

# TradeITM Homepage Chat - Client Review Packet

Updated for client review on February 16, 2026

## Purpose of this document

This packet explains, in plain language, how the homepage chat currently works, what it can answer today, when it passes a conversation to a live team member, and how you can request improvements.

## How the chat currently works (simple version)

- A visitor asks a question in the homepage chat box.
- The AI answers first using a built-in Q&A; knowledge library.
- If needed, the conversation can be escalated to a live team member.
- If escalation is needed and no email is on file, the system asks for an email first so follow-up is possible.
- The admin team can manually take over any conversation at any time.

## Current live snapshot (at audit time)

Metric	Current Value
Total conversations	31
AI-handled conversations	19 (61%)
Human-handled conversations	12 (39%)
Active escalated conversations	2
Active pending-escalation conversations	4

## What the AI can answer today (Q&A; library summary)

Topic	Example Questions	Current Answer Style
Pricing	How much does it cost? Core vs Pro vs Executive	Explains 3 tiers, monthly pricing, and guarantee language.
Proof / track record	Do you have proof? Can I see results?	References performance framing and recent wins examples.
Service details	How does it work? What do I get?	Explains alerts, timing, and Discord delivery.
FAQ	Refund? How many alerts? Beginner friendly?	Provides policy and expectation-setting answers.
Mentorship	What is the 90-day mentorship? How do I apply?	Explains 90-day mentorship path and qualification flow.
Platform	What broker or app can I use?	States broker/platform flexibility.

## Current escalation rules (when live team steps in)

- Visitor asks to speak to a real person.
- Visitor shows frustration/anger or strong complaint language.
- High purchase intent (for example: ready to join now).
- High-value tier or 90-day mentorship interest.
- Billing/refund/cancellation concerns.
- Low AI confidence in the answer.
- Long back-and-forth conversation that likely needs a human touch.

Note: If no email is available, the chat asks for an email before final handoff so your team can follow up.

## Example questions and answers (client-facing drafts)

These are sample answer styles for review and approval.

Example Question	Example Answer (Draft)
How much does membership cost?	We offer Core, Pro, and Executive tiers. I can break down each tier in 30 seconds and he
How does the 90-day mentorship work?	Our 90-day mentorship is a guided program focused on execution, risk management, and
I want to talk to a real person.	Absolutely. I can connect you with our team now. If we get disconnected, what is the bes
Do you guarantee profits?	No service can guarantee profits. We focus on process, risk controls, and disciplined exe
Can I get a refund?	Membership fees are generally non-refundable. If there is a billing error or account issue
I am brand new. Is this for me?	Yes. We can start you with a structured path and risk-first guidance so you build consiste

## Refund-policy wording recommendation (to avoid automatic refund promises)

Recommended default wording in chat: "Membership fees are generally non-refundable. If there is a billing error or technical access issue, our support team reviews requests case-by-case."

Avoid in chat copy: "No questions asked refund" or any unconditional refund promise.

## Client review worksheet: response improvements

Use this page to mark what you want changed. Keep comments in plain language. Your team can convert these directly into AI response updates.

Area to Review	What to keep	What to change	Priority (High/Med/Low)
Pricing responses			
90-day mentorship responses			
Refund-policy wording			
Escalation wording/tone			
Beginner guidance			
Proof/result language			
Any other response category			

Prepared by: TradeITM internal audit support