**SECTION 1: Daily Numbers Tracking**

**Q1. What is the purpose of tracing daily numbers?**

**A:** Daily numbers help track the number of sessions that need to be scheduled for the students. It gives the operations team an idea on how to plan the resources for session and strategize a plan for completing the sessions within the given timeline

**Q1. Where is the “Daily Numbers” sheet located?**

**A:** OneDrive > sharing\_with\_vibha > Key Trackers-selected > [that year] > year\_student Numbers

**Q2. What are the tabs you need to update in the daily numbers sheet?**

**A:** CO, CS, BS, and IP session tabs

**Q3. For each tab (CO/CS/BS/IP), what columns are used to update the student data?**

**A:** “Forms Expected” sections, bifurcated by UG, MBA, Masters, and PhD.

**Q4. How do you update numbers for Brainstorming (BS) sessions?**

**A:** Update the **“# of sessions pending”** column. If all sessions are done, remove the student.

**Q5. How do you update numbers for Interview Prep (IP) sessions?**

**A:** Update the **“# of hours pending”** column. If hours = 0, remove the student.

**Q6. When should you NOT remove a student from the list?**

**A:** VK's and Experts Advanced Apps students must **never** be removed from the list till their services are completed.

**Q7. After updating each section, what action must you take?**

**A:** Go to the “Others” tab, take a screenshot of the updated numbers, and send it to the **WhatsApp group: RI ops & admin**

**SECTION 2: Calendly Slot Availability**

**Q1. Why do we need to track the open calendly slots?**

**A:** Open calendly slots help provide a view of the number of sessions you can possibly conduct in the coming week. It helps plan the sessions and ask for more slots on need basis.

**Q1. Where can you find the Calendly link for each counsellor?**

**A:** Column D of the Calendly table in the Daily Numbers sheet

**Q2. How many days ahead should you check for open slots?**

**A:** 7 days from today (e.g., June 24 → check till July 1)

**Q3. What should you enter in Column B?**

**A:** Total number of open sessions available in the next 7 days

**Q4. What is Column C used for?**

**A:** Notes regarding blackout dates, slot unavailability, or special updates

**Q5. What do you do after updating Calendly data?**

**A:** Take a screenshot of the updated table and send it to the WhatsApp group: **RI ops & admin**

**SECTION 3: Event Registration Numbers**

**Q1. Where do you access event registration data?**

**A:** ReachIvy CRM → Event Registrations section

**Q2. What steps do you take to process event data?**

**A:**

1. Select the date range (From & To = event date)
2. Export/download the data
3. Paste the data into that event's tab in the **year\_\_Online\_In office events Registration sheet**

**Q3. Where do you send the final numbers?**

**A:** Send them to the **RI full team** WhatsApp group

**SECTION 4: Scholarship Numbers and Process**

**Q1. Where do you begin when working on scholarships?**

**A:** Open the current year’s **Scholarship applications Google sheet**

**Q2. What do you check in the Form Responses tab?**

**A:** Number of applicants. Add each to the **1st reviewers** tab.

**Q3. What happens after a name is added to the 1st reviewers tab?**

**A:** It auto-populates into the remaining reviewer tabs.

**Q4. Where do you find shortlisted students for interviews?**

**A:** In the **Team Average** tab → Students with an average rating of 3.4+

**Q5. Where should shortlisted students be manually added?**

**A:** The **To Interview** tab

**Q6. How do you track reviewer activity?**

**A:** Check how many applications each evaluator has reviewed and record it next to their name

**Q7. How do you track completed interviews?**

**A:** Update the **# of completed interviews** based on interview feedback rows

**Q8. How do you identify potential winners?**

**A:** Check students with average rating ≥ 4 in the “Final Rating” column  
Add their details (bifurcated by scholarship type) to the **Potential Winners** tab. The candidates that have not made the cut but seem potential are discussed within the team with Vibha and then we take a call on if we wish to declare them as a winner.

**Q9. What indicates that a student has formally accepted their scholarship?**

**A:** They’ve paid the admin fee and their record **is marked in green in the ptential winners** section

**Q10. Who receives updates on scholarship numbers?**

**A:** Send a screenshot of the scholarship table to the **RI full team** WhatsApp group

Q11. Where all do, we promote the ReachIvy scholarship

A: We promote scholarships by:

1. adding it to our website with the form to apply
2. Sharing multiple posts, reels, stories on all ReachIvy Social media platforms
3. Sharing regular Newsletters with our database about the scholarship
4. Sending yamms and whats app messages to all students in database
5. Sending yamms/ emails and whatsapp messages to all active partners
6. Sending Yamms / emails to college, school, coaching classes, foundations.
7. Making call to partners, foundations & schools and ask them to share with their students
8. Ask ReachIvy interns and staff to promote it among their network

**SECTION 5: Action Payment Process**

#### Q1. How do you determine if a student is new or existing?

**A:** Check Column A (Student ID) in the "All payments recd" tab. If the ID auto-populates, the student exists. If not, generate a new ID using the “Generate Client ID” button.

#### Q2. What must you verify or add after creating the ID?

**A:** Check if "Lead Source" and "Source Name" are present. If not, retrieve from HubSpot and add manually.

#### Q3. What should you do if the student is doing an Application Package?

**A:** Press the "Export to Application" button. If it’s a deferral student , color the row orange in the Applications tab. Ensure “P” or “VKP” is marked correctly in the respective columns as per the application package inclusions.

#### Q4. What should you do if the student is doing a Counselling Package?

**A:** Press the "Export to Counselling Package" button to auto-populate the respective tab. Ensure that the number of “P” (pending) sessions are marked correctly in the columns as per the package signed up for.

#### Q5. What about a Career Test package?

**A:** Press the "Export to Career Test" button to populate the Career Test tab.

#### Q6. What is the process for Single Counselling or College Selection?

**A:** Press the "Export to Counselling/College Selection" button to populate the relevant tab.

#### Q7. What if the student has signed up for standalone Interview Prep?

**A:** Use the "Export to Interview" button to populate the Interviews tab.

#### Q8. What is the process to create the student's Box folder?

**A:**

* Run **Cygwin/Terminal**.
* Use command: cd Desktop/Students
* Use script: ./directorycreator.sh (Student ID)
* Enter student's name when prompted.

#### Q9. What if the folder can’t be created using Cygwin?

**A:** Create a copy of the **Sample Box Folder** saved in Box and rename it with the student’s name and ID. Update internal folder names too. Ensure the final folder is created later using the Cygwin method.

#### Q10. After creating the folder, what is the next step?

**A:** Move the student folder to: Box > ReachIvy Business > Students > Degree > Class of (Year)

#### Q11. What permissions should be shared with the student?

**A:**

* Main Folder: Viewer/Uploader access
* Forms (from Box > students doc permission > counselling form viewer > Degree\_Counselling form): Viewer access
* Manuals: Previewer access

#### Q12. What email should be sent to the student and who should be in CC?

**A:** Use the canned response from **info@reachivy.com**. CC the advisory team and send to both student and parents. Remove ops email.

#### Q13. What additional step applies specifically for UG students?

**A:** Always CC parents in every communication. If parent email is missing, request it from advisory before proceeding.

#### Q14. What is the process for unpaid students (by Vibha's approval only)?

**A:**

* Manually enter first name, last name, and email in the All Paid Students tab to generate ID.
* Manually add student data in the respective service tab.
* Follow Box creation and form sharing as usual.

#### Q15. What should you do in the Single Counselling tab once form is received?

**A:**

* Add lead counsellor’s initials in assigned column
* Mention initials next to session date
* Color code:
  + Yellow: Session done, feedback not uploaded
  + Green: Session done, feedback uploaded

Q16. How is the validity of single sessions or packages decided?

1. Single sessions are valid for 3 months from the date of signup (purchase)
2. Counselling package: a 2 session package is valid for 6 months, 4 session package is valid for 1 year and 8 session package is valid for 2 years from the date of purchase.
3. Application package: Regular apps are valid till the end of the respective financial year (eg if the student has signed up in year Oct 2024 the package willl be valid till 31st March 2025). For advanced apps its valid till the end of financial year of the year of application (if the student has signed up in May 2025 for a application in Nov 2027 his package will be valid till 31st March 2028)

#### Q16. What must you verify in the Counselling Package tab?

**A:**

* Validity period is 1 year from date of purchase
* Add counsellor’s initials once form is received
* Add session dates with initials
* Color code per status
* For mentorship scholarship winners, add a note & mark “P” in S1 and S2. Mark their data in blue highlight.

#### Q17. What is required in the Career Test tab?

**A:**

* Ensure student details auto-populate
* Check Career Central weekly
* Update Column F with test status.
* If the test is completed ensure that the student has added the same on his box folder.

#### Q18. What are the steps for College Selection tab?

**A:**

* Add lead counsellor’s initials after form received
* Mention initials with session date
* Use yellow/green color coding based on session and feedback status

#### Q19. What must you check in the Applications tab?

**A:**

* Confirm correct student info auto-populates
* Check HubSpot for additional offers or services and reflect in Column I
* Populate columns L to T as per package
* Track resume, essays, recos with initials and color codes
* Send weekly follow-ups as needed

#### Q20. What is the process for the "Next Year" tab?

**A:**

* Transfer deferral requests using the "Export to Next Year" button
* Copy-paste entire tab to new FY sheet at end of year
* Share sheet with sales team at start of year
* After deferral fee payment, move data back to Applications tab

#### Q21. What steps are involved in managing the Essay tab?

**A:**

* Use "Export to Essay" button only once for first school
* Add school names manually
* Color brainstorming initials yellow (in progress) and green (complete)
* Assign editors and color code accordingly
* Send weekly reminders

#### Q22. What happens in the Audit sheet?

**A:**

* Press "Export to Audit Sheet" from Essay tab
* Add application statuses manually
* Track other interviews/admits

#### Q23. How is the Interview Prep tab maintained?

**A:**

* Use "Export to Interviews" from Payment or Essay tab
* Add session data, initials
* Mark cells yellow (in progress) and green (complete)
* Use Column T for all counsellors and U for final school admit

#### Q24. How are Testimonials recorded?

**A:**

* Export from Audit sheet
* Only one export per student
* Add additional colleges manually
* Upload testimonial links/text

#### Q25. What does the All Paid Students tab track?

**A:**

* History of all IDs
* Used to create new IDs
* If duplicates exist, delete old entry data and re-add when needed

#### Q26. What is the Guidelines tab used for?

**A:**

* Read it before editing or deleting data

**Scheduling a session:**

Q1. When do you schedule a session?

A. when a student uploads the form on Box for the session he has signed up for.

Q2. How do you determine this session can be scheduled.

1. Check the form uploaded by the student for completion. If all required data in the required tabs are filled out the form is ready. You can now schedule the session.

Q3. Which tabs do you need to check to determine form completion?

1. For Counselling: Candidate profile tab and counselling specific tab

For Followup counselling: check that the candidate profile tab is updated along with the sollowup session tab as per the number of session.

For College selection: Candidate profile tab and College selection tab

For Brainstormig: Candidate profile tab, Personal stories, professional stories, goals, common app tab, college essay tab , recommender tab, recommendation questions tab, deadlines tab

For Interview prep: Candidate profile tab

Q 4. How do you schedule the session?

1. Share the form folder with the respective expert (Viewer uploader access)

Share a email with the student “session with Counselor name” for the student to pick a session

Update the respective counselors tracker with the session details

Update the student sheet with the counselor initials for the session type scheduled in the respective sheet

Q5. What do you do once the session is completed?

1. Check if the feedback form is uploaded on Box

Remind the counsellor if there is no form

mark the counsellor initials green in the respective entry for the session in the student sheet

**Generic:**

Q1 . Where are the process documents saved

A: Onedrive> Sharing with Vibha> year process document folders

Q2. How to create a new canned response?

1. Open a compose a email remove the signature. Draft your email, add a subject, now go on the 3 dots at the bottom of the email window click and say save template > Save as new with the subject name.

**weekly conversion section:**

|  |  |
| --- | --- |
| What is the purpose of the weekly conversion tracker process? | To update the digital marketing team with weekly student conversions using student payment data and HubSpot leads. |
| Where do you find the payment data for the week? | In the 'All Payments' tab of the current year's student sheet. |
| What date range should you consider for copying payments? | From last Tuesday to this Monday. |
| Where should the copied payment data be pasted? | In the 'weekly conversion' tab of the 'ReachIvy Digital Ads Reports by MANA' Google Sheet. |
| What must you ensure when pasting the payment data? | Paste in the correct columns and fill all required fields accurately. |
| How do you find this week's student leads from HubSpot? | Go to HubSpot > Contacts > Filters. |
| What filters should be applied in HubSpot? | Set filters for 'Create Date' between last Tuesday and this Monday, and 'Original Lead Source' as 'query'. |
| How do you export the filtered HubSpot data? | Click on the export button in HubSpot after applying filters. |
| Where will the exported HubSpot data be sent? | To [help@reachivy.com](mailto:help@reachivy.com) via email. |
| What should you do after downloading the HubSpot data? | Keep only the required columns that match the raw data tab and arrange them in the same order. |
| Which tab should the HubSpot raw data be matched with? | The 'raw data' tab in the 'ReachIvy Digital Ads Reports by MANA' sheet. |
| What should you ensure when pasting HubSpot data into the raw data tab? | Ensure the columns are correctly arranged and pasted to match the raw data format. |
| What is the final step after updating both sets of data? | Inform the digital marketing team on the WhatsApp group. |

**Client FAQ**’**s**

**Counselling FAQs.**

**1. Internships while doing fulltime studies:**

My prospective colleges would know that I am a full time university student so want to know wouldn’t it be problem to them if I miss my classes and go for the 6 month internship . will missing so many days of college, take a negative strike in terms of my application?

1. *The colleges you apply to will look it negatively only if you allow the internship to impact your grades, if you are able to deliver strong academic results and create impact while you work at the internship then it will add positively to your profile.*

**Test Scores and Transcripts:**

2. **Who uploads the transcripts?:**

A)For a Undergrad applications the School upload the transcripts, for Post grad application you can upload your own transcripts.

3. **Who updates the Test Scores? :**

1. The relevant testing organization will send the details to the schools you are appliying to. You might have to pay some fees to the testing company for the same.

4. **I have got 97/120 in TOEFL iBT exam. Should I retake the exam?**

1. Most top colleges, that ask for an English proficiency exam, prefer a score in the 100-110 range. We strongly recommend a retake with a target score of 110.

Alternatively, once you have selected your colleges, you can look at their score expectations and then decide if you need a retake.

5. **My Gmat Scores expire just before the R1 / R2 deadlines?**

1. We recommended retaking the GMAT as the score as this is before R1/R2 deadlines, therefore might not be acceptable to the admissions committee of the b-schools. We recommend you directly reach out to the respective schools and confirm if the old score is still valid.

6) **Do the colleges I am applying for accept unofficial GMAT scores? As in if the official report doesn’t come before the deadline date of a particular college, can the unofficial scores be sent to it?**

1. Each school has its own policy with regards to GMAT scores including submitting official/unofficial scores and the deadlines for each. For example a college may ask for the unofficial score by the deadline and require the official score if accepted. Please look at program website for each of your colleges.

**Application FAQs**

1. Does ReachIvy help with filling up or reviewing the Online application?

1. No we do not help you fill out or review your online applications. The scope of service is as mentioned on your Invoice. We specialize in working on your essays, Recommendation and Resume and Interview prep.

2) Do I need to take the TOEFL / IELTS along with my SAT, GMAT. What is if dont take it?

1. Every school has a different requirement. We would suggest you refer to the schools website to check their guidelines on the Language tests and Proficiency tests. Please write to the schools adcom in case the data is unavailable on their website. :-)

3) Choosing pathways in an applications? (Undergrad applications):

1. Choosing a first year pathway when you enrol at UC Beerkeley. Choosing the traditional pathway or the fall program for freshman pathway - You can’t go wrong with either path but

- the FPF will allow an easier transition to the main campus. It allows you to settle in with a smaller group of students before you sit in a 600 person lecture. Students generally feel less overwhelmed with this option.

- do check out this link:

<https://oneclass.com/blog/university-of-california-berkeley/44405-4-things-to-know-about-fpf-at-uc-berkeley.en.html>

4) Do I need to answer the additional information question in CommonApp? (Undergrad)

1. Please chose "No" as an option for the Additional Information. Please note that this section is only to highlight any extenuating circumstances you might have.

5) On the common application all the LORs and the resume have been uploaded there therefor when we send the documents to the university do we include the LORs and resume as well along with all the supporting documents?

1. Since you have already submitted your LOR's and Resume through Commonapp, you do not need to submit them again.



6) When I applied to University I had sent my essays as well although on the student portal it is marked as incomplete at the moment and want it re uploaded I guess. What should I do?

Should I wait and check the portal in a while once it gets updated ? -

1. Please send an email to the University to check on why the status shows incomplete and what needs to be submitted to complete the application.

7) When would be a good time to send the documentation to the universities as they all have a deadline in March would Jan be ideal? -

1. The earlier this is done the better. 😊

Q8) **We need to upload the Summer Internship completion certificate . Can we submit along with Transcripts through school counselor? -?**

**A:** each school has its own process. They need to see how to upload additional LORs at the university website, Also not all schools allow additional LORs so pls check before uploading.

**Q) How to upload the Recommendation letters done for Community services ? Do we invite the concerned person so that he can create an account to upload the recommendation letters? or is there any other way which you could propose?**

A : - each school has its own process. They need to see how to upload additional LORs at the university website, Also not all schools allow additional LORs so pls check before uploading.

8) I have no revert on my Applications, so what should i do ?

1. In case there is no revert on your application in a long time - You can send an update letter to the school. Please talk about accomplishments/ updates since you sent the application (do not repeat info that is already there in your application) and also reiterate your commitment to the college. Let them know it’s your priority one school, you look forward to hearing from them soon and are happy to connect if there are any questions.

9) **part 1**) I have admits from 2 or more schools, how do I choose between schools –

1. Rankings are only an initial benchmark, and will change regularly and vary based on the source. I strongly recommend you instead focus on fit:

- connect with at least 2 students & 2 alumni to understand class/campus/peer dynamics

- look at the class profile details (what role/industry students are coming from)

- look at the career statistics (what companies/sectors/roles graduates are getting hired for)

- review the curriculum (is it relevant to your career goals)

Q10) Part 2:) Now that I’ve received an offer from durham university, its better that i reply back with my decision soon so that i get a good college, if I’m to go to Durham. But, till now Kings has not replied back with any decision on my app. so I was wondering if i get an offer from Kings as well, then which one should i go for ? Please forward this to the counsellors and the team which has worked with me! There are a few questions and things on my mind which i would like to get advice on,

for example,

* i want to know that because kings is located in central london, which means i would gain more experience being in the city as compared to being at Durham, so how much does that make a difference in one’s masters?
* Also, the kind of course and study which would be my main focus, i have researched on both the college’s respective site ( of MA in international relations and politics ) , and i feel that durham is offering a better course.. But i would really like if the counsellors can go on their site and just check please.
* And lastly, it is important that i choose the university which has more academic reputation and standing. What i know is Kings has a name because of being in central london, but im not sure whether its really that good for masters. Whereas, Durham seems to be more academically prestigious and reputed. So I would like to know the counsellors response too, on the reputation of the colleges.

1. Congratulations on Durham!

In the offer letter Durham would have provided you with a date/deadline by which you need to reply. I would recommend you wait at least a week before that deadline to accept the offer or decline the offer.

With regards to Kings I recommend you send them an update email, just providing a 2-3 points on what has changed/improved since you applied and that you are looking forward to hearing back from them. If they need any other information, you are happy to provide that.

In terms of ranking both globally and for your program, King's has a stronger reputation.

To decide between the two options - I strongly recommend you look at 3 things:

1) The class profile - are you going to be with a peer group you see yourself learning from both in the long term and short term?

2) Curriculum - is the class material aligning with your goals and expectations?

3) Career prospects - the college needs to allow you to gain employment in your company / field / role of preference.

To find this information, look at the college website, like/follow them on social media, read their student blogs and connect with students and alumni from these colleges. LinkedIn profiles of graduates will also give you great insight.

10) Choosing a school between UK and USA:

1. UK vs USA - the educational system and methodology is completely different. our preference is for the USA as you gain a more holistic approach to education, and flexibility to explore your academic options for deciding. The UK is very professionally oriented. We recommend you look at a) class profile b) curriculum (very important) and c) job options post graduation and then decide which geography suits you. You will find a vast difference in the curriculum structure.

Q11 ) how do i choose a first year pathway from my undergraducate programe?

1. Choosing a first year pathway when you enrol at UC Beerkeley. Choosing the traditional pathway or the fall program for freshman pathway - You can’t go wrong with either path but

- the FPF will allow an easier transition to the main campus. It allows you to settle in with a smaller group of students before you sit in a 600 person lecture. Students generally feel less overwhelmed with this option.

- do check out this link:

<https://oneclass.com/blog/university-of-california-berkeley/44405-4-things-to-know-about-fpf-at-uc-berkeley.en.html>



**Interview Prep FAQs:**

1) How do I **Choice of AdCom members?:**

1. There is no perfect strategy here. You could think of this in two ways - All the interviewers have been trained to ask you the right questions. Finding someone who knows your industry may lead to deeper questions that you may not be able to answer at your level (or perhaps you can!) On the other hand finding someone from a totally different industry may lead to him/her not understanding the details of your story. This is a call you need to take given the above framework. Hope this helps - wish you all the best and congratulations again on the interview!

2) Which is better **Campus Vs online interview? :**

1. It is always preferable to do the interview on campus. It is a great opportunity to visit the campus, sit in classes & meet the professors, current students and adcoms in person. While a campus interview is preferred, if its inconvenient for you, please go ahead and schedule an online interview.

3) **When do I start preparing for the interview?:**

1. It is your choice, a lot of students start interview prep once they have submitted their applications, while some start once they get an interview invite.

4) **How do I prepare for the core questions?:**

1. Review all questions given in the Interview prep manual. Practice your core questions using the ReachIvy Interview prep tool (the tool covers maximum Core questions). Follow up with a mock interview with a Interview prep expert form ReachIvy.