

Cold calling for partners

For partners running calls, mostly in a team or call centre setup: the list, the daily numbers, the opener, gatekeepers, voicemail, objections, qualifying, when to book a follow up and when to close, the metrics that separate a productive caller from a busy one, and three full scripts.

Calling is the oldest outreach channel and the one with the most rules. Done well, with a list of people who asked to be contacted and a script that educates, it produces more conversations per hour than anything else. Done badly, with a bought list and a pressure script, it produces complaints, regulator attention and a shut down operation. This guide is the first kind.

One thing before anything else: in many countries, calling consumers about a financial product without their prior consent is restricted or illegal, and some countries restrict individuals from promoting trading platforms by phone at all. Before the first call, know the rules of the country you are calling into. The academy cannot do this for you and neither can the platform.

What you will learn

- The list: where calls come from, and why list quality decides everything
- Daily activity targets: calls, conversations, meetings
- The opener and the first 15 seconds
- Gatekeepers and voicemail
- The qualifying questions, and when to stop
- Objections: the eight you will hear every day, and the honest answer to each
- Follow up or close: how to decide on the call
- The metrics that matter
- Three full scripts, top tips, do this not that, and key takeaways

The list

A call is only as good as the reason you have the number.

List source	Quality	Legal position	Use
People who filled in a form asking to be called (your landing page, a webinar, an ad)	Highest. They asked	Clean, if the form said you would call	The main list for any serious operation
People who registered on the platform through your link but did not fund	High. They took a step	Clean, if your registration flow told them you may contact them	The best call there is
People who messaged you on WhatsApp or Telegram and gave a number	High	Clean, with the message as the record	Warm calls
Referrals: a client says "call my brother"	High	Clean if the brother was told	Warm
Attendees of a local event you ran	Medium	Clean if they signed in with a number for this purpose	Warm

List source	Quality	Legal position	Use
Bought lists, scraped lists, "leads" from a vendor	Low, and often not real	Illegal or restricted in most markets, and the first thing a regulator asks about	Never

A caller with 50 numbers of people who asked to be called will out produce a caller with 2,000 bought numbers, every day, with no complaints.

Daily activity

Number	Solo partner, two hours	Team member, full day
Dials	30 to 40	120 to 160
Conversations (someone answered and talked for over a minute)	8 to 12	30 to 45
Qualified (time, money they can lose, real interest)	3 to 5	10 to 15
Next step booked (course started, demo opened, follow up call set)	2 to 3	6 to 10
Registrations a week	2 to 4	8 to 15

Write the numbers down every day. A caller who knows their conversation to qualified ratio knows what to fix.

The opener

You have fifteen seconds. The person did not expect the call, even if they asked for one last week.

The shape: name, company, why you are calling in one line, permission.

"Hi, is this Daniel? Daniel, it is Sam from [your brand]. You downloaded the trading checklist on Tuesday 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?"

What is in it: the reason you have their number (they gave it), what the call is not, one question, and the ask for permission. "Have you got two minutes?" lets them say no, which paradoxically gets more yeses.

Never in an opener: "how are you today", a company they have not heard of with no reason, "I have an opportunity", "I noticed you are interested in financial freedom", a number in money.

Gatekeepers and voicemail

Gatekeepers (a receptionist, a family member): be honest and short. "Hi, it is Sam from [brand], returning Daniel's enquiry about the trading course. Is he around?" If no: "No problem, when is better?" Never pretend to be a friend, never say it is urgent.

Voicemail: one message, under 20 seconds, once.

"Hi Daniel, Sam from [brand]. You asked for the trading checklist on Tuesday. I will send it on WhatsApp so you have it either way, and I will try once more tomorrow. If you would rather I did not, just reply STOP to the WhatsApp. Thanks."

Then send the WhatsApp with the checklist. One more call the next day. Then the Not now list. Two voicemails is the maximum anyone should ever receive from you.

Qualifying

Four questions, in order. The answers decide the pitch, or whether there is one.

Question	What you are finding out	If the answer is no
"Have you traded before?"	Beginner or trader. Course or platform	Never a disqualifier
"Is this something you want to learn over a few months, or were you hoping for something faster?"	Realistic expectations	"Faster" needs the honest answer: "Then I am not the right person. Trading takes months to learn and most people lose at first. If that changes, the course is free."
"Do you have money set aside that you could afford to lose entirely while you learn? Not savings, not rent."	Money they can lose	No money: "Then start with the course and a demo, which costs nothing. Real money is for later, if ever." Never push
"Could you give it an hour a week?"	Time	No time: "Then the course will wait for you. Shall I send it anyway?"

A person who fails two of the last three is not a client. Send the course, label Not now, and move on. A client who should not be trading is a loss, a complaint and a reputation problem.

Objections

You will hear these every day. The honest answer is also the one that works.

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. Good luck."
"I tried trading 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. The risk is real, and it is why learning first matters."	"That is a sensible reaction. I will leave it with you."
"Sounds like a scam"	"I understand, this industry has plenty. Here is 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 out 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 call Thursday to see if it made sense?"	Send it. One follow up. Then Not now
"I'll think about it"	"Of course. What is the main thing you would be thinking about?" Listen. 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 what a pip, a lot and a stop loss are. Want it?"	"No problem. It will be there."
"Busy right now"	"No problem. When is a better time, tomorrow morning or evening?"	Book it or Not now

Objection	Honest answer	If still no
"Why should I trust [the platform]?"	"You should check for yourself. I use it because [one true reason]. Here is what I do not like: [one honest thing]. Check the regulation page and the reviews, then decide. I am a partner so I am not neutral, and I would rather say so."	"Good. Check it. Call me if you want to talk after."

The pattern: agree with the true part, say the honest thing, offer the free step, let go. Pressure is what makes a complaint.

Follow up or close

Signal on the call	Do
They ask "how do I start?"	Close: "Open the course now while we are on the call, lesson one is 12 minutes. I will WhatsApp the link. Then the demo." Walk them through registration if they want
They are interested but asking general questions	Follow up: "Let me send the course, do lesson one, and I will call Thursday at this time. Does that work?" Book it
They already trade and asked about conditions	Close on the demo: "Open the demo while we talk, compare the spread on what you trade. If it is better, move. If not, no harm."
Any objection answered, then silence	Follow up, never close
Two qualifying questions failed	Neither. Course, Not now

Closing means helping them do the next step while you are on the phone. It never means asking for a deposit. The deposit is their decision, on their own, after the demo.

The metrics

Metric	Productive caller	Busy caller
Conversation rate (conversations per dial)	25 to 35 percent on a permission list	Under 10 percent on a bought list
Qualified per conversation	30 to 40 percent	10 percent, because they pitch instead of ask
Next step per qualified	60 percent plus	20 percent, because they ask for the deposit
Follow ups kept	90 percent	Forgotten
Complaints	Zero	Weekly
Registrations that fund within 30 days	Half	A quarter, and they leave

Track dials, conversations, qualified, next steps, registrations, funded, every day.

Three full scripts

Voicemail variants for all three are in the Voice and phone call scripts.

Script 1: warm call, they asked for the checklist

Open. "Hi, is this Daniel? Sam from [brand]. You downloaded the trading checklist Tuesday and ticked that a call was fine. Not selling anything today. Did the checklist make sense, and have you traded before? Two minutes?"

Qualify. "Learn over a few months, or hoping for something faster?" "Money set aside you could lose entirely, not rent?" "An hour a week?"

Present (beginner). "Then here is what I would do. Free course, it goes in order, lesson one is 12 minutes. Then a demo on the platform I use, twenty trades with a stop loss, no real money. Then, 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 me. It costs you nothing. Trading is high risk and most people lose money, which is why the order matters."

Objection. Answer from the table.

Close or follow up. "Shall I send the course now and call Thursday to see how lesson one went?"

Script 2: cold call, from a permission list (webinar attendee, event sign in)

Open. "Hi Maria, Sam from [brand]. You were at the trading intro on the 12th 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. Got two minutes?"

If they do not remember. "No problem, it was the one hour intro at [place]. If now is bad, I can send the free course instead and leave it there."

Qualify. Same four.

Present. Same as script 1, course first.

Objection. From the table. "Sounds like a scam" comes up more on cold calls. Use the full honest answer.

Close or follow up. "Course now, call Thursday?" If no: "Then I will send the course and leave it with you. Thanks for your time."

Script 3: registered but not funded

Open. "Hi Daniel, Sam from [brand]. You opened an account on the platform through my link last week, which is great, and I noticed you have not placed a demo trade yet. 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?" Listen.

Fix it. Platform: walk them through the demo while on the call. Not sure what: "Lesson three of the course, position size. Then one demo trade on [the simplest instrument]. I will send both." Life: "No rush at all. The account waits. Shall I call in two weeks?"

The honest line. "One thing before you put any real money in: twenty demo trades first, with a stop loss, every one. Most people lose money at first and the demo is where that should happen."

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

Top tips for calling

- 1. The list is the business.** Fifty people who asked beat two thousand who did not, and only one of those lists is legal.
- 2. Say what the call is not, in the first ten seconds.** "Not selling anything today" is what keeps them on the line.
- 3. Ask permission.** "Have you got two minutes?" gets more yeses than taking the two minutes.
- 4. Four qualifying questions, and fail people honestly.** A client who should not trade is a complaint with a deposit.
- 5. The honest objection answer is the one that works.** Agree with the true part, say the honest thing, offer the free step.
- 6. Close on the next step, never on the deposit.** Course now, demo now, call Thursday. The money is their decision, alone.
- 7. Two voicemails maximum, ever.** Then Not now.
- 8. Track six numbers daily.** Dials, conversations, qualified, next steps, registrations, funded.

Do this, not that

Do this	Not that
People who asked to be called	Bought lists
"Not selling anything today"	"I have an opportunity"
"Have you got two minutes?"	Talking for two minutes
Four qualifying questions	Pitch to everyone
Course first for beginners	Deposit first
Agree, honest answer, free step	Overcome the objection
Close on the demo	Close on the deposit
Two voicemails	Daily calls
Know the rules of the country	Assume it is allowed

Key takeaways

- Calling works on a permission list and fails on a bought one. In most countries the bought list is also illegal.
- Fifteen seconds: name, why you have their number, what the call is not, one question, permission.
- Four qualifying questions. Fail people honestly.
- Objections: agree, say the true thing, offer the free step, let go. Close on the next step, never on money.
- Two voicemails, then stop. Track six numbers every day.

Partners Academy

This material is provided for educational purposes for partners of the Partners Academy. It is not financial, investment, legal or tax advice, and nothing in it is a recommendation to trade. Trading carries risk and most retail traders lose money. Partner earnings depend on the activity you introduce and results vary. Nothing here should be presented to your audience as a promise of income or of trading outcomes. Third party tools, prices and platform features are named for convenience only and change over time, so verify before you rely on them. You are responsible for complying with the advertising rules of each platform you use and with the financial promotion rules of your own jurisdiction.