

# The Learning Dilemma

*From research paralysis to confident upskilling – Clario bridges the gap*



## Problem Statement

Millions of professionals are struggling to understand which learning option is best for them. They often feel overwhelmed by abundance of learning options available. Research shows that when faced with too many choices, people can experience a “*Paralyzing Paradox*”

[source](#)



## Why they Quit ?

- So many options
- Not sure which skill mirrors their goals
- Low confidence in choosing the right option amongst the available one
- They get stuck in research paralysis and bookmarking loops
- Afraid of wasting their time and money



## Monetization and Product Gaps

India's edtech sector reached 2.8 Billion \$ in 2024 & is projected to reach 33.2 Billion \$ by 2033. Monetization depends heavily on subscription, course fees, cohorts yet completion rates remain alarmingly low highlighting critical gap in learners accountability & course follow through

[source](#)



## Growth Drivers

- Penetration of internet in Indian market
- Demand for micro learning and certification
- Peer and Social pressure to “keep upskilling”
- Skill based hiring

[source](#)

[source](#)

## Global E-learning Market :

**11.01% CAGR**

2025 : 248.85 Billion \$

2030 : 419.31 Billion \$



## Indian E-Learning Market:

**28.7% CAGR**

2024 : 2.92 Billion \$

2033 : 20.98 Billion \$

# Sizing the Market, Defining the User



## Who are we building for

- 18-30 years young professionals/ freshers who want to upskill and upgrade in their career by learning new skills
- People who are confused in choosing a right platform and course which aligns with their career goals
- People who are open to learn but course should be economical and time saving



## Market Sizing

Metric	Value & Growth	Source
TAM	2025: 7.67 Billion \$ 2031 : 21.47 Billion \$	<a href="#">Techsci research</a>
SAM	2024: 10.81 Billion \$ 2035 : 61.25 Billion \$	<a href="#">Market research future</a>
SOM	2024: 5.13 Billion \$ 2030 : 17.34 Billion \$	<a href="#">Virtual market research</a>

## User Hypothesis

We identified different gaps in market such as :

- Overwhelming number of courses creating confusion and chaos
- Every learner has different upskilling requirements, learning strategy and availability of time
- Lack of interaction & query resolution leads to demotivation & wastage of time



We believe that we can fix these gaps by :

- Creating custom roadmaps based on different learners persona
- Motivate users to complete small milestones & reward them for the same
- By introducing different design elements & by curated learning workflows we can make learning a habit instead of it being a task
- We can add community groups so that people from different walks of life can interact & learn together

# Who is out there and Who we are for



## User Persona

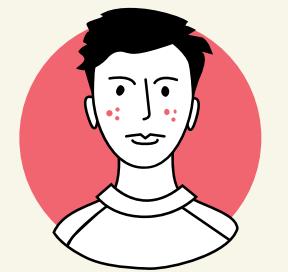


### Market competitive landscape

Competitor	About the platform
YouTube	Free, endless content but <b>overwhelming, unstructured and low completion rates</b>
Udemy / Coursera	Curated courses, certification but <b>less interaction with instructor, low community support, outdated contents thus reduced completion rates</b>
LinkedIn Learning	Strong with professional learning but <b>weak in personalization</b>
Bootcamps (like Scaler)	High accountability but <b>expensive</b>



**Shashi Singh**  
30/Female  
📍 Bangalore



**Shiv Kumar**  
23/Male  
📍 Lucknow

<b>About her</b>	5 years in tech, wants to upskill & switch
<b>Pain Points</b>	<ul style="list-style-type: none"> <li>Afraid of wasting money on irrelevant courses</li> <li>Stuck in a dead-end loop of monotony at work</li> </ul>
<b>Learning Investment</b>	Price isn't a concern for her, she is time bounded and would prefer recorded courses
<b>About him</b>	Fresh college grad, wants a job ready skill
<b>Pain Points</b>	<ul style="list-style-type: none"> <li>Overwhelmed by too many courses</li> <li>Roadmap not decided</li> <li>Unsure which skill will land him a job</li> </ul>
<b>Learning Investment</b>	Prefers low cost courses, he isn't time bounded and he is ok with both live and recorded courses

# From symptoms to its consequences

*listening to voices of our potential customers*



## Insights from survey responses

### The patterns we noticed:

#### source

- Most of the users were **mid to senior level** in their age and corporate experience : **88 percent**
- Getting **a new job** and **switching career** were biggest influencing factors to learn new skills **contributing 44 and 46 percent respectively.**
- **75.6 percent** agreed that **too many choices create confusion** and is the biggest challenge while learning a new skill
- **56 percent** users **preferred recorded classes** while **17 percent** were in favor of **live classes**
- **97 percent agreed** that if a course and a defined roadmap is provided then **they will be able to complete it in time**



## What is the real problem

The real problem isn't access to learning material or courses, instead the real problem is lack of clarity, accountability and career alignment in deciding what to learn next

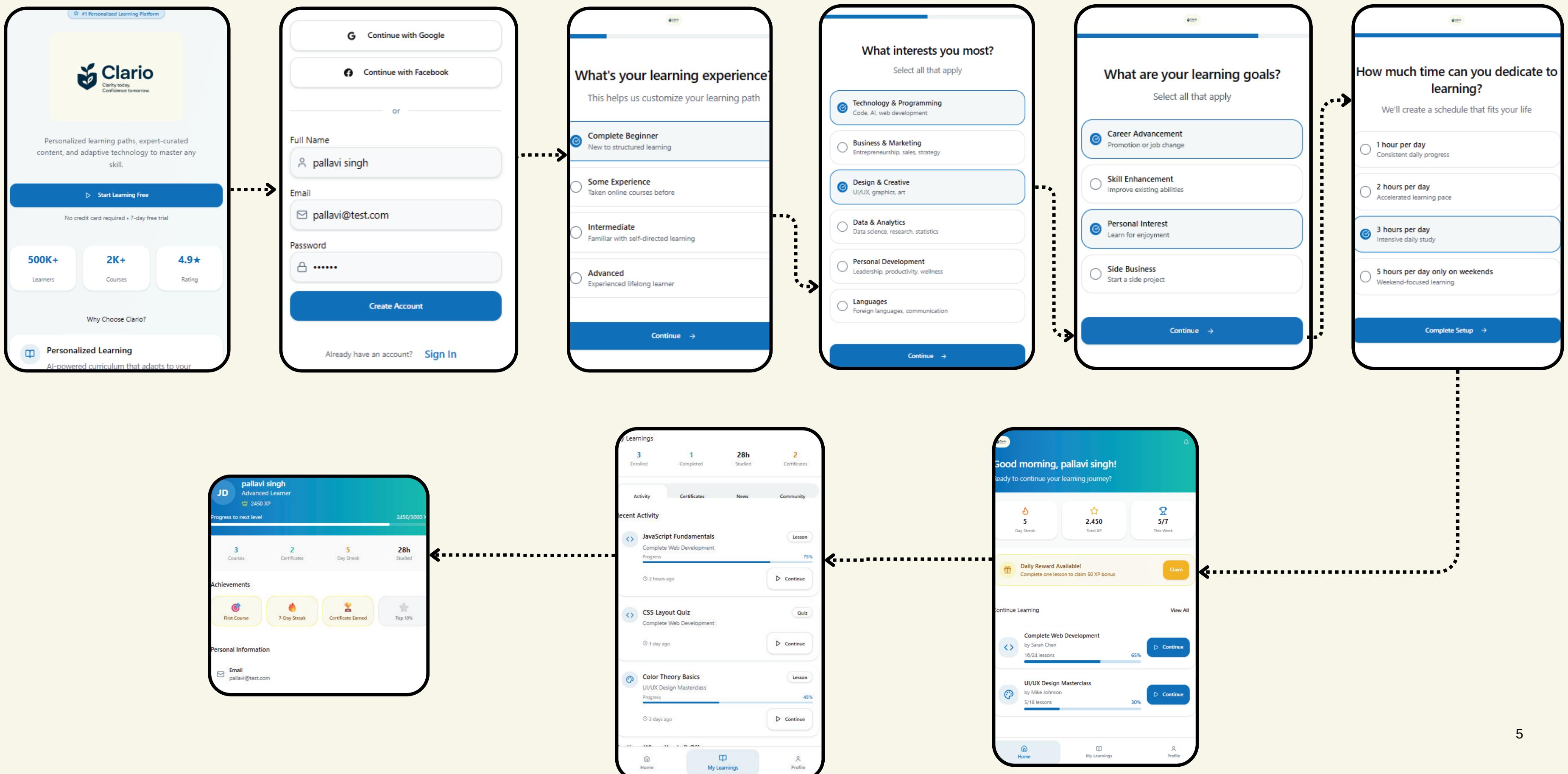


## Consequences

- They either waste time jumping from one course to another or don't start at all
- Time, money and confidence is lost which leads to frustration
- They go after courses which are half cooked, then they again find themselves looking for a new course and then they loose track of their original objective of why they started learning this new skill

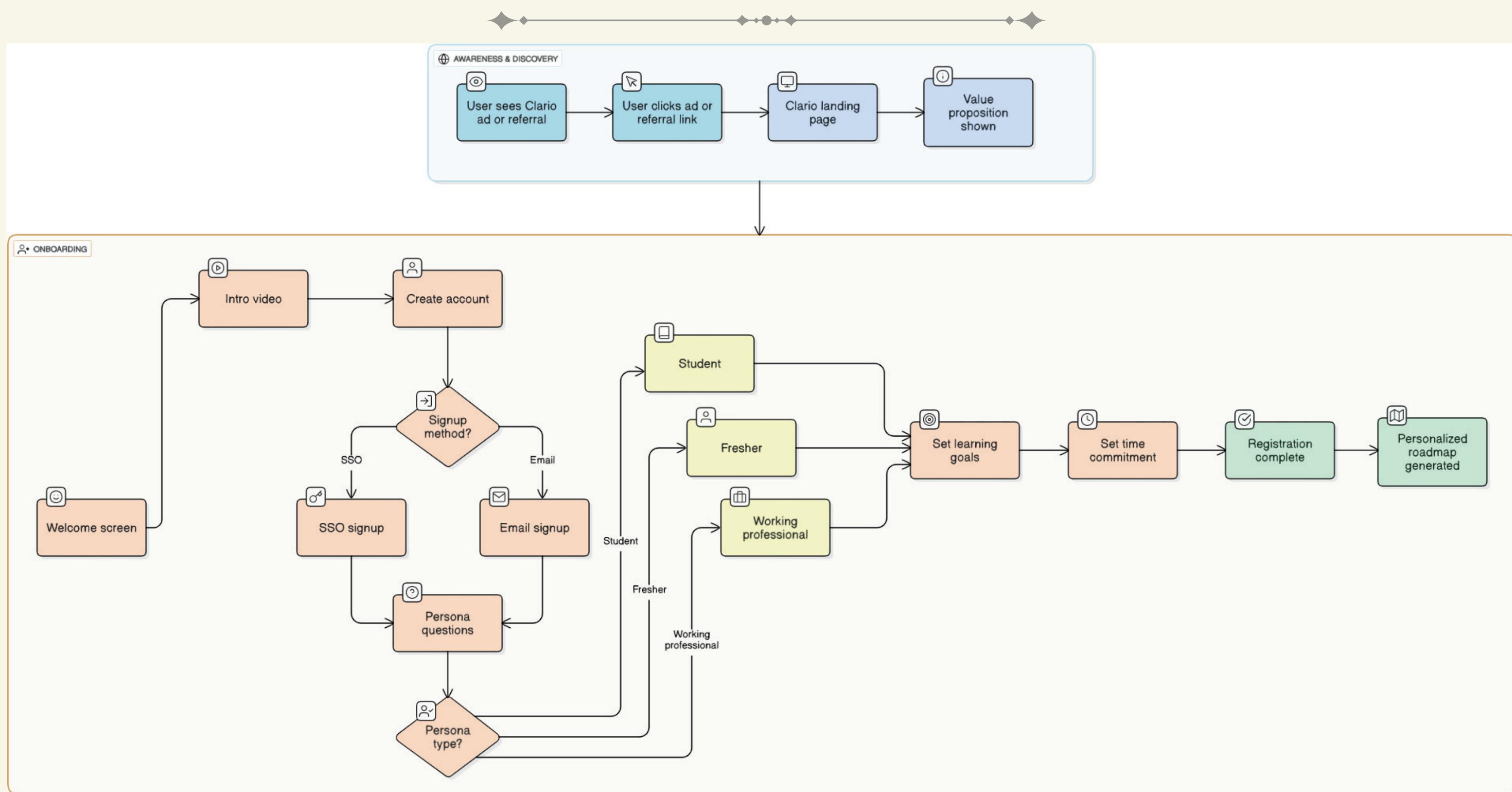
# Designing the Learning Path

*Turning clicks into a knowledge superpower*

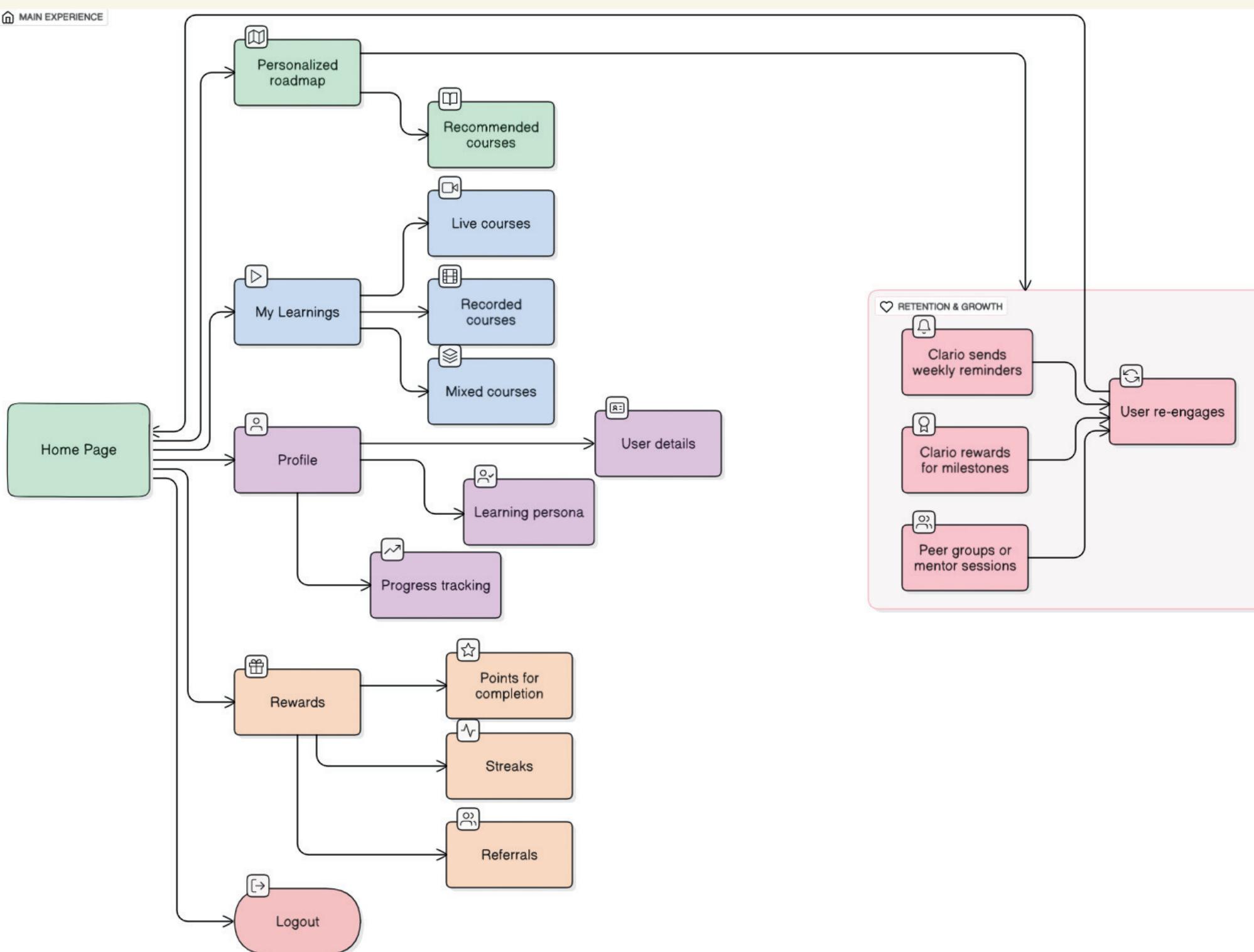


# First Steps with Our Product

*The onboarding journey*



# Our MVP in Action and plans for future



## Feature prioritization using MoSCoW framework

Priority	Feature	Why it matters
Must Have	Personalized roadmap	Reduces decision paralysis
Should have	Community group and recommended courses	Community group will help in motivation and recommended courses will help in regular upskilling
Could Have	AI chatbot and Query resolution	Will be able to respond to queries anytime leading to better clarity for the learners
Won't Have	Placement Tie-Ups	Requires scale & credibility so will park this for future

# How we scale and How we earn



## Metrics

### Leading Metric

### Lagging Metric



### Monetization Plan

Metric	Target
Activation rate	65%+
Free to paid conversion rate	2-5%+
First module preview	60%+
Live session registration rate	35-40%+

Metric	Target
Monthly paid conversion rate	less than 1%
Course completion	30-40%
Retention rate (7, 30, 90 Days)	7 days - 30% 30 days - 15% 90 days - 7%
Referral rate	10%

- **Freemium + Tiered pricing:** Free roadmap and 1 free module preview
- **Low cost bundled pricing for freshers**
- **Premium consultation and support services for employed professionals**
- **Addons:** certificate verification, interview preparation sessions, resume reviews
- **Future B2B:** Corporate packages (*paid by employer for employee upskilling*)

Average revenue per user (ARPU) : 1000 INR per course

Net promoter score/Customer satisfaction score (NPS/CSAT): 40+

# Path to Market & Pitfalls Ahead



## Distribution Channel



## Risks and Mitigation

Channel	Communication and Approach
LinkedIn	Share weekly posts, career tips, roadmap samples and success stories
Referrals	Emphasize on organic word of mouth, reward with 1 referral equals 1 extra live session or early access to new course
University / College partnership	Discount on group registrations, include 7 day free trials to entire batch
Online Communities	Engage with different communities in reddit, slack, discord and let them know : How to be a X in 90 days, where X can be a high-demand skill relevant to that group

Risk	Mitigation
<b>Struggle to acquire 1<sup>st</sup> 100 paying users</b>	Narrow GTM - Start with 1-2 courses and dominate the niche first
<b>Scaling live session as they don't scale well with thousand learners</b>	Hybrid model, combination of recorded and live sessions so that load is balanced
<b>Poor engagement / High drop off</b>	Include gentle nudges ( <i>reminders and notifications</i> ), gamify learning with streaks
<b>Monetization mismatch / Affordability</b>	Include tiered pricing