TradeITM Homepage Chat - Client Review Packet

Prepared 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.
Proof / track record	Do you have proof? Can I see results?	References win-rate and sample wins.
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 Precision Cohort? How do I apply?	Explains yearly mentorship and application path.
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 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.

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/L
Pricing responses			
Proof/results responses			
Refund/guarantee responses			
Mentorship responses			
Beginner guidance			
Escalation wording/tone			
Any other response category			

Suggested questions for your client reviewer

- Do these responses sound like your brand voice?
- Are there any promises or claims that should be softened or removed?
- Where should the AI be shorter, clearer, or more direct?
- At what point should the AI stop and immediately escalate to a person?
- Are there any words, phrases, or topics that should never be used?

After client feedback (implementation checklist)

- Update or add Q&A; entries in the Knowledge Base.
- Adjust escalation rules and trigger phrases as approved.
- Standardize tier naming (Executive vs Execute) across all responses.

- Run a quick 10-question test script and validate tone and accuracy.
- Approve and publish the revised response set.

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