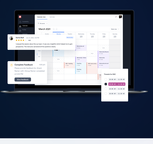
CRM for Experts

Brand new all in one platform for our experts & operations making processes automated.



About upGrad

upGrad is an online higher education platform providing rigorous industry-relevant programs designed and delivered in collaboration with world-class faculty and industry. Transitioning has always been one of major key selling points which means a dedicated individual "Student success mentor". They make sure learner's study goals are fulfilled & they are able finish their course seamlessly.

Experts (Mentors, Career coaches, Student Group Coaches (SGC)) are able to help the learners in their career journey by conducting one on one meetings and group meetings to guide them.

Why did we solve this problem?

Four different interactions happening between the learners and experts. No tracking available.

No automatic calling and recording of the calls which are made to the learners by the coaches.

Industry mentors are hardly aware about the progress and the status of the learners.

To understand the pain points, admins, coaches and mentors were interviewed. Following are the key insights.

Feedback given by learners	No visibility	Manual work	Lack of communication
"Feedback to available on the platform"	"Need a place to store agenda of the session"	"Grouping of students and mapping them is a manual task before kick"	"Proper communication from us is missing"
"No feedback reminder is there. Sometimes we attendance groups"	"Very low visibility of attendance details. Mentors individually keep notes of learners"	"Manually changing the excel sheet. Automation can save"	"Inconsistency in communication of stakeholders in multiple cohorts"
		"A lot of time is wasted in arranging slots as per teachers"	

Need of the Experts

- Set availability of myself
- Schedule calls with student
- View learner details in one place
- View calendar events with details
- Provide feedback to learners
- Communications with all touchpoints

Project Goal

Tracking
Tracking the progress of learners

Planning
For scheduling and planning of events

Engagement
Should be able to complete the tasks through reminders and communication

User Journey

The goal was to make the user journey simple & seamless through all steps. These features would save time and help to work more effectively.

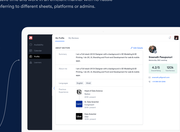
CRM for experts is a collection of different pages

Implementation

All the details in one platform where features are intuitive and designed to save time and work in an efficient manner with no hassle of referring to different sheets, platforms or admins.

Expert's profile

Expert should be able to view, edit and add different profile details for themselves.

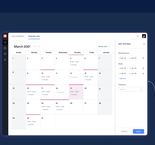


Expert should be able to navigate different pages

Reviews and ratings of experts are displayed to the admins and can be feedback received from learners and set accordingly.

Availability Management

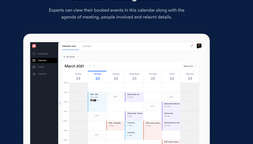
Here, expert can add timings to their calendar according to their availability for the week.



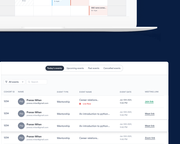
They can set their availability by prep as specific and if they want

Calendar Management

Experts can view their booked events in this calendar along with the agenda of meeting, people involved and relavent details.

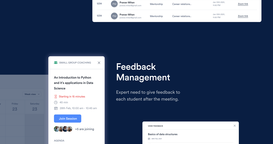


List view for experts to scan the list of events categorized according to the status of events.



Feedback Management

Expert need to give feedback to each student after the meeting.



They can refer the previous feedback to track the progress of the learners

Communication Management

Reminders of tasks to keep the users engaged and to complete required tasks.

Notifications are categorized according to the type of event

Project
CRM for experts

Arunit Kumar
Product Design
Core Engagement

Direction and Review sessions
Abhishekar, Product Design Lead
Hosahs, Product Design Direction

Collaborations
Sreenath and Krishanth, Product Management
Pavan and team, Web Development

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