

Voice and phone call scripts

Five full call scripts for partners who talk to people: the warm intro call, the cold prospect call, the registered but not funded call, the win back call and the referral ask. Each one with the opening, the qualifying questions, the presentation of the free course or the platform, objection responses, the close and a voicemail version. Then voice notes for WhatsApp and Telegram, and every objection you will hear with its honest answer and the line for when it is still no.

A call is the fastest way to find out whether someone should be trading, and the fastest way to lose them if you push. These scripts are written so that pushing is impossible: every one of them asks permission, qualifies honestly, offers the free step first, and closes on the next action rather than on money. Read them out loud until they sound like you, then stop reading them.

Before any call: know the rules of the country you are calling into. Calling consumers about financial products without their prior consent is restricted or illegal in many places. Every script here assumes the person asked to hear from you.

How to use these scripts

Script	Use it for	Length
1. Warm intro call	Someone who asked for the checklist, the course or a call	5 to 8 minutes
2. Cold prospect call	Someone from a permission list who may not remember you (event sign in, webinar)	3 to 6 minutes
3. Registered, not funded	Someone who opened an account through your link and stopped	5 to 10 minutes
4. Win back	A client who stopped trading or a lead who went quiet three months ago	3 to 5 minutes
5. Referral ask	A client who is happy	2 to 3 minutes

Every script has six parts: open, qualify, present, objections, close, voicemail. Mark the parts with your own words in the margin.

The four qualifying questions

Used in every script. In this order.

Question	What it decides
"Have you traded before?"	Course path or platform path
"Is this something you want to learn over a few months, or were you hoping for something faster?"	Realistic. "Faster" ends the call honestly
"Do you have money set aside that you could afford to lose entirely while you learn? Not savings, not rent."	Whether real money is ever part of this
"Could you give it an hour a week?"	Whether the course will happen

Fail two of the last three and the person gets the free course and the Not now label. Nobody who should not trade gets the platform.

Script 1: the warm intro call

Open

"Hi, is this [name]? [name], it is [you] from [brand]. You downloaded the trading checklist on [day] and ticked that it was fine to call. I am not calling to sell you anything today. I just wanted to ask: did the checklist make sense, and have you traded before? Have you got two minutes?"

Qualify

The four questions. Listen. Write down the answers.

Present, beginner

"Then here is what I would do, and it is what I did. A free course, it goes in order, lesson one is 12 minutes. Then a demo account on the platform I use, twenty trades with a stop loss, no real money. Then, only if you still want to, a small real account. I partner with the platform, so I may earn a commission if you sign up through my link, and it costs you nothing. Trading is high risk and most people lose money at first, which is why the order matters."

Present, trader

"Then you do not need the course. Here is what I use and why: [platform], mainly for [one true reason]. What I do not like: [one honest thing]. If it fits what you trade, open the demo and compare the spread on your main pair. I am a partner, so I earn if you move, and I would rather say that than have you wonder."

Objections

From the table at the end.

Close

"Shall I send the course now, while we are on the call, and ring you Thursday to see how lesson one went?" Book the day and time. Send the WhatsApp before you hang up.

Voicemail

"Hi [name], [you] from [brand], about the checklist you asked for on [day]. I will WhatsApp it and the free course so you have them either way. I will try once more tomorrow, or reply STOP on WhatsApp and I will not. Thanks."

Script 2: the cold prospect call

Open

"Hi [name], [you] from [brand]. You were at the trading intro on the [date] and signed in for a follow up. I am the one who does those. Not selling anything, just checking what you thought of it and whether you have traded before. Have you got two minutes?"

If they do not remember

"No problem, it was the one hour intro at [place]. If now is a bad time, I can just send the free course and leave it with you."

Qualify

The four questions.

Present

Course first, as in script 1. On a cold call the trader path is rare, but if they trade, the setup line.

Objections

"Sounds like a scam" is the common one here. Use the full honest answer from the table.

Close

"Course now, call Thursday?" If no: "Then I will send the course and leave it there. Thanks for the time."

Voicemail

"Hi [name], [you] from [brand], following up from the intro on the [date]. I will send the free course on WhatsApp so you have it. No need to call back unless you want to. Thanks."

Script 3: registered but not funded

Open

"Hi [name], [you] from [brand]. You opened an account on the platform through my link last week, which is great, and I noticed there is no demo trade on it yet. I am not chasing you for money. I wanted to check if you got stuck somewhere. Two minutes?"

Find the blocker

"Was it the platform itself, not sure what to trade, or just life got in the way?" Listen. It is one of those three.

Fix it

Platform: "Open it now, I will walk you to the demo. Takes three minutes."

Not sure what: "Lesson three of the course, position size, then one demo trade on [the simplest instrument], smallest size, with a stop. I will send both now."

Life: "No rush at all. The account waits. Shall I ring in two weeks?"

The honest line

"One thing before any real money goes in: twenty demo trades, each with a stop loss. Most people lose money at first and the demo is where that should happen."

Close

"Shall we do the first demo trade together now?" or book the two week call.

Voicemail

"Hi [name], [you] from [brand]. Saw the account is open, nice one. Not about money. If you got stuck on the demo, reply on WhatsApp and I will walk you through it. Otherwise no action needed."

Script 4: the win back call

Open

"Hi [name], [you] from [brand]. We spoke about three months ago and you said not now, which was fair. I am not calling to ask again. Something changed on my side that I thought was worth one call: [the new, true thing: a 30 day challenge starting, a new free lesson series, a real campaign with dates]. Two minutes, or shall I just message it?"

Qualify, short

"Has anything changed for you since? Traded at all, or still thinking?"

Present

The new thing only. Not the whole pitch again. "The challenge is one demo trade a day for 30 days, with the group. Free. Starts [date]."

Objections

Usually "still not now". The answer: "Fair. I will put you down as not now and leave it a few months. Thanks for picking up."

Close

"Want in on the challenge? I will send the rules." Or: "Noted. All the best."

Voicemail

"Hi [name], [you] from [brand]. Not asking again, promise. There is a free 30 day demo challenge starting [date] and I thought of you. Details on WhatsApp. No need to reply."

Script 5: the referral ask

Open

"Hi [name], [you]. Quick one, two minutes. You have been trading a few months now and you told me the course helped. Can I ask you something?"

The ask

"Is there one person, a friend or a colleague, who has asked you about trading since you started? I would rather help one person you send me than message fifty strangers."

The honest line

"Same rules for them as for you: free course first, demo, then only if they want to. I am a partner so I earn if they open an account, and I will tell them that in the first message."

How

"Easiest is: you send them my number and say I am OK to talk to. Or give me theirs if they are fine with that, and I will say you sent me."

Close

"Thank you. Nothing to do today. If someone comes to mind, just send them my way."

Voicemail

"Hi [name], [you]. Nothing urgent. If anyone has asked you about trading lately, I would be glad to help them the same way, free course first. Send them my number if it fits. Thanks."

Voice notes for WhatsApp and Telegram

A voice note is a call the person can listen to when they want. Shorter, more casual, and never the opener.

Rule	Why
After the second reply, not before	A voice note from a stranger is deleted unheard
20 to 45 seconds	Longer is not played to the end
Their name in the first three seconds	So they know it is not a broadcast
One thing: an answer, a next step, or a thank you	Not the whole pitch
The risk line, if the platform is mentioned	"And the usual: high risk, most people lose at first, start on the demo."
Recorded by you, on your phone, in one take	A clone passed off as you is a lie. A clone declared as a tool is fine for translations
Never a number in money	It is recorded, forever

Three voice note scripts

The answer. "Hey [name], [you]. Your question about the stop loss. Short version: put it where the idea is wrong, not where it feels safe. If the level breaks, you are out, and that is the plan working. I will send you the one page. Talk soon."

The next step. "[name], [you] here. Lesson one done, nice. Next is the demo, twenty trades, each with a stop. The platform I use has a free one, link in my pinned message, and I am a partner so I earn if you ever go real. High risk, most people lose at first, which is exactly why the demo. Message me when the first one is placed."

The thank you. "[name], just a quick thank you for sending [friend] my way. I will look after them properly, course first, same as you. Appreciate it."

Objections, every one, with the honest answer

The pattern for all of them: agree with the true part, say the honest thing, offer the free step, let go. The "if still no" line is one sentence and then silence.

Objection	Honest answer	If still no
"I don't have money"	"Then do not trade with any. The course and the demo are free and that is where everyone should start. Shall I send the course?"	"Fair enough. It is there whenever. All the best."
"I tried trading before and lost"	"So did almost everyone, me included. Usually it is size and no stop loss, not the market. Was it something like that?"	"Understood. If you ever want to see what you would do differently, the course is free."
"Sounds risky"	"It is. Trading is high risk and most people lose money at first. That is exactly why I start everyone on the free course and the demo."	"That is a sensible reaction. I will leave it with you."

Objection	Honest answer	If still no
"Sounds like a scam"	"I understand, this industry has plenty. What is true: I partner with a platform and earn a commission if you open an account through me. I will tell you that every time. I am not asking you for money, I am offering a free course. Check me first, my channel is public."	"Take your time. I would rather you checked than trusted."
"Send me more info"	"Happy to. Which bit: how trading works, or how I earn? I will send the course and one page on that. Can I ring Thursday to see if it made sense?"	"Will do. If I do not hear back, no problem."
"I'll think about it"	"Of course. What is the main thing you would be thinking about?" Then answer that one thing.	"Take the time. I will send the course so you have something to think with."
"I don't know enough"	"Nobody does at the start, that is what the course is for. Lesson one is 12 minutes and it explains a pip, a lot and a stop loss. Want it?"	"No problem. It will be there."
"Busy right now"	"No problem. When is better, tomorrow morning or evening?"	Book it, or "I will send the course and leave it there."
"Why should I trust [the platform]?"	"You should check for yourself. I use it because [one true reason]. What I do not like: [one honest thing]. Check the regulation page and reviews, then decide. I am a partner so I am not neutral, and I would rather say so."	"Good. Check it. Ring me if you want to talk after."
"My friend lost everything doing this"	"That happens, and usually it is leverage and size, not trading itself. I am sorry about your friend. The course spends two lessons on exactly that. If you ever want to understand what happened, it is free."	"Completely understand. Leave it there."
"Is this like crypto / gambling / a pyramid?"	"It is trading, buying and selling with your own account, on a regulated platform. Nobody recruits anyone. I earn a commission from the platform, not from you, and I say so. Whether it is gambling depends on whether you have a plan and a stop loss, which is what the course teaches."	"Fair question. The course is free if you want to see for yourself."
"How much do you make from this?"	"A commission from the platform when someone I referred trades. It costs you nothing and I will not tell you a number, because I never talk about money I make, with anyone. That rule is for your protection as much as mine."	"Understood. Thanks for asking straight."
"Can you guarantee I will not lose?"	"No. Nobody can, and anyone who does is lying. Most people lose money at first. What I can do is show you how to lose small while you learn, on the demo, for free."	"That is the honest answer. I will leave it with you."
"Just give me the signals"	"I do not run a signal service, and I would not follow one blind either. I post my trades with the reasoning so people learn. If that is useful, the channel is free. If you want someone to tell you what to buy, I am not the right person."	"No hard feelings. All the best."
"I'm already with another broker"	"Then you do not need me for that. If you ever want to compare the spread on what you trade, the demo on mine is free. Otherwise, the lessons are free regardless of where you trade."	"Fair. Stay where it works."

Top tips for calls and voice notes

1. **Permission first.** "Have you got two minutes?" on every call. "After the second reply" for every voice note.
 2. **Say what the call is not.** "Not selling anything today" keeps them on the line and it is true.
 3. **Four questions, fail honestly.** The person who fails two gets the course and a kind goodbye.
 4. **Agree, honest thing, free step, let go.** Every objection, same shape.
 5. **Close on the next action, never on money.** Course now, demo now, Thursday call.
 6. **Two voicemails, ever.** Then Not now.
 7. **Voice notes are 30 seconds, your voice, one thing.** Never the opener.
 8. **Write down every answer to the four questions.** That sheet is your pipeline.
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Key takeaways

- Five scripts, six parts each: open, qualify, present, objections, close, voicemail.
 - Four qualifying questions decide everything. The course is for everyone, the platform is for people who passed.
 - Every objection has the same honest shape: agree, say the true thing, offer the free step, let go.
 - Close on the free next step. The deposit is their decision alone.
 - Voice notes after the second reply, 30 seconds, recorded by you.
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