

The complete guide to outreach and sales

What outreach looks like for a partner, why the partners who win think of themselves as educators and not sellers, the three ways to run it (solo, small team, call centre), the two pitches and when to use each, and where the scripts live.

Content and community wait for people to come to you. Outreach goes to them. A partner doing outreach finds a person who might want to trade, starts a conversation, helps them, and at the right moment shows them the platform. It is the oldest way to build a book of clients, it works in every country, and it needs no followers, no videos and no website. It needs a phone, a list of people, and a way of talking that makes people glad you messaged.

That last part is where most outreach partners fail. They open with a pitch, get ignored or reported, and conclude that outreach does not work. It does. The pitch just goes last.

What you will learn

- What outreach means for a partner, and what it is not
- The educator mindset: why the partners who help the most earn the most
- Three ways to run outreach: solo, small team, call centre
- The two pitches, free course first or platform direct, and when each one fits
- The rules that keep your accounts and your reputation safe
- Top tips, do this not that, and key takeaways

What outreach is, and what it is not

Outreach is a conversation you start. You find someone who has shown an interest in trading, or money, or a better side income, and you message them, call them or meet them. You ask a question, you listen, you help with the thing they are stuck on, and when they are ready you point them at the free course or the platform.

Outreach is	Outreach is not
A question, then a conversation	A pitch sent to a thousand people
One person at a time, by name	A broadcast
Helping first, platform later	Link in the first message
Follow ups on a schedule	Chasing daily
Permission: they can say stop and you stop	Pressure
Honest about who you are and why you message	Pretending to be a friend, a trader with a secret, or anything you are not

The reason it is not cold calling in the old sense: nobody you message is a stranger with no interest. They are in a trading group, they commented on a trading video, they told a friend they wanted to start, they asked a question on a forum. Your job is to find people who already raised their hand a little, and to be the person who answers.

The educator mindset

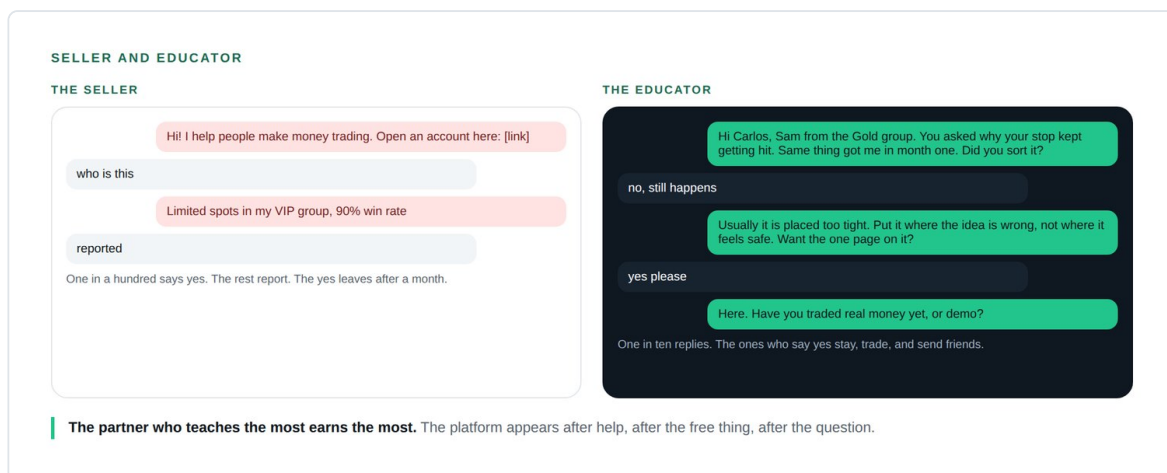
Here is the whole method in one line: **the partner who teaches the most earns the most.**

A seller asks "will you open an account?" An educator asks "what are you stuck on?" and then unsticks it. The seller gets a yes from one in a hundred and the no from the other ninety nine comes with a report. The educator gets a conversation with one in ten, and the people who say yes stay, trade, and send friends.

What the educator does in practice:

- **Opens with a question about them**, not a statement about you.
- **Gives the first useful thing for free** and before any ask: a two line answer, the free course link, a checklist.
- **Says the risk line early**, not as a disclaimer at the end but as a sign of honesty: "most people lose money at first, which is why I start everyone on the free course."
- **Qualifies honestly**. If they have no time, no money they can lose, or no real interest, the educator says so and lets them go. A client who should not be trading is a client who loses, blames you, and leaves.
- **Recommends the platform the way a friend would**. "This is what I use, this is why, and I am a partner so I may earn a commission if you sign up through me. It costs you nothing."

The educator mindset is not softer. It is faster. It skips the ninety nine arguments and spends the time on the ten people who want help.



The two mindsets, side by side. The educator's conversation is longer and the client stays.

The three ways to run outreach

	Solo	Small team	Call centre
Who	You, your phone, 1 to 2 hours a day	You plus 2 to 5 people you train, usually paid per qualified lead or on a share	10 or more agents, a manager, a dialler, scripts, a CRM
Channels	WhatsApp, Telegram, Instagram DM, LinkedIn	Same, plus one person on calls	Phone first, WhatsApp follow up
Daily volume	20 to 40 new conversations	100 to 200	500 to 2,000 calls
Cost	Zero	Commission or small base per person	Salaries, software, office

	Solo	Small team	Call centre
Where clients come from	Your own network and the groups you are in	Each team member's network plus shared lead sources	Bought or built lists, and inbound from ads
Biggest risk	Running out of people to message	Team members cutting corners and getting the whole operation banned	Compliance. One bad script, one wrong market, and the entire centre is a liability
Right for	Everyone starting out	A partner who has done solo for three months and knows the script works	Partners with capital, a legal review, and experience running sales teams

Start solo. Three months of your own conversations teach you which opener works, which objection comes up most, and what a good lead looks like. Nobody can train a team on a script they have not run themselves.

Add a team when the limit is your hours, not your method. The sign: you have a message and a follow up sequence that reliably produces a registration from one conversation in ten, and you cannot start more than 40 a day.

A call centre is a business, not a channel. It needs a legal review of the markets you call into, a recorded and approved script, opt out handling, and a manager watching every day. The cold calling guide covers it. Most partners should never run one, and the ones who should already know.

The two pitches

Every outreach conversation ends in one of two asks. Choose before you message, because the opener is different.

Pitch 1: the free course first

"You want to learn? Start here, it is free, and message me when you finish lesson one."

Use it when	Why
The person has never traded	They need to understand before they can decide, and a demo before real money
The person tried, lost, and stopped	They need a reason to believe it can be different: a method, not a platform
You are messaging from a community or a cold source	Trust is low. A free, useful thing earns the right to the next message
The market is one where "trading" sounds like gambling	Education reframes it, and it is the honest frame

The path: free course, then a demo account on the platform, then a small real account. Three steps, each with its own message. Slower per person, but the clients who arrive this way fund their accounts, keep trading and do not come back angry.

Pitch 2: the platform direct

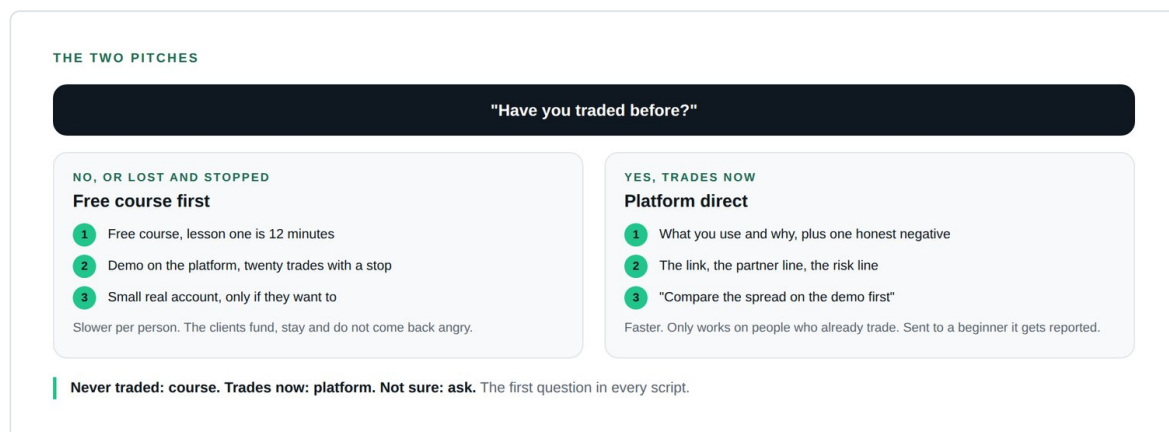
"You already trade? Here is what I use and why. If it fits what you trade, my link is here, and I am a partner."

Use it when	Why
The person already trades and talks about conditions, spreads, instruments	They do not need education, they need a reason to switch or add
They asked "which platform do you use?"	The question is the permission
A real campaign exists: a contest, a fee cut, a new instrument	A concrete, dated reason that is true
You are messaging a trader community where everyone has an account	The free course would read as condescending

The path: one honest comparison, the link with the partner line, and an offer to help with the first steps. Faster, but it only works on people who already trade. Sent to a beginner it reads as "sign up for something you do not understand", which is the message that gets you reported.

The decision in one line

Never traded, or lost and stopped: free course. Trades now: platform. Not sure: ask. "Have you traded before?" is the first question in every script for a reason.



The decision: have you traded before? decides which pitch, which path and which script.

The rules

Outreach is where partners get banned, reported and in some countries fined. These rules are not optional.

Rule	Why
Message people who showed interest. A trading group, a comment, a question, a referral. Never a scraped list of strangers	Interest is what makes it a conversation. Without it, it is spam, and platforms treat it as spam
One message, then wait. No second message until they reply or the follow up day arrives	Two unanswered messages in a row is how WhatsApp and Telegram decide you are a bot
Say who you are in the first message. Your name, how you found them, why you are messaging	Anonymous outreach is reported. Honest outreach is answered
No money promises, no numbers, no "I made X". Ever, anywhere, including voice notes	It is the fastest way to a ban, and in most countries it is illegal

Rule	Why
The risk line before the link. "Trading is high risk and most people lose money"	It protects you, it protects them, and it reads as honesty
The partner line with the link. "I partner with the platform, so I may earn a commission if you sign up through me"	Required, and the people who mind are not your clients anyway
Stop means stop. One "not interested" and they leave your list	Continuing is harassment, and harassment is a report
Know the rules of the country you message into. Some markets restrict financial promotion by individuals entirely	You are responsible, not the platform and not the academy
Never pretend. Not a trader with a secret, not a friend of a friend you are not, not a woman if you are a man, not a bot pretending to be a person	The lie is discovered and the report follows

Where the scripts live

This guide is the why. The tools are the what:

Tool	What is in it
Outreach script library	60 first messages by channel and audience, each with when to use it and when not to
Follow up sequence templates	Day 1, 3, 7, 14 and 30 for the four situations that come up
Voice and phone call scripts	Five full calls, the voice note section, and every objection with its answer
Where to find leads playbook	15 places to find people who already raised their hand, and the qualification checklist

The channel guides (email, WhatsApp, LinkedIn, Telegram DM, cold calling, AI tools) cover how each channel works.

Top tips for outreach

- 1. Lead with a question.** "Have you traded before?" opens more conversations than any pitch ever written.
- 2. Give the free thing before any ask.** The free course, a checklist, a two line answer. The first message that helps earns the second.
- 3. Decide the pitch before you message.** Beginner gets the course. Trader gets the platform. Never the other way round.
- 4. Twenty real conversations a day beat two hundred messages.** Volume is not the lever. Replies are.
- 5. Follow up on a schedule, not on a feeling.** Day 3, 7, 14, 30. Then stop.
- 6. Say the risk line as a sign of honesty, early.** "Most people lose at first, which is why I start everyone on the course" converts better than hiding it.
- 7. Run solo for three months before building a team.** You cannot teach a script you have not run.
- 8. Write down every reply.** A list of who said what is your business. The people who said "not now" in March are your October.

Do this, not that

Do this	Not that
Ask "have you traded before?"	Open with the platform
Free course for beginners	Registration link to someone who has never traded
One message, then wait	Three messages in a day
Your name and why you are messaging	Anonymous or fake
Risk line before the link	Risk line never
Stop at "not interested"	One more try
Solo first, team later	Hire before the script works
Twenty real conversations	Two hundred copied messages

Key takeaways

- Outreach is a conversation you start with someone who already showed interest. It is not spam and it is not old style cold calling.
- The educator who helps first earns more than the seller who pitches first, and keeps the clients.
- Start solo, add a team when hours are the limit, treat a call centre as a separate business with legal review.
- Two pitches: free course for beginners and people who lost, platform direct for people who already trade. "Have you traded before?" decides it.
- The rules are not optional: interest first, one message then wait, honest name, no money talk, risk line, partner line, stop means stop.

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