

Email Template — Pilot Program Request

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For inviting interested partners to start with a pilot case before full partnership.

Version A: Offering Pilot After Positive Call

Subject: Pilot program — let's start with one case

Hi [First Name],

Following our conversation, I think the best way forward is a pilot — one case, no long-term commitment, so you can see how we work firsthand.

How the pilot works:

1. **You submit a client profile** — via our intake form or email
2. **We do a free pre-screen** — KYC, risk classification, banking scenario (5–7 business days)
3. **You review the result** — if it's a fit, we proceed to execution
4. **We deliver** — within the agreed scope and timeline
5. **We debrief** — what worked, what to adjust

What's different about the pilot:

- Free pre-screen (no cost for the risk assessment)
- Direct access to the account manager (me)
- Full transparency on process and pricing
- No partnership commitment required until you're satisfied

What we need from you:

- One client profile that fits our scope (company formation, banking, or residency in UAE)
- Completed intake checklist (I'll send the form)
- Passport copy and SOF documentation for the client

Ready to give it a try? Just reply and I'll send the intake form.

Best,

[Your Name]

WTP | email@wtp.uae

Version B: Requesting Pilot from a New Lead

Subject: Free pre-screen — test our UAE execution

Hi [First Name],

If you have clients considering UAE company formation, banking, or residency, I'd like to offer a free pre-screen as a way to test our service.

No commitment required. Here's what you get:

- Risk classification of the client profile (Green / Yellow / Red)
- Banking scenario recommendation (which bank, what requirements)
- Package recommendation with estimated costs and timeline

- All within 5–7 business days

If the pre-screen result looks good and the client wants to proceed, we handle the full execution. You earn a commission on delivery — no operational burden.
If it doesn't work out, no cost, no strings.

Interested? Send me a client profile and I'll get started.

Best,
[Your Name]
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Version C: Formalizing After Successful Pilot

Subject: Partnership agreement — next step
Hi [First Name],

The pilot case went well — [brief summary of outcome]. Thank you for the smooth collaboration.

I'd like to formalize our partnership. Here's what the agreement covers:

- **Commission structure:** [X%] of WTP service fees for referred clients
- **Client protection:** All referred clients tagged in our CRM, no direct engagement without your permission
- **Reporting:** Weekly updates on active cases, monthly summary
- **Scope:** Referral model / White-label (as discussed)
- **Term:** 12 months, renewable, 30-day notice for termination

I'll prepare the draft agreement this week. In the meantime, feel free to send any new cases — the pilot terms continue until the agreement is signed.

Best,
[Your Name]
WTP | email@wtp.uae

Pilot Program Details (Internal Reference)

ASPECT	PILOT TERMS	FULL PARTNERSHIP TERMS
Pre-screen cost	Free	Free
Commission rate	Standard rate	Standard or negotiated
Number of cases	1–3	Unlimited
Reporting	Per case	Weekly + monthly
Agreement required	No	Yes
Duration	Until mutual decision	12 months renewable
Support level	Direct account manager	Dedicated or shared