Tutor Requests and KPI Charts

How Tutor Request are Created

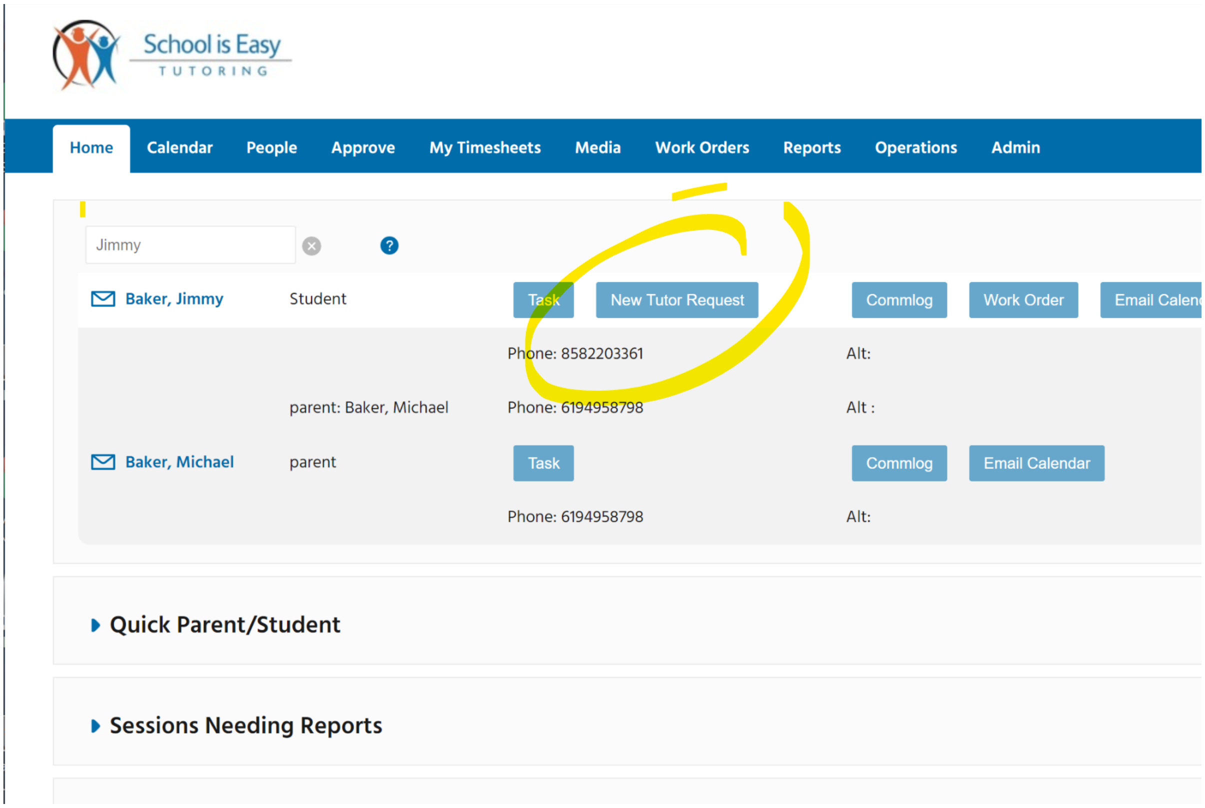
Tutor requests are automatically created when:

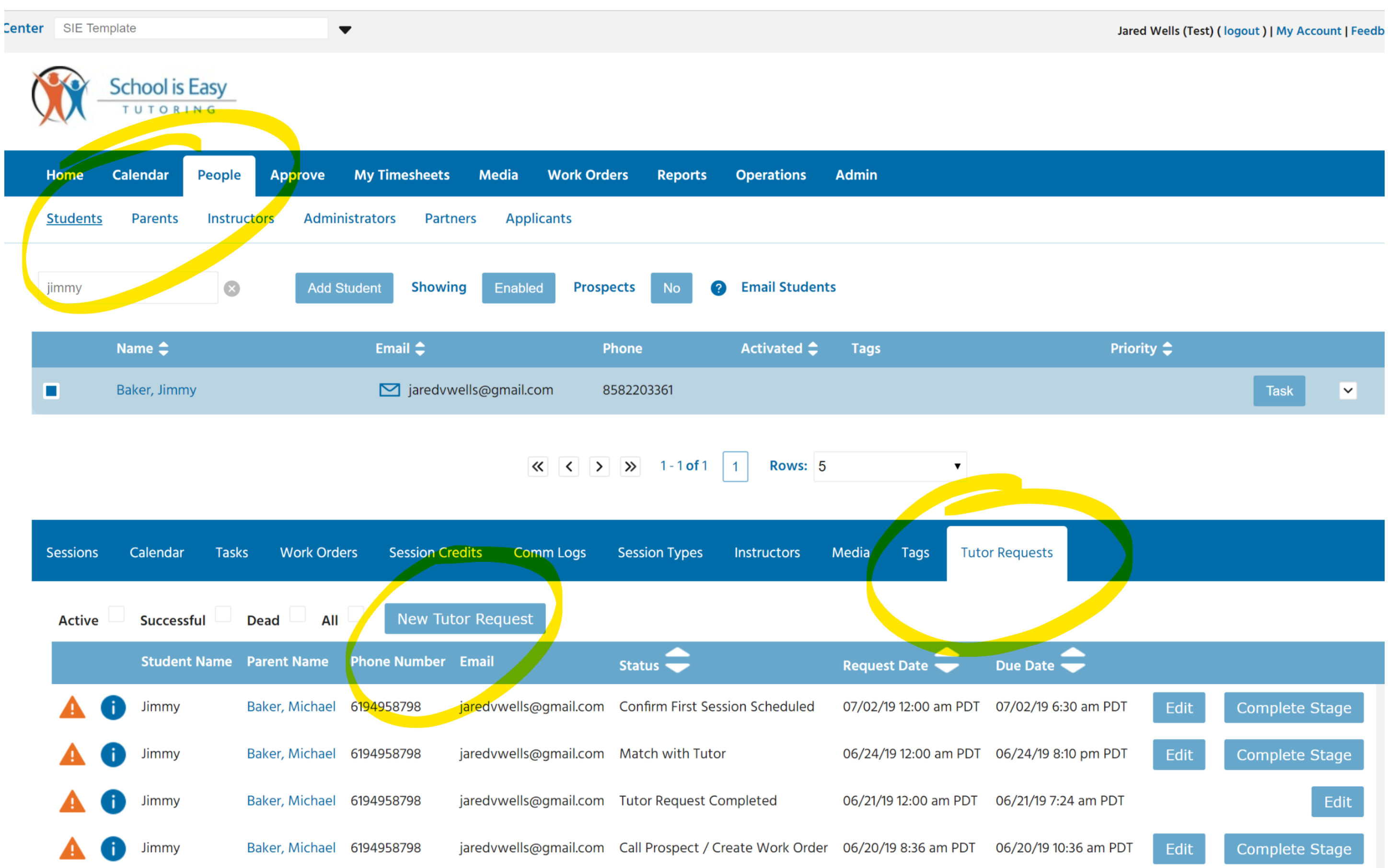
1. A Website Form is completed by a prospect.
2. When a new prospect is added via the Opus Home Tab Quick Add.
3. When an existing customer has a new Tutor Request.

For existing customers you will find options to create new Tutor Request:

1. Looking up a student in Account Search
2. Under the People / Student tab, subtab Tutor Requests

See screenshots on next page.

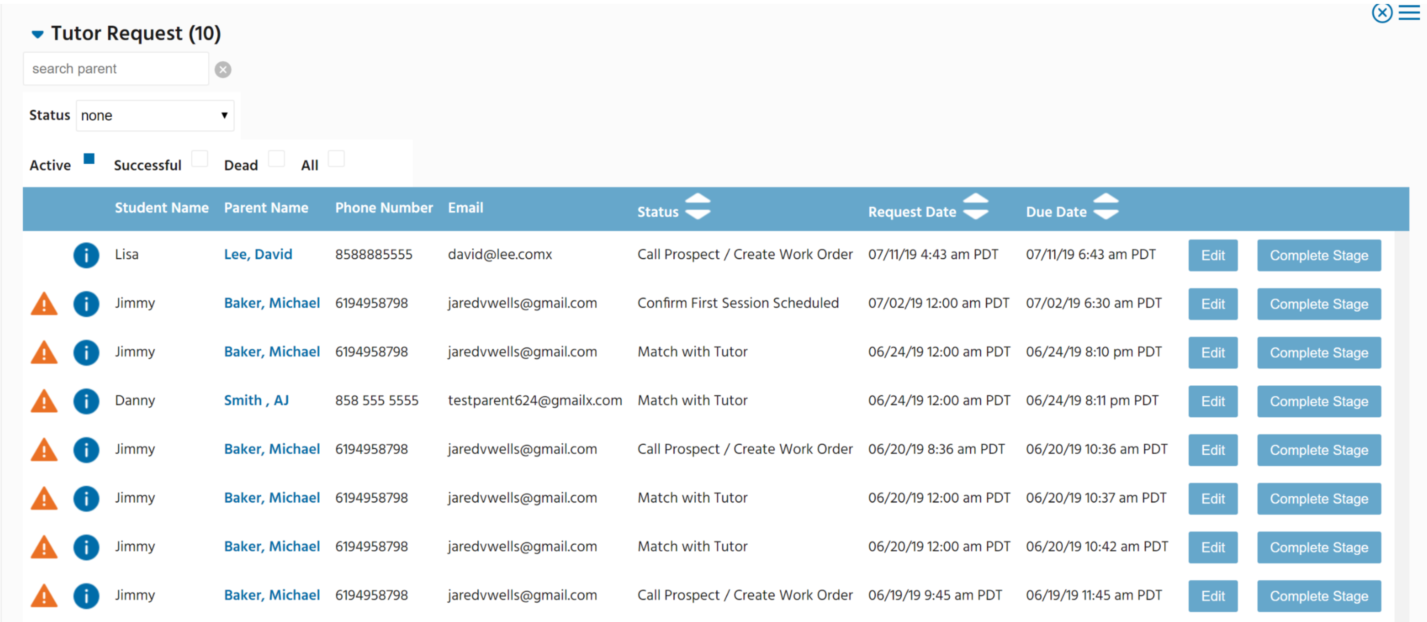

School is Easy
TUTORING
Home
Calendar
People
Approve
My Timesheets
Media
Work Orders
Reports
Operations
Admin
Jimmy
Baker, Jimmy
Student
Task
New Tutor Request
Commlog
Work Order
Phone: 8582203361
Alt:
parent: Baker, Michael
Phone: 6194958798
Alt :
Baker, Michael
parent
Task
Commlog
Email Calendar
Phone: 6194958798
Alt:
Quick Parent/Student
Sessions Needing Reports


SIE Template
Jared Wells (Test) (logout) | My Account |
School is Easy
TUTORING
Home
Calendar
People
Approve
My Timesheets
Media
Work Orders
Reports
Operations
Admin
Students
Parents
Instructors
Administrators
Partners
Applicants
jimmy
Add Student
Showing
Enabled
Prospects
No
Email Students
Name
Email
Phone
Activated
Tags
Priority
Baker, Jimmy
jaredvwells@gmail.com
8582203361
Task
1 - 1 of 1
Rows: 5
Sessions
Calendar
Tasks
Work Orders
Session Credits
Comm Logs
Session Types
Instructors
Media
Tags
Tutor Requests
Active
Successful
Dead
All
New Tutor Request
Student Name
Parent Name
Phone Number
Email
Status
Request Date
Due Date
Jimmy
Baker, Michael
6194958798
jaredvwells@gmail.com
Confirm First Session Scheduled
07/02/19 12:00 am PDT
07/02/19 6:30 am PDT
Edit
Complete Stage
Jimmy
Baker, Michael
6194958798
jaredvwells@gmail.com
Match with Tutor
06/24/19 12:00 am PDT
06/24/19 8:10 pm PDT
Edit
Complete Stage
Jimmy
Baker, Michael
6194958798
jaredvwells@gmail.com
Tutor Request Completed
06/21/19 12:00 am PDT
06/21/19 7:24 am PDT
Edit
Jimmy
Baker, Michael
6194958798
jaredvwells@gmail.com
Call Prospect / Create Work Order
06/20/19 8:36 am PDT
06/20/19 10:36 am PDT
Edit
Complete Stage

Managing Tutor Requests

Tutor Requests are managed on the Home tab under the Tutor Request widget.

This list will show all Active Tutor Requests by default. You can filter to show Successful and Dead Tutor Requests.



	Student Name	Parent Name	Phone Number	Email	Status	Request Date	Due Date		
	Lisa	Lee, David	8588885555	david@lee.comx	Call Prospect / Create Work Order	07/11/19 4:43 am PDT	07/11/19 6:43 am PDT	Edit	Complete Stage
	Jimmy	Baker, Michael	6194958798	jaredvwells@gmail.com	Confirm First Session Scheduled	07/02/19 12:00 am PDT	07/02/19 6:30 am PDT	Edit	Complete Stage
	Jimmy	Baker, Michael	6194958798	jaredvwells@gmail.com	Match with Tutor	06/24/19 12:00 am PDT	06/24/19 8:10 pm PDT	Edit	Complete Stage
	Danny	Smith , AJ	858 555 5555	testparent624@gmailx.com	Match with Tutor	06/24/19 12:00 am PDT	06/24/19 8:11 pm PDT	Edit	Complete Stage
	Jimmy	Baker, Michael	6194958798	jaredvwells@gmail.com	Call Prospect / Create Work Order	06/20/19 8:36 am PDT	06/20/19 10:36 am PDT	Edit	Complete Stage
	Jimmy	Baker, Michael	6194958798	jaredvwells@gmail.com	Match with Tutor	06/20/19 12:00 am PDT	06/20/19 10:37 am PDT	Edit	Complete Stage
	Jimmy	Baker, Michael	6194958798	jaredvwells@gmail.com	Match with Tutor	06/20/19 12:00 am PDT	06/20/19 10:42 am PDT	Edit	Complete Stage
	Jimmy	Baker, Michael	6194958798	jaredvwells@gmail.com	Call Prospect / Create Work Order	06/19/19 9:45 am PDT	06/19/19 11:45 am PDT	Edit	Complete Stage

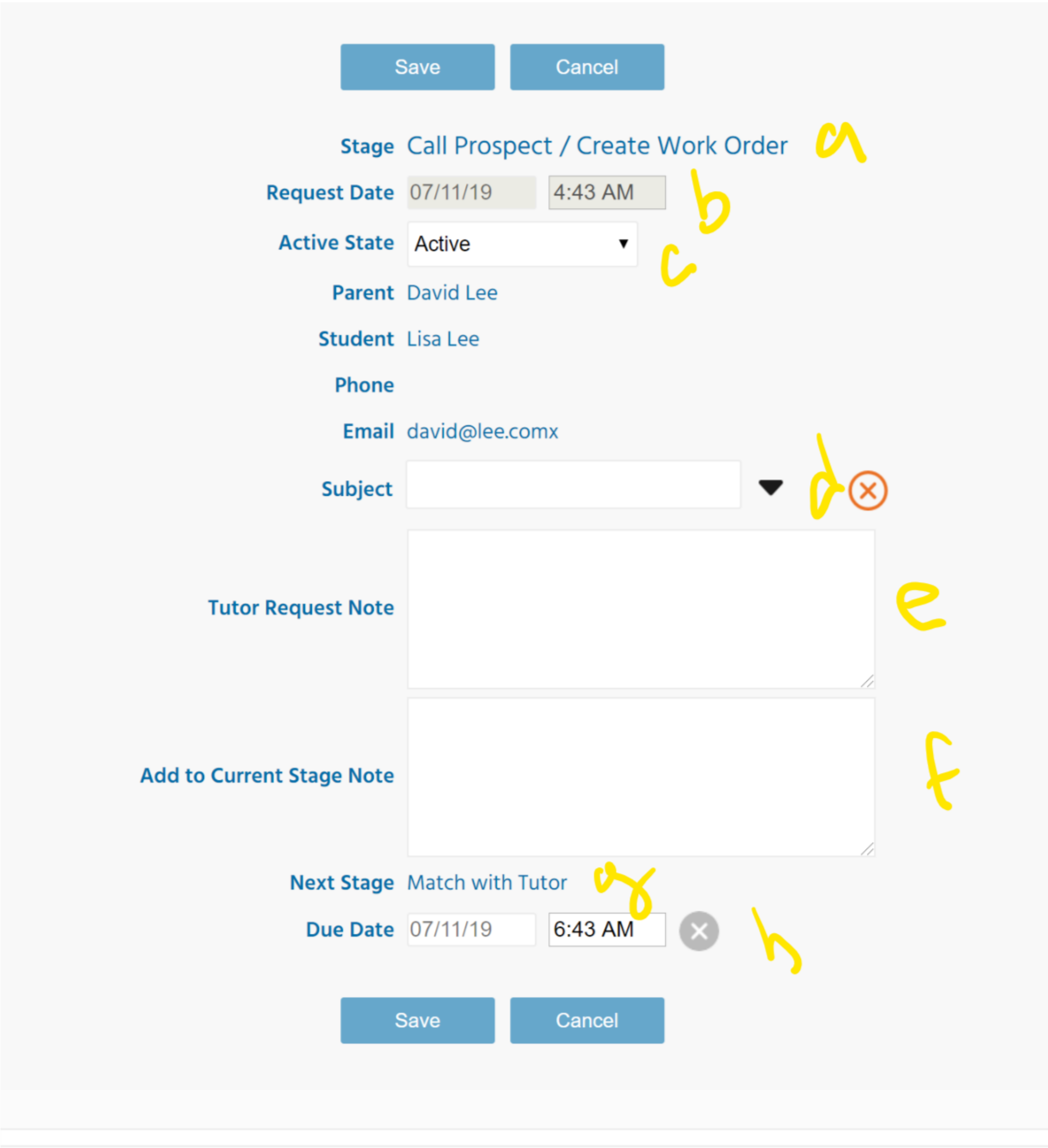
Completing Tutor Request Stages

Each of the 6 stages must be completed in order for a Tutor Request to be successful.

The 6 stages are:

1. Call Prospect / Schedule Consultation
2. Complete Consultation / Create Work Order
3. Match w/ Tutor
4. Confirm 1st Session Scheduled
5. 1st Session Follow up
6. 3 Week Follow up

To complete each stage, click on the Complete Stage button. You can also update an existing stage notes by clicking on Edit.



Complete Stage Form

a. Current Stage
b. Original Request Date
c. Active Status. This will remain as “active” unless a prospect fails to move forward. In that case, change the Active Status to “dead” and add a note about the reason if known. This is very important to help you learn how to improve your process and decrease the number of dead leads.
d. You must add a subject before completing the second stage, Complete Consultation / Create Work Order.
e. This is a running list of notes across all stages.
f. Use Add to Current Stage Notes any notes related to this stage.
g. Displays next stage after completing the current stage.
h. Due dates will help you see which Tutor Requests are past their due dates. These dates will be added by default. The default times to complete each stage are as follows. While not all stages can be completed in these times, they will provide a performance goal benchmark.
    i. Call Prospect / Schedule Consultation (Same Date as Tutor Request Date)
    ii. Complete Consultation / Create Work Order (48 hrs)
    iii. Match w/ Tutor (24 hrs)
    iv. Confirm 1st Session Scheduled 48hrs
    v. 1st Session Follow up (You define based on when the 1st session is scheduled)
    vi. 3 Week Follow up (14 days after 1st Session Follow up completed)

KPI Charts

The KPI Charts provide a visual way for you to understand how you are doing now compared to past performance and compared to best practice benchmarks. (Note: These charts are incomplete and will be updated once testing is completed.)

A. Total Tutor Requests: Shows the total number of Tutor Request for a three month period. It will also show how these three months compay to the same three months from two years prior.
B. Conversions: Displays the percent of successful completion of each stage. It will help you see where you need to make improvements. As you grow, it will help you to keep tabs on how your staff is performing.

C. Conversion Times: Show how your stage completion times are compared to best practice benchmarks.Comparing Stage Conversion to Conversion Times will help you understand where you may need to improve you times to stage completion.
D. Dead Leads: Shows the number of leads that were marked as dead at each stage.