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Training & Support
Guided onboarding, contextual help, certification tracks

Here is a full, best-practice research and implementation-ready user story for **Training & Support**, covering guided onboarding, contextual help, and certification tracks, specifically for a compliance/RegTech SaaS platform serving SMEs and mid-markets. [1] [2] [3] [4] [5]

Training & Support – Full-Fledged User Story

Title

Continuous, Contextual Training & Scalable Support for Every User Role

Description

As a new user, compliance officer, or system admin, I want my compliance platform to provide guided onboarding, role-based contextual help, advanced troubleshooting, and path to certification—so I am never stuck, can learn at my own pace, and can validate our team's readiness with industry-recognized credentials.

360-Degree Functional Requirements

1. Guided, Interactive Onboarding

- Launches automatically for new users; tracks individual and team progress.
- Embedded tours with step-by-step walkthroughs, mock data exercises, and self-paced "explore mode."
- Scenario-based onboarding: "Process your first order," "Set up a sanctions rule," "Simulate an alert escalation."
- UI visually highlights what's next and provides checkpoint reviews.

2. In-App, Contextual Help

- Every screen and major process includes "help" and "what's this?" tooltips, definitions, and intelligent FAQs.
- Contextual search returns documentation, video clips, and community Q&As filtered to the workflow in use.

- Proactive "Did you know?" micro-lessons surfaced based on user journey and admin preferences.

3. Certification Tracks and Skill Verification

- Tiered courses for key roles: analyst, admin, auditor, IT/integration, SME owner.
- Online training content and interactive exercises, with quizzes at each module.
- Digital badges/certificates earned on completion, sharable on LinkedIn, and unlockable in-app feature sets (e.g., "advanced admin mode").

4. Smart Troubleshooting and Live Support

- "Get help now" button allows users to escalate to AI-powered troubleshooting or initiate live chat/callback with a real support engineer.
- Issue tracking with self-service status updates; users can attach screenshots/log dumps.
- In-app diagnostic and "report a problem" tools gather context automatically for smarter/faster support.

5. Knowledge Base & Community

- Public, always-updated knowledge base with articles, top tips, system release notes, and regulatory news.
- In-app link/federation to user community forums, peer best-practice sharing, and virtual events.
- Dedicated admin/IT corner with admin-level scripts/templates, API docs, and migration guides.

6. Feedback & Continuous Improvement

- Post-training surveys and "rate this help" after every module and support interaction.
- Usage analytics to optimize onboarding flow, prioritize new help content, and highlight underused power features for training focus.

Acceptance Criteria

- New users reach "first success" (e.g. first partner screened, first workflow simulated) in <1 hour on average, measured by product analytics.
- 90%+ of all help and training content accessible without leaving the product interface.
- Certification pass-rates and user satisfaction with training/support are tracked and continuously improved.
- Support queries resolved with a median time under 4 hours; 1-click escalation to live expert on urgent workflow failure.

Distinctive Innovations

- "Just-in-time" micro-training boosts adoption; avoids static PDF manuals and expensive on-site/consultant sessions.

- Certification unlocks deeper admin controls ("earned not given") and supports employee retention, compliance audit readiness, and recruitment marketing.

- Embedded support means even non-technical staff can operate advanced compliance features confidently and independently.

Subtasks & QA

- Design/implement onboarding flows and training content management.

- Build contextual search/index and in-app guidance overlay.

- Develop AI or rule-driven "next best help" and feedback analysis pipeline.

- Pilot certification with multiple user groups; collect baseline completion and satisfaction stats for continuous optimization.

With these features, your platform sets a new bar for SME compliance SaaS usability and customer satisfaction, scaling global onboarding and support without high cost or complexity. [2] [3] [4] [5] [1]

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