload capabilities.
- Provide real-time status updates to students on their loan applications.



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METRICS AND SUCCESS RATE

Defining Success!

Students:

- **Metrics:** Increase in application completion rates, satisfaction scores, and successful placements.
- **KPI:** 25% increase in completed applications within the first 6 months.

College Admins:

- **Metrics:** Reduction in time spent managing applications, number of successful student enrollments.
- **KPI:** 30% decrease in admin time spent on application processing.

Financial Lenders:

- **Metrics:** Increase in loan application submissions and approvals, satisfaction with the matching process.
- **KPI:** 20% increase in loan application conversion rates.

Dashboard Design

- **Students:** Track application progress, financial aid applications, and engagement levels.
- **College Admins:** Monitor application inflow, processing times, and outreach campaign success.
- **Financial Lenders:** Analyze loan application trends, approval rates, and user engagement.

WIREFRAMES

Designing the User Experience!

Wireframe Overview

- **Students:** Home screen with personalized college recommendations and application tracker.
- **College Admins:** Dashboard with application stats, filters, and sorting options.
- **Financial Lenders:** Loan matching interface with student profiles and application status.

Key Screens

- **Student Onboarding:** Interactive quiz and personalized recommendations.
- **Admin Dashboard:** Tools for application management and outreach.
- **Lender Interface:** Loan matching and application processing tools.

GAP ANALYSIS AND LAUNCH PLAN

Overall Strategy!

Recognizing Gaps

- **Current Solutions:** Note gaps in personalization and efficiency.
- **Proposed Solutions:** Show CollEdge's improvements.

Assumptions

- Users will provide detailed info.
- Adoption of new tools by colleges and lenders.

Launch Plan

- **Phase 1:** Pilot, gather feedback, and refine.
- **Phase 2:** Full rollout and monitor.
- **Phase 3:** Optimize and expand.

Impact and Prioritization

- **Key Metrics:** Engagement, satisfaction, and conversion
- **Prioritization:** Focus on high-impact features.

"A case study is a story with a purpose, offering lessons that drive future success." – Paul J. Meyer



Thank You

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