

Outreach script library

60 first message templates for WhatsApp, Telegram, LinkedIn and Instagram DM, split by how well you know the person: warm (you know them), lukewarm (a mutual or a shared place), cold (a public group, never spoken). Each one is a three line opener with one ask, a note on when to use it, and a warning on when not to.

The first message decides whether there is a second. Every template below follows the same rules: their name, how you know them or found them, one question, no link, under 40 words. Copy it, change one line so it could only have been sent to this person, send it. Then wait.

How to use this library

1. Find the channel, then the audience. Warm if you know them, lukewarm if a mutual or a shared group links you, cold if they posted in public and you have never spoken.
2. Read the "when" and the "not if" notes. The second one is the important one.
3. Change the brackets and at least one more line. Never send two the same.
4. One message, then wait. The follow up sequences are in the Follow up sequence templates.
5. The link comes after help, never in message one. The platform comes after the free thing, with the partner line and the risk line. Those lines are in the Voice and phone call scripts and the Conversion message library.

The rules every template follows

Rule	Why
Their name and the exact thing they said or did	It could only have been sent to them
Who you are and how you found them	Anonymous messages are reported
One question, about them	A question gets a reply. A statement gets ignored
No link, no channel name, no platform	Links in first messages are the top report trigger on every app
Under 40 words	It is read on a lock screen
No money, no results, no "VIP"	Rule break and ban

Warm (you know them)

WhatsApp

#	Template	Message	Use when	Not if
1	The friend who mentioned it	Hi [name], it is [you]. You mentioned at [place] that you wanted to try trading. I started [time] ago and I am learning in public. Have you had a go yet?	They said it to your face once	They never mentioned trading. Do not invent the memory
2	The curious colleague	Hey [name], random one. You asked me last week what I was looking at on my phone. It was a chart. I have been learning to trade for [time], small and careful. Want me to show you what I mean sometime?	They asked, you deflected at the time	You work in a company with rules about this. Check first
3	Family, honest	Hi [name], you know I have been doing the trading thing. Not asking you to do it, but I made a one page checklist of what I wish I knew. Want it? Zero pressure.	Family who are curious, not sceptical	Family who have told you they think it is gambling. Leave it
4	The ex trader friend	[name], you used to trade, right? I am [time] in and finally understand why you said size matters. Still at it, or fully out?	A friend who traded before	They lost badly and it is a sore point
5	The one who asked on your status	Hey, thanks for the reply on my status. What got you curious, the chart or the losing part?	Anyone who replied to a status	They replied with a joke. Reply with a joke

Telegram

#	Template	Message	Use when	Not if
1	Joined your channel	Hi [name], [you] here, saw you joined. Quick one so I know what to post: have you traded before, or starting from zero?	Every new member, same day	They joined from a swap and are clearly a trader with their own channel
2	Messaged START	Here is the checklist: [link]. One question so I send the right things next: demo, real money, or neither yet?	Anyone who sent the keyword	Never. This one always works
3	Reacted to a post	Hey [name], thanks for the reaction on the [topic] post. What got you looking into trading?	Repeated reactors	A single reaction. Wait for two
4	Replied in the discussion group	Hi [name], good question under today's post. The short answer is [one line]. Want the longer version? I have it as one page.	Anyone who asked a real question	Anyone who argued. Answer in public only
5	Friend who trades	[name], saw you are still in the gold game. I set up a channel where I post every trade with the reasoning, losses too. Would value your eyes on it, not asking you to join anything.	Trader friends	Friends who run a competing channel. Offer a swap instead

LinkedIn

#	Template	Message	Use when	Not if
1	Old colleague	Hi [name], long time. I left [company] and ended up learning to trade, slowly and in public. Not a pitch. Curious whether you ever looked into it, or if it is a someday thing?	Past colleagues you got on with	Anyone at a firm with trading restrictions. Ask about the rules, not trading
2	Engaged on your post	Appreciated your comment on the [topic] post, [name]. Have you traded yourself, or still on the fence?	Commenters, not likers	Anyone whose comment was a correction. Thank them, no ask
3	Mutual connection intro	Hi [name], [mutual] suggested I say hello, she mentioned you asked her about trading. I write about it for people with a day job. Happy to connect.	Real introductions only	If the mutual did not actually suggest it
4	Same industry group	Hi [name], we are both in [group]. I share one trading lesson a week for professionals. Good to connect.	Group members who post	Members who never post. Low acceptance
5	Met at an event	Hi [name], we spoke at [event] about [thing]. The trading course I mentioned is in my featured section if it is ever useful. Good to connect properly.	Anyone you actually met	Anyone you saw across the room

Instagram DM

#	Template	Message	Use when	Not if
1	Replied to a story	Hey, thanks for the reply. What got you interested, the chart or the losing part?	Any story reply	Replies to a story with no trading in it
2	Sent the keyword	Here is the checklist: [link]. So I send the right things next: have you traded before?	Anyone who sent START	Never
3	Friend following for a while	[name], you have been watching my trading stories for months. Finally asking: curious, or just entertained?	Friends who view every story	Friends who have made it clear they think it is silly
4	Commented on a Reel	Hey [name], saw your comment on the stop loss Reel. Did it make sense or do you want the longer version?	Real comments with a question	"Nice" comments
5	Someone who tagged a friend	Hi [name], saw you tagged [friend] on the Reel. Are you two thinking about starting, or already trading?	Tags on educational Reels	Tags on funny Reels

Lukewarm (intro via mutual or shared place)

WhatsApp

#	Template	Message	Use when	Not if
1	Friend of a friend	Hi [name], [you] here, [mutual]'s friend. He said you asked him about trading. I am not an expert, I started this year, but happy to share what I wish I had known. Have you traded before?	The mutual told you to message	The mutual only mentioned them in passing. Ask the mutual to introduce you instead
2	Group member who asked	Hi [name], [you] from the [group] group. Saw your question about [topic]. Had the exact same confusion in month one. Did you get it sorted?	They asked in a group you are both in	The group bans DMs. Reply in the group
3	Introduced in a group chat	Hi [name], [mutual] added us to that chat last week. You said you were trying to understand leverage. One line: it multiplies size, so size is the thing to control. Want the one page on it?	Group chat introductions	You are not sure they said it
4	Referred by a client	Hi [name], [client] said you might want the beginner checklist he got from me. Here it is: [link]. Have you traded before, or starting fresh?	A client gave you the number with their friend's OK	The client did not tell the friend. Ask them to
5	Attended your small meetup	Hi [name], [you] from [event] on [day]. Thanks for coming. You asked about demo accounts, the short answer is: start there, twenty trades. Want the course that goes with it?	Event attendees who gave a number	Attendees who did not

Telegram

#	Template	Message	Use when	Not if
1	From a swap partner's channel	Hi [name], [you] from the channel [partner] mentioned this week. Saw you joined, welcome. Beginner or trader?	After a cross promotion	If they did not join yours
2	Asked in a big channel's comments	Hi [name], saw your question under [channel]'s post about [topic]. I replied there but the thread moved fast. The short answer: [one line]. Want the longer version?	Comment threads under big channels	If you did not reply in the thread first
3	Member of a group you both moderate or help in	Hi [name], we both hang around [group]. You mentioned you blew a small account last month. Been there. Was it size or no stop?	People who posted a loss	People who posted a win. No opener there
4	Mutual in a trading group	Hi [name], [mutual] from [group] said you two had been talking about getting into gold. I post every gold trade I take, with the reasoning. Not asking you to join, just curious where you are at.	Named mutual, real conversation	Vague mutual
5	Replied to your poll	Thanks for voting on the poll, [name]. You picked "demo first". Have you opened one yet?	Poll voters you can see	Anonymous polls. You cannot see them

LinkedIn

#	Template	Message	Use when	Not if
1	2nd degree, commented on a mutual's post	Hi [name], saw your comment on [mutual]'s post about side income. I write about trading for beginners with a day job, learning in public. Happy to connect.	Real comments on a connection's post	Likes
2	Same company as a client	Hi [name], [client] at [company] mentioned a few colleagues were curious about the trading course. I will not pitch anything, just happy to connect and answer questions.	The client said so	The client did not
3	Industry event attendee list	Hi [name], we were both at [event] last week. I share a weekly trading lesson for professionals. Good to connect.	Public attendee lists	Private lists you should not have
4	Engaged with a post you were tagged in	Hi [name], you reacted to the [topic] post I was tagged in. I write about that for people with a day job. Good to connect.	Reactions on posts you are in	Random reactions
5	Follower who never connected	Hi [name], you have followed me for a while, thank you. Making it official. Out of interest: trading something you have tried, or a someday thing?	Followers with a profile that fits	Followers who are obvious bots

Instagram DM

#	Template	Message	Use when	Not if
1	Follows a friend who tagged you	Hi [name], [friend] tagged you under my Reel on [topic]. Are you two thinking about starting?	Real tags	Tags on jokes
2	Follower who likes everything	Hey [name], you like every trading post I put up, which I appreciate. Honest question: are you trading, or thinking about it?	Consistent likers over weeks	One like
3	Replied to a poll sticker	Thanks for voting "never traded" on the story, [name]. What has stopped you so far?	Poll sticker voters	Quiz sticker losers. Be kind
4	From a collab post	Hi [name], saw you came over from [partner]'s page. Welcome. Beginner or trader?	After a collab	If they did not follow
5	Asked in a comment on someone else's post	Hi [name], saw your question under [creator]'s post about [topic]. Not my post, but I had the same question in month one. Did you get an answer?	Questions on other creators' posts you also follow	Arguments

Cold (public group, never spoken)

WhatsApp

#	Template	Message	Use when	Not if
1	Number from a public group	Hi [name], [you] from the [group] WhatsApp group. You asked about [topic] today. I had the same confusion in month one. Did anyone answer properly?	Only groups where DMs are allowed and they posted a question	Numbers you got any other way
2	Replied to your question in a group	Hi [name], thanks for answering my question in [group]. I owe you one. If you ever want the beginner checklist I made, say the word.	People who helped you	Nobody else
3	Posted a loss in a group	Hi [name], saw your message about the [pair] trade in [group]. That setup got me too. Not selling anything, just curious: was it the entry or the stop?	Posted losses with a question	Posted wins
4	Asked where to start	Hi [name], you asked in [group] where to start. Honest answer: a free course, then a demo, then small. I have a one page on it. Want it?	"Where do I start" posts	Anyone else
5	Local business group member	Hi [name], [you] from the [local] group. Not business related, but you mentioned looking at trading. I am learning in public and happy to share what I wish I knew. Have you traded before?	They mentioned it in the group	They did not

Telegram

#	Template	Message	Use when	Not if
1	Asked a question in a public group	Hi [name], [you] from [group]. You asked about [topic] yesterday. Same thing confused me in month one. Did you get an answer?	Questions, and the group allows DMs	Groups that ban DMs
2	Posted a loss	Hi [name], saw the [pair] trade in [group]. That got me too in [month]. Not here to sell anything. Entry or the stop?	Posted losses	Posted wins
3	Asked which broker	Hi [name], you asked in [group] which platform people use. I will tell you mine and why, and also that I am a partner with them, so I may earn a commission. If you want the honest version, here it is: [one true reason]. Want the comparison I did?	"Which broker" questions, with the disclosure in the first message	Anyone who did not ask
4	Commented under a big channel	Hi [name], saw your comment under [channel]'s post. I replied but it got buried. Short answer: [one line]. Longer version if you want it.	Comment threads where you replied first	Where you did not
5	Signal group member who posted a question	Hi [name], we are both in [signal group]. You asked why the last call did not have reasoning. I post mine with the full reasoning, losses too. Not asking you to leave anywhere. Want to see one?	Members asking for reasoning	Members happy with the group

LinkedIn

#	Template	Message	Use when	Not if
1	Search result, right job and city	Hi [name], we are both in [industry] in [city]. I share a weekly trading lesson for professionals, learning in public. Good to connect.	Targeted search, ten a day max	Anyone outside your filters
2	Posted about side income	Hi [name], saw your post about side income. I write about trading for people with a day job, the honest version with losses. Good to connect.	Public posts on the topic	Posts about something else
3	Commented on a finance creator	Hi [name], saw your comment on [creator]'s post about [topic]. I write about that for beginners. Happy to connect.	Real comments	Likes
4	Group member who posts	Hi [name], we are both in [group] and I always read your posts. I share one trading lesson a week. Good to connect.	Active group posters	Lurkers
5	Changed job recently	Hi [name], congratulations on the new role at [company]. I write about trading for professionals with a day job. Good to connect.	Sales Navigator job change alerts	Anyone whose change is a layoff

Instagram DM

#	Template	Message	Use when	Not if
1	Commented on a competitor's Reel	Hi [name], saw your question under [creator]'s Reel on [topic]. I had the same one in month one. Did you get an answer?	Questions under similar creators	Fans defending the creator
2	Follows three trading accounts	Hi [name], we follow some of the same trading accounts. Honest question: are you trading, or still watching?	Profiles that follow the niche and post a bit	Private accounts with no posts
3	Posted a chart	Hi [name], saw your chart post on [pair]. Nice level. Where did you put the stop?	People who post their own charts	People who post other people's
4	Used a trading hashtag	Hi [name], saw your post under #tradingforbeginners. How far in are you?	Beginner hashtags	#forexlifestyle type hashtags
5	Replied to a trading meme	Hey [name], saw your reply on that stop loss meme. Funny because true. Are you trading or just enjoying the memes?	Meme replies that show they trade	Replies that show nothing

Key takeaways

- Name, how you found them, one question, no link, under 40 words. Every template, every channel.
- Warm gets one in three replies, lukewarm one in five, cold one in ten. Spend the day on warm and lukewarm first.
- The "not if" column is the one that keeps your accounts. Read it every time.
- Change one line by hand. The changed line is the one that gets the reply.
- One message, then wait. Day 3 and 7 are in the follow up templates.

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