Bigger businesses. Better conversations.

A practical sales playbook inspired by Hunter Dickinson and Bear Matthews.

TIER 1 PARTNERS

Build your processing portfolio with expert help.

Find existing volume. Understand the money flow. Bring the right opportunity to the team.

THE PLAY

Research → Ask → Match a case → Qualify → Introduce

Inside: ready-to-use outreach, 28 discovery questions, six concrete business examples, objection responses, and a prospect handoff worksheet.

Research basis: Hunter archive + Bear archive

Find the money flow

One relationship can unlock a merchant - or an entire network of sellers.

Established merchants

Look for coaching companies, agencies, education businesses, and service operators with existing sales. Learn who owns payments, what they process, and what could justify changing providers.

Platforms and marketplaces

Look for booking software, dues platforms, creator networks, expert marketplaces, and vertical business software. A platform may need customer checkout, platform fees, seller balances, and payouts together.

FIVE QUESTIONS BEFORE YOU REACH OUT

Is the business already selling?
Does it control its payment setup?
Does it collect for other sellers or service providers?
Can you reach an owner or finance, operations, or product lead?
What specific problem could make a conversation useful?

Prioritize: meaningful existing volume, a confirmed problem, decision-maker access, and a workable next step. A small platform serving many businesses may be more valuable than a large audience with little revenue.

Hunter emphasizes accounts that create further credibility and introductions. Bear emphasizes evaluating the whole payment experience, including checkout and payouts.

Hunter: prioritize high-impact accounts

Bear: payments as a product decision

Outreach that earns a reply

Use a real observation. Replace every bracket before sending.

MERCHANT / FIRST TOUCH

Hey [Name], I looked through [business] and noticed [specific checkout or payment-flow observation]. How are you handling [relevant issue] today? I work with businesses evaluating Whop for payments and thought it might be worth comparing.

PLATFORM / FIRST TOUCH

Hey [Name], does [platform] handle payments for your users, or do they connect their own processors? I work with Whop's partner network and am looking for platforms where checkout and payouts could work better together. Curious how you have built that today.

WARM INTRODUCTION

Do you know who owns payments or finance at [business]? I noticed [specific opportunity]. I would like to understand their setup and see whether an introduction to Whop would be useful.

FOLLOW-UP WITH A REASON

Following up because [relevant observation or case study]. Is [problem] something you are actively working on, or is the current setup doing everything you need?

Research first: inspect the public website, checkout, booking journey, and payment options. Mention only what you actually observed. Hunter describes learning the customer experience before offering feedback.

Hunter: customer-first outreach

Ask before you pitch

Pick the questions that fit. Let the answers determine the conversation.

Business fundamentals

1. What do you sell, and who buys it?
2. Roughly how much do you process monthly?
3. What is the average transaction size?
4. Which countries are customers in?
5. How much is recurring versus one-time?
6. Do you sell directly or collect for others?

Current setup

7. Who handles checkout, subscriptions, and payouts?
8. What do you like about the setup?
9. What would you change?
10. Why did you choose it originally?
11. What are the costs, including additional fees?
12. Can we review a recent processing statement?

Problems worth solving

13. Where do buyers drop out before paying?
14. Do you track failures and successful retries?
15. Have reserves or settlement delays affected operations?
16. How much time goes to collections or reconciliation?
17. Which payment methods do customers request?
18. What becomes difficult as you grow?

Hunter: question-led discovery

Get to a real next step

Understand platform complexity, decision-makers, and the reason to act.

For platforms and marketplaces

19. How do sellers onboard and receive payouts?
20. Do buyers leave your product to pay?
21. How do you collect your platform fee?
22. What happens with refunds and disputes?
23. Which payment functions do your engineers maintain?
24. What would they build if that work disappeared?

Decision process and timing

25. Who else needs to evaluate a change?
26. What would make switching worthwhile?
27. What contracts or technical dependencies affect timing?
28. Would you review one payment flow with the Whop team?

IF THEY SAY EVERYTHING WORKS

Good to hear. What would the setup need to handle if the business doubled?

CONNECT THE ANSWERS

You said [problem]. It causes [measured impact]. We should evaluate [specific payment flow], using [relevant case] as a reference.

Example: "You said your team spends two days each month calculating seller payouts. Metafy is relevant because its flow includes customer payments, platform fees, and creator payouts. Let's include your operations lead in a review."

If the impact is unknown, ask. Do not invent savings.

Fix the financial workflow

Detailed examples surfaced through Bear's posts and checked against Whop case studies.

Nickel / B2B payments

29% → 47% platform-wide completion

Separate card and ACH/payout arrangements required repeated integration work. Whop supplied embedded checkout, payouts, and fraud tooling. Nickel reported an 18 percentage-point completion increase from June to August and real payments about a week after integration work began.

Find: Contractor software, freight platforms, B2B invoicing, and vertical finance tools.

Ask: Are you maintaining separate systems to collect and settle payments? What does adding a provider cost your team?

Say: Nickel brought checkout and payouts into one relationship. We could explore whether that simplifies your setup too.

Read the source case / announcement

Dueflow / membership collections

$1.1M processed in August · 67 organizations

Dueflow replaced fragmented dues collection with a platform built on Whop. The case reports $388K from one chapter in 30 days and one chapter improving collection from 78% to 95%. These are payment and collection figures, not profit.

Find: Association software, chapter networks, clubs, and dues-management platforms.

Ask: Across your organizations, how much is collected annually - and how much still requires manual follow-up?

Say: Dueflow shows that a focused membership niche can contain substantial aggregate volume. Who manages that flow across your network?

Read the source case / announcement

Keep payments in the product

Use the case that matches the prospect's workflow.

Cal.com / paid bookings

Native payments launched in under two weeks

Hosts previously needed an external account and extra setup to charge for bookings. Cal embedded payment into booking and payout tools into the host dashboard. The case describes a new payment-related revenue stream, without disclosing earnings.

Find: Booking software, consultant networks, tutoring platforms, and appointment marketplaces.

Ask: Do users collect payment inside your booking flow? Does the platform earn from that activity?

Say: Cal brought payment into booking itself. Could your users benefit from choosing a time and paying in one flow?

Read the source case / announcement

Metafy / creator marketplaces

Customer payment → platform fee → creator payout

Bear describes embedded checkout for gaming coaching, guides, and live events, together with payment acceptance, platform-fee collection, and creator payouts. The post establishes a workflow example, not a measured conversion uplift.

Find: Coaching marketplaces, education platforms, expert networks, and creator marketplaces.

Ask: When a customer buys, how do you retain your fee and get the rest to the creator?

Say: Metafy is a useful example of supporting the complete marketplace money flow. Is that one system for you today?

Read the source case / announcement

Start with payouts, too

Some of the best opportunities begin after the customer has paid.

SideShift / distributed work

Reported scale: $10M+ payouts · 10K+ students

The announcement shared by Bear described a platform connecting businesses with people producing organic content. These figures describe reported platform scale when it joined the network; they do not establish subsequent volume processed by Whop.

Find: UGC networks, ambassador programs, contractor platforms, and distributed-workforce businesses.

Ask: How do you track who earned what, verify recipients, and send payouts?

Say: If contributor payments are becoming an operational burden, it may be worth reviewing payouts as well as checkout.

Read the source case / announcement

Flite / real-world experiences

Global acceptance, wallets, and payouts

Bear announced Whop powering these functions for an experience marketplace. No financial result or conversion improvement was disclosed in that post.

Find: Tour platforms, experience marketplaces, and event-booking networks.

Ask: How do customers pay, how do hosts receive funds, and what happens when an experience is canceled?

Say: Let's map the buyer-to-host payment flow and see where collections, balances, or payouts are creating friction.

Read the source case / announcement

Keep the conversation useful

Answer the concern, then ask a question that moves the evaluation forward.

WE ALREADY USE STRIPE

What works well, and what still sits outside it? I would want to understand checkout, fees, reconciliation, and payouts before suggesting a change.

JUST TELL ME THE RATE

Happy to get a proper comparison. What are your monthly volume, average ticket, payment methods, and customer countries? A recent statement helps us compare total costs.

WE DO NOT WANT TO REBUILD

What would need to stay exactly as it is? We can have the team review the integration scope before you commit to anything.

CAN YOU GUARANTEE APPROVAL OR FASTER SETTLEMENT?

The team needs to review the business and confirm the applicable terms. I will help you get a clear answer.

SEND ME SOMETHING

Absolutely. Which is most relevant: checkout conversion, costs, seller payouts, or engineering work? I will send the closest example.

Keep claims precise: case outcomes belong to those businesses. Confirm rates, markets, underwriting, reserves, settlement, and integration scope for each prospect. Payment volume is not revenue or partner commission.

Bring a qualified opportunity

Complete this before asking for an introduction or presenting a deal on the daily call.

Business / website

Decision-maker / your relationship

What it sells / direct or platform

Monthly volume / source of estimate

Average ticket / countries / payment methods

Current providers / sellers or payout recipients

Confirmed problem / measured impact

Closest case study / why it fits

Decision process / timing / dependencies

Agreed next action / owner / date

DAILY CALL CHECK-IN

Who is the business? How much money moves through it? What problem did the decision-maker confirm? Which case fits? What is the next action?

Label estimates. Separate existing volume from projected growth. Ask for confirmation where information is missing.

Teach from evidence

A source shelf for partners and coaches. Click any title to open the original.

Hunter / Discovery before pitching

Hunter / Become a customer first

Hunter / Target higher-impact accounts

Hunter / Ask before offering a rate

Bear / Evaluate the whole platform payment experience

Nickel / Completion and integration case study

Dueflow / Dues collection case study

Cal.com / Native booking payments case study

Bear / Metafy announcement

Bear / SideShift announcement

Bear / Flite announcement

How to use this playbook

The questions, scripts, and qualification worksheet are Tier 1 teaching adaptations, not verbatim statements from Hunter or Bear. Case-study results are company-reported. Announcement examples are identified separately from measured outcomes.

Do not reuse unverified authorization-rate calculations or promise a universal uplift. Different businesses, payment mixes, and implementations can produce different results.

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