Lead Lifecycle Process in Studynet CRM

Overview

In the Studynet CRM system, a **Lead** is defined as a prospective student who registers through a web form or whose information is manually entered by a salesperson into any branch's CRM system.

Each Lead is assigned a unique **CRM ID**, ensuring that the email and phone number provided are unique to avoid duplication. This document outlines the detailed lifecycle of a Lead, from initial registration to conversion, highlighting key stages, statuses, ratings, and critical information required for successful management.

Lead Creation

A Lead is created either through an automated web form submission or manual entry by a salesperson. For manual Lead creation, the following steps are followed:

1. **Service Selection**: The salesperson selects one of the following services for the Lead:
    - Education
    - Professional Year (PY)
    - Visa Services
    - Health Cover
    - Recognition of Prior Learning (RPL)
2. **Basic Information Collection**: The following mandatory information is collected to create a Lead:
    - **Inquiring Reason**: The purpose of the inquiry (e.g., Education Counselling, Scholarship Assistance, Visa Extension, etc.).
    - **Current Study Level**: The student's current academic level (e.g., Year 12+, undergraduate, postgraduate, Diploma etc).
    - **Inquiry Note**: Additional details or specific requirements provided by the student.
    - **Interested Course Name**: The course the student wishes to pursue.
    - **Lead Source**: The origin of the Lead. The current lead source options are:
        I. Call
        II. Company FB/Insta

III. Email/Email Marketing
IV. Eventbrite
V. Expo Walkin Registration
VI. FB Messenger
VII. Gumtree Ads
VIII. Office Phone/Mobile
IX. Online Application
X. Online Application - Sub agent
XI. Others
XII. Personal Reference (Employee Referral)
XIII. Referral Agent
XIV. Referred by Hossain
XV. Referred by Manir
XVI. Sub Agent
XVII. Virtual Office
XVIII. Walk-in (Daily Visitor Registration)
XIX. Website/Landing Page
XX. WhatsApp
XXI. Acuity

- **Student's First and Last Name**: Full name of the student.
- **Email**: A unique email address for the student.
- **Contact Number**: A unique phone number for the student.
- **Date of Birth (DOB)**: The student's date of birth according to the passport.
- **Country of Birth**: The student's country of origin.
- **Application Type**:
  - **Onshore**: Applications for students applying for services within Australia.
  - **Offshore**: Applications for students applying from any country outside Australia.
- **Counsellor Assignment**: A counsellor is assigned to handle the case. If the lead is created manually then the counsellor need to assign as a handler at the beginning but if the lead come from a source automatically the owner (counsellor) and handler stay empty and the Team leader and branch manager need to assign

3. **Saving the Lead**: Once all required information is entered and saved, the Lead is successfully created in the CRM with a unique CRM ID. The default **status** is set

to **Enquiry**, and the default **rating** is **Hot** for the manual lead input. If the lead added from any other source automatically then the default **status** is set to **Enquiry**, and the default **rating** is **Hot.**

Lead Handling Process

The Lead handling process in Studynet CRM ensures clear assignment and tracking of responsibilities for each Lead to facilitate effective management and follow-up.

- **Manual Lead Entry**:
  - If a Lead is added manually by a counsellor, the counsellor can assign themselves as the **Lead Owner**.
  - The **Lead Handler** is also set to the same counsellor initially.
- **Automated Lead Entry**:
  - If a Lead is received automatically through the website or other sources via API, both the **Lead Owner** and **Lead Handler** fields remain empty.
  - The **Team Leader** or **Branch Manager** is responsible for assigning a **Lead Owner** to the Lead.
  - Once a **Lead Owner** is assigned, the **Lead Handler** is set to the same person as the **Lead Owner**.
- **Initial Contact**:
  - A **Contact Center Team Member** makes the first call to the student to collect and verify basic information (as outlined in the Lead Creation section).
  - The collected information is updated in the CRM before the assigned counsellor begins further engagement.
- **Follow-Up and Handler Updates**:
  - After the initial contact, any follow-up actions (e.g., calls, emails) by a **Counsellor** or **Contact Center Team Member** result in the **Lead Handler** field being updated to reflect the name of the person who performed the most recent follow-up.
  - The **Lead Handler** name continues to change based on the individual who conducts the latest follow-up, ensuring accurate tracking of engagement.

    - The **Lead Owner** remains unchanged unless reassigned by the **Team Leader** or **Branch Manager**.

- **Objective**:
    - Ensure clear ownership and accountability for each Lead.
    - Maintain accurate records of interactions by updating the **Lead Handler** field with each follow-up.
    - Facilitate seamless collaboration between the Contact Center Team and Counsellors by ensuring all basic information is collected and updated before in-depth counselling begins.

Lead Statuses

The Studynet CRM system assigns one of five statuses to a Lead, reflecting its progress through the lifecycle:

1. **Pending**: The default status when a Lead is first created in the CRM. No follow-up or application has been initiated yet.
2. **Enquiry**: Assigned when a contact center representative follows up with the student, initiating communication to gather requirements.
3. **Application Stage**: Set when a salesperson submits an application on behalf of the student, marking the transition to the admission process.
4. **Cancelled**: Applied when a Lead is no longer viable. The Team follows procedure to cancel a lead

Engagement Level	Action Required by Sales Team	Tracking link
1. **No response after 30 follow-up attempts →** Marked as cancelled after **3 weeks**. 2. **Explicitly stated they are not interested**. 3. **Does not meet eligibility criteria** (e.g., funding issues, language test failures). 4. Leads from the **Expo who were never reachable** despite multiple attempts.	Team will analysis Branch wise weekly Basis.	Tracking will be done by Contact Center Team.

5. **Converted**: Achieved when the student successfully receives a visa and enrolls in the chosen course or program.

Lead Ratings

Leads are also assigned one of four ratings based on their engagement and eligibility:

1. **Hot**: The default rating assigned when a Lead is created manually with all necessary information. A Lead becomes Hot if all criteria are matched with the student for further processing.

Engagement Level	Action Required by Sales Team	Tracking Process
1. **Expressed strong interest** but still deciding between providers or intake periods. 2. Needs assistance with **funding, visa, or document completion** 3. Attended an **expo event** and scheduled an **office visit** but hasn't confirmed 4. Engaged with counsellors and requested more information 5. Negotiating or in a proposal stage	Follow-up, clarify doubts, assist in final decision.	Contact Center Team will making sure all follow ups are done with Specific cause and timely manner.

2. **Cold**: Assigned when follow-up attempts by sales or contact center staff receive no response or engagement from the student. Additionally, a Lead becomes Cold when the student fails to submit all required information properly.

Engagement Level	Action Required by Sales Team	Tracking Process
1. Says they will "think about it" but **no concrete actions taken**. 2. Still **undecided on the course, university, or intake**. 3. Needs additional nurturing over a long period. 4. Lead is interested but prefers next year's intake and will decide later. 5. Student is waiting for family approval before proceeding.	1. Sales Team should follow up the leads 2. Mandatory updates interested intake 3. Manually tracked and nurture In ever follow up would be frequently after a month and updates notes on it	Tracking will done By Contact Center Team and Sales Team leaders.

3. **Warm**: Currently warm rating is not used by the team members.

4. **Committed**: Assigned when the student is eligible, all requirements are fulfilled, and they are actively pursuing the application process.

Engagement Level	Action Required by Sales Team	Tracking Process
1. Completed degree provider Top Public and Private Universities as per the NOOSR (National Office of Overseas Skills Recognition) guidelines 2. O level/A level English Medium School Prospective students with all Docs and ready to proceed.	Collect documents and immediate action for application or further step.	Lead will be Audit weekly - Monthly – Quarterly - Yearly by all Managers

Lead Lifecycle Stages

The lifecycle of a Lead in Studynet CRM progresses through several stages, each managed by specific teams to ensure a streamlined process. Below are the key stages, with associated status and rating updates:

1. Lead Communication Stage

- **Responsible Teams**: Counsellor and Contact Center Team
- **Status**: Transitions from **Pending** to **Enquiry** upon follow-up.
- **Rating**: Typically **Hot** initially; may shift to **Cold** if no response or if the student fails to submit required information properly, or **Committed** if the student engages actively.
- **Activities**:
  - The assigned counsellor and contact center team initiate communication with the student via email or phone.
  - They gather additional requirements and details necessary for future assessments, such as:
    - Academic qualifications and transcripts
    - English proficiency test results (e.g., IELTS, PTE)
    - Financial documents (if applicable)
    - Visa status and history
  - All collected information is updated in the CRM for reference.
  - **Student Profile Categorization:**
    - **Onshore Students (within Australia):**
      - **Education History Group 1:** Students from Top Public and Private Universities as per NOOSR (National Office of Overseas Skills Recognition) guidelines or All English Medium Schools are categorized as Tier 1 leads.
      - **Education History Group 2:** Students from Top Bangla Medium Schools and Colleges or those not from Education History Group 1 are categorized as Tier 2 or 3 leads, with missing/empty information flagged for the CC Team to have these details filled before sending to counsellors.
  - **Lead Source Group 1:** Students from Call (all types), Walk-in (Daily Visitor Registration), Referral or Personal Reference, and Virtual Office are categorized as Tier 1 leads.

- **Lead Source Group 2:** Students from Acuity Appointment, Online Applications, and Sub Agents are categorized as Tier 1 or 2 leads.
- **Lead Source Group 3:** Students from FB/Instagram or Social Media, Web SN or Website/Landing Page, WhatsApp or FB Messenger, Email, and Others are categorized as Tier 2 or 3 leads.

Education History Group	Education History Institution	Explanation
1	Top Public and Private Universities as per the NOOSR (National Office of Overseas Skills Recognition) guidelines	Students of such academic background are the highest tier of lead.
	All English Medium Schools	
	Top Bangla Medium Schools and Colleges	
2	Those who are not from Education History Group 1	Students of such academic background are secondary tier of lead. And if Education History information is missing/empty, it is the CC Team's duty to have this information filled before sending the leads off to counsellors

Lead Source Group	Lead Source	Explanation
1	Call (all types)	Students who come in from this source are considered the highest tier of lead. However, sometimes all information are not retrieved during the initial phone call. CC team should aim to retrieve all information during that initial contact
	Walk-in (Daily Visitor Registration)	Students who come in from this source are considered the highest tier of lead. Additionally, since they have walked in, all their historic information should be noted down right then and there
	Referral or Personal Reference	Students who come in from this source are considered the highest tier of lead
	Virtual Office	
	Acuity Appointment	
	Online Applications	
	Sub Agents	
2	Company FB/Insta or social media	Students who come in from this source are the second highest priority tier
	Web SN or Website/Landing Page	
	Expo	
3	WhatsApp or FB Messenger	Students who come in from this source are the third highest priority tier because all information are not generally provided initially
	FB Messenger	
	Email	
	Others	

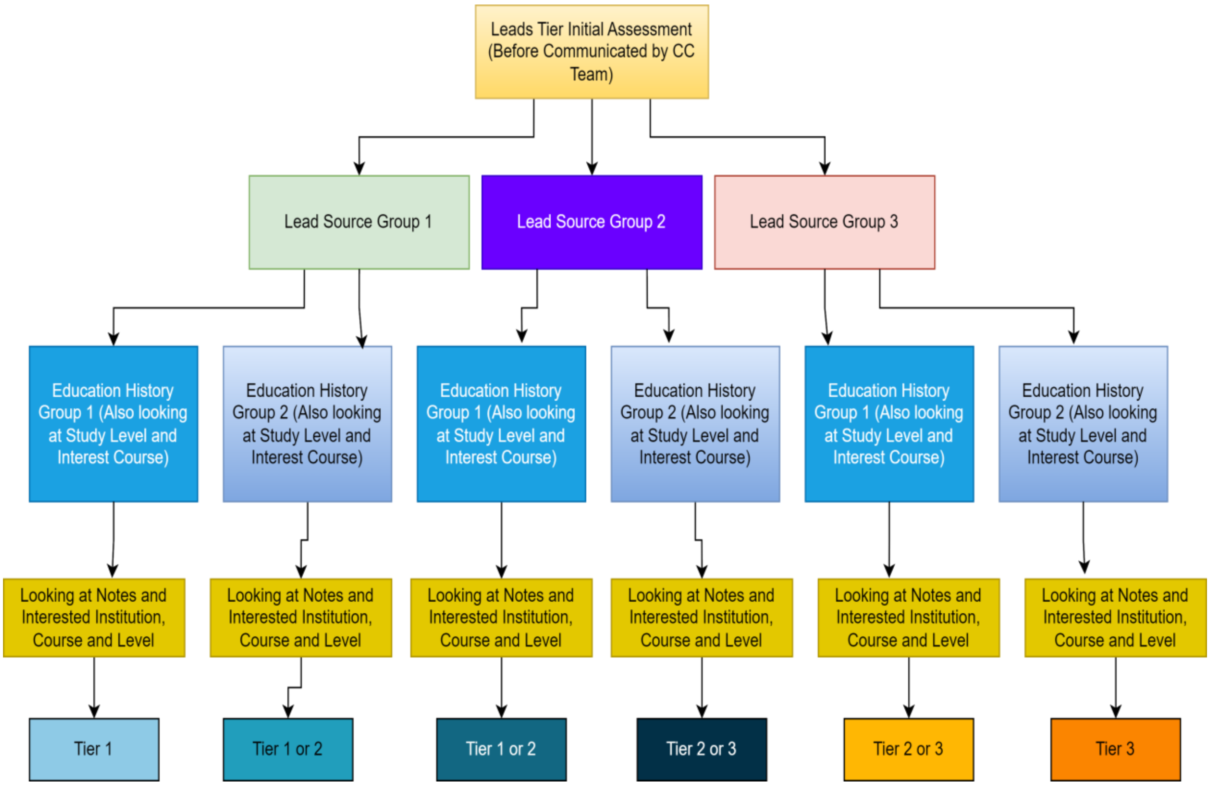

Image: Lead Tear Assessment Structure (Offshore)

- **Offshore Students (outside Australia):**
  - **Client Location Group 1 & 2:** Students from Non-High Risk Countries (e.g., Sri Lanka, India, Bangladesh, Pakistan, Nepal) are categorized as Tier 1 or 2 leads.

- **Client Location Group 3:** Students from Sub Continental Countries (e.g., Sri Lanka, India, Bangladesh, Pakistan, Nepal) are categorized as Tier 2 or 3 leads.
- **Client Location Group 4:** Students from Other countries are categorized as Tier 3 leads.

Client Location Group	Client Location	Explanation
1	Non-High-Risk Countries	These Countries are easy to convert
2	Non-Subcontinental Countries	
3	Sub Continental Countries	These Include: Sri Lanka, India, Bangladesh, Pakistan and Nepal. The countries are named in order of how easily they convert
4	Others	Countries which are not in Client Location Group 1, 2 or 3

Lead Source Group	Lead Source	Explanation
1	Call (all types)	Students who come in from this source are considered the highest tier of lead. However, sometimes all information are not retrieved during the initial phone call. CC team should aim to retrieve all information during that initial contact
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	Online Applications	
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	FB Messenger	
	Email	
	Others	

- **Lead Source Group 1:** Students from Call (all types), Walk-in (Daily Visitor Registration), Referral or Personal Reference, and Virtual Office are categorized as Tier 1 leads.

- **Lead Source Group 2:** Students from Acuity Appointment, Online Applications, and Sub Agents are categorized as Tier 1 or 2 leads.
- **Lead Source Group 3:** Students from FB/Instagram or Social Media, Web SN or Website/Landing Page, WhatsApp or FB Messenger, Email, and Others are categorized as Tier 2 or 3 leads.

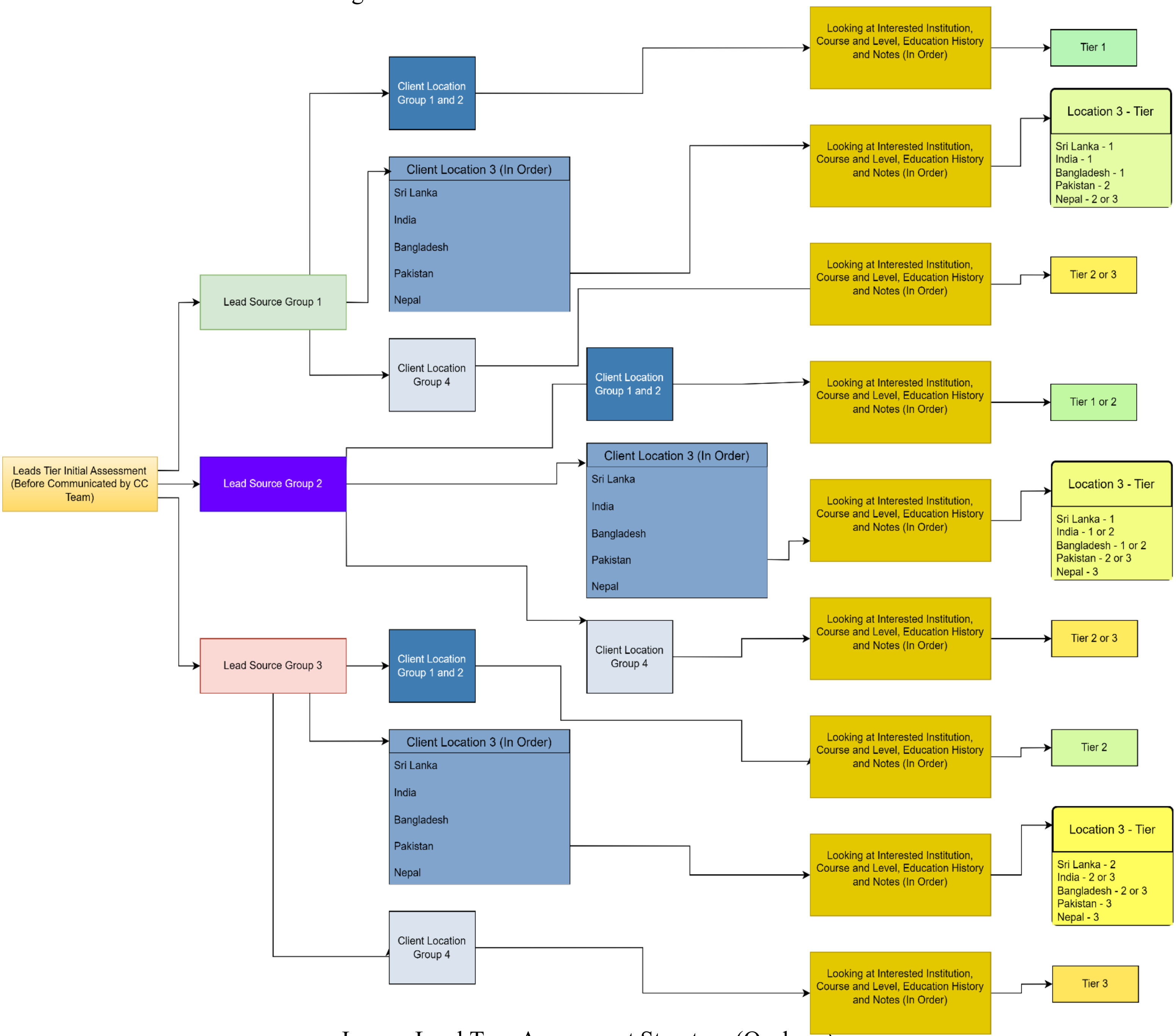

Image: Lead Tear Assessment Structure (Onshore)

- **Objective**:
  The goal at this stage is not just to initiate contact but also to:
  - Collect detailed academic background and lead source info

- Determine the **initial Tier level** for each student
- Record **client location, education background**, and **lead source** in CRM
- Update notes with **interested institutions**, **course and level**, and any qualifying remarks

2. Student Data Collection and Course Application

- **Responsible Teams**: Counsellor (Lead Owner)
- **Status**: Transitions from **Pending** to **Enquiry** upon follow-up.
- **Rating**: Typically, **Hot** initially; may shift to **Cold** if no response or if the student fails to submit required information properly, or **Committed** if the student engages actively and eligible for doing application.
- **Activities**:
    - The assigned counsellor and contact center team initiate communication via zoom session or talk face to face.
    - Counsellor will gather additional requirements and details necessary for future assessments, which are recorded in the **Lead Information Section** of the CRM. The Red Start (*) marked fields are all mandatory.
    - The **Lead Information Section** consists of the following 11 sections, which must be completed sequentially to unlock subsequent stages:

0. Personal Info:

- **Fields**:
    - First Name *
    - Last Name *
    - Email *
    - Contact Number *
    - Date of Birth (DOB) *
    - Application Type (Onshore/Offshore) *
    - Gender *
    - Marital Status *
    - Country of Birth *
    - Client Location *

        - Lead Source *

    - **Description**: This section captures the basic information required to create a Lead. All fields marked with an asterisk (*) are mandatory. This section is typically filled during Lead Creation or initial contact by the Contact Center Team.

1. Client History:

- **Fields**:
    - Highest Qualification *
    - Current Course Name *
    - Current Institution Name *
    - English Test Score
    - English Test Date
    - Preferred Country to Study *
    - Preferred Location to Study *
- **Description**: This section records the student's academic background and preferences for further studies. Mandatory fields (*) must be completed to proceed.

2. Sponsorship Details:

- **Fields**:
    - Has Sponsorship? *
    - Your Annual Budget for Education *
    - If Has Sponsorship? is Yes:
        - Sponsorship Type *
        - Fund Types *
        - Sponsor Occupation *
        - Source of Income *
        - Sponsors Annual Income *
        - Maturity Date
        - Sponsor Name *
        - Sponsor Email

- What Is The Name Of Your Scholarship *
- Sponsor Other Name
- Sponsor Phone Number

- **Description**: This section captures financial support details, indicating whether the student has sponsorship and their budget for education.

3. Education History:

- **Fields**:
  - Course
  - Study Level
  - Institution
  - Country
  - Start Date
  - End Date
  - Status
  - GPA
  - Verified Info or Not?
  - Remarks
- **Description**: Multiple educational qualifications can be added, detailing the student's academic history. This section helps assess eligibility for courses and institutions.

4. Course Selection:

- **Fields**:
  - Course *
  - Institution *
  - Intake Date *
- **Description**: The counsellor adds the student's desired courses, selecting multiple courses for application if needed. The same course cannot be applied for in the same semester, but different

courses or the same course at different universities can be selected. Intake dates must be specified.

5. English Language Proficiency:

- **Fields**:
    - English Is My First Language? (Yes/No)
    - If No:
        - Test Taken? * (Yes/No)
        - If Yes:
            - English Test * : The current dropdown values are IELTS, TOEFL, PTE, OET, Others.
            - Overall Test Score *
            - English Test Verification ID
            - Date of Test *
            - Reading Score
            - Writing Score
            - Speaking Score
            - Listening Score
- **Description**: This section records the student's English proficiency details. If no test has been taken, the counsellor selects "No" for "Test Taken?" and updates the information later when the student completes a test.

6. Job Experience:

- **Fields**:
    - Country
    - Company
    - Designation
    - Start Date
    - End Date
    - Remarks

- **Description**: Multiple job experiences can be added, detailing the student's current or past employment history to support their application.

7. Address and Contact Details:

- **Fields**:
  - **For Offshore Students**:
    - **Overseas Address**:
      - Street Address *
      - City/Town/Suburb *
      - Zip code/Post Code *
      - State *
      - Country *
      - Overseas Contact Number *
    - **Emergency Contact Info #1**:
      - Title * (Current Dropdown values are **Mr. Mrs. Ms. Miss Dr. Prof. Engr. Other**)
      - First Name *
      - Last Name *
      - Family/Relatives Type *
      - Contact No *
      - Email Address
  - **For Onshore Students** (includes all Offshore fields plus):
    - **Australia Address**:
      - Street Address *
      - Suburb *
      - Post Code *
      - State *
      - Country * (Australia, selected by default)

- **Description**: This section records the student's current address and emergency contact details, with additional requirements for Onshore students.

8. Passport/Visa:

- **Fields**:
  - **Citizenship Details**:
    - Citizenship From * (auto-selected based on Country of Birth, unchangeable unless updated)
    - Citizenship Obtained By * (By Birth, Descent, Other)
    - Dual Citizenship * (Yes/No)
    - If Yes: Dual Citizenship Country *
  - **Passport Detail**:
    - Passport Number *
    - Passport Issuing Country *
    - Passport Issue Date *
    - Passport Expiry Date *
  - **Visa Detail**:
    - Have Australian Visa? (Yes/No)
    - If Yes:
      - USI ID
      - Visa Number *
      - Visa Status *
      - Visa Expiry Date *
- **Description**: This section captures citizenship, passport, and visa details, with conditional fields appearing based on responses.

9. Insurance:

- **Fields**:
  - Has OSHC Insurance? (Yes/No)
  - If Yes:
    - OSHC Provider * (dropdown of insurance providers)

        - OSHC Type *
        - Insurance Number *
        - OSHC Start Date *
        - OSHC End Date *
- **Description**: This section records details of the student's Overseas Student Health Cover (OSHC) if applicable.

10. Others:

- **Fields** (all Yes/No questions, with additional fields if "Yes" is selected):
    - i. Does The Applicant Have A Disability? (If Yes: Remarks)
    - ii. Does The Applicant Require Assistance Due To A Disability?
    - iii. Is The Applicant Considered A Minor Under The Law (usually Under The Age Of 18)?
    - iv. Does The Applicant Have Only A Single Name, With No Last Name?
    - v. Has The Applicant Previously Used A Different Last Name? (If Yes: Previous Last Name)
    - vi. Does The Applicant Have A Preferred First Name That Is Different From Their Legal First Name? (If Yes: Preferred First Name)
    - vii. Does The Applicant Have A Permanent Residency Right Now For Australia?
    - viii. Is The Applicant First Nation Of Australia?
    - ix. Has The Applicant's Visa Been Rejected Before? (If Yes: Visa Refusal Remarks)
    - x. Is The Applicant Applying For RPL? (If Yes: Transcript Upload, Course Outline Upload)
    - xi. Is The Applicant An Alumni Of The Selected Provider? (If Yes: Alumni Student ID)
- **Description**: This section captures additional relevant information about the student, with conditional fields based on responses.

11. Apply:

- **Fields**:
  - Selected Courses (populated from Course Selection)
  - Apply Notes *
  - Application Urgency *
- **Description**: This section unlocks only after all previous sections (0–10) are fully completed. The counsellor applies for each selected course one by one, adding notes and specifying the urgency of the application. This marks the transition to the admission team's responsibilities.

3. Application Preparation Stage

- **Responsible Team**: Sales Team
- **Status**: Transitions to **Application Stage** once an application is prepared.
- **Rating**: Typically moves to **Committed** if the student is eligible and requirements are met; may shift to **Warm** if ineligible or not ready.
- **Activities**:
  - The sales team reviews the collected information to determine the student's eligibility for the desired course or service, factoring in the application type (Onshore or Offshore).
  - Based on eligibility, the sales team shortlists suitable courses and institutions that align with the student's goals, qualifications, and application type.
- **Objective**: Identify appropriate courses and institutions tailored to the student's needs and application type.

3. Genuine Temporary Entrant (GTE) Stage

- **Responsible Team**: Admission Team
- **Status**: Remains in **Application Stage**.
- **Rating**: Typically **Committed**; may shift to **Warm** if issues arise with eligibility or documentation.
- **Activities**:

- The admission team conducts a thorough review of all documents provided by the student to ensure compliance with Genuine Temporary Entrant (GTE) requirements, which may vary for Onshore and Offshore applications.
    - Documents are verified and attested as needed, ensuring they meet the standards of the institution and visa authorities.
    - Common documents checked include:
        - Academic certificates and transcripts
        - Proof of English proficiency
        - Financial statements (with specific requirements for Offshore applicants)
        - Passport and visa documents
    - If any discrepancies are found, the admission team communicates with the Hobbs or counsellor to resolve them.
- **Objective**: Ensure all documents are authentic and meet the requirements for course and visa applications, tailored to Onshore or Offshore criteria.

4. Application Submission Stage

- **Responsible Team**: Admission Team
- **Status**: Remains in **Application Stage**.
- **Rating**: Typically **Committed**.
- **Activities**:
    - The admission team submits applications to the selected universities or institutions on behalf of the student via their respective portals, ensuring compliance with Onshore or Offshore application processes.
    - A single Lead may result in multiple applications to different universities, depending on the student's preferences, eligibility, and application type.
- **Objective**: Successfully apply to the chosen institutions and secure admission offers, accounting for differences in Onshore and Offshore application requirements.

5. Communication Stage

- **Responsible Team**: Admission Team
- **Status**: Remains in **Application Stage**.
- **Rating**: Typically **Committed**.

- **Activities**:
  - The admission team communicates with the institutions to track the status of applications.
  - Upon receiving a **Conditional Offer Letter (COL)** or **Final Offer Letter (FOL)** from the institution, the team informs the student and counsellor.
  - The team provides guidance on accepting the offer and fulfilling any conditions (e.g., paying fees, submitting additional documents), which may differ for Onshore and Offshore applicants.
- **Objective**: Ensure clear and timely communication between the student, counsellor, and institution to secure admission, tailored to the application type.

6. Visa Application Stage

- **Responsible Parties**: Student or Counsellor
- **Status**: Remains in **Application Stage** until visa approval.
- **Rating**: Typically **Committed**.
- **Activities**:
  - After receiving the offer letter, the student or counsellor initiates the visa application process (e.g., student visa, visa extension, or change of visa status), with specific requirements for Onshore or Offshore applicants.
  - The admission team may provide support by ensuring all required documents are prepared and submitted correctly, particularly for Offshore applicants who may face stricter visa requirements.
  - The team updates the CRM with visa application details and tracks progress.
- **Objective**: Successfully obtain the necessary visa for the student to commence their studies, ensuring compliance with Onshore or Offshore visa regulations.

7. Lead Conversion

- **Responsible Team**: Admission Team
- **Status**: Transitions to **Converted** upon visa approval and enrollment.
- **Rating**: Remains **Committed**.
- **Activities**:
  - The admission team confirms the student’s enrollment with the institution.
  - The CRM is updated to reflect the Lead’s status as **Converted**.

    - Any post-enrollment support, such as orientation or accommodation assistance, may be coordinated, with specific considerations for Onshore students already in Australia.
- **Objective**: Complete the Lead lifecycle by ensuring the student successfully begins their educational journey.
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8. Cancellation (if applicable)

- **Status**: Transitions to **Cancelled** if the Lead is no longer viable.
- **Rating**: Typically shifts to **Warm** if the student may be reconsidered later, or **Cold** if no further engagement is expected or if the student fails to submit required information properly.
- **Activities**:
    - The Lead may be cancelled if the student is ineligible, not ready to apply, or withdraws from the process.
    - The CRM is updated with the reason for cancellation for future reference.
- **Objective**: Properly document and close non-viable Leads while maintaining the possibility of future engagement for **Warm** Leads.

Common Inquiring Reasons

Leads may contact Studynet CRM for a variety of reasons, including but not limited to:

- Education Counselling
- Scholarship Assistance
- Course Change or Institute Change
- Visa Extension
- Change of Visa Status (e.g., from other visa types to student visa)
- Regional Study Options
- Permanent Residency (PR) Pathway Courses
- Enrollment in a New Course
- Transition from 485 Visa to Student Visa
- Affordable Course Fees
- Payment or Fees-Related Issues
- Visa/PR Consultation
- Referral Bonus

- Scholarship Claims
- Refunds
- Appointment Scheduling
- Other Miscellaneous Inquiries

Key Points for Effective Lead Management

1. **Unique Identifiers**: Every Lead must have a unique CRM ID, email, and phone number to avoid duplication and ensure accurate tracking.
2. **Application Type Specification**: Clearly identifying whether the application is Onshore (within Australia) or Offshore (outside Australia) is critical, as it impacts document requirements, visa processes, and institutional preferences.
3. **Status Tracking**: Updating the Lead's status (Pending, Enquiry, Application Stage, Cancelled, Converted) accurately reflects its progress and ensures proper team coordination.
4. **Rating System**: Assigning appropriate ratings (Hot, Cold, Warm, Committed) helps prioritize Leads and tailor follow-up strategies based on engagement and eligibility.
5. **Service Selection**: Defining the service (Education, PY, Visa Services, etc.) at the Lead creation stage ensures proper assignment and follow-up.
6. **Comprehensive Information**: Collecting detailed and accurate information during the initial stage is critical for eligibility assessment and application success, with additional considerations for Offshore applicants.
7. **Team Collaboration**: Seamless coordination between the counsellor, contact center, sales, and admission teams is essential for moving the Lead through each stage efficiently.
8. **Document Verification**: The GTE stage is crucial for ensuring document authenticity and compliance with institutional and visa requirements, with specific attention to Onshore vs. Offshore differences.
9. **Multiple Applications**: A single Lead may result in multiple applications to different institutions, increasing the chances of securing an offer, particularly for Offshore applicants seeking diverse options.
10. **CRM Updates**: Regularly updating the Lead's stage, status, rating, application type, and details in the CRM ensures transparency and efficient tracking throughout the lifecycle.
11. **Student-Centric Approach**: Continuous communication with the student ensures their needs and preferences are met, with tailored support for Onshore and Offshore applicants to increase conversion likelihood.

Conclusion

The **Lead lifecycle in Studynet CRM** is a carefully designed, structured process that ensures every prospective student—from initial inquiry to final enrollment—is managed in a professional, personalized, and strategic manner.

The CRM distinguishes between **Onshore** (students currently in Australia) and **Offshore** (students applying from outside Australia) applications. This distinction is crucial because it affects documentation requirements, visa regulations, and institutional processes. By recognizing these differences, the CRM ensures that each student is evaluated and supported appropriately.

Every lead is assigned a **unique CRM ID** and tracked using a combination of **status** and **rating**:

- **Statuses** reflect where the student is in the process (Pending, Enquiry, Application Stage, Cancelled, Converted).
- **Ratings** indicate how likely the student is to convert (Hot, Cold, Warm, Committed).

The process follows eight well-defined stages:

1. **Lead Creation** – Capturing essential information about the student and their inquiry.
2. **Lead Communication** – Initiating contact, collecting more details, and assigning a lead tier based on source, location, and education history.
3. **Application Preparation** – Assessing eligibility and shortlisting suitable courses and institutions.
4. **GTE (Genuine Temporary Entrant) Review** – Verifying the authenticity and eligibility of the student's documentation.
5. **Application Submission** – Sending the student's application to one or more institutions.
6. **Institution Communication** – Tracking offers and keeping the student informed.

7. **Visa Application** – Supporting the visa process to ensure timely and compliant applications.
8. **Lead Conversion** – Finalizing enrollment and updating the system as the student begins their study journey.

Each stage involves dedicated teams—**Counsellors, Contact Center Staff, Sales Team, and Admission Officers**—working collaboratively through the CRM to ensure no step is missed and no student is left behind.

The CRM's strength lies in its **tiered approach**, especially during the communication stage. Students are grouped by client location, lead source, and education background, allowing Studynet to prioritize leads and tailor services effectively. This approach ensures that **high-potential leads are fast-tracked**, while others are nurtured with suitable follow-ups and support.

In summary, Studynet's CRM enables:

- **Streamlined and accountable lead tracking**
- **Tailored communication for Onshore and Offshore students**
- **Strategic lead categorization and prioritization**
- **High conversion rates through efficient processing and documentation**

By maintaining accurate records, regular follow-ups, and strong coordination across departments, Studynet ensures a **student-centric experience** that maximizes both **satisfaction and conversion outcomes**.