

DECISIONFLOW

Customer Onboarding and Support Guide

Activation, education, AI disclosure, support, and customer success

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Evidence rule	Actual artifacts are identified separately from assumed capabilities and simulated outcomes.

EVIDENCE & PUBLISHING INTEGRITY

This public portfolio edition distinguishes actual evidence, assumed continuity steps, simulated case-study outcomes, targets, and recommendations. Simulated customers, commercial results, benchmarks, incidents, quotations, and later-lifecycle outcomes are illustrative and must not be interpreted as results from a live commercial product. Evidence labels are retained throughout the package to support transparent and responsible interpretation.

Document Control

Control	Definition
Purpose	Document the Launch phase for Customer Onboarding and Support Guide.
Primary audience	Hiring managers, product leaders, launch stakeholders, engineering, customer success, and operations.
Evidence classes	Actual artifact / assumed post-development capability / simulated launch outcome / recommendation.
Scenario assumption	All development P0 release gates are assumed complete before the simulated controlled launch begins.
Ethical use	Do not present simulated customer evidence, revenue, testimonials, or performance figures as real-world results.
Change control	Publication rule: retain evidence labels unless content is replaced by documented real-world observations.

Actual Project Artifacts

- [Low-Fidelity Prototype](#)
- [High-Fidelity Prototype](#)
- [MVP Frontend Repository](#)
- [MVP Backend Repository](#)

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Onboarding Objective

The onboarding experience should help a qualified customer produce one trusted, finalized decision quickly, understand how AI is used, and establish a repeatable personal decision workflow. Activation is not account creation; it is the completion of a verified decision with clear evidence and explicit user ownership.

Evidence classification - Actual: public prototypes, repository references, uploaded MVP development baseline, and prior Product/Plan/Develop artifacts. Assumed: the production-ready v1.0 core capabilities documented in DEV-06 as completed for the launch scenario. Simulated: user behavior, commercial results, AI benchmarks, incidents, quotations, and launch outcomes.

Customer Eligibility

Requirement	Reason	Evidence before access
Named champion	Workflow change and feedback need an accountable owner.	Champion and backup contact identified.
Approved content source	Meeting content may contain confidential or personal information.	Customer confirms permission and data policy.
Representative use case	The launch needs realistic decisions, not artificial demo tasks.	At least two candidate meetings/decisions selected.
Named decision owner	The launch validates the personal core workflow.	One accountable user and one backup contact identified.
Success outcome	Product value must be defined before usage begins.	Time, quality, accountability, or retrieval outcome documented.
Support consent	Launch team needs permission to observe and follow up.	Communication and research consent captured.

Onboarding Journey

Stage	Customer action	DecisionFlow support	Success evidence
Prepare	Confirm data, roles, goals, and first use case.	Security brief, launch guide, and account setup.	Ready-to-process source and named owner.
Configure	Confirm account, privacy notice, retention choice, and AI settings.	Guided configuration or checklist.	Account passes readiness check.
First decision	Upload source, review extraction, compare options, and finalize.	Facilitated walkthrough and help content.	Verified decision completed.
Habit formation	Complete a second decision and retrieve a previous final record.	Office hours, reminders, and use-case templates.	Repeat workflow begins.
Value review	Compare baseline and actual workflow outcomes.	Success review using analytics and interview data.	Continue, expand, or stop decision.

First-Decision Success Path

1. Choose a meeting or decision with at least two options, meaningful criteria, and a clear decision owner.
2. Remove secrets or content that is not approved for processing and confirm the privacy notice.
3. Upload or paste the source and verify the identified topic, options, criteria, stakeholders, risks, and actions.
4. Correct the AI output and confirm that the saved reviewed structure remains after reload.
5. Adjust criteria and weights to reflect the team's real priorities.
6. Generate the recommendation and inspect evidence, reasoning, risks, alternatives, confidence, provider/model provenance, and next steps.
7. Compare options using the documented scoring method; change user-provided scores where judgment differs.
8. Select and finalize the decision explicitly, including the decision owner and follow-up actions.
9. Return later, retrieve the finalized record from the personal library, and start a second decision.
10. Complete the onboarding feedback prompt and schedule the first success review.

Training Plan

Session	Duration	Topics	Output
Champion kickoff	45 minutes	Problem, success outcome, data policy, roles, first use case, launch timeline.	Customer success plan.
User onboarding	35 minutes	Workspace, source intake, AI review, criteria, recommendation, comparison, finalization.	First completed decision.
Reviewer training	20 minutes	Evidence, comments, changes, approval, and accountability.	Review workflow established.
Admin/security review	30 minutes	Access, retention, provider processing, audit, export, deletion, support.	Configuration accepted.
Week-2 office hours	30 minutes	Questions, defects, workflow coaching, feature requests.	Issue and feedback register.
Week-4 success review	45 minutes	Adoption, AI edits, value, trust, blockers, expansion.	Continue / change / stop plan.

AI and Privacy Disclosure

Customer-facing disclosure - DecisionFlow uses AI to extract and organize information and to generate advisory recommendations. AI output may be incomplete or incorrect. Users must review and approve every final record. Source content may be processed by configured AI providers under the applicable data-processing terms. Do not upload content you are not authorized to process.

Topic	Customer guidance
Human authority	AI never finalizes a decision automatically; the user selects the outcome.
Evidence	Review transcript excerpts, source references, rationale, risks, and alternatives.

Topic	Customer guidance
Confidence	Treat confidence as a review aid, not a guarantee.
Sensitive data	Remove unnecessary secrets, credentials, regulated data, or personal information before upload.
Provider output versus fallback	The interface identifies the provider/model and visibly labels conservative fallback output.
Retention and deletion	Use the published personal-account retention and deletion controls.
Feedback use	Corrections may be used to improve prompts and evaluation only under the agreed data policy.

Support Model

Priority	Example	Initial response target	Resolution / update target
P1 Critical	Data exposure, widespread outage, corrupted finalized decisions.	15 minutes	Continuous updates; immediate mitigation.
P2 High	Core workflow blocked for multiple users; no reasonable workaround.	1 business hour	Workaround or update within 4 hours.
P3 Normal	Isolated defect, confusing behavior, processing issue with workaround.	4 business hours	Plan or fix target within 2 business days.
P4 Guidance	How-to question, configuration, feature request.	1 business day	Answer or backlog disposition within 3 business days.

Troubleshooting

Symptom	Likely cause	Customer action	Support evidence
Source rejected	Unsupported format, encoding, size, or unsafe characters.	Use supported format; reduce size; remove invalid content.	File metadata and validation code, not full sensitive content.
Processing slow	Provider latency, queue, large source, or retry.	Wait for status update; avoid duplicate submission.	Request ID, stage, latency, provider status.
Extraction incomplete	Sparse notes, ambiguous language, missing speakers/context.	Edit output and add context; report material omission.	Edited-field count and anonymized failure classification.
Recommendation unavailable	Provider, credentials, quota, or validation failure.	Retry once; use clearly labeled fallback only if acceptable.	Generation version and error category.
Cannot finalize	Missing required option, review, or explicit selected outcome.	Complete the highlighted fields and select the final outcome.	Validation result and role.
Record missing	Filter, archive, account, or synchronization problem.	Clear filters; confirm the signed-in account and archive state.	Decision ID and audit history.

Feedback and Success Review

- Collect in-product friction at workflow stage without capturing transcript or decision text in analytics.
- Review extraction edits by field and failure category, not only the final approval rate.
- Interview the decision owner and, where applicable, the sponsoring buyer separately to identify user value and purchase resistance.
- Compare the customer's baseline documentation effort, retrieval time, repeated discussions, and follow-up behavior.
- Record feature requests with problem, user, frequency, impact, workaround, and evidence instead of only the requested solution.
- End each review with a customer and product action owner and a date.

Customer Communication Templates

Welcome message

Subject: Welcome to the DecisionFlow launch program

Welcome to DecisionFlow. Your account is ready. The goal of this launch program is to help you turn notes or meeting content into reviewed, explainable, and reusable decision records. Before uploading content, confirm that you are authorized to process it. Your first step is to select one meaningful decision and complete the guided workflow. AI output is advisory and must be reviewed before finalization. Your support contact and launch schedule are included below.

Processing incident message

Subject: DecisionFlow processing issue - your data remains protected

We identified a processing issue affecting your request. The source record remains protected and no final decision was created automatically. We are investigating the issue and will provide the next update by the stated time. Please avoid submitting the same source repeatedly unless support asks you to retry.

Known limitations

- AI may miss implicit decisions, ambiguous owners, relative dates, or domain-specific context.
- Confidence scores do not guarantee correctness.
- Recommendations depend on the quality and completeness of source content and reviewed criteria.
- DecisionFlow supports decision work; it does not provide legal, medical, financial, or regulatory advice.
- Customers remain responsible for final decisions, approvals, records obligations, and downstream actions.

Onboarding Completion Checklist

Checklist item	Owner	Complete when
Success outcome and baseline documented	Champion + CS	Metric, workflow, and review date agreed.
Data and AI disclosure accepted	Customer admin	Approved content and provider policy understood.
Account and privacy settings configured	Decision owner	The user can access only their own records and understands data handling.
First decision finalized	Decision owner	Record contains reviewed inputs, outcome, rationale, and actions.
Reviewer participates	Reviewer	Comment/approval or review evidence recorded.

Checklist item	Owner	Complete when
Support channel tested	CS	Customer can open and track a support request.
Analytics visible	Product	Activation and workflow events appear without sensitive content.
Success review scheduled	Champion + CS	Week-2 and Week-4 sessions on calendar.