

# Industry Rockstar Customer Support: what customers ask, why, and how to fix it

Analysis of 47,632 Freshdesk tickets created 21 Oct 2025 – 21 Oct 2026. It shows what customers ask, which channels they use, the root causes, and a 30/60/90-day plan across the Facebook group, onboarding, a shared MyGentic CS brain and Freshdesk.

## 01 Executive summary

**19,561**

genuine customer tickets in 12 months (of 47,632 total; the rest is spam, system mail and outbound)

**17.2%**

about live sessions, Zoom links, schedules and replays, the #1 named theme

**0%**

arrive via the Facebook channel; 99.98% arrive by email

**43.1%**

are replies or forwards to IR emails ("Re:/"Fwd:"), mostly campaigns sent in Kane & Alessia's name

## What we found

- **Most volume is "where/when/how do I..." questions, not complex problems.** The top themes are live sessions/Zoom/replays (17.2%), certification steps (13.7%), pre-sales (6.7%), refunds/cancellations (6.2%), mentorship (5.9%) and login/access (5.5%).
- **The Facebook group is a hidden dependency.** No tickets come in via Facebook (it isn't connected to Freshdesk as a channel), but 5.5% of tickets mention the group, and agents send people to Facebook/Guides in about 26% of replies, because that's the only place Zoom links and replays are kept.
- **Onboarding leaks.** About 24% of agent replies say "check your spam", 11% have to locate the purchase email, and customers juggle 6–7 platforms with no single "Start Here".
- **Policy ambiguity creates tickets and risk.** Refund windows, finance charges, the certification sequence and partner seats are applied inconsistently. 22 items are marked **NEEDS CONFIRMATION** and must be settled before any self-serve tool answers them.
- **Freshdesk is under-configured.** There are no solution articles, 30 canned responses (several outdated or missing links), and no web forms. Campaign replies flood the main inbox.

**Combined estimated deflection:** about **25–35%** of genuine ticket volume (≈5,000–7,000 tickets a year) if all four levers are delivered. The levers overlap, so the individual estimates below (sum ≈37%) are *not* additive.

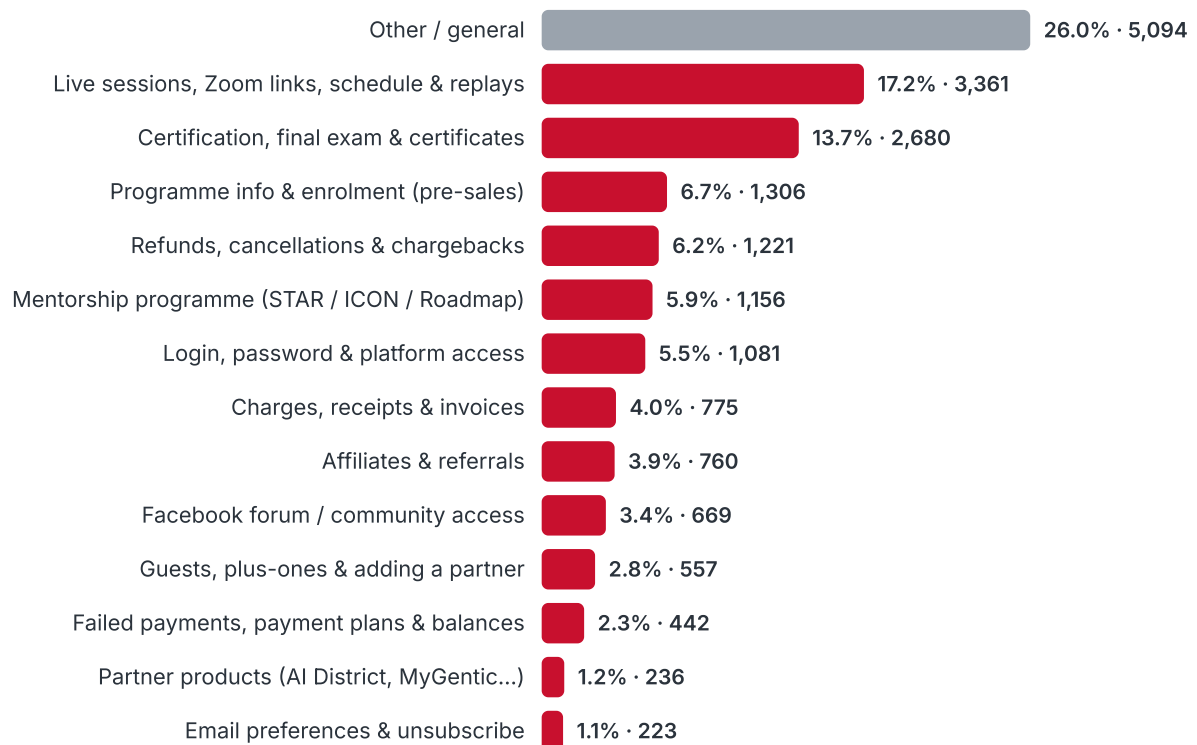
**ESTIMATE**

## Top 5 recommendations

1. **Stop hiding the essentials in Facebook.** Put the Zoom link, passcode, calendar (.ics with the link inside) and replay policy in every reminder email and on a "Live sessions" page per programme.
2. **Build a "Start Here" onboarding journey per programme** (proposed in HubSpot, or in Keap if HubSpot isn't in scope): logins, which group to join and exactly how, the certification checklist, and who supports partner products. Fix welcome-email deliverability too.
3. **Confirm the 22 policy items, then launch the shared MyGentic CS brain:** self-serve for customers and draft-assist for agents, seeded from the Seed Q&A doc, with refunds and disputes always handed to a human.
4. **Fix Freshdesk basics in 30 days:** route campaign replies away from the main queue, auto-handle unsubscribes/affiliates/partner keywords, repair the canned responses, publish the top 20 answers as solution articles, and add web forms that require the purchase email.
5. **Move the paid community from Facebook to Circle** (where purchase = access) in phases. Keep Facebook for public marketing.

## 02 What customers ask: themes & questions

Share of 19,561 genuine customer tickets (21 Oct 2025 – 21 Oct 2026). Each ticket is assigned to one primary theme by keyword rules; see the methodology section. Percentages are estimates from keyword clustering.



"Other / general" (26.0%) is mostly thank-you notes, replies to campaign emails, personal updates and one-off requests that don't match a theme. Excluding it, the named themes cover 14,467

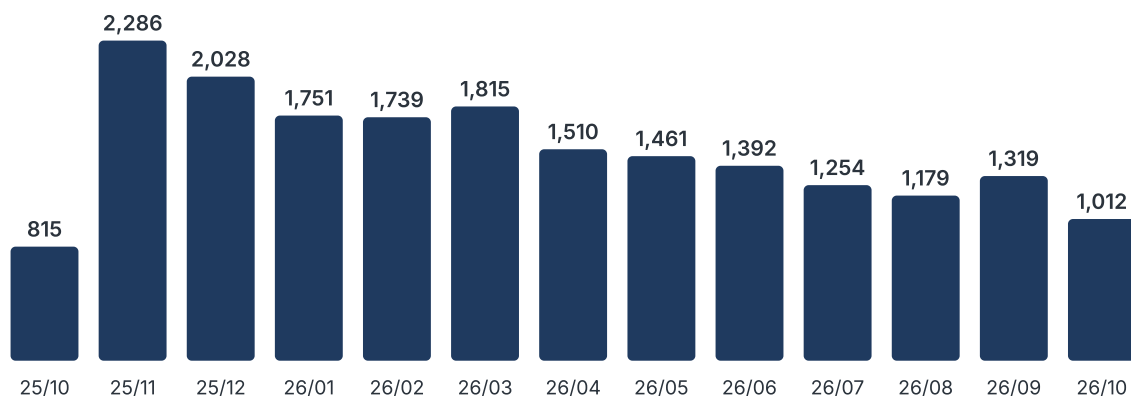
tickets; live sessions alone are 23.2% of that.

## Most frequent specific questions

A ticket can match more than one question, so the shares don't add up to 100%. Matching uses the customer's own text with quoted email history removed.

| QUESTION / PHRASING                             | TICKETS | % OF GENUINE |
|-------------------------------------------------|---------|--------------|
| Zoom link, session time, schedule or calendar   | 2,415   | 12.3%        |
| Recording / replay of a session                 | 1,855   | 9.5%         |
| What's included / price / more info (pre-sales) | 1,723   | 8.8%         |
| Login, password or "can't access"               | 1,082   | 5.5%         |
| Refund or cancellation request                  | 982     | 5.0%         |
| Affiliate / referral / commission               | 868     | 4.4%         |
| Mentor / mentorship questions                   | 788     | 4.0%         |
| Trustpilot review / review gift                 | 743     | 3.8%         |
| Guest, plus-one or bonus ticket                 | 659     | 3.4%         |
| "Where do I start?" / overwhelmed / confused    | 604     | 3.1%         |
| Error, not loading, locked content              | 568     | 2.9%         |
| In-person event / venue                         | 533     | 2.7%         |
| Never received login / welcome / access email   | 432     | 2.2%         |
| Roadmap Call / assessments / Jumpstart          | 369     | 1.9%         |
| Final exam                                      | 341     | 1.7%         |
| IR Brain / MCP Brain / MyGentic / Katalyst      | 316     | 1.6%         |
| AI District / Rockstar Advisor                  | 313     | 1.6%         |
| Testimonial for certification                   | 292     | 1.5%         |
| Certificate not received                        | 266     | 1.4%         |
| Upgrade / apply credit                          | 251     | 1.3%         |

## Monthly volume of genuine tickets



Oct 2025 and Oct 2026 are partial months. Volume peaked in Nov–Dec 2025 (Start At The Top / year-end promotions) and has fallen by about 40% since.

### 03 Channels: Facebook page vs everything else

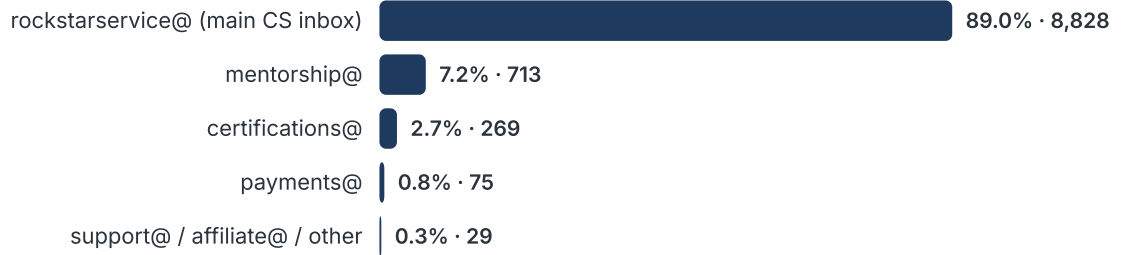
From the Freshdesk source field on every ticket in the period:

| SOURCE (FRESHDESK)                              | ALL TICKETS | GENUINE CUSTOMER TICKETS | % OF GENUINE |
|-------------------------------------------------|-------------|--------------------------|--------------|
| Email                                           | 42,199      | 19,557                   | 99.98%       |
| Outbound email (agent-initiated)                | 5,429       | n/a                      | n/a          |
| Portal (Freshdesk web form)                     | 2           | 2                        | 0.01%        |
| Phone                                           | 2           | 2                        | 0.01%        |
| <b>Facebook (page messages / comments)</b>      | <b>0</b>    | <b>0</b>                 | <b>0%</b>    |
| Chat, WhatsApp, X/Twitter, feedback widget, bot | 0           | 0                        | 0%           |

**Interpretation:** the Facebook page isn't connected to Freshdesk (or isn't used as a support channel), so any messages sent to the IR Facebook page are handled outside the helpdesk and aren't counted here. If page messages are answered by someone else today, that workload is invisible to this analysis.

### Which inbox they write to

Based on 9,914 genuine tickets that have recipient data (the most recent ~30k tickets pulled).



## The Facebook *group* inside email tickets

No mention 94.5%

- **1,073** genuine tickets (5.5%) mention the Facebook group or forum.
- **562** (2.9% of all genuine tickets, 52% of Facebook mentions) are about **joining or access**: pending or declined requests, the wrong group, or "can't find the link".
- A further 296 Facebook-mention tickets ask for Zoom links or passcodes and 107 ask for recordings, because those live in the group.
- In the other direction, agents point customers **to** Facebook/the Guides in about **26%** of analysed replies.

Customers almost never use Facebook to *contact* support, but the Facebook group is a key *dependency* behind a large share of email tickets.

## 04 Root causes & best fixes, by theme

Root causes come from reading 1,558 tickets in full (1,190 with agent replies). Evidence percentages marked "of agent replies" come from that sample; other percentages are of all 19,561 genuine tickets. Ticket numbers are Freshdesk IDs for internal verification.

## 1 · Live sessions, Zoom links, schedules & replays

17.2% · 3,361

### ROOT CAUSE

- Zoom links, passcodes, schedules and replays live **only** in each programme's Facebook group "Guides". If you aren't in the group, or don't use Facebook, you can't find them.
- The programme Google Calendar entries **don't contain the Zoom link**, and all times are set in Pacific Time while customers are worldwide.
- Rolling cohorts mean days and times change, so customers can't rely on what they were told at enrolment.
- Free summits/webinars aren't recorded, but invitations don't say so clearly, which drives a steady stream of "is there a replay?" emails.

### EVIDENCE

- "Zoom link / time / schedule" phrasing appears in **12.3%** of genuine tickets, and "recording/replay" in **9.5%**.
- In the analysed sample, **26%** of agent replies send the customer to Facebook / the Guides, and **13%** mention the calendar.
- Several tickets report campaign emails with the wrong date or a broken link (e.g. #89694, #96684).

### BEST FIX

- Put the **Zoom link, passcode, local-time converter link and replay policy in every reminder email** and in the calendar invite (.ics), not only in Facebook.
- One public "Live sessions" page per programme (schedule, link, replay location: Facebook for 7 days, then the Academy).
- Add one line to every free-event invite: "This session is not recorded".
- Canned response + brain answer for "missed session / where is the replay".

Example tickets: #99184, #92054, #96672, #108730, #95018

## 2 · Certification: requirements, final exam, certificates

13.7% · 2,680

### ROOT CAUSE

- There's no single published checklist (100% of lessons, final exam, client testimonial, paid in full), so students find each step out one at a time.
- The final exam is **unlocked by hand**, and agents apply the steps in different orders (exam first vs testimonial first). This is a NEEDS CONFIRMATION item.
- Certificates are issued by hand in Accredible, which creates "where is my certificate?" chasers.

### EVIDENCE

- Exam questions: 1.7%; testimonial: 1.5%; certificate not received: 1.4% of genuine tickets.
- Certification is the largest theme in the deep-read sample (167 of 1,558 tickets), and the Certifications mailbox receives about 2.7% of inbound mail.
- Conflicting sequence: #91510 (exam unlocked first) vs #105641 (testimonial required first).

### BEST FIX

- Publish a **"Path to Certification" checklist** in the Academy and the welcome email, after IR confirms the official order.
- A **testimonial + exam-score submission form** (not email) that creates a Freshdesk ticket tagged Certifications; unlock the exam automatically once completion hits 100% where the LMS allows it.
- Automated "your certificate is being issued" status email; Accredible issuance in batches on a stated cadence.

Example tickets: #90750, #102097, #97929, #105641, #91510

### 3 · Programme info & pre-sales questions

6.7% · 1,306

#### ROOT CAUSE

- Prices, bundles and programme names changed during the year (e.g. Consultant pricing and the "Architect" package), and webinar offers differ from the website.
- Prospects reply to campaign emails asking "what's included / how much", and CS has no single comparison page to point to.

#### EVIDENCE

- "What's included / price / more info" phrasing appears in 8.8% of genuine tickets; upgrade/credit questions in 1.3%.
- Agents send enrolment links rather than quoting prices. Price changes are listed under NEEDS CONFIRMATION (C1, C2, C7).

#### BEST FIX

- One maintained **programme comparison page** (what's included, format, duration, links), owned by Marketing and linked from every campaign email.
- Brain answers pre-sales questions **from that page only**, never quoting prices that aren't confirmed, and hands hot leads to Sales.

Example tickets: #95694, #106490, #107078, #85535

### 4 · Refunds, cancellations & chargebacks

6.2% · 1,221

#### ROOT CAUSE

- Refund windows differ by product (Sprint 3-day cooling-off vs certifications 14-day trial) and customers hear different things on webinars, so expectations clash with the T&Cs.
- The Satisfaction Guarantee timeline isn't stated anywhere customers can see it.
- Payment-plan finance charges surprise people, which turns into cancellation requests.

#### EVIDENCE

- Refund/cancel requests: 5.0% of genuine tickets; chargeback/dispute language: 52 tickets.
- Policy conflicts are listed under NEEDS CONFIRMATION A1, A4, A5, A8 and B3, e.g. #104088 (a 2-week refund promise for the Sprint).

#### BEST FIX

- Publish **one plain-English refund page** per programme (window, conditions, how to request) and repeat it on the checkout and in the welcome email. IR must confirm the windows first.
- A refund-request web form with required fields (purchase email, programme, date, reason) routed to Payments, with save offers scripted.
- Keep refunds **human-only** in the brain: it explains the policy and collects details, but never promises an outcome.

Example tickets: #75155, #104753, #91475, #84953

## 5 · Login, access & "where do I start?"

5.5% · 1,081

### ROOT CAUSE

- Welcome/login emails **land in spam** or go to a different address from the one the customer uses.
- Customers juggle up to 6 or 7 destinations (AI Assisted Academy, the Facebook groups, the mentorship site/dashboard, Accredible, AI District, MyGentic, Katalyst) with no single "Start Here".
- Purchase email ≠ the email they write in from, so agents first have to locate the account.

### EVIDENCE

- In the analysed sample, **24%** of agent replies tell the customer to check spam/junk/promotions, **11%** have to locate the purchase/account email, and **8%** resend an email/invoice/link.
- "Where do I start / overwhelmed" phrasing appears in 3.1% of genuine tickets; "never received login/welcome" in 2.2%.

### BEST FIX

- Check email deliverability (SPF/DKIM/DMARC, sending domain, plain-text welcome email) on the welcome/login sequence.
- A **single "Start Here" hub** per programme listing every destination in order, linked from every email footer.
- Self-serve "resend my access" form keyed on the purchase email; the brain asks for the purchase email up front.

Example tickets: #95673, #97366, #99625, #92154, #88884

## 6 · Mentorship onboarding (STAR / ICON / Roadmap)

5.9% · 1,156

### ROOT CAUSE

- The prerequisites for the Roadmap Call (Jumpstart homework or My Rockstar Business PDF, plus the 3 assessments) aren't clear, and the canned response names a 2025 coach.
- Agreement (Scribe), dashboard access and onboarding call happen in a sequence that isn't written down for the customer.

### EVIDENCE

- Roadmap/assessment questions: 1.9%; mentor questions: 4.0%. The Mentorship mailbox handles about 7% of inbound mail.
- NEEDS CONFIRMATION I1 and I3 (Roadmap coach, cooling-off, tiers).

### BEST FIX

- A mentorship onboarding email sequence (agreement → dashboard → assessments → Roadmap booking), with a progress checklist on the dashboard.
- Update the outdated canned response "Before booking your Roadmap call".

Example tickets: #105779, #105342, #108124, #107290

## 7 · Facebook group access

3.4% · 669

### ROOT CAUSE

- Join requests are **declined automatically** unless the person agrees to the rules and enters the exact purchase email. People use another email, skip a question, or have no or locked Facebook accounts.
- Approval is manual and done by agents. There are 11+ separate groups, so people join the wrong one.

### EVIDENCE

- **1,073** genuine tickets (5.5%) mention the Facebook group/forum; **562** (2.9%) are about joining or access.
- 10% of analysed agent replies explain the group rules / exact-email requirement.

### BEST FIX

- Put the group link and a **screenshot of the 3 membership answers** in the welcome email; auto-approve when the email matches a purchase (member-list export or Zapier).
- Longer term: move the paid community to a platform where purchase = access (see the platform section).

Example tickets: #97419, #105762, #86828, #96604

## 8 · Charges, receipts & failed payments

6.2% · 1,217

### ROOT CAUSE

- Multiple receipts per purchase, finance charges on payment plans, and declined cards flagged by banks during live-event enrolment spikes.
- Customers can't see their own payment schedule or download invoices.

### EVIDENCE

- Declined/failed payment phrasing: 98 tickets; pause/extension requests: 138; finance-charge questions: 18.
- NEEDS CONFIRMATION B2, B3, B4.

### BEST FIX

- A dunning sequence with a "Pay Now" link and a "call your bank" tip, sent automatically on failure.
- A customer billing portal (or a Keap/Stripe customer link) to view the schedule and download invoices.

Example tickets: #107797, #106998, #92531, #99169

## 9 · Partner products & misrouted requests

1.2% · 236

### ROOT CAUSE

- Bundled partner products (MyGentic/IR Brain, AI District, Katalyst) and partner-run events (John Lee, Real Success) have their own support, but customers write to IR.

### EVIDENCE

- 18% of analysed agent replies mention a partner product or company; MyGentic/IR Brain phrasing appears in 316 tickets and AI District in 313.

### BEST FIX

- A "Who supports what" table in the welcome email and the brain; Freshdesk auto-replies with the partner's contact when a partner keyword is detected.

Example tickets: #93565, #95936, #98654, #100773

## Cross-cutting · Replies to campaign emails land in the CS queue

29.8% · 5,824

### ROOT CAUSE

- Marketing emails are sent in Kane & Alessia's name with a reply-to that goes into the main CS inbox. Every "Thanks!", "Is this recorded?" and "Remove me" becomes a ticket.

### EVIDENCE

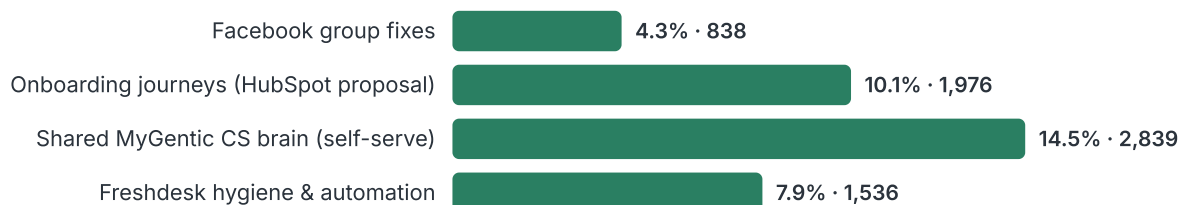
- 43.1% of genuine tickets have a "Re:/Fwd:" subject; about 29.8% quote an email signed by Kane & Alessia.
- Unsubscribe requests: 223 tickets.

### BEST FIX

- Give campaign emails a separate reply-to (e.g. a "community@" mailbox) with an auto-reply that links the help hub, and a Freshdesk rule that tags them and keeps them out of the SLA queue.
- An unsubscribe link in every campaign email, plus automation to process "remove me" emails.

## 05 Recommendations by lever

Each lever is sized as **theme volume × an assumed deflection rate** (shown for each lever). All figures are **estimates** for planning, not measurements, and the levers overlap.



| LEVER & WHAT TO DO                                                                                                                                                                                                                                         | TICKETS / YR DEFLECTED       | ASSUMPTIONS (THEME × RATE)                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Facebook group fixes</b><br>Pinned "Start Here" + Guides in every group; auto-approve join requests by matching the purchase email (Zapier/Keap or a member-list export); put the group link and the exact join instructions in the welcome email.      | ≈840<br>≈4.3% <b>EST.</b>    | Facebook forum / community access × 50%; Live sessions × 15%                                                                                        |
| <b>Onboarding journeys (HubSpot proposal)</b><br>Day 0 / 1 / 3 / 7 sequences per programme: logins, one "Start Here" link, Zoom link + calendar (.ics with the link inside), replay policy, which group to join and how, partner-product support contacts. | ≈1,980<br>≈10.1% <b>EST.</b> | Login × 40%; Live sessions × 25%; Mentorship programme × 20%; Certification × 10%; Facebook forum / community access × 20%; Partner companies × 30% |

### Shared MyGentic CS brain (self-serve)

Customer-facing assistant on the help page / Academy / community, seeded from the Seed Q&A doc; it answers policy-safe questions and hands everything else to Freshdesk with the purchase email captured.

≈2,840  
≈14.5% **EST.**

Programme info & enrolment × 30%; Live sessions × 20%; Certification × 20%; Refunds × 10%; Affiliates & referrals × 50%; Guests × 20%; Charges × 15%; Other / general × 10%

### Freshdesk hygiene & automation

Route/auto-close replies to campaign emails, auto-handle unsubscribes, affiliate auto-response, web forms with required fields (purchase email, programme), fix & expand canned responses, publish solution articles.

≈1,540  
≈7.9% **EST.**

Email preferences & unsubscribe × 80%; Affiliates & referrals × 30%; Other / general × 20%; Guests × 20%

Estimates. The four levers overlap (e.g. a Zoom-link question fixed by onboarding emails can't also be deflected by the brain). A realistic combined target is **25–35% fewer genuine tickets** within about 6 months. Agent-assist (brain drafting replies inside Freshdesk) is separate from this and could cut handling time on the rest by an estimated 30–40%. **EST.**

## A · The Facebook group

- Pin a standard **"Start Here" post + Guides** in every programme group: Zoom link, schedule, replay location (7 days here, then the Academy), certification checklist, support email.
- Rewrite the membership questions so the purchase-email question is unmissable, and show the 3 answers in the welcome email.
- Automate approval: match join requests against a daily export of purchasers (or a Zapier/Keap flow), so agents stop approving by hand.
- Consolidate the 11+ groups to one per active programme, and archive legacy groups with a redirect post.
- **Never** make Facebook the *only* home for links and replays. Mirror them in email and the Academy.

## B · HubSpot onboarding

**PROPOSAL: HUBSPOT SCOPE NOT CONFIRMED**

Tickets show IR's checkout and emails run on Keap today. Whether HubSpot will own lifecycle email for IR isn't confirmed, so the same journeys could be built in Keap.

- **Day 0:** welcome with logins (plain-text, spam-safe), purchase email reminder, and one "Start Here" hub link.
- **Day 1:** "Join your community" with the exact steps and the membership answers.
- **Before each live session:** Zoom link + passcode + .ics + local-time link + "replay will be in..."
- **Day 7 / 30:** progress nudges; the certification checklist for certification programmes; the Roadmap prerequisites for mentorship.
- Lifecycle properties (programme, cohort, purchase email, partner products) make it possible to segment and to show the brain/agents who the customer is.

## C · A shared MyGentic CS brain

- **Seed:** the "IR Customer Support Brain — Seed Q&A (DRAFT)" (53 Q&As), after the 22 NEEDS CONFIRMATION items are settled.
- **Customer self-serve:** embedded on the help page, Academy and community. It answers how-to, schedule, replay, certification-steps, affiliate and partner-routing questions; captures the purchase email; and opens a Freshdesk ticket when it can't answer.
- **Agent assist:** agents ask it for the right policy answer and canned text; it drafts replies for review.
- **Guardrails:** no price quotes unless confirmed; refunds, chargebacks, hardship and complaints always go to a human; answers cite the source article.
- **Feedback loop:** unanswered questions are reviewed weekly and become new Q&As / solution articles.

## D · Freshdesk itself

- **Solution articles:** none exist today. Publish the top 20 Q&As as public articles (this also feeds the brain and the Freshdesk widget).
- **Canned responses:** audit the 30 existing ones (several are missing links or bodies; the Roadmap one names a 2025 coach) and add ones for the top 20 questions.
- **Automations:** tag and route campaign replies; auto-respond to unsubscribe, affiliate and partner-product keywords; send Certification/Mentorship/Payments mail to the right groups; set SLA timers. (Median first agent reply in the sample was about 4 hours; the slowest 10% took more than 46 hours.)
- **Web forms:** a help widget/portal with required fields (purchase email, programme, topic) to cut the "which account is this?" back-and-forth (needed in about 11% of replies).
- **Reporting:** a mandatory "Topic" field on close, so this analysis becomes a live dashboard instead of a keyword estimate.

## 06 Community platform: Facebook vs Circle vs custom

# portal

## Keep the Facebook groups

### Pros

- No migration; members already there; zero platform cost.
- Good engagement and discovery for marketing.

### Cons (from the data)

- 2.9% of tickets are about getting in; approval is manual and fails if the email doesn't match.
- Links and replays are locked inside it, so agents point people there in about 26% of replies.
- Excludes customers without, or locked out of, Facebook (e.g. #86828).
- No link between purchase and access, no SSO, and limited search and structure.

## Move paid community to Circle



### Pros

- Access can be granted automatically on purchase (via integrations or Zapier), which removes the join-request problem.
- Events with Zoom links, courses/replays, searchable posts and member profiles in one place.
- Email sign-in works for members without Facebook; you can embed the CS brain.
- Already familiar: tickets show IR Brain / MyGentic members use a Circle community (#94706).

### Cons

- Migration effort and change management for the existing groups.
- Subscription cost (to be confirmed; not priced here).
- Engagement needs active moderation to match Facebook.

## Build a custom portal

### Pros

- Full control and a single branded hub.
- Could unify the Academy, community, billing and support.

### Cons

- Highest cost and longest time to value. Nothing in the data needs custom functionality.
- Ongoing engineering and hosting burden; it rebuilds what Circle already does.
- Delays the fixes that matter most (onboarding and information placement).

**Recommendation:** move the **paid programme communities to Circle** in phases, starting with the next new cohort, then migrating active groups. Keep the public Facebook presence for marketing and top-of-funnel. Don't build a custom portal; the support problems come from information placement and access provisioning, which onboarding emails plus Circle solve. Until the move, apply the Facebook fixes in lever A.

## 07 Prioritised action plan

### Quick wins · 0–30 days

1. Settle the 22 NEEDS CONFIRMATION policy items (owner: Head of Client Services + Kane).
2. Add the Zoom link, passcode, .ics and replay policy to every session reminder; add "not recorded" to free-event invites.
3. Fix the 30 canned responses; add ones for the top 20 questions.
4. Freshdesk rules: tag/route campaign replies, auto-handle unsubscribe, affiliate and partner keywords.
5. Pin a "Start Here" post in every Facebook group; rewrite the membership questions.
6. Check welcome-email deliverability (SPF/DKIM/DMARC).

### 31–60 days

1. Publish the top 20 solution articles and a "Start Here" hub per programme.
2. Launch the MyGentic CS brain in **agent-assist** mode; measure answer accuracy.
3. Build the onboarding journeys (HubSpot if confirmed, otherwise Keap) for the Sprint and certifications first.
4. Web forms with required purchase email and topic; a mandatory Topic field on close.
5. A certification checklist + submission form; dunning sequence for failed payments.

### 61–90 days

1. Turn on **customer self-serve** for the brain on the help page and in the Academy.
2. Pilot Circle with the next new cohort (purchase = access, events, replays).
3. Mentorship onboarding sequence; automated Facebook group approval for the remaining groups.
4. A live dashboard from the Topic field; re-measure against this baseline (target: 25–35% fewer genuine tickets).
5. Decide the full Circle migration based on the pilot.

## 08 NEEDS CONFIRMATION before anything goes self-serve

From the Seed Q&A document. These policies and prices are applied inconsistently in tickets. This report doesn't state them; IR must confirm each one.

1. **A1** — I want to cancel and get a refund. Am I eligible?

Policy conflict: one agent reply (#104088) told a prospect the \$497 Sprint has a 2-week refund guarantee, and a customer quoted a webinar promise of 14 days on a Sprint deposit (#92345). Most replies say 3 days for the Sprint and 14 days for certifications. Confirm the current windows for each programme, and whether webinar/event offers (e.g. a '2 Week Trial Opportunity') change them.

2. **A4** — What is the Satisfaction Guarantee?

The 'defined timeline' after completion is never stated in tickets. Confirm the exact deadline and what counts as acceptable business records.

3. **A5** — I have a medical, financial or family hardship. Can I get a refund?  
Confirm whether any discretionary hardship exception exists outside the refund window, and who can approve it. Some replies hint that the Head of Client Services reviews these cases.
4. **A6** — I bought through a partner event (e.g. John Lee, Real Success). Who handles my refund or payment change?  
Confirm the full list of partner channels (some tickets also mention Swedish Wealth Institute and Financial Freedom Summit purchases) and the correct partner support address for each.
5. **A8** — I'm going to dispute the charge with my bank / file a complaint.  
Confirm who owns chargeback responses and formal complaints, and whether frontline agents should reply at all once a dispute is opened.
6. **B2** — Can I pay another way (PayPal, a different card, split the payment)?  
Confirm whether splitting a balance across several invoices/cards is allowed, and whether PayPal is still accepted.
7. **B3** — Why is there an extra charge on my payment plan?  
The finance-charge amounts quoted differ by programme and over time: Consultant \$300 (Jul-Oct 2026) vs \$450 (Apr 2026); CMO \$370. Confirm the current price and finance-charge table, and the rules for removing the charge.
8. **B4** — Can I pause or delay an instalment?  
Confirm who can approve pauses/extensions, the maximum length, and whether access is always suspended during a pause.
9. **C1** — What does the programme include, and how much is it?  
Prices quoted in tickets changed over the year (e.g. Consultant \$2,997 in Feb-Apr 2026 vs \$1,997 from mid-2026; 'Architect' package). Confirm the current price list, the programme names/links, and which bonuses come with each programme before the brain quotes any figure.
10. **C2** — I bought the Sprint. Can I upgrade to the Consultant Certification?  
Confirm the one-month upgrade window and the current upgrade pricing.
11. **C7** — I couldn't decide during the webinar. Can I still get the webinar price?  
Confirm whether event pricing can be honoured after the event, and for how long.
12. **D6** — The old AI portal (ai-portal.industryrockstar.ai) / where are the AI tools? What about AI District credits?  
Confirm the AI District bonus-credit amounts and expiry rules (tickets show different expiry dates), and which programmes include Rockstar Advisor.
13. **F1** — When are the live sessions, and where's the Zoom link?  
Days and times quoted for live sessions differ between cohorts and programmes. Confirm whether the brain should ever quote session times, or always point to the calendar.
14. **F4** — Is Start At The Top recorded / in person / when is the next one?  
Confirm how long Start At The Top replays stay up, and whether bonus sessions follow the same rule.
15. **G1** — Can I bring a guest to Start At The Top?  
Confirm which programmes include the free plus-one and whether there's a limit of one guest per event.
16. **G2** — Can I add my spouse / business partner / colleague to my programme?  
Confirm which programmes and tiers include a partner seat (Sprint? mentorship tiers?) and whether a colleague can be added to the Sprint at no cost as standard.
17. **H2** — My final exam is locked. How do I unlock it?  
The order is inconsistent: some agents unlock the exam first and ask for the testimonial afterwards (#91510); others require the testimonial before unlocking (#105641). Confirm the standard sequence and the exam release dates for each cohort.
18. **I1** — How do I book my Roadmap Call?  
The Roadmap Call coach named in tickets changed during the year (the 2025 canned

response names a different coach from 2026 tickets). Confirm who runs Roadmap Calls now and update the canned response "Before booking your Roadmap call".

19. **I3** — I can't afford to continue the mentorship.

Confirm the mentorship cooling-off period, the tier inclusions and prices (STAR / ICON / Influencer), and the agreement length (one reply says 12 months).

20. **I4** — How do I claim the free 3 months of Katalyst CRM?

Confirm the Katalyst code is still valid and which tiers include it.

21. **J1** — Do you have an affiliate / referral programme? How do I join?

Confirm whether affiliate@ or affiliates@ is the correct address (both appear), and whether the request form is the standard route.

22. **K1** — Questions about the IR Brain / MCP Brain / MyGentic (setup, sessions, recordings, billing).

Confirm which cohorts/tiers include IR Brain access (tickets mention June and September 2026 cohorts and ICON) and how it's provisioned.

Also outstanding: several canned responses are broken or outdated, and the Freshdesk knowledge base is empty.

## 09 Methodology & limitations

- **Data:** Freshdesk API v2, read-only. Ticket metadata and descriptions for all 47,632 tickets created 21 Oct 2025 – 21 Oct 2026; full conversations for a stratified sample of 1,558 tickets (1,190 with an agent reply), weighted to recent months.
- **"Genuine customer ticket":** inbound (not agent-initiated), from a requester with  $\leq 25$  tickets in the period (filters out system senders and bulk senders), and a subject that doesn't match spam, newsletter, auto-reply or system-notification patterns. Result: 19,561 tickets (41% of all).
- **Themes:** keyword/regex clustering over the subject and the customer's own text (quoted email history and signatures removed). Each ticket gets **one primary theme** by priority order; question-level counts allow multiple matches. These are **estimates**: keyword rules miss paraphrases and occasionally misclassify, and "Other / general" absorbs ambiguous tickets.
- **Root-cause evidence** ("% of agent replies") comes from regex matches in agent replies in the deep-read sample. It is indicative, not exact.
- **Channel** uses the Freshdesk source field. Messages handled outside Freshdesk (e.g. Facebook page inbox, Messenger, DMs to staff) aren't visible.
- **Deflection** figures are planning estimates (theme volume  $\times$  assumed rate) and aren't additive.
- **Privacy:** no customer names, emails or phone numbers appear in this report. Ticket IDs are included for internal verification only.

Prepared for Wesley Longueira · Data pulled from Freshdesk 21 Oct 2026 (SAST) · Companion document: "IR Customer Support Brain — Seed Q&A (DRAFT)".