

Trader Positioning Index (TPI) – CRO-Grade Intelligence Report

Ideal Customer Profile & Persona Mapping

Who Benefits Most – Target Personas: The Trader Positioning Index is geared toward serious market participants who have a high level of technical trading knowledge but are held back by psychological and behavioral barriers. In particular, TPI is ideal for **experienced traders** – whether independent day traders, prop firm traders, hedge fund professionals, or trading team leaders – who recognize that *“90%+ of trading success is mental”* yet still struggle with self-sabotaging patterns. Key personas who derive exceptional value include:

- **Independent Retail Traders (Full-Time or Active Part-Time):** These are self-directed traders (often in equities, forex, or crypto) who have invested in strategies and education but find themselves stuck in cycles of inconsistent performance. They often speak the language of *“setups,” “P&L,” “drawdowns,”* and *“FOMO” (fear of missing out)* – acknowledging that *“it’s NOT your setup, it’s your inner game”*. Their pains include frequent impulsive trades, inability to stick to a plan, or *“revenge trading”* after losses. Their goal is consistent profitability and emotional stability. They frequent trading communities (e.g. Bear Bull Traders, Investors Underground, r/DayTrading on Reddit) and follow FinTwit influencers. The decision journey for this persona often begins after a significant setback or plateau – they realize another strategy isn’t the answer and start seeking psychological tools. TPI’s promise to *“smash through invisible barriers”* to achieve ambitious goals resonates strongly with them, as it pinpoints why they fail to *“trade on [their] rules consistently...no matter what the markets are doing”*.
- **Prop Firm and Hedge Fund Traders (Professional Traders):** These are traders operating in high-stakes environments (proprietary trading firms, hedge funds, asset management). Typically mid-career (5–15 years experience), they have proven technical skill but face hidden biases and performance anxiety as their capital stakes grow. They are competitive and metrics-driven; for example, a trader might notice their **win-rate stuck around 40%** and seek help – one TPI client reported *“my win rate improved from 40% to 60%”* after addressing psychological factors. Common pain points are overconfidence leading to outsized risks, **fear of failure** causing hesitation, or mental fatigue and burnout (*“undervaluing self-care”* is cited as a common issue). They are motivated by achieving peak performance and protecting their career longevity (and bonuses). Their language revolves around *“edge,” “risk management,” “alpha,”* and *“drawdown recovery.”* They consume content like trading psychology books (e.g. *The Daily Trading Coach*), follow top trading psychologists (Brett Steenbarger, Denise Shull, etc.), and attend industry conferences (Traders4ACause, etc.). TPI appeals to them by offering a **data-driven “x-ray” of judgment** – something more concrete than generic coaching. It directly addresses their critical need: *“showing the best judgment”* under pressure. The persona’s decision journey often involves an **internal trigger** (a big loss or a stagnating fund performance) followed by research into performance coaching. Seeing testimonials like a former **Uber CTO saying his jaw “almost hit the table”** at how accurately TPI understood his decision-

making, or a **prop firm manager reporting a trader's slump was cured and "paid for itself in no time"**, provides the social proof needed to justify the investment to themselves or management.

- **Trading Team Leaders & Institutions:** This persona is a **portfolio manager, trading desk head, or trading firm owner** who is responsible for a team's performance. Their interest in TPI is often driven by seeing talented traders on their team fall prey to recurring psychological pitfalls, affecting P&L and morale. For example, one firm head (**Gregg Sciabica of Lucky Strike Trading**) turned to Kim (The Wall Street Coach) when a star trader hit a *"long drawn out slump."* The **TPI plus coaching "paid for itself in no time"**, returning the trader to consistent profitability and even transforming his attitude and outlook. This persona looks for solutions that can be *scalable* and *objective* for talent development – TPI's quantified **70+ judgment indicators** and formal report fits well. They value the **"team building" and "hire/promotion" insights that understanding a trader's value profile can provide** ¹. Their pain is twofold: the lost revenue from underperforming traders and the turnover risk if traders burn out. They use managerial language like *"performance metrics," "KPIs," "coaching ROI,"* and will respond to TPI's value proposition in economic terms (improved trading results, reduced costly errors). The decision journey here often requires building a business case: **TPI's ROI can be quantified by case studies (e.g. a trader growing their account +135% in 6 months post-intervention, or another achieving a 90% win rate in the month after TPI).** This persona might first encounter TPI via industry word-of-mouth or seeing Kim Ann Curtin speak on podcasts/webinars catering to professional traders (e.g. *Confessions of a Market Maker* podcast or Bear Bull Traders community sessions). They likely will pilot the program with one or two traders before wider rollout, looking for proof of concept.
- **High-Performing Individuals Seeking an Edge (Executives-turned-Traders or Entrepreneur Traders):** A smaller but notable segment, these are individuals with successful careers outside trading (engineers, tech executives, business owners) who have taken up active trading or investing. Often highly analytical, they struggle because markets don't respond to the traits that made them successful in corporate life. For instance, a confident ex-executive might discover that *"what is successful in the real world often isn't in trading"*, as markets won't bend to one's will. This persona's pain is the frustration that their usual tactics (hard work, intellect, even ego) aren't yielding trading success – leading to *identity crises* and significant stress. They seek TPI to gain *self-awareness* and remove blind spots that they never had to confront before. The language they use includes psychological terms (*"biases," "self-identity," "inner game"*), and they consume content like trading psychology blogs or even therapy/coaching. TPI's framing as an assessment of one's **"values that drive every decision"** ² resonates, because this persona appreciates that a deep internal alignment is needed. We see this in TPI clients like **Thuan Pham (former CTO of Uber)**, who said the TPI process *"felt as if [the coach] had lived inside my head and fully understood my value system... And with that, [she] offered pragmatic insights into how I can do even better."* Similarly, **John Carlton (a veteran copywriter)**, with a background in psychology, was stunned to discover through TPI a *"critical... 'secret sauce' in my successful career that I never realized before"* – highlighting that even lifelong self-analytical personalities gain new insight from this assessment. This persona often finds TPI through personal networks or thought leadership (for example, reading Kim's book *Transforming Wall Street* or seeing her speak about decision-making). Their decision journey is guided by a quest for personal mastery; emotional benefits like *"clarity and peace"* and *"a HUGE weight lifted"*, as past clients describe, are as compelling as the performance gains.

Psychographic & Behavioral Traits: Across these personas, common traits include a **growth mindset** (willingness to invest in self-improvement), a tendency to be **self-critical and introspective** (they know something within is holding them back), and often a feeling of being at a **crossroads** (e.g. tired of repeating mistakes or determined to reach a new performance level). They are typically **action-oriented** but have realized that brute force ("try harder, be more disciplined!") isn't fixing their issues. They resonate with messaging about *uncovering the unconscious factors* in their trading. In fact, language around *"shine a spotlight on every area... see where you're out of balance"* ³ ⁴ directly speaks to their desire for self-discovery. Many have tried conventional solutions (strategy tweaks, risk management rules, maybe even meditation or generic personality tests) and found those insufficient. Thus, they value that TPI is *"unlike any other assessment... not a personality test or IQ test... goes to a deeper level"* ² by targeting core **judgment values**.

Pains & Challenges Aligned with TPI Benefits: Almost all ideal customers struggle with **invisible mental and emotional barriers** that TPI is designed to diagnose. According to The Wall Street Coach, even top traders are plagued by issues like *"Self-sabotage, Overconfidence, Fear of failure, Weak strategic thinking, Undervaluing self-care, [and] Poor data analysis leading to flawed decision making"*. Each persona will recognize some of these in their own experience: - For example, the independent day trader might sabotage themselves by overtrading or breaking their rules after a few wins (a discipline issue tied to emotions). - The prop trader might grapple with overconfidence after a big run (leading to outsized bets and subsequent drawdowns), or fear of failure when trading others' capital. - Team managers see weak strategic thinking in traders who jump from strategy to strategy, and poor self-care in traders burning out after marathon screen sessions. - High-achieving professionals often are overly self-critical and carry hidden **"childhood or past trauma"** that manifests in their trading decisions, as one client discovered and resolved through TPI coaching.

These pain points are often **urgent** because they directly cost money (losses, missed opportunities) and cause psychological stress. As one trader put it, after TPI *"my trading has improved, and I feel like a HUGE weight has been lifted... my overall quality of life has also improved"* – indicating the dual financial and emotional toll of these problems.

Goals & Motivations: The core goal uniting TPI's ideal customers is **consistent high performance** in trading *without* sacrificing their well-being. They want to *"finally trade on [their] rules consistently"* and have *"command over [their] career"*, which translates to stable profits and confidence in execution. Many also explicitly aim for **clarity and control over their emotions**, seeking the *"happiness... and peace of mind"* that comes from knowing they are operating at their best. A prop firm trader might define the goal as achieving a higher Sharpe ratio or getting a promotion to manage more capital; a retail trader might aim for making a living from trading or recovering from a big loss; a hedge fund PM might aim for less volatile performance and better team cohesion. Motivations vary slightly: some are *pain-avoidance* (e.g. "I can't afford another blow-up; I must fix this") while others are *aspirational* (e.g. "I know I'm capable of more; I want to unlock my full potential"). Many independent traders are motivated by **financial freedom** and see improved trading as the path to quit a job or secure their family's future. TPI's ability to address both *tangible outcomes* (better trading results) and *intangible fulfillment* (confidence, joy in trading again) speaks to both motivations. Notably, several testimonial quotes show deeply emotional motivations – traders mention *"I truly understood [inner demons] impact on my decision-making"*, or *"for the first time, I feel like I've reached the light at the end of the tunnel"*. These suggest a motivation to attain *self-mastery and relief* from long-standing psychological burdens.

“Watering Holes” & Media Habits: Ideal customers are actively present in trading education and community channels. They often consume trading podcasts (e.g. *The Wall Street Coach Podcast* itself, *Chat With Traders*, *Confessions of a Market Maker* where Kim Ann Curtin discussed TPI in episode #76), YouTube channels about trading psychology, and are members of online communities or chatrooms (such as Bear Bull Traders, where Kim has given presentations, or follow figures like Andrew Aziz, SMB Capital's educational streams, etc.). They likely read finance Twitter (X) – Kim's own social media indicates outreach to that crowd (e.g. prompting followers to DM “INDEX” for info). Many have books like *Trading in the Zone* dog-eared on their shelves and subscribe to newsletters or blogs on mindset (Steenbarger's blog, or sites like MindMuscles for Traders). **LinkedIn** and **professional networks** matter more for the institutional personas – e.g. a hedge fund HR or manager might discover TPI via LinkedIn articles on trading performance or via word-of-mouth at industry meetups. All personas appreciate *case studies and success stories*, so seeing others in their shoes (a fellow “independent trader” or a well-known figure) endorse TPI is influential. For instance, **testimonials on the TPI page from traders, a CTO, a publisher, and a trading community moderator** provide credibility across different sub-groups. The *language* that resonates in marketing to them includes terms like “*edge*,” “*consistency*,” “*breakthrough*,” “*self-awareness*,” “*biases*,” “*trading psychology*,” etc., and **Kim Ann Curtin's branding** explicitly uses such language (e.g. “*Master your judgment, master your life*”; “*It's not your strategy – it's your psychology*” tone). The more personal, transformation-oriented language (e.g. “*life-changing*,” “*game-changer*”) seen in user quotes also resonates strongly, as these personas ultimately crave a transformative change.

Product Value Proposition & Differentiation Analysis

What TPI Is & How It Works: The Trader Positioning Index is a **comprehensive judgment assessment and coaching program** designed specifically for traders. It is **not a trading strategy or technical tool**, but rather an “X-Ray” of a trader's **decision-making framework**. At its core, TPI is built on a Nobel Prize-nominated behavioral science foundation – it adapts **Dr. Robert Hartman's life's work on value profiles** (Hartman's Values Profile) to the context of trading. Practically, the process starts with an **online assessment (~10-15 minutes)** consisting of a specialized questionnaire that measures the individual's value hierarchy and cognitive biases. Unlike personality tests that ask direct questions, this assessment dives into how the trader prioritizes and evaluates various concepts, yielding quantitative scores on **over 70 dimensions** of judgment. Immediately after, the trader receives a multilayered diagnostic report: the **Diamond Index Score Sheet** provides a graphical “X-Ray of your soul” – showing key strengths/weaknesses across major areas like **Relational (People), Tactical (Work/Task), and Strategic (Big Picture) thinking** – and a **Personalized Narrative (35+ pages)** that interprets over 40 indicators in plain language and details specific next steps for development. Crucially, TPI doesn't stop at insight; it bundles **live one-on-one coaching** to turn insight into action. Every TPI client gets at least **1 hour of private coaching** to deep-dive into their results and formulate a plan, plus a **30-minute follow-up session** after a month to ensure progress. In summary, TPI is delivered as an integrated package: assessment → detailed report → personal coaching, making it a high-touch solution.

Tangible & Emotional Value Delivered: TPI's value proposition spans both **tangible performance improvement** and **intangible psychological benefits**: - **Enhanced Trading Performance (ROI):** By pinpointing specific cognitive biases and behavioral patterns, TPI helps traders correct costly mistakes. For example, a trader discovered an unconscious issue with “*immediately zooming to a bird's-eye view*” – a strength that became a weakness in certain contexts – and could then adjust his approach. Clients report measurable outcomes such as **win-rate jumps from 40% to 60%** and even hitting a **90% win rate over 6 weeks** post-intervention. Another client credited TPI and coaching for helping him “*grow my account by over*

135%” in half a year – far exceeding prior performance. These are dramatic ROI figures for active traders. Even in less quantifiable terms, traders note making *“more by focusing on the best opportunities and acknowledging FOMO”* – effectively increasing profits by eliminating bad trades. For team leaders, the **economic value** is seen in getting a sidelined trader *“back to consistent profitability”* and improving team P&L. In essence, TPI provides a **diagnosis that directly translates to profit potential**: by fixing misalignments in judgment, traders make better decisions under pressure – cutting losing behaviors early and riding winning behaviors longer.

- **Stress Reduction and Emotional Resilience:** A huge part of TPI’s promise is reducing the mental toll of trading. By revealing a trader’s “out of whack” values or imbalances, the program helps realign them, which has immediate stress-reduction effects. Clients repeatedly mention feeling *“a huge weight lifted”, “peace of mind”,* and renewed *“excitement and joy”* in trading. One trader said after addressing deep-rooted issues through TPI coaching, *“the clarity and peace I’ve gained have been invaluable – not just in trading, but in every aspect of my life”*. Reducing stress has tangible side benefits: less emotional trading mistakes (no more panicked exits or revenge trades) and more **sustainable trading habits** (preventing burnout and preserving “mental capital”). The TPI process explicitly trains traders to *“stop being overly critical of yourself”* and maintain *balanced self-motivation* ⁵ ⁶ , which combats the anxiety and emotional swings common in trading.

- **Decision Clarity and Consistency:** The ultimate promise of TPI is captured in its tagline: *“Master your judgment, master your life.”* By making the “invisible barriers” visible, traders gain crystal-clear self-awareness of how they make decisions. The assessment exposes personal biases – e.g., whether someone has a **propensity to overwork or underwork**, their **level of discipline vs. spontaneity**, their **capacity for big-picture thinking vs. detail focus** – allowing precision in adjusting one’s approach. The result is traders begin to trust their strategy and themselves again. For example, one benefit is *“you’ll innately learn processes required for profitable trading so you never have to question your strategy ever again.”* ⁵ This means fewer flip-flopping of methods and more **consistent execution** of trading plans. In practice, that consistency yields smoother equity curves. As one user said, *“I finally understood my biggest hang-ups... in a way no one has ever done before. It was so simple to take action from. I wish I had been exposed to this 5 years ago.”*, implying that TPI dramatically shortened his trial-and-error period and gave him a clear path forward.

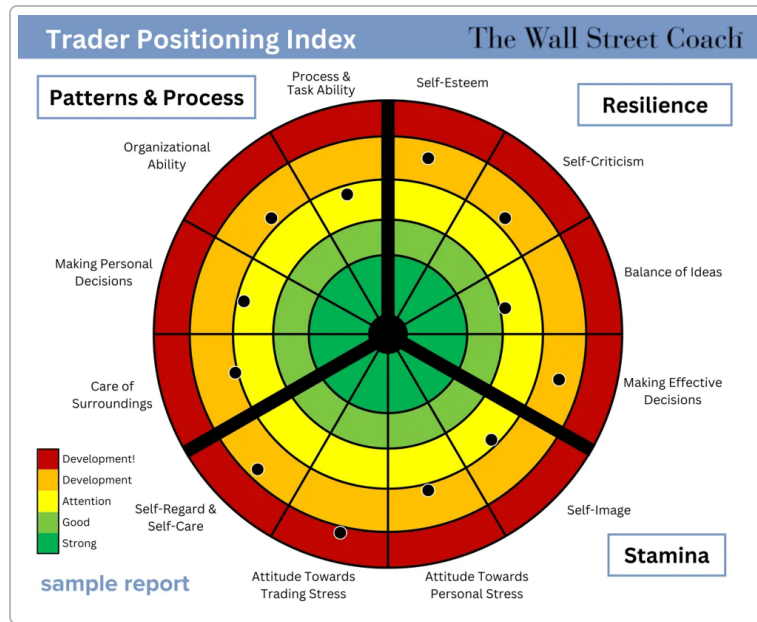
- **Life and Career Alignment (Beyond Trading):** A differentiating value of TPI is that it links trading behavior to one’s broader life values. This holistic approach means improvements spill into personal life and leadership skills. Testimonials highlight improved communication, leadership, and even resolving past traumas that *“had been silently sabotaging my trading”*. For institutional clients, this can mean more grounded, emotionally intelligent traders on the desk. For individuals, it means happier personal relationships as stress is managed better. TPI essentially markets itself as *both* a trading tool and a personal development catalyst, which is unique among trader programs. This dual impact provides an emotional value that competitors rarely match; clients feel *transformed* at an identity level (e.g. *“I am a changed [person]... see the world through a different lens now”* ⁷ ⁸).

Unique Differentiators: The Trader Positioning Index sets itself apart from other offerings in several key ways:

- **Depth of Assessment (70+ Judgment Areas):** Traditional trader personality tests or quizzes often bucket people into a few types (for instance, Van Tharp’s Trader Test identifies 15 trader personality

types, or others use 8 archetypes). TPI, however, provides a *granular profile across dozens of variables*, which is far more nuanced. It doesn't simply label a trader as "impulsive" or "analytical" – it maps out *specific strengths, biases, blind spots, work ethic, big-picture vs detail orientation, problem-solving ability, and more*. This level of detail means advice can be highly customized. The inclusion of *Intrinsic, Extrinsic, Systemic* scores (core to Hartman's theory) within the results ensures a balanced look at how one values people, practical things, and systems ⁹. **No competitor offers an assessment with this scientific pedigree in the trading domain** – most are either simplistic quizzes or general psychology tests not tailored to trading.

- **Combination of Objective Test + Human Coaching:** Many trading psychology programs fall into either offering content (courses, books) or pure coaching. TPI strikes a balance by starting with an objective test result *and then* layering personalized coaching. This hybrid ensures efficiency – the coach isn't starting from scratch to diagnose you; they have the "X-ray" in hand. As a result, coaching sessions can yield *"surgical precision to guide improvement"* ¹⁰, as one observer noted of Kim's style, and traders can see progress quickly (e.g., the prop trader who rebounded in just a few weeks). Competing offerings like **Mind Muscles' Trader's Compass** provide courses and ask traders to self-reflect on behaviors, but without a rigorous upfront assessment, it may rely on the trader's subjective awareness. The **TPI's guided process** ensures even blind spots the trader *isn't* aware of get addressed (hence comments like *"felt like [she] fully understood my thought process"* from clients). The **coaching component** also differentiates TPI from free tests and books – it bridges the *knowing-doing gap*. For example, a free test might tell someone "you are too risk-averse," but TPI's package will not only reveal that but also work with the trader on *how* to leverage or counteract it in their daily routine (with follow-up accountability).
- **Tailored for Trading (Language and Context):** TPI's narrative report and coaching discussions are explicitly framed in trading contexts. While its core is based on a general values profile, the interpretation has been customized for traders – talking about trading styles, market decisions, career goals in trading, etc. Competing personality assessments like Myers-Briggs or DISC can be applied to traders, but they use generic workplace language. TPI's marketing copy shows this specialization: e.g., *"innately learn processes required for profitable trading"*, *"make effective decisions... when life or the markets throw volatility"* ⁵ ¹¹. Also, the **score outputs** are sometimes labeled in trader-friendly terms – a portion of the TPI "Diamond" chart is segmented into areas like *"Patterns & Process," "Resilience,"* and *"Stamina"*



which directly correlate to trading competencies (consistent routines, mental toughness, endurance under stress). This context-specific approach increases the credibility and relatability of the results for clients, setting it apart from one-size-fits-all self-help tools.

- Proprietary “Diamond Index” Visualization:** The program provides a unique visual report (the Diamond Index Score Sheet) that has been described as *“like looking at the X-Ray of your soul.”* This is a powerful differentiator in sales conversations – it gives a concrete picture to an abstract concept. For example, the Diamond Index may show a trader’s **“Self-Image”** and **“Self-Criticism”** levels in a red zone (indicating development needed), while their **“Making Effective Decisions”** might be green (a strength to leverage) [27†]. Such a chart is far more compelling than a text summary and is *rare in the coaching industry*. Competitors typically offer written reports or verbal feedback only. The TPI visual dashboard allows clients to immediately grasp where they stand and later to track improvements (taking TPI again after a year could show progress on the chart). This visualization enhances perceived value and makes the assessment *memorable*.
- Testimonials and Credibility in Finance:** The Wall Street Coach has assembled high-caliber testimonials specifically naming the TPI. From **hedge fund executives and entrepreneurs to well-known trading educators** (e.g. Brian Shannon of Alphatrends praising Kim’s mental coaching), the social proof around TPI is significant. One standout differentiator is that **few if any competitors have such public success stories tied to a single product**. Generic trading psychology coaching might have testimonials, but here we have multiple clients explicitly referencing the *assessment* and its results – *“The Trader Positioning Index is a game-changer... uncovered areas of strength that were showing up as barriers... now I can pinpoint with more awareness”* [3†L280-L288], says Megan M., a senior trader. Even a **former Uber CTO** endorses it, which lends cross-industry credibility (someone outside of trading found it valuable, implying the tool’s robustness). This breadth of proof points (retail traders, tech execs, trading firm owners) makes TPI stand out as *battle-tested* in ways competitors might not be.

Economic Value Drivers (Why It's Worth the Cost): Priced at **\$1,295 for the TPI bundle** (assessment + 2 coaching sessions + full report), the product isn't cheap – but the economic case is that a single insight or prevented mistake can pay it back **many times over** for an active trader. For instance, if TPI helps a day trader avoid one catastrophic loss (say, not averaging down on a bad trade due to newfound self-discipline), it might save them \$5,000 in one go. Or if it improves consistency leading to even a modest 5% increase in monthly returns, a trader with a \$50k account could see \$2.5k+ more profit soon after implementing changes. Indeed, a prop firm leader explicitly noted the **coaching paid for itself quickly** via the trader's regained profitability. Furthermore, by reducing emotional stress, TPI likely helps traders stick with their careers longer and make more over time (harder to quantify, but extremely valuable). There's also a **career advancement** angle: traders who show improved decision-making and emotional control are more likely to get allocations, promotions, or attract investor capital – yielding potentially huge financial upside. For institutional buyers, \$1,295 per trader is trivial if it leads to even a 1% performance uptick on a multi-million P&L. Compared to alternatives (hiring a full-time performance coach, or suffering ongoing losses), TPI is positioned as **high ROI**. The product page emphasizes value, listing components worth \$2,970 in total and then offering the bundle at a discount, reinforcing that it's a bargain relative to its components and results. Emotionally, the value drivers include *relief* from trading-induced anxiety and *confidence* in one's trading – as one trader put it, *"for the first time, I have real clarity... this was so simple to understand and act on"*. How do you put a price on potentially life-changing clarity? TPI's marketing subtly makes that case, using phrases like *"best money I've ever invested in myself"* from clients. This emotional ROI – gaining joy back in one's work and life – is a strong differentiator when competitors often promise only incremental performance tips.

Comparative Assessment vs. Other Products: In the landscape of trader psychology and assessments, TPI stands out as a premium, **all-in-one solution**, whereas most competitors fall into either free/simple quizzes or high-end coaching without a standardized assessment. Here's how TPI compares:

- **Versus Free Online Trader Personality Tests:** There are free tests like the **Van Tharp Trader Test** (15 personality types) or the **TradeUni "Trader Personality Test"** (8 personalities) which take minutes and give some generic advice (e.g. "you thrive on structure, so use rule-based strategies"). These can be fun eye-openers for novices, but lack depth and follow-up. They don't quantify *70 attributes* or provide coaching. TPI clearly differentiates by **scientific rigor and actionability**. One could say TPI is to those free tests what a detailed medical MRI is to a quick online symptom checklist. The free tests are lead magnets (TradeUni uses it to funnel into courses), whereas TPI is a standalone product that delivers a transformation. The **serious trader** segment likely views free tests as too simplistic; TPI offers an upgrade by promising insights *"invisible... before"* ¹² and has the proof to back it.
- **Versus General Trading Psychology Coaching/Courses:** Many authors and coaches (Brett Steenbarger, Mark Douglas's legacy content, **Jared Tendler's "Mental Game of Trading" approach**, etc.) provide education on trading mindset and exercises to work on discipline, fear, etc. These are typically delivered via books, videos, or one-size-fits-all courses. For instance, you might buy a \$500 course that teaches meditation, journaling techniques, and cognitive tricks. While valuable, these rely on the trader to self-identify their issues and practice solutions broadly recommended. TPI's edge here is **personalization and precision**. Instead of guessing, the trader gets a pinpointed diagnosis – maybe the issue isn't what they thought. Indeed, a TPI user confessed *"I came in thinking I needed help with a specific challenge, and walked away with a completely new perspective on myself"*. That kind of course-correction is something generic courses rarely achieve. Moreover, TPI's coaching ensures the trader isn't left floundering on *how* to implement changes. Another aspect: **time**

efficiency – TPI takes 10-15 minutes for the test and a couple hours of coaching, whereas courses require many hours of content consumption and practice. Busy professional traders may prefer the former.

- **Versus One-on-One Performance Coaches:** At the high end, a trader (especially at a firm) could hire a trading psychologist or performance coach for bespoke sessions (people like **Denise Shull**, **Steve Ward**, or consulting firms). These often cost thousands of dollars for a series of sessions and largely depend on conversational analysis and the coach's skill to identify issues. For example, Denise Shull's ReThink Group works with hedge funds on emotional decision-making, but there's no mention of a standardized diagnostic like TPI – it's more qualitative. TPI differentiates by offering a **tangible, productized service** with a repeatable framework. This can actually complement such coaching, but in terms of competition, TPI is more **scalable and accessible**. Not every retail trader can afford or arrange sessions with a top Wall Street psychologist, but they can book a TPI package and effectively get a similar benefit. In fact, Kim Ann Curtin herself, as *The Wall Street Coach*, is a notable figure among trading coaches (with 17+ years experience coaching execs and traders). The TPI is her flagship systematization of coaching. So for a prospect comparing options: a bespoke coach might be appealing for ultra-rich traders who want confidentiality and infinite customization. But for the vast majority, TPI offers **structured expertise** at a fraction of the cost (e.g. ~\$1.3k for TPI vs. easily \$5k+ for a few sessions with a top coach). Additionally, TPI's report can provide a **common language** and benchmark to use in future coaching, which pure talk therapy-style coaching lacks. The ability to re-test and measure progress (since the test can presumably be taken again later) is another plus – *"We change what we measure...most traders just look at P&L. At Mind Muscles, we developed behavior metrics"* (notes Rich Friesen of Mind Muscles). TPI aligns with this measurable approach, giving it a competitive edge in demonstrating progress to analytical clients.

- **Versus Community/Group Coaching Programs:** Some alternatives combine community support with mindset training (e.g. "Traders' Mastermind" communities, or even Kim's own **Trader Hero(ine) Journey** group offering). These tend to provide ongoing coaching calls, accountability partners, etc., at a lower monthly cost, but without the individualized assessment. For example, Kim's Trader Heroine Journey (focused on women traders) provides weekly coaching calls, office hours, and peer support on issues like FOMO, greed, ego, discipline. While such communities are great for continuous support (and TPI clients might join afterwards for reinforcement), they are not direct competitors to the diagnostic power of TPI. In fact, TPI could be an *entry point* or premium add-on to those communities. The differentiation remains that **TPI is a short-term, intensive intervention with lasting impact**, whereas communities are ongoing and incremental. A trader might spend months in a group to slowly improve discipline, whereas TPI can *"get to the root of patterns... in a total WOW state"* within one session of debrief. That immediacy is a selling point when compared to slower-burn programs.

In summary, TPI's primary differentiators are **depth, personalization, scientific validity**, and **demonstrable results**, wrapped in a trader-centric package. It occupies a unique position between self-serve cheap resources and very expensive coaching, essentially offering a *boutique, high-impact service at a mid-tier price*. No other product in 2025 appears to measure quite the same things or offer the same combination of tools, which gives TPI a strong competitive moat in its niche.

Go-to-Market Strategy & Sales Enablement Audit

Current Marketing & Sales Approach: The Wall Street Coach's go-to-market for TPI appears to be a blend of **content marketing, partnerships, and direct response funnels** aimed at building credibility and capturing leads.

- **Content Marketing & Thought Leadership:** Kim Ann Curtin (The Wall Street Coach) produces a steady stream of content that draws in the target audience. There is a **podcast** (The Wall Street Coach podcast) featuring interviews with traders and discussions on mindset – episodes often plug her resources (e.g., Episode 104's show notes encourage listeners to *"Measure over 70 different areas of your judgement style with the Trader Positioning Index"*). The blog on the official site similarly ties in her offerings: each post or episode recap ends with "More Good Stuff," linking to TPI and free e-books. This content both educates the market on trading psychology and softly sells TPI as a solution. Kim also wrote a book (*Transforming Wall Street*) and engages on social media with insights and clips, all reinforcing her authority in trading psychology. By sharing success stories (like Matthew Monaco's journey or interviews with figures like SMB Capital's head of recruiting), she indirectly highlights the importance of mindset – warming up potential clients to the idea that they might need a tool like TPI.
- **Lead Magnets & Email Funnels:** The presence of **free resources** suggests a funnel-based marketing approach. For example, Kim offers a **FREE e-book "The 5 Practices to Become a Better Trader"** on her site and a *"3-minute Trader Check-In"* tool, as well as a weekly email called the "Curtin Call" ¹³. These are classic top-of-funnel lead magnets: traders sign up to get these freebies, enter the email list, and then receive value-packed emails that likely nurture them towards considering paid services (like TPI or coaching). The content of the e-book – *"Build Unshakable Discipline, Rewire Self-Sabotaging Patterns," etc.* – directly hits the pain points TPI solves, priming readers to seek a more customized solution. The use of ActiveCampaign on the landing pages ¹⁴ and clickfunnels domains (like go.thewallstreetcoach.com) indicates a fairly sophisticated marketing automation setup: users enter their information, get automated follow-ups, and are possibly segmented by interest.
- **Webinars and Live Sessions:** Kim has been known to do **free live coaching sessions** on platforms like Instagram Live or Twitter Spaces. In fact, she references offering *"free coaching on Wall Street all those years ago"* and popping into social media lives to keep things affordable, which doubles as a promotional strategy – giving a taste of her coaching to attract paying clients. It's likely that some webinars or live events specifically highlight the Trader Positioning Index (for instance, a webinar on "Breaking Trading Barriers" that ends with an invite to try TPI). This live interaction builds trust and allows her to handle objections in real time.
- **Partnerships and Affiliations:** The Wall Street Coach has cleverly tapped into existing trader communities and influencers. A notable example is **Bear Bull Traders (BBT)** – a large trading education community. Kim provided a custom presentation for BBT (as evidenced by a slide deck on BBT's site with a *"Special Link for Bear Bull Traders: bit.ly/BBT-TPI"*). This implies a partnership or affiliate deal where BBT members are funneled to TPI, possibly with a special offer. Additionally, Kim has collaborated with BBT's founder Andrew Aziz (he appeared on her podcast and she at their conference), giving her product exposure to a big pool of motivated traders. Other communities or prop firms are likely targeted too – e.g., her podcast includes guests from SMB Capital, and we see

testimonials from Investor's Underground's moderator and other groups, hinting at referrals. By aligning with respected trading educators and communities, TPI gains implied endorsement. This **B2B2C approach** (getting community leaders to promote TPI to their members) is smart: it scales trust faster than one-to-one marketing.

- **Sales Process:** The actual sales path for TPI seems to be a **direct online purchase or scheduled call**. On the TPI landing page, a user likely clicks an enroll button which might take them to a summary/checkout page, given the copy says "Click the button below... you'll be taken to the summary page where you'll have time to make your decision". This suggests a lower-friction sale where traders can sign up and pay for the bundle online. However, the main website's "Trader Coaching" section has a **"Schedule a call" CTA** for various packages, indicating that some prospects go through a consultation call with Kim or her team before buying – especially if they're not entirely sold or if they might need a different package. For institutional or team sales, definitely a call is needed to discuss group rates or custom arrangements. The presence of a **phone number (646-420-2099)** prominently on the site also facilitates direct contact, which can catch high-value leads who prefer to talk first. Overall, sales likely mix **self-service checkout** for individual traders who are ready (driven by persuasive landing page copy), with **consultative selling** for larger clients.
- **Messaging & Positioning:** Currently, the messaging heavily emphasizes *unlocking hidden performance* through mastering judgment. The copy is motivational, speaking to the trader's frustrations and aspirations: e.g. *"smash through ALL the invisible barriers... in trading and beyond"*, *"if you don't execute when it matters, it will hold you back from reaching the next level"*. It paints a vivid before-and-after: before TPI you have invisible self-limitations; after TPI you achieve consistency, control, and even happiness outside work. Key hooks include calling TPI an *"X-Ray of your most overlooked trading edge"* (implying something novel and precise), and framing judgment as the ultimate differentiator in success (*"most successful traders show the best judgment"*). The funnel also leverages **social proof and authority**: mentions of Nobel-nominated science ², inclusion of trustworthy faces (photos of Kim and possibly logos of firms she's coached, client testimonials as seen on the site ¹⁵). Pain-point agitation is evident: listing those *"hidden problems"* and pointing out the consequences of ignoring them (like *"constantly swimming upstream"* until you address them). The call-to-action is framed positively as *"your roadmap"* to a *"fail-safe trading strategy"* and *"breakthrough after breakthrough"* ¹⁶ ⁴, making TPI sound like an essential investment, not a luxury.
- **Sales & Marketing Collateral:** The assets in use include the **detailed landing page** (with all the information and testimonials we documented), likely **email sequences** (to follow up with leads – e.g. those who download the free e-book might get emails highlighting a case study of TPI each week), and **testimonial videos or audio**. The TPI page invites prospects to listen to Stephen & Barry's story – possibly an audio clip or video testimonial, which is powerful sales enablement. Additionally, Kim's media appearances (podcasts, MoneyShow events, etc.) serve as collateral; a salesperson (even if it's just Kim or her team emailing a prospect) can link to these for credibility. We also see use of **social media snippets** – for example, an Instagram post: *"Most traders review charts. But very few review themselves... Kim's Trader's Positioning Index shows you exactly where you're strong, where you sabotage, and where to fix it."* Such snippets are likely repurposed across LinkedIn, Twitter, etc., as bite-sized ads or posts. There's coherence in branding: *"It's not your setup, it's your inner game"* is a phrase on the site, which encapsulates the message consistently.

Funnels, Hooks, and Customer Journey: The marketing funnel likely works as follows: **awareness stage** via content (podcast, social posts, partnerships) -> **lead capture** via free download or direct interest -> **nurture** via emails and retargeting (sharing success stories, tackling common objections, providing more value) -> **conversion** via the TPI sales page or a consult call. One hook used is offering *free value first*, which builds trust (Kim's persona is a giver – doing free live coaching, etc. – which makes prospects comfortable that she's not just after their wallet). Another hook is **urgency and FOMO**: on the landing page, after laying out value, it challenges the reader with *"Now it's time for you to make a decision... You can close this page and keep pushing as before, OR you can enroll in the TPI and finally... [list of outcomes]"*. This direct call-out serves to push fence-sitters over the edge by making them consider the cost of *not* acting.

Objections & How They're Addressed: Likely objections include: *"Is this just another personality test gimmick?"* – countered by highlighting the Nobel-nominated science and that it's *"deeper than any traditional assessment"* ¹⁷. *"I've done therapy or other tests before, how is this different?"* – answered by stressing it's **not** a generic personality/IQ test but something that uncovers values and blind spots others miss ² (testimonials from people who had taken many tests and were still surprised by TPI lend weight). *"It's expensive"* – handled by value stacking (showing nearly \$3k of value and charging \$1,295) and by ROI testimonials (multiple clients saying "best money ever spent on myself", or giving concrete trading gains). *"Will a 10-minute test really tell me about myself?"* – the page pre-empts this with skepticism turned success: e.g., client @BellaBullBear *"Initially, I was skeptical; it took only ten minutes so I wasn't expecting much... But I was blown away by how accurate and insightful the results were."*. This is a direct objection handling embedded in testimonial form. *"I'm not a 'head case,' do I really need this?"* – addressed by normalizing these issues even for "the most successful traders" and highlighting that **peak performers use such tools** (peer influence: "others like you are doing it"). Also, the inclusion of male, female, retail, institutional testimonials counters the "maybe this is only for X type of person" objection – it shows broad applicability.

Areas for Improvement in Messaging (Based on Persona Insights): While the current messaging is strong, it skews a bit towards individual retail traders in tone (the emotive, motivational copy). To target institutional personas more effectively, some adjustments can be considered: - Introduce **data or case-study snippets** up front: e.g., "On average, traders who complete TPI report a __% improvement in win-rate or a reduction in trading errors." If such data can be aggregated, it speaks to the analytical mindset of pros. - Create variant landing pages or sections speaking directly to segments: For example, a page for "For Prop Firms & Hedge Funds" emphasizing team benefits, hiring insights, and perhaps offering volume pricing or a pilot program. Use language like "Elevate your desk's performance" alongside the existing "master your judgment" phrasing. - Leverage more authority signaling for skeptical audiences: perhaps mention that Kim has coached at **top institutions (Anchorage Capital, Bank of America, Blackstone, etc.)** which was hinted on her site. This could reassure a hedge fund manager that TPI isn't just for struggling amateurs. - Emphasize **confidentiality and professionalism** for those worried about taking a psychological test (some traders might fear their results being seen as weakness). Clarifying that results are private and the coaches are certified could alleviate that. - Based on persona language, incorporate key terms each segment uses: For retail day traders, words like *"FOMO, discipline, consistency"* are perfect (already present). For institutional, words like *"decision-making under uncertainty, cognitive bias, high-performance culture"* might catch their eye. Ensuring the marketing copy includes a few of these terms can make different personas feel *"this is for me."* - Highlighting the **time efficiency** and ease (10-15 min online, scheduling at your convenience) could be more prominent, to counter the "I'm too busy" objection from professionals.

Sales Enablement Audit: From a sales enablement perspective, the assets are quite robust – the testimonial library is extensive and persuasive. One recommendation is to organize these testimonials by

persona in internal sales docs. For instance, when talking to a prop firm, the salesperson can pull out Gregg's story of his trader slump and Thuan Pham's testimonial, as those carry weight in a professional context, and mention Brian Shannon's endorsement as he's well-known in trading education. For retail prospects, citing the independent traders who achieved big improvements (Andres's win-rate jump, Tom's account growth) and emotional transformations (Stephen, Gardi, etc.) will hit home.

The funnel could also perhaps benefit from a **short quiz or survey** in the marketing stage – ironically, using a mini assessment as a hook (e.g. “Take this 6-question Trader Mindset Quiz to see if your values align with success; then lead them into the full TPI if the quiz reveals issues). Since TPI is about diagnostics, using diagnostics in marketing is on-brand and engages prospects interactively.

Overall, The Wall Street Coach has a multi-pronged GTM: **content to attract, free value to capture, social proof to convince, and personal touch to close**. It's a modern approach that seems to be working, given the “countless traders” helped so far ¹², but there are opportunities to further fine-tune messaging to each key persona and to double down on the most effective channels (e.g. if Bear Bull Traders partnership brought many leads, replicate that with other communities).

Competitive Landscape

The market for trader-focused psychological assessments and coaching is still emerging, but there are several players and alternatives addressing pieces of this puzzle. Below is an overview of key competitors and how they compare in features, delivery, pricing, and positioning relative to The Wall Street Coach's Trader Positioning Index:

- **Mind Muscles for Traders (Richard Friesen):** Mind Muscles offers a *free Trader Assessment* and a suite of courses/coaching (e.g., the “Trader's Compass” 90-day program) focused on cognitive-behavioral training. Their philosophy emphasizes measuring behavioral change and using techniques like journaling and “mental trading metrics” to improve decisions. **Comparison:** Mind Muscles' free assessment is a lead-in that helps traders identify broad areas to work on (likely via a questionnaire about trading habits/emotions), but it is not as comprehensive or personalized as TPI's assessment (likely fewer dimensions, no formal report unless one enrolls in their program). The paid program is course-based with group coaching elements, priced a few hundred dollars (exact current pricing is not public, but similar offerings range \$300-\$1000). Unlike TPI, which delivers a tailor-made profile and one-on-one sessions, Mind Muscles leans more toward *self-directed behavior modification* with support. In terms of positioning, Mind Muscles markets to traders who want to “stop emotional trading” and adopt a “Master Trader Mindset” – very similar in promise to TPI – but their tone is more about training your brain with specific exercises. TPI differentiates by using the Hartman value science (a unique angle) and a more consultative approach; Mind Muscles differentiates by focusing on neuropsychology and habit formation techniques. Both target serious retail and prop traders, but TPI has perhaps attracted more high-end clients (given its price and testimonials).
- **Van Tharp Institute – Trader Personality Type & Peak Performance Courses:** Van K. Tharp (a well-known trading coach who authored *Trade Your Way to Financial Freedom*) created a *Trader Personality Type Test* (free on his site) that categorizes traders (e.g. “Accuracy-based, Detailed, Fun-loving, etc.”). Beyond the test, the Institute sells courses like Peak Performance Home Study (~\$795) and personal coaching packages. **Comparison:** The **Tharp Trader Test** is somewhat analogous to a mini-assessment – it gives traders insight into their tendencies (for example, whether they prefer being

systematic or discretionary, introverted or extroverted in trading). However, it's a relatively *short quiz* (taking ~5-10 minutes) and the output is a basic profile with some tips; it doesn't dive into one's cognitive biases or provide a development plan like TPI does. Tharp's paid offerings then generalize advice (e.g., how to handle different personality types, exercises to fix psychological issues) via books/courses. TPI, in contrast, builds a full custom report and includes coaching time to directly address the findings. On pricing, TPI at \$1295 is in line with a comprehensive course like Tharp's, but TPI is a shorter, intensive engagement versus a multi-week course – appealing to those who want quick, actionable results rather than academic study. In positioning, the Tharp Institute has legacy credibility and appeals to those who like psychological models; TPI positions itself as more modern and cutting-edge (“x-ray of your soul”, Nobel-nominated science). One might say TPI is what a Tharp test taker might graduate to if they want deeper analysis.

- **Trade at your Best / Dr. Brett Steenbarger (and similar coaches):** Dr. Brett Steenbarger is a pioneer in trading psychology, working with hedge funds and writing extensively. While he doesn't sell a specific “assessment” product, he provides tools like self-assessment checklists in his books and sometimes works directly with firms. Others in this vein include **Dr. Jonathan Katz** (performance coach for proprietary firms), **Denise Shull's The ReThink Group**, **Steven Goldstein (AlphaRCubed)**, etc. Typically these are consultants hired by trading firms or high-net-worth traders to coach them on mindset. **Comparison:** These are perhaps the closest alternatives in terms of *outcome*, since an institutional trader might either do TPI or hire someone like Steenbarger as a coach. The big difference is that TPI is *productized with a consistent methodology*, whereas these coaches offer more free-form, relationship-based coaching (often on a retainer or hourly fee). The cost for private coaching with top names can be **significantly higher** (tens of thousands for a retainer or several hundred per hour). The benefit of those coaches is total customization and often deep experience in markets; however, TPI can claim an edge by providing a *concrete starting point (the Index results)* which even a coach could leverage. In fact, an interesting note is that a **former SMB Capital trader** (a firm where Steenbarger has been an advisor) still chose to do TPI and praised how it revealed things others hadn't – implying that even if one has access to coaching, the TPI assessment adds value. In positioning, TPI is accessible to individuals without needing a firm to sponsor it, whereas many top coaches only work B2B or with select clients. TPI's existence also speaks to a **market gap**: not everyone can get Steenbarger on the phone, but anyone can buy a TPI. That democratizes elite coaching somewhat.

- **The Rethink Group (Denise Shull) & Rewired Investor (Denise's programs):** Denise Shull emphasizes understanding emotions as information in trading. While her group doesn't publicize an “index,” they offer workshops and programs like “TraderBrain” or custom coaching for hedge funds. **Comparison:** The Rethink approach might involve an intake process and psychological profiling, but it's not standardized for the client to see – it's mostly in the coach's head. Their focus is on *psychological frameworks (like Freudian/Jungian concepts applied to markets)*, differing from TPI's values-based focus. Pricing for corporate workshops or one-on-one with Denise is likely very high (corporate budget level). Denise Shull's public positioning (author of *Market Mind Games*, inspiration for the Wendy Rhoades character on *Billions*) is very high-end and institutional. TPI, while having institutional clients, also courts retail. Thus, one could see The Wall Street Coach competing for some of the same hedge fund clients but probably more so capturing the broad retail/professional trader market that can't access Rethink.

- **Other Trader Assessment Tools:** There are a few niche tools like the “**Trader DNA**” or **TraderEval tests** used by some prop firms to evaluate applicants (e.g., aptitude tests measuring risk tolerance, pattern recognition). For instance, proprietary firms sometimes use cognitive assessments (like **Thomas KPIs or psychometric tests**) to hire traders. These however are not coaching products; they’re internal HR tools. **Comparison:** TPI could actually be complementary – a firm might use a cognitive test for hiring, and TPI for developing. If one considered those tests competition, TPI is distinct in that it’s developmental (meant to help the trader grow), not just evaluative. Also, TPI’s feedback is shared with the trader, while HR tests often keep results internal.
- **Psychology Sections in Trading Platforms or Journals:** Some modern trading platforms or journals have basic psychological modules – e.g., **Tradervue or Edgewonk** journaling software allow tagging trades with emotions or tracking discipline deviations. Even some brokers have rolled out sentiment analysis of a user’s trades (like IB’s *risk navigator*). **Comparison:** These tools give *behavioral data* (e.g., “you break your rules 20% of the time after 3 losses in a row”) but they don’t tell *why* or *how to fix it*. TPI operates at that *why-level*, providing the introspective insight that complements the raw data. So while not direct competitors, it’s part of the landscape of trader self-improvement. TPI could integrate with these (imagine, use journaling to track progress on issues TPI identified).

Feature Set and Delivery Model Comparison:

- **Assessment Provided?** – TPI: Yes, proprietary 70-metric profile. Mind Muscles: Yes (free quiz, narrower scope). TradeUni: Yes (free 8-type quiz). Van Tharp: Yes (free type quiz). Others (Steenbarger, Shull): No standardized test, more qualitative.
- **Personal Coaching?** – TPI: Yes, 1.5 hours included + available for more. Mind Muscles: Group coaching in courses, some 1-1 in premium. Van Tharp: No 1-1 in basic offerings, but has SuperTrader program (very expensive) for guided coaching. Steenbarger/Shull: Yes, but bespoke.
- **Output/Report?** – TPI: 35+ page personalized report + visual charts. Others: Free tests output a short description or type label; coaching-only competitors produce no formal report (just conversations/ notes).
- **Pricing:** – TPI \$1,295 retail. TradeUni & Tharp tests are free (with upsells to courses \$500-\$2000). Mind Muscles courses likely a few hundred; coaching like Steenbarger/Shull can be several thousand. So TPI is mid-to-high for an individual, but arguably **cost-effective for what it includes**.
- **Scalability:** – TPI can be rolled out to many via the online assessment + multiple certified coaches (Kim mentions a “team of coaches” delivering results ¹⁸). This means it can handle firm-wide deployments if needed. Most high-end coaches are bottlenecked by their personal time. On the other end, free tests scale but with no support.

Positioning: Each competitor positions differently. TPI positions as **the ultimate breakthrough tool for traders’ inner game**, with a bit of life-coach flavor. Mind Muscles positions around **neuroscience and metrics** (“stop fighting your brain” vibe). Tharp’s institute positions around **systematic self-improvement and psychology types** (with the mystique of a famous guru). Trading coaches like Steenbarger position around **experience and performance** (often emphasizing they’ve worked with top firms). In comparison, The Wall Street Coach’s brand (and hence TPI) blends Wall Street credibility (NYC, high finance vibe) with an accessible, empathetic coaching style. Kim often uses a compassionate tone – e.g., highlighting **self-acceptance** and growth, not just discipline and grit. This resonates well with traders who might be tired of the macho “try harder” advice and are ready for a more introspective approach.

In sum, while several alternatives exist, **TPI stands in a relatively unique spot**: it offers the precision of a formal assessment (which free tests attempt but don't follow through on) and the personalized guidance of a coach (which high-end competitors offer, but usually without an equivalent assessment tool). The competitive landscape is not overly saturated with direct analogues, which is an opportunity for TPI to become the *go-to standard assessment* for trading psychology – much like a CFA is standard for finance knowledge, TPI could aspire to be standard for trader self-awareness. However, competitors could respond: for example, if Mind Muscles or others see TPI's success, they might enhance their own assessment offerings. Keeping the differentiators (scientific basis, proven track record, integration with coaching) front and center will be key for TPI to maintain its edge.

Customer Voice & Proof Points

One of TPI's strongest assets is the **voice of its customers** – traders and professionals who have experienced dramatic improvements. Their testimonials not only validate the product's effectiveness but also provide rich insight into the *language and emotional resonance* that attracts new customers. Here we highlight some key proof points and themes from customer feedback:

Life-Changing Transformations: Many clients describe TPI in almost life-changing terms, indicating deep impact. For instance, *"The transformation I experienced was nothing short of life-changing,"* says Stephen H., a trader. He goes on to explain that the sessions with Kim helped him *"uncover and process childhood trauma that had been silently sabotaging my trading"*, and as a result he gained clarity and peace in *"every aspect of my life"*. Such strong language ("life-changing," "best money I've ever invested in myself") speaks to prospective customers who are desperately seeking a breakthrough. It suggests that TPI isn't a band-aid but a true turning point. Another trader, Gardi A., felt like *"a HUGE weight has been lifted off my back – it's the best feeling ever"*, noting improvements in both trading and personal life. The **emotional relief** is a recurring theme – words like *"clarity," "peace of mind," "confidence," "freedom"* populate these testimonials, reinforcing that TPI addresses not just the technical side of trading but the person behind the trades.

Concrete Performance Improvements: Alongside emotions, customers provide hard numbers and outcomes, which is gold for CRO discussions. For example, **Andres A.**, a day trader, reported *"My win rate improved from 40% to 60% as I began to trade less and make more by focusing on the best opportunities and acknowledging FOMO when it reared its ugly head."* He directly ties this improvement to the self-knowledge gained ("the better you know yourself, the better you are able to execute"). Similarly, **Tom B.** shares, *"In just 6 months... I have been able to grow my account by over 135%. Far exceeding my prior losses, gains, and expectations."* These are staggering statistics that any trader would love to emulate. They serve as proof that TPI isn't just about feeling better – it yields measurable financial results. For team-level impact, **Gregg S.** (trading firm owner) says after his trader's TPI coaching, *"in just a few weeks she managed to help him get back to consistent profitability... His performance has continued to improve... Over the next few months he transformed into a new person – outlook and attitude positive. My only regret is not starting sooner!"*. This quote is powerful because it tackles a common objection ("do I really need this now?") by saying the only regret was not doing it earlier, and it highlights both **rapid results** (weeks to profitability) and **sustained improvement** (months of transformation).

Bias/Blind Spot Revelation: A lot of the customer voice highlights how TPI revealed something they were completely unaware of. Sam P., a moderator for a trading community, noted it *"highlighted some areas to improve on... which may have been overlooked on other profiles"* and now she can *"pinpoint [these strengths showing up as barriers] with more awareness"*. The phrase "game-changer" appears multiple times (Megan M.

and others), consistently linked with discovering counterintuitive insights – like strengths that double-edged into weaknesses, or assumptions they held about “everyone sees the big picture like me” being shattered (John C.’s realization). John, a highly experienced professional, said *“I’m just stunned I never realized it before... any test that can uncover something so essential is a critical step in understanding ourselves. Highly recommended.”*. This peer voice from someone who *has a degree in psychology* and has tried assessments since the 1970s is particularly compelling – it establishes TPI as a cut above decades of other tools.

Language and Tone Used by Customers: It’s notable that customers often mirror the language of the product messaging but in a genuine way. Phrases like *“inner demons,” “under the hood,” “root cause,” “blind spots,”* and *“light at the end of the tunnel”* appear in their testimonials. This indicates that the concepts TPI addresses (like unconscious motivators, judgment biases) are exactly what traders end up talking about after going through it. The Wall Street Coach can double down on these phrases in marketing, knowing they resonate. Also, customers emphasize **simplicity and actionability**: Barry R., CEO of an investment group, said *“This was so simple to understand and take action from. I wish I had been exposed to this 5 years ago.”*. Traders appreciate that the results weren’t just academic but came with clear steps. When he says he thought he *“knew everything”* from other profiles but *“wasn’t prepared for the results of TPI”*, it subtly challenges those who think they don’t need help – a very useful quote for skeptical prospects.

Diverse Credible Voices: Testimonials come from a range of backgrounds – **independent traders, business owners, a tech executive, a trading educator, and even a financial publisher**. For example, **Aaron G.**, a financial publisher, broadens the appeal by saying *“For a trader, business owner, entrepreneur – anyone who needs to think concretely and act decisively – these are invaluable insights. I highly recommend you do this work for yourself, the results can be profound.”*. By saying “anyone who needs to think concretely and act decisively,” he essentially positions TPI as beneficial beyond trading, touching managers and entrepreneurs. This can help in marketing to, say, startup founders who also trade, or executives responsible for decisions under uncertainty. **Thuan Pham’s** testimonial (former Uber CTO) lends Silicon Valley cred: his quote about the jaw-dropping assessment and *“pragmatic insights to do even better”* could attract other tech investors or quants who respect an analytical approach. **Brian Shannon’s** endorsement (on the Trader Coaching page) isn’t TPI-specific but underscores the mental side of trading and calls Kim’s help *“actionable”*, reinforcing the credibility among the trading educator community.

Social Sentiment & Community Feedback: Outside the official site, Kim’s social media posts and interactions suggest positive reception. The Instagram example *“Don’t just track the trade. Track yourself. Kim’s Trader’s Positioning Index shows you exactly where you’re strong, where you sabotage, and where to fix it.”* garnered engagement – implying traders find this message relatable (they know they should introspect more). On X (Twitter), Kim shared the TPI link multiple times, presumably with some engagement (tweets from Aug 2024 indicate continued promotion). While we don’t have direct tweets from users, the fact that she keeps pushing it suggests there’s demand and likely positive anecdotal feedback in replies or DMs (like people messaging “INDEX” to her as invited). Also, her being invited on multiple podcasts (Confessions of a Market Maker twice, etc.) indicates the trading community sees value in discussing TPI – it’s not common for a product to be the focus of podcast interviews, which means hosts trust that this is helpful content, not just an ad.

Case Studies and Stories: We have glimpses of actual case studies in those testimonials – Stephen overcoming childhood trauma and improving life quality; BellaBullBear going from skeptical to 90% win rate; Gregg’s trader bouncing back to profitability. These stories, if expanded, would make excellent case study write-ups for sales materials. They each follow a nice trajectory: problem -> TPI insight -> result. For

example, *Problem*: Trader in slump with negative attitude; *Insight*: identified key frustration factors and values misalignment; *Result*: back to profitability, improved attitude, long-term transformation. Or *Problem*: Veteran trader thought he knew himself; *Insight*: realized a unique cognitive strength he took for granted (big picture thinking) which is his secret sauce; *Result*: newfound appreciation and conscious use of that strength.

For CRO strategy, leveraging these voices is crucial. These quotes can be used in ad copy, landing pages (already are), nurture emails ("Remember Stephen's story? This could be you..."), webinars, etc. The language also tells us what *benefits to emphasize*: **clarity, confidence, consistency, lifting weight off shoulders, breaking barriers, life-changing, simple and actionable, must-do, game-changer** – all these phrases have come straight from customers, so they clearly resonate.

One thing to note: The testimonials also indirectly address **targeted personas**. For example: - Sam P. (Investors Underground mod) – speaks to community-oriented, likely experienced day traders. - Carson K. and Barry R. both explicitly say if you're a professional trader it's a "MUST do", pushing the notion that even pros (or especially pros) need this – helping overcome pride or complacency in that segment. - Megan M. (senior trader) demonstrates that even already successful traders get value by finding overlooked strengths/barriers. - Stephen and Gardi speak to those struggling with deeper issues or feeling stuck. Thus, the range of voices covers those who are underperforming and those who are doing well but want more – a great broad appeal.

In conclusion, the **customer voice confirms that TPI delivers on its promises**, with quotes that the marketing team can align directly to each value proposition point. The key is to continue collecting such proof (perhaps encourage clients to quantify their improvements whenever possible) and to showcase these in various formats (text, video testimonials, interview-style case studies). Given how positive and specific these testimonials are, they significantly de-risk the purchase in a prospect's mind. A trader reading them can likely identify with one of the stories and think "that sounds like me – and they succeeded, so I can too." The authenticity (mentioning personal details like childhood trauma, or being skeptical at first) makes them trustworthy. For sales enablement, having a library sorted by theme (e.g. one addresses skepticism, one addresses life outside trading, one addresses ROI, one addresses must-do for pros) will allow tailoring the right proof to the right lead at the right time.

Strategic Recommendations

Based on the deep analysis above, here are strategic, CRO-focused recommendations to scale TPI sales and maximize its impact over the next 6–12 months. These suggestions span **targeting, messaging, packaging, and conversion optimization experiments**:

1. Persona-Specific Positioning & Funnels: Develop tailored messaging for each key segment identified, and consider dedicated landing pages or funnel paths for them. For example: - **Prop Firm/Hedge Fund Segment:** Create a professional-looking landing page speaking to firm managers and high-end traders. Emphasize team performance, risk reduction, and ROI in terms of money (use testimonial of a trader's slump turnaround that "*paid for itself*" and Thuan Pham's exec perspective). Include logos of firms Kim has worked with (with permission) for social proof. Messaging should highlight "*objectively measure and improve trader decision-making across 70+ metrics*" and "*talent development tool nominated for Nobel Prize work*" to appeal to a data-driven mindset. Offer a "**Team Package**" inquiry form or an option for volume pricing (e.g., "assess your whole desk – contact us for enterprise pricing") to facilitate B2B sales. A targeted LinkedIn

outreach or ad campaign can drive this (“Upgrade Your Trading Desk’s Performance – Used by traders at [XYZ]”). - **Independent/Active Retail Trader Segment:** Continue the current emotive, aspirational messaging but test segmenting by experience level. For instance, one funnel targeting **experienced retail traders** who are plateaued (e.g., ads or content like “Been trading 3+ years and still inconsistent? This is for you.”). Use language from testimonials about “*I thought I knew it all after so many tests... wasn’t prepared for how much I learned*” to hook the skeptical veteran. Another sub-funnel could target **newer traders** (1-2 years in) who are starting to realize the mental game is key – perhaps leveraging the free e-book to educate them, then pitching TPI as a way to “*avoid years of trial and error – get your trading DNA decoded now.*” By mapping content and social proof that aligns with the trader’s stage of journey, you’ll increase relevance and conversion. Consider creating persona-based lead magnets too: e.g., a short PDF “Top 5 Trading Biases for [Day Traders/ Swing Traders]” that then leads into the need for TPI. - **Women Traders Segment:** Given the creation of Trader **Heroine** Journey, it’s clear women in trading are an important persona. Leverage that by highlighting testimonials from female traders (Sam Prior’s, Megan’s) and perhaps creating community or safe-space appeals. For instance, an ad or email that says “Women traders: Master the inner game that gives you an edge in a male-dominated field” could resonate. Offering occasional women-only TPI group debriefs or pairing female clients with a female coach might be a selling point for some. Since Kim already fosters that community, ensure the TPI marketing explicitly invites women (e.g., imagery, examples).

2. Refine Value Proposition in Marketing Collateral: While the core value prop is strong, we can sharpen the **quantification and specificity**: - Incorporate more *numbers* and outcomes in headlines or subheads. E.g., “Unlock a 20-50% improvement in your trading performance by mastering your decision-making” (supported by those win-rate and account growth stats from testimonials). Or “Identify the 1-2 blind spots that have been costing you tens of thousands in losses” – make the pain and payoff vivid. - Emphasize **stress reduction** alongside performance: maybe a tagline like “Boost your trading P&L **and** eliminate the sleepless nights – all by re-tuning your inner game.” Phrasing that captures both the financial and personal upside, since testimonials indicate both were achieved. - Highlight the **unique differentiator of values-based insight**: e.g., a comparison chart on the page showing “Typical Trading Psychology Advice vs. Trader Positioning Index” – where typical advice is generic (“be more disciplined, control your emotions”) and TPI is specific (“You have a bias for X, here’s how to leverage or counteract it”). This will make clear how TPI stands out from, say, just reading another trading psychology book.

3. Pricing and Packaging Optimization: The \$1,295 price point positions TPI as a premium product, which is appropriate given the value. However, consider a **tiered offering** to capture more price-sensitive customers and upsell: - **“TPI Lite” (Assessment + Report Only):** For, say, \$500-\$600, a customer gets the online assessment and the 35-page personalized report (possibly with a brief recorded overview or group webinar to explain common findings, rather than 1:1 coaching). This caters to those who can’t afford the full package or are not ready to speak with a coach. It could be marketed as “Self-Study Option – get your profile and action blueprint.” Many may start here and then opt to purchase coaching sessions later as an add-on when they see the value. This also scales delivery, since the assessment and report can be automated at volume. - **Full “TPI Platinum” (Assessment + 4 Coaching Sessions):** Currently it’s 2 sessions. You could introduce a higher tier, maybe ~\$2,500, that includes the assessment and a month-long intensive coaching (e.g., 4 weekly sessions or 3 sessions plus one follow-up). This would appeal to those who know they need ongoing support or firms that want a more robust program. It increases the lifetime value per client and for some, ensures deeper habit change. The Platinum tier could also include extra resources like a 3-month membership to the Trader Heroine/Hero Journey community or a custom follow-up plan. - **Group/Team Rates:** Explicitly offer a discounted rate for purchasing multiple TPI assessments (e.g., “Equip your team: purchase 5 or more assessments at \$995 each”). This can encourage small prop shops or trading

groups to sign up together. It also promotes a social aspect (colleagues doing it together and perhaps discussing results in a workshop moderated by Kim). - **Money-Back Guarantee:** Consider offering a conditional guarantee to reduce risk for the buyer. For example, “100% Satisfaction Guarantee – if you don’t feel you’ve gained at least one game-changing insight in your debrief session, we’ll refund you.” Given the strength of outcomes, presumably refund requests would be very low, and it would signal confidence. Some traders might be on the fence due to fear of “wasting money on another thing” – this helps overcome that. The guarantee could be subject to completing the process (they have to take the test and do the debrief to qualify) to ensure they give it a fair shot. - **Financing or Installments:** Offer a payment plan (e.g., 3 monthly payments of \$450) to make the cost more digestible. Especially for independent traders who might not have a large bankroll yet, this option can increase conversions without lowering price.

4. Partnerships & Channel Expansion: Building on the success with Bear Bull Traders, identify and pursue similar partnerships to tap into ready audiences: - **Trading Education Schools & Communities:** Target ones like Warrior Trading, TierOneTrading, Online Trading Academy, or popular YouTube trading channels (many have affiliated products). A webinar or guest coaching session co-hosted with these communities can funnel interested members into TPI. Offer these partners an affiliate commission for each TPI sale (e.g., a negotiated fee or revenue share) to incentivize promotion. As seen, BBT got a special link; formalize that affiliate program so more communities can sign up. - **Prop Trading Firms (prop academies):** Many prop firms (e.g., Topstep, FTMO for remote prop, SMB Capital’s training arm) might be interested in licensing a tool like TPI for their trainees. Approach these firms with a proposition: for a bulk fee or discounted per-head, they can include TPI as part of their trader development curriculum. This could open a B2B revenue stream. For instance, SMB Capital is known for emphasizing psychology – a conversation with them (especially as Kim had their head of recruiting on her podcast) could lead to a pilot where all new SMB traders take TPI and get a debrief (Kim or certified coaches could train SMB’s in-house coaches on interpreting the results). - **Financial Media & Conferences:** Appearances or sponsorships at trader conferences (Traders4ACause, MoneyShow, TradersExpo, etc.) can raise visibility. Perhaps offer free mini assessments at a conference booth (a truncated 10-item quiz version that hints at the full TPI) to collect leads, then follow up with those leads with an offer to do the real TPI. Also, writing guest articles for sites like TradingView, Investopedia, or finance magazines about “The Psychology Edge” can subtly plug TPI as the solution. - **Corporate/Institutional Partnerships:** Reach out to hedge fund industry groups or trading technology firms to co-host webinars on risk management through psychology. For example, partnering with a risk software company or a trader journal software (Edgewonk, Tradervue) to co-market (like “integrate psychological insights with your trading journal – special offer on TPI through this partner”). Such collaboration extends reach beyond The Wall Street Coach’s own audience.

5. Content Marketing Enhancements: Continue producing valuable content but with a more targeted and conversion-optimized spin: - **Case Study Blog Series:** Write anonymized (or permission-granted) case studies detailing a client’s journey (Problem -> TPI Findings -> Actions -> Results). We have the raw material from testimonials; flesh each out into a story. For example, “How a Professional Trader Overcame Self-Sabotage to Achieve a 90% Win Rate” – walk through how TPI identified his issues and what changed. These not only serve SEO (attracting those searching for “trader self-sabotage solution”) but also act as mid-funnel content for those considering purchase. Include calls-to-action like “Feeling similar? Learn what your Trader Positioning Index profile would reveal – schedule a call.” - **Video Testimonials and Interviews:** Get a few willing clients (perhaps those already publicly quoted like Aaron Gentzler or Sam from IU) to do short video interviews about their experience. Video adds credibility and can be used in ads, on the sales page, or in webinars. It humanizes the success stories. Even a 2-minute clip of a trader saying “I was skeptical but now I swear by it” can tip someone over. - **Educational Videos or Webinars:** Create a high-value webinar such as

“The 5 Invisible Psychological Biases That Cost Traders Money” – Kim (or a coach) explains common biases (self-sabotage, etc.) and how to address them. The webinar naturally leads to “if you want to find out your specific biases and get a tailored plan, consider TPI.” Run this webinar live monthly (to allow Q&A and real-time persuasion) and also have an on-demand version. Use it as a lead magnet: people sign up with email to watch. This serves both lead generation and warming up prospects by delivering insight upfront. - **Leverage “Curtin Call” Newsletter:** The weekly reflective questions email can occasionally feature a success snippet or a question that leads into TPI. For example, a weekly question might be “What recurring trading decision do I regret, and what value or fear might be driving it?” – then note, “If this question resonated, the Trader Positioning Index was designed to pinpoint those values and fears for you ¹⁷. One trader discovered X... (brief testimonial snippet).” This integrates subtle promotion into content that readers already enjoy, possibly nudging them to act.

6. CRO Experiments for Conversion Optimization: To improve the funnel conversion at each stage, run systematic tests: - **Landing Page A/B Tests:** - Test a **short-form landing page** against the current long copy page. Some highly qualified prospects may respond better to a concise pitch with bullet-point benefits, a few key stats/testimonials, and a quick CTA (especially if coming from an email or partner referral where they already have context). The long page is great for cold traffic or those wanting detail, but a short version might yield more direct sign-ups from warm leads. - Experiment with the **headline**. For instance, current one is about “Crack the Code on High-Performance Trading...with this X-Ray of your most overlooked edge”. Test a more direct ROI-driven headline: “The #1 Reason Traders Fail Isn’t Strategy – It’s THIS (Fix it in 15 minutes)” or a testimonial-based headline: “‘This assessment was life-changing’ – Discover your Trader Positioning Index”. Measure which drives more engagement. - Test adding an **order bump or urgency**: e.g., a limited-time bonus if they enroll now (like a free copy of Kim’s book or a bonus group coaching call) to see if that spurs action. - **Email Sequence Optimization:** If email nurture open/click rates are low after lead magnets, test different approaches. For example, a plain-text personal style email from Kim vs. a designed newsletter style – see which gets more response in terms of clicks to the TPI page. Test subject lines that highlight pain (“Still struggling with trading discipline? Read this.”) vs. gain (“Ready for your trading breakthrough? Here’s how.”). - Also test an **early offer** vs. delayed offer: some funnels wait a week of nurturing before pitching the product, but trying an immediate follow-up email that says “Thanks for downloading X. If you already know psychology is your next frontier, here’s an exclusive 10% off TPI valid for 48 hours” could capture the hottest leads right away. Monitor conversion vs. waiting. - **Retargeting Ads:** Use the testimonials and results in retargeting campaigns on Facebook/Instagram, YouTube, and Google Display for anyone who visited the site or started checkout but didn’t finish. For example, a short video ad with a client quote (“My trading has improved and a huge weight lifted... -G.A.”) and Kim briefly explaining TPI’s benefit could remind prospects of the value. Test different messages: one focusing on ROI, one on emotional relief, one on social proof (“Join traders from [list communities or 10+ countries] who have transformed with TPI”). Track which messaging drives the most last-click conversions. - **Improve On-Site Engagement:** Add an interactive element on the landing page like a **self-diagnostic quiz snippet**. For example: “Which of these trader profiles sounds like you?” with three options (e.g., Over Analyzer, Impulsive Gunslinger, or Fearful Hesitator – each corresponding to certain biases). After selection, show a tailored blurb like “You might be struggling with X, Y, Z... The Trader Positioning Index can pinpoint your exact profile and help you overcome it.” Include a CTA “Get My Trader Index”. This engages the visitor and personalizes the pitch. We can test presence vs. absence of this quiz on bounce rate and conversion rate. - **Leverage FOMO and Community:** Create a section showing maybe a counter or list of some recent TPI takers (anonymized, or just count “X traders assessed this month”) to imply it’s popular – a bit of social proof. Alternatively, a rotating quote ticker of the testimonials (since there are so many good one-liners: “game-changer” etc.) might keep visitors intrigued as they scroll. Test adding that vs. static page. -

Checkout Page Optimization: If not already done, ensure the checkout or summary page reiterates key guarantees and benefits. Maybe include one or two short testimonial snippets right near the final buy button (“HIGHLY RECOMMEND – completely changed the way I see myself, my work...”). This can reduce last-minute doubt. Also test one-page checkout vs. multi-step (sometimes breaking the process into “Step 1: Your Info, Step 2: Payment” can reduce overwhelm). - **Post-Purchase Referral Ask:** Though not about initial conversion, implement a strategy where after a client completes TPI and is happy (perhaps a week after their debrief), you prompt them for referrals or an affiliate link. Satisfied customers like those we’ve seen often *want* to share. Provide them an easy way (like “Share this 10% off code with a friend who might benefit”). This can bring in highly qualified leads at low cost and should be measured (tracking codes, etc.).

7. Scale Coaching Capacity & Certification: As sales scale, Kim’s team of coaches needs to be ready to deliver quality debriefs. Investing in **training more certified coaches** in the Diamond Index/TPI methodology will ensure scalability (so you’re not limited if suddenly 100 people sign up in a week). This is more operational, but crucial – a bottleneck here could kill momentum. Possibly, formalize a “*Wall Street Coach Certified*” training for coaches so that down the line, TPI could even be licensed out (similar to how some orgs license personality assessments to coaches). Strategically, that could open a new growth avenue: other trading coaches might pay to use the TPI assessment with their clients, giving The Wall Street Coach a licensing fee and broader market penetration. It would position TPI as an industry standard.

8. Continue to Build Social Proof & Authority: In parallel, keep boosting Kim Ann Curtin’s profile as THE go-to expert in trading psychology: - Encourage more **public reviews** of TPI on forums or Trustpilot if possible (maybe after the program, send a link asking for a review on Google or a testimonial on LinkedIn). Having 3rd party reviews could help skeptical buyers who think everything on the site is cherry-picked. - Aim for more podcast appearances or media articles featuring TPI success (e.g., a story in a trading magazine about a trader who turned things around with a coach’s help – basically pitching a journalist on a human interest story that also highlights TPI). - If not already, compile the results and perhaps pursue some form of **academic validation or publication**. For example, working with a behavioral finance researcher to do a study on TPI’s effectiveness (even if small-scale). Being able to say “In a study of 30 traders, those who underwent TPI improved profitability by X% on average vs a control” would be extremely persuasive for analytical customers. It would also differentiate the product with hard evidence, something virtually no competitor has done. This is a longer-term play, but fits a CRO mindset of providing proof.

Each of these recommendations is aimed at either **broadening the top of the funnel** (more leads via partnerships and awareness), **increasing conversion rates** (via targeted messaging and CRO tests), or **increasing average revenue per customer** (through tiered offerings and referrals). By implementing these, The Wall Street Coach can expect to see not only higher TPI sales, but also a stronger brand presence in the trader community as the authority on trading psychology.

In conclusion, the Trader Positioning Index is a powerful, differentiated offering in a market hungry for psychological edge. By fine-tuning its targeting, communicating its value in the metrics-oriented language traders trust, and removing friction in the buying process, The Wall Street Coach can position TPI as an indispensable assessment for serious traders worldwide – effectively making it the “CRO’s secret weapon” for converting struggling traders into consistent high-performers. The next 6–12 months should focus on scaling up what works (testimonials, partnerships, content) and experimenting boldly where there’s opportunity (new funnels, product packages), all while keeping the authentic, customer-centric ethos that is clearly driving its current success. With these strategies, TPI can achieve significant growth and help countless more traders “master their judgment” and, by extension, master their trading destiny.

1 2 3 4 5 6 11 14 16 17 **Trader Positioning Index**

<https://go.thewallstreetcoach.com/trader-positioning-index-asp>

7 8 10 12 **Trader Heroine Journey**

<https://go.thewallstreetcoach.com/trader-heroine-journey-sp>

9 18 **Trader Positioning Index**

<https://thewallstreetcoach.net/trader-positioning-index>

13 **Ep 104: From \$2,000 to \$1 Million - Matthew Monaco's Road to Trading Success - The Wall Street Coach**

<https://thewallstreetcoach.com/blog/2025/02/ep-104-from-2000-to-1-million-matthew-monacos-road-to-trading-success/>

15 **Work with Kim: Trader Coaching - The Wall Street Coach**

<https://thewallstreetcoach.com/trader-coaching/>