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Social Trading

Where trading meets community.



Bring provider profiles, updates and conversations into one considered brokerage experience. Give clients room to discover strategies and understand the people behind them.

Discovery starts with the community.

Social Trading adds a community layer to the client experience. Profiles, provider updates and shared discussions help clients explore an approach before deciding whether to take it further.



Discover

Explore provider profiles and strategy information, bringing the person and their approach into view.

Participate

Follow providers, read their updates and join conversations connected to the trading experience.

Consider

Review the information and conversations around an approach, with individual judgement guiding discovery.

People, strategies and conversations. One connected experience.

The people behind the strategy.

A strategy becomes easier to understand when clients can explore the provider behind it. Profiles and strategy information create a clearer starting point for discovery.



Give the approach context

Provider information, trading history and risk context support a more considered review. Clients can look beyond a single headline and assess whether an approach fits their preferences.

Make discovery deliberate

Exploring a profile is part of understanding a provider. It gives clients a place to learn about the approach before choosing which voices to follow and which topics remain relevant to them.

Product visuals are conceptual. Illustrative charts are not verified performance records or forecasts.

Updates that keep the approach in view.

Updates give clients a continuing view of the providers they choose to follow. Keep those voices within the brokerage experience, alongside the profiles that introduced them.



Follow the voices that matter

Clients choose which providers they want to keep following and read the updates shared around their approach. Following a provider helps organise the social experience around individual interests.

Build understanding over time

A profile introduces the provider; updates add an ongoing perspective. Clients can spend time reading and participating, building familiarity with the voices and ideas that interest them.

More perspective.
A clearer starting point.

Make provider discovery a considered part of the community experience. Strategy information, profiles and the surrounding conversation give clients several ways to understand an approach.



Look beyond a headline

Bring the provider and their strategy information into the same discovery journey. Trading history and risk context support a more informed review, alongside the way the provider explains their approach.

Explore with individual judgement

Clients decide which providers and ideas they want to spend time understanding. The community gives them a place to explore information and perspectives at their own pace.

More context.
A shared conversation.

Strategy information alone does not answer every client question. Discussions give the community a place to exchange perspectives around the providers and approaches they are exploring.



Bring discussion into the journey

Clients can join conversations as part of the same experience in which they discover providers and read updates. The context stays close, helping participation feel connected rather than scattered across separate destinations.

Leave room for judgement

Community contributions provide perspectives to consider. Clients retain their own judgement about the information they read and the strategies they choose to explore further.

Follow the voices that matter.

Let clients build a community experience around the providers they choose to follow. Individual interests guide the voices and updates they keep returning to.



A personal point of interest

Following a provider creates a continuing social relationship with their updates and community presence. Clients choose which voices they want to stay close to as they explore different approaches.

Keep participation ongoing

The experience extends beyond a first profile visit. Clients can return to updates and discussions, revisit an approach and stay involved in the conversations that interest them.

Your community.
Your operating approach.

A considered community brings the brokerage, providers and members together while keeping their responsibilities clear. Your rules and moderation approach set the tone for participation.



Brokerage

Define the community rules, moderation approach and the providers and strategies presented to clients.

Provider

Present an approach through profile information, updates and participation in the community.

Member

Explore providers, follow updates and join discussions, using individual judgement throughout.

Shape the community around the way your brokerage serves clients.

Inside your CRM. Part of your brand.

For brokerages using Paperbot CRM, Social Trading can sit natively within the client portal. Community discovery becomes part of the relationship your business already manages.



One coherent client experience

Profiles, updates and conversations can be presented within the brokerage's branded portal, rather than through an iframe showing a separate platform. The community feels like a considered part of the wider service.

An integration shaped to fit

We streamline setup and integration to keep turnaround as short as possible for the agreed scope. Portal workflows and deployment requirements are confirmed with your team.

The native CRM integration described here applies to Paperbot CRM clients.

A fit for your community. A clear path forward.

A focused walkthrough connects Social Trading with the way your brokerage wants clients and providers to participate. Begin with the experience you want to create, then agree the delivery scope.

The member experience

Explore provider discovery, profiles, updates, following and discussion within the community journey.

The operating approach

Discuss the provider presentation, community rules, moderation approach and fit with your client portal.

The agreed engagement

Confirm the selected scope, deployment environment and integration requirements in a written quotation. Pricing is defined for the engagement agreed with your team.

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Handcrafted for your business.

Technology should adapt to the business, not the other way around. We connect product design, technology and practical workflows around the people your brokerage serves.

Begin with understanding

Your client relationships, brand and operating priorities inform the discussion. We consider how the community should fit into the way your brokerage works.

Make the whole experience coherent

Profiles, conversations and the wider client portal should feel connected. Clear interfaces and thoughtful integration help those relationships work together.

Your brokerage. A more connected community.

Bring Social Trading to your community.

Explore a community experience shaped around your brokerage, your providers and your clients.

Let's talk about your community

Tell us how you want clients to discover providers, follow updates and take part in discussions. We will review Social Trading with your team and shape the deployment around your operation.

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