

Dec 3, 2025 | 📅 CDP Phase 1 - Business Review / Discussion

Attendees: Kashika Makkar Laksh Arora Varun Garg Shikhar Singh Kshitij Aggarwal
Vivek Khattar Abhishek Sinha Shivam Bajaj

Minutes of meeting:

1. If student is not interested in lets say rcc opportunity and the lead is given to a AD owner then The owner will not create a new AD opportunity once the conversation get concrete then new ad opportunity will be created keeping the rcc opportunity stage as it is
This will not happen that the owner will shift the opportunity to not interested then new ad opportunity will be created
2. We discussed the logic for last 45 days, this academic year, and eternity we need to add fields of which course we are referring to, and how many leads are coming from which channels such as API or website. In the last 45 days we need to track whether any opportunity in AD, RCC, or DLP was created, disposed, or edited and understand the overall count in that period, including number of times the lead was lost, number of times lost within 45 days, number of times lost in specific regions, number of leads coming from API, and number of leads coming from the website.
3. Disposition is currently not mapped to a product opportunity and will be updated as per the latest product opportunity structure, but we can revise it if a disposition belongs to another opportunity.(very few cases)
4. For mobile numbers, right now we cannot identify if the message is going to the parent or the student, so we discussed creating separate fields specifically for father and student message numbers.
5. In inbound calls, dummy opportunity is not created; if the course is not defined on the calling page then dummy cannot be created, but in all other cases dummy opportunities are automatically created.
6. For class studying logic, we need to confirm the final calculation approach from the category team(Mohit).
7. **Campaign ID** is currently not being used, and we only get the lead source but cannot identify from which specific block or page the lead originated.
8. We need to make use of the OTP_verified field going forward and whatsapp_opt_in = all yes

9. We have to include details of iat, iacst 1 and 2 , anthe all 3 exam in user level (anthe and akthe is the same