

# TradeITM Homepage Chat Review Packet

Prepared for client review

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## 1) What This Document Covers

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This packet explains how the homepage chat works today, what the AI is allowed to say, when chats are escalated to a human, and the exact Q&A content currently used as references.

This version is written for non-technical review.

## 2) Simple Overview of Chat Flow

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1. A visitor asks a question in homepage chat.
2. AI gives an answer using approved pricing, feature, proof, and policy content.
3. If certain triggers are detected, the conversation is escalated to a human team member.
4. Human team can also manually take over any conversation from the admin chat panel.

## 3) Current Program + Policy Rules (Approved)

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- Monthly memberships:
- Core Sniper: \$199/month
- Pro Sniper: \$299/month
- Executive Sniper: \$499/month
- Precision Cohort: \$1,500 total for a fixed 90-day mentorship
- Private 1-on-1 Mentorship: \$2,500 total for a fixed 8-week mentorship
- Refund policy language:
- All sales are final.
- Trade In The Money is not obligated to issue refunds.
- Any exception is discretionary and does not create a right to a refund.

## 4) AI Reference Q&A (What AI Pulls From)

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Below are the core knowledge-base Q&A entries the AI references when responding to visitors.

### Pricing

Q: How much does it cost?

A: Core (\$199/mo), Pro (\$299/mo), Executive (\$499/mo), plus mentorship paths: Cohort (\$1,500 / 90-day) and Private 1-on-1 (\$2,500 / 8-week). Includes all-sales-final refund language.

Q: What is the difference between Core, Pro, and Executive?

A: Core is foundational SPX-focused alerts; Pro adds LEAPS and swing structure; Executive adds advanced NDX real-time alerts and higher-conviction frameworks.

## **Results / Proof**

Q: Do you have proof?

A: Uses verified facts: 87% win rate over 8+ years, 100%+ target framing, and recent example wins.

Q: What do members say?

A: Shares testimonial-style examples from the approved knowledge base.

## **How It Works**

Q: How does it work?

A: Join, get Discord access, receive 1-3 setups/day during market hours, with entry/stop/target and educational commentary.

Q: What makes you different?

A: Execution-focused education, verified performance framing, and serious-trader positioning.

## **FAQ**

Q: How many alerts per day?

A: 1-3 setups/day during market hours (9:30am-4pm ET), with tier differences in instruments and depth.

Q: How much money do I need?

A: Guidance on minimum vs ideal account size, with risk management emphasis.

Q: Do I need experience?

A: Beginner-friendly with education; advanced value for experienced traders.

Q: Refund policy?

A: All sales final, no refund obligation, discretionary exceptions only.

## **Mentorship**

Q: What is the Precision Cohort?

A: Fixed 90-day mentorship, \$1,500 total, limited cohort.

Q: What is private 1-on-1 mentorship?

A: Fixed 8-week mentorship, \$2,500 total, weekly private coaching.

Q: How is Cohort different from monthly tiers?

A: Monthly tiers focus on alerts + commentary; Cohort focuses on mentorship and trader development.

Q: How do I apply for Cohort?

A: Qualification questions + application process; designed for fit and commitment.

## 5) Detailed Sample Q&A (For Client Review)

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These are editable sample responses written in the approved style.

### Sample 1: Pricing Overview

Sample visitor question: "How much is it to join?"

Recommended AI response:

"We have three monthly membership tiers:

- Core Sniper: \$199/month
- Pro Sniper: \$299/month
- Executive Sniper: \$499/month

If you want mentorship options, we also offer:

- Precision Cohort: \$1,500 total for a fixed 90-day program
- Private 1-on-1 Mentorship: \$2,500 total for a fixed 8-week program"

Escalate: No

### Sample 2: Tier Recommendation

Sample visitor question: "Which plan should I start with?"

Recommended AI response:

"If you are building consistency and want strong SPX focus, Core is a solid starting point.

If you want added LEAPS and swing structure, Pro is usually the next step.

If you want advanced NDX real-time coverage and highest-conviction frameworks, Executive is the premium path.

If you tell me your experience level and account size, I can recommend one directly."

Escalate: No

### Sample 3: Results / Proof

Sample visitor question: "Do you have real proof this works?"

Recommended AI response:

"Yes. Our verified benchmark is an 87% win rate over 8+ years, with a 100%+ per-trade target framework.

We send 1-3 setups per day during market hours and include exact entry, stop-loss, and take-profit levels.

If you'd like, I can also walk you through how alerts are structured so you can evaluate fit before joining."

Escalate: No

#### **Sample 4: Beginner Question**

Sample visitor question: "I'm new. Is this beginner friendly?"

Recommended AI response:

"Yes, beginners can start here.

The alerts include educational reasoning, and each setup includes entry/stop/target levels so execution is clearer.

If you are brand new, Core is usually the easiest entry point before moving up to Pro or Executive."

Escalate: No

#### **Sample 5: Platform/Broker Question**

Sample visitor question: "Can I use Robinhood or Webull?"

Recommended AI response:

"Yes. You can use any broker that supports options.

TradeITM provides the setup details, and you execute on your own platform."

Escalate: No

#### **Sample 6: Cohort Clarification**

Sample visitor question: "Tell me about your mentorship program."

Recommended AI response:

"We offer two separate mentorship paths:

- Precision Cohort: fixed 90-day mentorship at \$1,500 total
- Private 1-on-1 Mentorship: fixed 8-week coaching at \$2,500 total

If you want, I can help you choose the right one based on your experience and goals."

Escalate: No

## **Sample 7: Cohort Intent**

Sample visitor question: "I want the Cohort. How do I apply?"

Recommended AI response:

"Great. The Precision Cohort is our 90-day mentorship path and uses an application process to ensure fit.

We'll review your experience, current trading process, and goals.

If you want, I can start the application flow now."

Escalate: Yes

Reason: High-value mentorship intent.

## **Sample 8: Private 1-on-1 Intent**

Sample visitor question: "I want private coaching with someone directly."

Recommended AI response:

"Our Private 1-on-1 Precision Mentorship is an 8-week coaching program at \$2,500 total.

It includes weekly private sessions and direct accountability around execution and risk.

If you want to proceed, I can move this to our team for fit review."

Escalate: Yes

Reason: High-value 1-on-1 mentorship intent.

## **Sample 9: Refund Request**

Sample visitor question: "Can I get a refund if I don't like it?"

Recommended AI response:

"All sales are final. Trade In The Money is not obligated to issue refunds.

Any exception is discretionary and does not create an entitlement or precedent.

If you have a billing or account-access issue, I can route your case to support."

Escalate: Yes

Reason: Billing/refund support path.

## **Sample 10: Human Request**

Sample visitor question: "I want to speak to a real person."

Recommended AI response:

"Understood. I can route this to a team member.

Please share the best email so we can complete handoff and follow up if disconnected."

Escalate: Yes

Reason: Explicit human request.

### **Sample 11: High-Intent Buyer**

Sample visitor question: "I'm ready to buy right now. What's next?"

Recommended AI response:

"Perfect. I can point you to the best-fit plan immediately.

If you tell me whether you want monthly membership, Cohort (90-day), or private 1-on-1 (8-week), I'll direct you to the right checkout path."

Escalate: Yes

Reason: Purchase intent.

### **Sample 12: Frustrated Visitor**

Sample visitor question: "This sounds fake and I'm frustrated."

Recommended AI response:

"I hear you. If you'd like, I can connect you with a team member for direct support.

If you prefer, I can also answer specific questions about pricing, alerts, and process so you can evaluate clearly."

Escalate: Yes

Reason: Negative sentiment.

## **6) Escalation Rules (When Human Takes Over)**

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The system escalates to human support when one or more of the following is detected:

1. Visitor explicitly asks for a human.
2. Purchase-intent / high-value signals (ready to buy, premium tier interest, mentorship interest).
3. Billing/refund/cancellation concerns.
4. Negative sentiment (frustrated/angry language).
5. Extended back-and-forth where human support is better.
6. Manual takeover by team member in admin panel.

### **Email Gate Before Full Handoff**

If escalation is needed and email is missing:

1. AI asks for contact email.
2. Escalation is marked as pending.

3. Once email is provided, handoff is completed for human follow-up.

## 7) Guardrails for AI Responses

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- AI should only use approved facts from system prompt + knowledge base.
- AI must not invent win rates, performance claims, customer counts, or policy terms.
- AI must keep Cohort and Private 1-on-1 terms separate:
- Cohort = 90-day
- 1-on-1 = 8-week
- AI must use no-refund-obligation language when refund questions are asked.

## 8) Client Review Checklist

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Please review and mark any edits needed for:

1. Tone of AI answers (more formal, more friendly, shorter, etc.).
2. Pricing wording clarity.
3. Mentorship positioning clarity (Cohort vs 1-on-1).
4. Refund wording comfort level.
5. Escalation triggers (too aggressive / too passive).
6. Any missing questions your team receives often.

## 9) Suggested Next Improvements

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1. Rename any legacy "Execute" wording in older knowledge-base entries to "Executive" for naming consistency.
2. Add 10-15 more approved Q&A entries from real customer conversations.
3. Add monthly review of escalated chats to tune AI responses and handoff timing.