

TradeITM Homepage Chat Review Packet

Prepared for client review

Date: February 16, 2026

1) What This Document Covers

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

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)

- 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)

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) Escalation Rules (When Human Takes Over)

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.

6) Guardrails for AI Responses

- 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.

7) Client Review Checklist

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.

8) Suggested Next Improvements

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.