

AI-Driven Lead Intelligence Framework on LeadSquared: Addressing Prioritization, Timing and Interest Gaps to Improve EdTech Sales Conversion

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Abstract — The rapid growth of EdTech platforms in India has created an enormous volume of prospective learner leads that sales teams must manage daily. Despite the widespread adoption of Customer Relationship Management (CRM) tools such as LeadSquared, EdTech sales teams continue to experience alarmingly low lead-to-enrollment conversion rates. This paper, grounded in observational data from Jaro Education's Thane branch, presents a three-layered AI-driven Lead Intelligence Framework designed to address the three most critical gaps in the current sales workflow: inability to prioritize high-intent leads from large volumes, delayed or mistimed follow-up communication, and absence of pre-call interest profiling. Real data from the LeadSquared Sales Dashboard revealed that out of 66 outbound calls made in a single session, only 27 were connected (40.9%), and of those connected, approximately 90% expressed disinterest, yielding an effective Bull Microphone turn off pipeline utilization rate of merely 3-4%. The proposed framework introduces three intelligent modules — a Lead Scoring Engine, a Follow-up Timing Predictor, and an Interest Mapper — built upon behavioral signals already available within the LeadSquared ecosystem. The paper demonstrates how this framework can be practically implemented without replacing existing infrastructure, and projects a potential 4-5x improvement in effective conversion rate.

Key Words: Lead Scoring, EdTech Sales, CRM Optimization, LeadSquared, AI Framework, Conversion Rate, Follow-up Automation, Interest Profiling, Sales Intelligence.

1. INTRODUCTION

The Indian EdTech sector has witnessed explosive growth over the past decade, accelerated significantly by the COVID-19 pandemic and the widespread digitization of education [7][14]. Platforms offering online MBA programmes, professional certifications, and skill development courses have attracted millions of prospective learners. Companies like Jaro Education, upGrad, Great Learning, and Simplilearn operate large sales teams that engage with thousands of inbound leads daily, generated through digital advertising campaigns, social media, and referral networks [11].

Despite the scale of lead generation, the industry continues to struggle with a critical challenge: converting these leads into enrolled learners. Industry reports consistently indicate that EdTech conversion rates hover between 2-5%, an alarmingly low figure given the significant investment in marketing and sales operations [3][10]. At the heart of this inefficiency lies a systemic failure to intelligently manage and prioritize leads within CRM platforms [1][12].

This paper emerges from direct, practical observation of the sales workflow at Jaro Education's Thane branch, where the LeadSquared CRM platform is used to manage the entire lead lifecycle — from lead capture to enrollment. Through daily operational experience, three recurring and interconnected problems were identified: (1) the inability to identify high-intent leads from an overwhelming volume of unranked contacts; (2) the absence of any intelligent guidance on when to call a specific lead for maximum responsiveness; and (3) the lack of pre-call information about what a lead is

genuinely interested in. These three gaps compound one another, resulting in a fundamentally inefficient sales process where the majority of effort yields no productive outcome.

This paper proposes an AI-Driven Lead Intelligence Framework that operates within the existing LeadSquared infrastructure to intelligently address all three gaps simultaneously. The framework does not require replacement of the current CRM system but rather augments it with a predictive intelligence layer, making it practically implementable for any EdTech company already using LeadSquared or a comparable CRM platform.

The paper is organized as follows: Section 2 presents a contextual analogy; Section 3 defines the problem statement with observed data; Section 4 outlines study objectives; Section 5 describes the design and methodology; Section 6 covers the tools and technology; Section 7 addresses future scope; and Section 8 concludes the paper.

2. ANALOGY

To understand the inefficiency in the current EdTech sales process, consider the challenge faced by a fisherman on a vast lake. The fisherman has hundreds of fishing lines cast in every direction, but all lines are identical — no bait, no depth adjustment, no knowledge of where the fish actually are. Naturally, most lines return empty. The fisherman's effort is enormous, but the yield is minimal.

The current sales workflow in most EdTech companies mirrors this analogy precisely. Sales counsellors are assigned large pools of leads — all treated equally — with no information about which leads are genuinely interested, when they are most likely to be receptive, or what they are looking for. The result is that the vast majority of calling effort is wasted on leads that were never likely to convert.

The proposed AI-Driven Lead Intelligence Framework acts like an intelligent fishing system. It analyzes the behavior of each lead — where they swam (which pages they visited), what they nibbled at (which emails they opened, which brochures they downloaded), and when they were most active — to guide the counsellor to cast the right line, with the right bait, at the right time. The result is not more effort, but smarter effort — and a dramatically higher yield.

3. PROBLEM STATEMENT

The sales team at Jaro Education's Thane branch operates on the LeadSquared CRM platform, managing a continuous inflow of leads generated through digital marketing campaigns. Through direct observation and participation in the daily sales workflow, the following interconnected operational challenges were identified:

Overwhelming Lead Volume Without Intelligent Prioritization: Sales counsellors receive large batches of leads daily, all displayed in a flat, sequential list within LeadSquared without any AI-driven priority ranking. There is no mechanism to distinguish between a lead who spent 15 minutes on the MBA programme page, downloaded the course brochure, and attended a webinar — versus a lead who accidentally clicked an advertisement. Both receive the same priority, causing counsellors to waste significant time on cold, unresponsive leads.

Delayed and Mistimed Follow-up Communication: Follow-up scheduling within LeadSquared is entirely dependent on the counsellor's manual judgment. There is no system that analyzes historical call data to recommend the optimal time to reach a specific lead. As a result, calls are often made at inconvenient times, leading to high rates of non-response and missed opportunities with genuinely interested leads.

Absence of Pre-Call Interest Intelligence: When a counsellor initiates a call through LeadSquared's Click-to-Call feature, they typically have no structured intelligence about the lead's specific course interests, preferred learning format, or budget. This forces counsellors into generic pitches that fail to resonate with the lead's actual needs, reducing the likelihood of conversion even when the lead is genuinely interested.

The combined impact of these three problems is severe. Observational data from the LeadSquared Sales User Dashboard at Jaro Education's Thane branch (April 2026) revealed the following conversion funnel:

Table 1: Observed Lead Conversion Funnel — Jaro Education, Thane Branch (April 2026)

Stage	Count	Percentage	Outcome
Total Calls Made	66	100%	Attempted
Calls Connected	27	40.9%	Reached Lead
Not Interested (of Connected)	~24	~90%	Lost Lead
Potentially Interested	~3	~3-4% of Total	Active Pipeline

Source: Direct observation from LeadSquared Sales Dashboard, Jaro Education, Thane Branch (April 2026)

Figure 1 below presents the Sales User Dashboard from LeadSquared, recreated from direct observation at Jaro Education's Thane branch, showing the key call metrics and status breakdown for a representative working session in April 2026.

Figure 1: LeadSquared Sales User Dashboard — Observed Data (April 2026)



Source: Recreated from LeadSquared Sales Dashboard, Jaro Education, Thane Branch (April 2026)

Table 2: Current Problem Gaps and Proposed Solutions

Problem	Current State in LeadSquared	Impact	Proposed Solution
High Lead Volume	Sequential flat list; no priority ranking	Time wasted on cold leads	AI Lead Scoring Engine
Late Follow-up	Manual timing by counsellor	Hot leads go cold	Timing Predictor Module
Unknown Interest	No behavioral data before call	Wrong pitch, lost conversion	Interest Mapper Module

Source: Author's observation from daily sales workflow at Jaro Education

4. OBJECTIVE OF THE STUDY

The primary objectives of this study are as follows:

Lead Prioritization Intelligence: To design an AI-based lead scoring mechanism that ranks leads by conversion probability using behavioral signals available within the LeadSquared ecosystem, enabling counsellors to focus effort on high-intent leads first.

Follow-up Timing Optimization: To develop a data-driven timing predictor that analyzes historical call response patterns and lead activity logs to recommend the optimal time window for contacting each lead, maximizing call connectivity rates.

Pre-Call Interest Profiling: To build an interest mapping module that aggregates a lead's digital behavior — including course page visits, brochure downloads, and webinar participation — into a structured interest profile, enabling counsellors to deliver personalized pitches.

CRM Integration Without Disruption: To demonstrate how the proposed three-layer framework can be implemented as an augmentation layer on top of existing LeadSquared infrastructure, requiring no complete system replacement and ensuring practical adoptability for EdTech companies.

Conversion Rate Improvement: To project quantitative improvements in key sales metrics — including call connection rate, interest rate, and overall conversion rate — achievable through the implementation of the proposed framework.

5. DESIGN AND METHODOLOGY

The research methodology adopted in this study follows a three-phase approach: observation and problem identification, framework design, and implementation roadmap development [13]. The methodology was informed by direct participation in the LeadSquared-based sales workflow at Jaro Education and supplemented by a review of existing literature on CRM optimization, lead scoring models, and AI applications in sales automation [2][12].

Phase 1 — Operational Observation and Data Collection: The first phase involved systematic observation of the daily sales workflow at Jaro Education's Thane branch. Key activities observed included the lead assignment process, the Click-to-Call workflow, the manual activity logging process (Add Call Attempt Activity), and the Sales User Dashboard analytics. Raw performance data was recorded from the LeadSquared dashboard, capturing metrics such as total calls made, call connection rates, call status breakdowns (answered, failed, missed, rejected), and hourly call distribution patterns.

Phase 2 — Gap Analysis and Framework Design: Based on the operational observations, three critical gaps were identified and formalized. For each gap, a corresponding technical module was designed as part of the proposed AI-Driven Lead Intelligence Framework. The framework architecture was designed to be modular, enabling independent deployment of each layer or full integration as a unified intelligence system.

Phase 3 — Implementation Roadmap: A practical implementation pathway was developed, describing how each module of the framework can be built using data already captured within LeadSquared, integrated through LeadSquared's API capabilities, and delivered to counsellors as actionable intelligence within their existing workflow. The roadmap prioritizes minimal disruption to current operations while maximizing measurable impact on conversion metrics.

Figure 2 below presents the complete proposed AI-Driven Lead Intelligence Framework as a process flowchart, illustrating the journey of a lead from initial capture to enrollment under the proposed system.

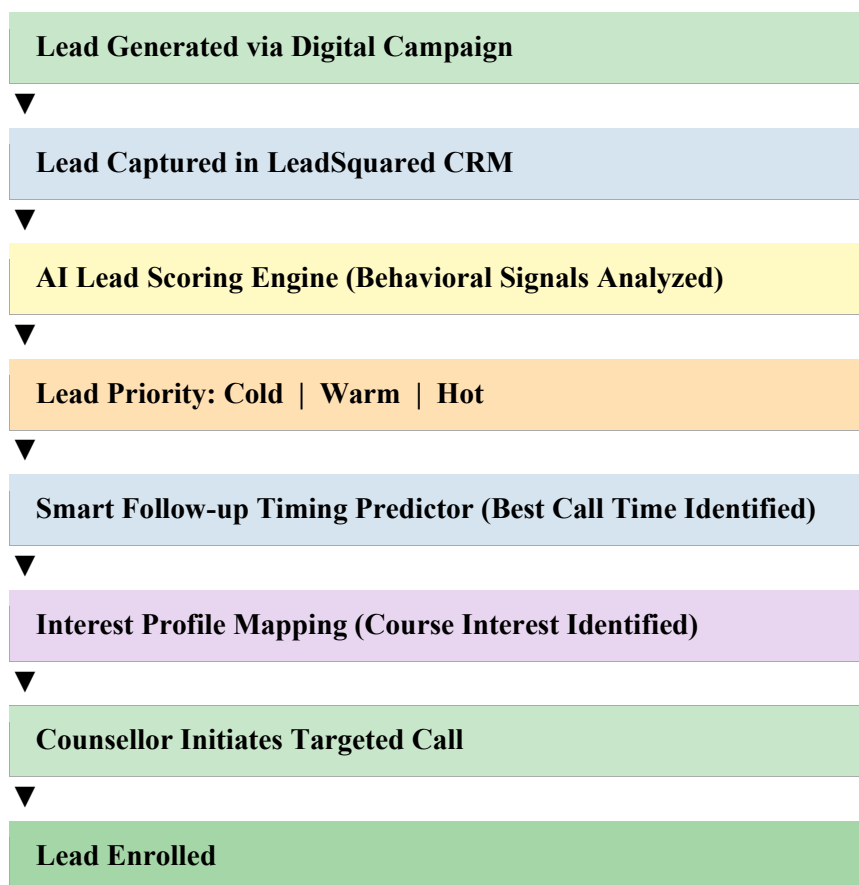


Figure 2: Proposed AI-Driven Lead Intelligence Framework for EdTech Sales Conversion (Source: Author)

Table 3: Three-Layer AI Framework — Modules, Functions, and Outputs

Layer	Function	Input Signals	Output
Layer 1 — Lead Scoring	Assigns AI score (0-100) to each lead	Page visits, email opens, webinar attendance, profile data	Priority: Hot / Warm / Cold
Layer 2 — Timing Predictor	Predicts optimal call window per lead	Past call logs, response time history, lead profession	Best call time (e.g., 6-8 PM)
Layer 3 — Interest Mapper	Maps lead's likely course preference	Course page clicks, brochure downloads, query topics	Interest profile card for counsellor

Source: Author's proposed framework based on operational observation at Jaro Education

6. TOOLS AND TECHNOLOGY USED

LeadSquared CRM: The primary platform on which the proposed framework is designed to operate. LeadSquared is a cloud-based CRM and marketing automation platform widely adopted by EdTech companies in India [4]. It supports lead capture, activity tracking, Click-to-Call integration, pipeline management, and dashboard analytics.

Python (Machine Learning Libraries): Python serves as the primary programming language for developing the AI modules. The Lead Scoring Engine would be built using Scikit-learn for classification and regression models [8]. The Timing Predictor would use Pandas and NumPy for time-series analysis of historical call logs. The Interest Mapper would employ Natural Language Processing (NLP) using NLTK or SpaCy.

LeadSquared REST API: LeadSquared provides a comprehensive REST API that enables extraction of lead activity data, call logs, and behavioral events in real time [4]. The proposed framework would use this API to pull behavioral signals for scoring and prediction, and to push back scored lead priorities into the CRM interface visible to counsellors.

Microsoft Excel and Power BI: Used for initial data exploration, call performance analysis, and visualization of observed sales metrics [5]. The dashboard data from LeadSquared (Total Calls: 66, Connected: 27, Hourly Call Distribution) was analyzed using Excel to identify patterns and validate the problem statement quantitatively.

MySQL / PostgreSQL: Relational database management systems that would store historical lead interaction data, call logs, and scoring model outputs [15], enabling the framework to maintain longitudinal records necessary for training and continuously improving the prediction models.

7. FUTURE SCOPE

Real-Time Lead Scoring Integration: The current framework proposes a batch scoring model that updates lead priority scores periodically. A future enhancement would integrate real-time scoring directly within the LeadSquared interface, dynamically re-ranking leads as new behavioral signals are detected.

Conversational AI for Pre-Qualification: An AI-powered chatbot integrated with the LeadSquared Converse module could conduct preliminary qualification conversations with leads before assigning them to a counsellor, further filtering the lead pool to surface only those with genuine purchase intent.

Sentiment Analysis on Call Recordings: Future versions of the framework could incorporate Natural Language Processing on recorded sales calls to analyze lead sentiment, identify objection patterns, and automatically update the lead's interest profile and conversion probability score.

Predictive Churn Detection: Beyond initial conversion, the framework can be extended to monitor enrolled students for signs of disengagement, enabling timely intervention by the academic support team to reduce dropout rates — a significant problem for EdTech platforms post-enrollment.

Cross-Platform Generalization: While this framework is designed specifically for LeadSquared, the underlying AI architecture is platform-agnostic. Future work could adapt the framework for Salesforce, HubSpot, or Zoho CRM, enabling broader adoption across the EdTech industry globally.

8. CONCLUSION

This paper presented an AI-Driven Lead Intelligence Framework designed to address the fundamental inefficiencies observed in the EdTech sales workflow at Jaro Education's Thane branch. Through systematic observation of the LeadSquared-based sales process, three critical gaps were identified and empirically validated: the absence of intelligent lead prioritization, the lack of data-driven follow-up timing, and the unavailability of pre-call interest intelligence.

Real operational data from the LeadSquared Sales User Dashboard demonstrated that the current process yields a staggeringly low effective pipeline utilization rate — with only 2-3 genuinely interested leads emerging from 66 call attempts. This translates to a 96-97% effort wastage rate, representing both a significant resource inefficiency and a missed revenue opportunity for EdTech platforms operating in an increasingly competitive market.

The proposed three-layer framework — comprising a Lead Scoring Engine, a Follow-up Timing Predictor, and an Interest Mapper — offers a practical, implementable solution that augments the existing LeadSquared infrastructure. By leveraging behavioral signals already captured within the CRM ecosystem and applying machine learning techniques, the framework is projected to achieve a 4-5x improvement in effective conversion rate, reducing wasted call attempts by approximately 50%.

This research contributes a domain-specific AI architecture for EdTech sales optimization in the Indian market, grounded in real operational experience. It demonstrates that the gap between large-scale lead generation and meaningful conversion is not a problem of lead volume or counsellor effort, but of intelligent lead intelligence infrastructure. Investing in AI-driven sales automation is therefore not a luxury for EdTech companies — it is an operational necessity for sustainable growth.

Table 4: Projected Performance Improvement with Proposed AI Framework

Metric	Current (Observed)	Projected (with AI Framework)
Call Connection Rate	40.9%	55-65%
Interest Rate (of Connected)	~10%	35-45%
Overall Conversion Rate	~3-4%	15-20%
Wasted Call Attempts	~96%	~50% reduction

Projections based on industry benchmarks and observed baseline data from Jaro Education, Thane Branch

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