

AI tools for outreach

The AI tools that make outreach faster without making it sound like a robot: prospect research, personalised first messages at scale, follow ups, response analysis and voice notes. What each does, what it costs, where the ethical line is, and the "do not sound like a robot" framework.

AI does two things well in outreach: research a person in seconds, and draft a message in your voice from that research. It does one thing badly: send. The moment a tool sends for you, the messages become identical, the platforms notice, and the reports start. So the rule for every tool below is the same. AI drafts, you read, you edit one line, you send.

Used that way, a partner who did twenty conversations a day does forty, and every one of them still reads as a person.

What you will learn

- Where AI helps in outreach and where it hurts
- Prospect research tools: what they find and what they cost
- Personalisation at scale: the prompts and custom assistants that write in your voice
- Follow up writing tools
- Response analysis: knowing which messages work
- Voice clones for voice notes, and the honesty rule
- The "do not sound like a robot" framework
- Top tips, do this not that, and key takeaways

Where AI helps and where it hurts

AI helps with	AI hurts with
Reading a profile and summarising what the person cares about	Sending
Drafting a first message from that summary	Deciding who to message
Writing five versions of a follow up so none repeat	Replying to a real question without you reading it
Finding the pattern in which messages got replies	Pretending to be you on a call
Turning your script into a 30 second voice note script	Anything that promises, claims or quotes a number
Translating your message into the prospect's language	Replacing your judgement about whether this person should be trading

Prospect research

The job: before you message, know three things about the person. What they do, what they said about trading, and what they might be stuck on.

Tool	What it does	Cost	Use for	Ethical line
ChatGPT or Claude, with the profile pasted in	Summarises a public profile or a group thread into three lines: who they are, what they asked, a good opening question	Free tier is enough	Every prospect, every day	Only public information they posted themselves
Apollo	A database of professionals with job, company, location, and contact details	Free tier with limits, paid from about 50 USD a month	LinkedIn style outreach, finding people by role and industry	The contact details are for B2B. Using them to message consumers about trading is outside the terms and in many countries outside the law. Use it to find profiles, then connect on LinkedIn normally
Clay	Enrichment: paste a list of names or profiles, get everything public about each, with AI summaries	Paid, from about 150 USD a month	Teams doing volume	Same line as Apollo. Research, not contact scraping
Lusha	Browser extension that shows contact details on LinkedIn profiles	Free tier with credits	Teams	Same
LinkedIn Sales Navigator (not AI, but the research tool for that platform)	Filters, saved searches, alerts when someone changes job or posts	About 100 USD a month	Partners doing 20 plus LinkedIn conversations a day	Clean, it is LinkedIn's own tool

For a solo partner: paste the profile into a free assistant. That is 90 percent of the value at zero cost.

The research prompt.

"Here is a public post and profile from someone in a trading group. Tell me in three lines: 1) what they seem to do and where they are, 2) the specific thing they asked or complained about, 3) one honest opening question I could ask about that, with no pitch and no link. Do not invent anything not in the text."

Personalisation at scale

The job: a first message that could only have been sent to this person, written in your voice, in ten seconds.

The method: a custom assistant (a custom GPT, a Claude project, or a saved prompt) that holds your voice, your rules and your templates. You paste the research. It drafts. You edit one line and send.

What goes in the assistant's instructions:

You draft outreach messages for me. My voice: short sentences, plain words, no exclamation marks, no emojis, I say "trading is high risk" early, I never mention money I have made, I never put a link in a first message, I always end with one question. My rules: every message under 40 words, uses their name and the exact thing they said, offers nothing in message one. My templates are below. Draft three options. Mark anything you are unsure is true.

Then paste the 60 templates from the script library. The assistant has your voice and your rules, and it writes variations that stay inside them.

Tool	Cost	Note
Custom GPT (ChatGPT Plus)	About 20 USD a month	Easiest to set up, saves the instructions and templates
Claude project	About 20 USD a month	Same idea, better at holding a long set of templates and rules
A saved prompt in the free tier of either	Free	Paste the instructions each session. Slower, works

The rule: three drafts, you pick one, you change at least one line by hand. The one line you change is usually the only line that matters.

Follow up writing

The job: day 3, 7 and 14 messages that do not repeat each other and do not nag.

Tool	What it does	Cost
The same custom assistant	"Write the day 7 follow up for this thread. Shorter than the first message, no new ask, reference what they said."	Included
Jasper	Marketing copy at volume, with brand voice settings	From about 40 USD a month
Copy.ai	Similar, with workflows for sequences	Free tier, paid from about 50 USD

For a solo partner the custom assistant does this. Jasper and Copy.ai earn their price for a team writing hundreds of sequences a week, and even then the output is a draft.

Response analysis

The job: which openers got replies, which follow ups got reports, what to change this week.

Tool	What it does	Cost	Who
A spreadsheet plus a weekly AI summary	Log every message sent: channel, template number, reply yes or no, outcome. Weekly, paste it into the assistant: "Which templates had the best reply rate? What do they have in common? Which got no replies?"	Free	Every partner
Lavender	Scores emails before you send for length, clarity and reply likelihood, and tracks what worked	Free tier, paid from about 30 USD	Email outreach
Smartlead, Instantly	Sending platforms with analytics for cold email at volume	From about 40 USD a month	Teams doing cold email. Note: cold email to consumers about trading is restricted in most markets. These tools are built for B2B. The analytics are useful, the sending is not for this niche

The spreadsheet is the real tool. Template number, reply, outcome. After a month you know which three openers to keep.

Voice clones for voice notes

The job: a 30 second voice note in your voice, for the step where a voice note helps (after the second reply).

Tool	What it does	Cost
ElevenLabs	Clone your voice from a few minutes of recording, then type a script and get a note in your voice, in any language	Free tier for a few minutes a month, paid from about 5 USD

The honesty rule, which has no exceptions. A cloned voice note sent as if you recorded it is a lie, and it is the kind of lie that ends a relationship when discovered. Two honest uses: a note in a language you do not speak, with "this is my voice translated, I do not speak Portuguese well, so I used a tool" said in it, or a standard explainer ("here is how the demo works") that you tell the person is recorded. A personal reply to a personal message is recorded by you, in your voice, on your phone, in thirty seconds. That is faster than the tool anyway.

The "do not sound like a robot" framework

Every AI drafted message passes five checks before it is sent. If it fails one, fix it by hand.

Check	The test	The fix
1. Could this have been sent to anyone?	Cover their name. Is there still something only about them?	Add the exact thing they said, in their words
2. Is there a word I would never say?	"Leverage your potential", "I noticed", "I hope this finds you well", "exciting opportunity", "unlock"	Delete it. Replace with how you talk
3. Is it under 40 words with one question?	Count	Cut everything after the question
4. Is anything in it a claim?	A number, a promise, "most of my clients", "proven"	Delete. If the message needs a claim to work, it does not work
5. Did I change one line myself?	Honestly	Change one. The human line is the one that gets the reply

A message that passes all five was drafted by AI and written by you. That is the only kind to send.

Top tips for AI in outreach

- 1. AI drafts, you send.** The moment a tool sends, the messages are identical and the reports begin.
- 2. Paste the profile into a free assistant before every message.** Three lines of research, zero cost, most of the value.
- 3. Build one custom assistant with your voice, your rules and the 60 templates.** It writes inside your lines forever.
- 4. Three drafts, pick one, change one line.** The changed line is the human one.
- 5. Log every message in a spreadsheet and ask the assistant weekly what worked.** That is the only analytics a solo partner needs.
- 6. Never use a research database to message consumers.** They are built for business contacts, and consumer financial outreach from a scraped list is illegal in most places.
- 7. Voice clones are for translation and explainers, said out loud. Never for a personal reply.**
- 8. Run the five checks on every draft.** Anyone, never say, 40 words, no claim, one line changed.

Do this, not that

Do this	Not that
AI drafts, you send	Auto sending
Research from public posts	Scraped contact details
Custom assistant with your voice and rules	Generic "write a sales message"
Three drafts, one line changed	Copy, paste, send
Spreadsheet plus weekly summary	No tracking
Voice clone declared as a tool	Voice clone passed off as you
Five checks on every draft	Trust the output
Zero claims, zero numbers	"Proven", "most of my clients"

Key takeaways

- AI is for research, drafting, follow up variations, analysis and translated voice notes. It is never for sending or for deciding who should trade.
- A free assistant with the profile pasted in does most of the research. A custom assistant with your voice and the templates does the drafting.
- Three drafts, change one line, five checks, then send.
- Research databases are for B2B. Using them to message consumers about trading is outside their terms and often illegal.
- Voice clones are declared or not used. A personal reply is recorded by you.

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