



LEADSQUARED CRM IMPLEMENTATION

Converting Student Enquiries into Enrolments with a Structured Admissions Process

Industry focus: Education and Professional Training

BUSINESS OVERVIEW

Education providers receive enquiries for courses, certifications, professional training and cohort-based programmes from websites, campaigns, call centres, events and partner referrals. Admissions teams need to capture course interest, contact students quickly, schedule counselling, manage applications and understand which enquiries progress to enrolment. LeadSquared is designed around lead capture, lead management, sales execution and process automation, making it a relevant platform to assess for this admissions scenario.

Project snapshot

Area	Solution focus
Industry	Higher education, vocational learning and professional training admissions
Platform	LeadSquared Sales + Marketing Automation capabilities as scoped; modules, limits and integrations require subscription validation
Core challenge	Student enquiries, counsellor callbacks, counselling sessions and application updates tracked across channels and spreadsheets
Primary goal	Create a traceable admissions journey from enquiry through counselling, application and enrolment
Delivery approach	Admissions discovery, process design, configuration, data migration, integrations, testing and training

Executive summary

In this illustrative scenario, a training provider receives enquiries for multiple courses and upcoming intakes. A student may compare course format, schedule, fees, eligibility and career relevance before applying. Admissions staff need to know the preferred programme, intake, contact history, counselling outcome, document status and next deadline without repeatedly checking separate systems.

Liyan IT Solution's proposed LeadSquared design centers on lead capture, source attribution, counsellor assignment, qualification fields, scheduled follow-ups and a defined admissions pipeline. Where licensed and configured, automation can support lead distribution, task reminders and communication journeys. Application or enrolment records may require integration with a student information system, learning platform or payment provider; these should not be assumed to be native CRM functions without discovery.

Intended business outcome

Give admissions teams a consistent record of student intent and progress, make overdue follow-ups visible, and help managers review enquiry-to-enrolment movement by course, source, intake and counsellor.

SOLUTION PRINCIPLE

Admissions progress should be driven by clear next actions, accurate course and intake data, and a documented student decision—not enquiry volume alone.

01 | Business Challenges and Requirements

Admissions journeys often have fixed intake dates, multiple touchpoints and varying levels of student readiness. A student may request information, attend counselling, compare alternatives and submit documents over several weeks. The CRM must support timely follow-up and consistent status definitions while respecting communication preferences and personal-data controls.

Key challenges in the scenario

- Enquiries from landing pages, calls, campaigns and events are duplicated or lose their original source.
- Course interest, preferred intake, location, learning mode and eligibility are not captured consistently.
- Counsellor allocation is manual, so workload and response ownership are difficult to review.
- Calls, counselling appointments, reminders and promised callbacks are not recorded in a shared timeline.
- Application documents and admission status may sit in a separate system without clear synchronization.
- Managers cannot easily compare lead quality, counselling attendance, application completion and enrolment by course.
- High-volume outreach risks sending irrelevant messages unless segmentation, consent and opt-out rules are designed.

Requirements mapped to LeadSquared

Requirement	Proposed approach
Lead capture and source	Map web forms, campaign sources and approved imports into standardized lead fields; preserve campaign and source identifiers for attribution.
Student qualification	Capture course/programme, intake, learning mode, location, eligibility, budget/fee readiness and expected decision timeline.
Counsellor assignment	Define routing by programme, campus, geography, language or workload. Confirm LeadSquared module, rules and configuration before implementation.
Follow-up execution	Use tasks, call outcomes, appointments and due dates to manage counselling and callbacks; verify telephony/calendar connectivity.
Admissions pipeline	Define stages for new enquiry, contacted, counselling, application, documentation, offer/admission and enrolled, with exit criteria for each.
Automation and journeys	Evaluate supported automation for assignment, reminders and segmented communication; confirm channel licensing, consent, limits and opt-out handling.
Reporting	Create or configure reports for source quality, response time, counselling attendance, application completion and enrolment conversion.
System integration	Assess student information system, application portal, LMS, payment and telephony integrations; use supported connectors or scoped APIs as required.

Discovery and scope decisions

Confirm the LeadSquared products and modules licensed, number of counsellors, campuses, courses, intakes and enquiry volumes. Agree whether application documents and enrolment status are maintained in LeadSquared or another system. Discovery should define duplicate rules, counsellor working hours, lead reassignment conditions, communication consent, retention requirements and the exact event that counts as an enrolment.

SUCCESS MEASURES

Set baselines for first-response time, leads contacted within target, counselling booking and attendance, application completion, enquiry-to-enrolment conversion, source quality, counsellor workload and CRM adoption. Report only from validated records and agreed definitions.

02 | Proposed LeadSquared CRM Solution Design

The proposed setup treats each enquiry as a student relationship with a defined course interest and admissions status. LeadSquared's lead-management and automation capabilities can support routing and follow-up; application processing, payments or student lifecycle data should be connected only after the system boundaries are agreed.

Core CRM components

Component	Role in the admissions workflow
Lead capture	Receive enquiries from approved web forms, campaign sources, imports and other configured channels with source metadata.
Lead profile and custom fields	Record contact details, course, intake, campus, mode, eligibility, preferred language, communication preference and decision timeline.
Lead distribution	Apply agreed allocation rules so new enquiries reach the correct counsellor or team; validate available rules and licensing.
Activities and call outcomes	Track call attempts, connected conversations, counselling appointments, reminders and next steps through supported activity tools.
Lead stages / status	Represent the admissions funnel with consistent stage-entry criteria and a reason for disqualification or delay.
Automation and communication	Use configured workflows or marketing automation journeys for approved reminders and segmented follow-up where licensed.
Reports and dashboards	Review lead ageing, response SLA, counsellor activity, counselling outcomes, application progress and enrolment trends.
Integration layer	Synchronize with application, student information, LMS, payment or telephony systems only through validated connectors/API mapping.

Illustrative admissions pipeline

New enquiry — Record source, course interest, intake and timestamp; identify missing contact details.

Contact attempted — Log call/email outcome and set the next attempt when the student is not reached.

Connected and qualified — Confirm course fit, eligibility, location/mode, fees, timing and student intent.

Counselling scheduled — Create an appointment with counsellor, date, format and preparation notes.

Counselling completed — Record questions, recommendation, objections, decision readiness and next step.

Application / documents — Track application initiation and outstanding requirements; use the designated application system as source of truth.

Offer / admitted / enrolled — Record decision and verified enrolment status; capture deferral, decline or nurture reason when applicable.

Integration and data quality

Agree which platform owns application status, student ID, fee/payment status and course availability. Map field formats and status values before integration, use stable identifiers to prevent duplicates, and define retry/error monitoring. Restrict access to student data by role, preserve source and consent history, and test intake changes and re-enrolment cases before importing the full dataset.

ACCESS AND GOVERNANCE

Use role-based access and least-privilege permissions. Document who can export student records, change application status, edit consent preferences or reassign leads; align retention and outreach practices with the provider's policies and applicable law.

03 | Activity-Led Workflow and Reporting

A structured admissions workflow helps counsellors know which student to contact, what information is missing and what event should happen next. Automation should support timely communication while preserving counsellor judgment and student preferences.

Illustrative lead-to-enrolment workflow

1. Capture the student enquiry

Collect the student's contact details, programme interest, intake and source through approved forms, campaigns or staff entry.

2. Route to a counsellor

Apply the agreed distribution rule by programme, campus or team; send an alert or queue item where supported.

3. Make first contact

Log the outcome, confirm the student's preferred contact channel and schedule another attempt if needed.

4. Qualify course fit

Discuss eligibility, study mode, schedule, fees, goals and intended intake; record a clear qualification status.

5. Schedule counselling

Create an appointment and reminder, then record attendance and the counsellor's recommendation.

6. Progress the application

Track application initiation, missing documents and decision status; synchronize with the application system if in scope.

7. Confirm enrolment or next nurture

Record verified enrolment, deferral, decline or disqualification and initiate the approved handoff or follow-up.

Automation candidates

- Assign new leads using agreed programme, campus or counsellor rules where supported.
- Create reminders for uncontacted enquiries and counselling appointments.
- Notify counsellors when a student's application is incomplete or a key deadline is approaching.
- Trigger segmented follow-up for course information or upcoming intakes only where consent and channel rules permit.
- Escalate records with repeated failed contact attempts or extended time in a stage for review.
- Synchronize application or enrolment status through a tested connector/API if the system of record is external.

Management dashboards

Report	Question it helps answer
Leads by source and programme	Which channels and courses attract enquiries that qualify?
First-response SLA	Are new enquiries receiving timely first contact?
Counsellor activity and workload	Are follow-ups distributed fairly and completed as planned?
Counselling booking and attendance	Where do students drop out between contact and counselling?
Application completeness	Which applications are waiting on documents or a decision?
Enrolment conversion by intake	How does enquiry progression vary by course, source and intake?

REPORTING DISCIPLINE

Agree definitions for contacted, qualified, application complete, admitted and enrolled. Do not treat application intent or an offer as a confirmed enrolment; reconcile final outcomes with the authoritative student system.

04 | Implementation Roadmap and Expected Outcomes

A phased rollout helps admissions teams agree on the funnel, validate source data and test counsellor workflows before the CRM becomes the primary operational view for new enquiries.

Suggested delivery roadmap

Phase	Key activities	Deliverable
1. Discover	Review courses, intakes, lead sources, counsellor roles, admissions systems, privacy and reporting needs.	Approved requirements and scope
2. Design	Define lead fields, qualification criteria, routing, stage rules, SLA metrics and system ownership.	Admissions process and data design
3. Configure	Configure supported lead statuses, fields, assignment rules, activities, automations and reports.	Configured test environment
4. Prepare & Connect	Clean and map lead records; test forms, campaign sources and approved SIS/application/telephony connections.	Validated data and integrations
5. Test & Train	Test routing, duplicate cases, appointment reminders, application updates, permissions and reporting.	User acceptance sign-off
6. Launch & Optimize	Go live, monitor response discipline, gather counsellor feedback and refine reports and rules.	Live CRM and improvement backlog

Expected business benefits

- A more complete view of student course interest, contact history and next action.
- Clearer counsellor ownership and more consistent first-contact and follow-up practices.
- Better visibility into counselling attendance, application blockers and intake readiness.
- More consistent source attribution and course-level admissions reporting.
- A clearer distinction between CRM activity and verified application/enrolment records.
- A practical foundation for connecting the CRM with approved student and learning systems.

How outcomes should be reviewed

30 days: Check source capture, data quality, counsellor adoption, assignment coverage and activity logging. **60 days:** Review first-response time, counselling attendance, overdue follow-ups and application completeness. **90 days:** Compare enquiry-to-enrolment trends by course and intake with the baseline, validate status synchronization and prioritize improvements based on reliable data.

Why Liyan IT Solution

Liyan IT Solution supports CRM implementation, workflow configuration, data migration, integration planning and technical support. The focus is to translate the admissions process into clear fields, ownership rules and follow-up actions while respecting the boundaries of student information and application systems.

LET'S DISCUSS YOUR LEADSQUARED CRM REQUIREMENTS

Share your enquiry channels, course structure, counsellor allocation rules, admissions stages and systems that need to connect. Liyan IT Solution can help scope a LeadSquared setup aligned to your admissions workflow.

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