SALES & PARTNER PLAYBOOK

Subscriber Bot

Subscriber Bot gives finance, IT and everyday subscribers one honest view of everything they pay for on repeat — and what to cut.

Subscription system of record | Universal Inbox | Renewal forecast | Governed AI agents | SaaS spend control

PREPARED BY
Burdenoff Consultancy Services Pvt. Ltd.

PRODUCT
subscriberbot.com

BOOK A CALL
calendly.com/vignesh-burdenoff/1-1

00 How to use this playbook

Read the problems, ICP and opportunity signals first — they tell you whether the conversation in front of you is worth pursuing. Use the persona hooks to open, the discovery questions to qualify, and the objection answers when the prospect pushes back. Everything here is written for you to say out loud; nothing needs a technical briefing beforehand.

IN A HURRY

Read sections 01–03 and 18. That is enough to recognise an opportunity and open a conversation.

BEFORE A MEETING

Add 06–08, 10 and 16 — who buys, what they buy, what it costs, and what they will push back on.

HANDING OVER A LEAD

Sections 19–22 tell you exactly what to send, to whom, and what you earn for it.

CONTENTS

01 Product Overview

SUBSCRIBERBOT.COM

Subscriber Bot is one place to see and run every recurring commitment a person or an organisation holds — subscriptions, memberships, licences, contracts, newsletters, insurance, telecom and utilities. Each one is tracked as a single record carrying its provider, plan, price, next renewal date, entitlements, invoices and attached documents. A Universal Inbox — one merged, categorised stream of the messages providers send — sits alongside it, so renewal notices and price changes stop getting lost in marketing mail. On top, AI agents with an explicit operating setting can propose actions within rules you write, and the product is deliberate about refusing autonomy it cannot yet enforce.

CATEGORY

Subscription management and recurring-spend governance, serving individuals and households at one end and finance, IT and procurement teams at the other.

WHERE IT STANDS TODAY

Generally available and free to start. The tracking, inbox, invoice, vault, provider registry and governance layers are live; automated discovery from mailboxes and statements, the conversational concierge, computed health scores and price benchmarking are published roadmap, not shipped. There are no public reference customers yet.

HOW CUSTOMERS GET IT

A hosted cloud service — sign in at app.subscriberbot.com, no installation. Multi-tenant by default with each organisation isolated; dedicated tenancy and self-hosting are discussed case by case for large or regulated buyers. Single sign-on, roles and an audit trail are on every plan rather than an enterprise upsell.

- Web app
- Mobile app for iOS and Android
- Browser extension
- Command-line tool
- MCP server for AI clients such as Claude Desktop
- Node.js library
- Python library
- Community hub at community.subscriberbot.com

02 One-Line Pitch

SAY EXACTLY THIS

"Subscriber Bot gives finance, IT and everyday subscribers one honest view of everything they pay for on repeat — and what to cut."

SHORTER, FOR A CHAT MESSAGE

One system of record for every subscription, licence and contract you pay for.

THE CATEGORY SENTENCE

Subscriber Bot is a subscription and recurring-spend management platform for individuals, households, finance and IT teams, and procurement.

03 30-Second Elevator Pitch

SPOKEN, ROUGHLY 30 SECONDS

"Most people cannot say what they pay for on repeat, and most companies cannot either — the charges sit in inboxes, on cards, in app stores and in procurement spreadsheets. Subscriber Bot is a system of record for every recurring relationship: each subscription, membership, licence and contract becomes one tracked record with its plan, renewal date, invoices, documents and provider messages attached. You get a single total, a six-month renewal forecast, and a list of what to cut. Individuals start free; finance and IT teams run the same model across the company."

IF THEY ARE TECHNICAL

Every subscription is a first-class record linked to its provider, plan, entitlements, payment instrument, invoices, renewal events and attached documents, and those links are written as a connected map as the records are created. The whole domain is reachable through one API that the web app, the command-line tool, the Node and Python libraries and an MCP server for AI clients all call — with the same permission check and the same audit entry on every path.

IF THEY ARE A BUSINESS BUYER

Recurring software and services spend is usually the least governed large line item a company has: nobody owns the renewal calendar, nobody knows which licences are idle, and auto-renewals lock in cost before anyone notices. Subscriber Bot puts every recurring commitment, its owner, its renewal date and its documents in one place, so a renewal quarter can be planned instead of survived.

04 Problem We Solve

These are the recurring-spend problems that show up in ordinary conversation. If a prospect says any of them out loud, you have found the opening.

Nobody can state the real total

Who feels it: Individuals, and the finance lead in any company above about fifty people

What it costs them: Recurring spend is budgeted from memory and last year's invoices. Decisions about what to cut are argued rather than evidenced, and the number is almost always higher than anyone guessed.

How Subscriber Bot answers it: Every commitment becomes one record with a price and a billing cadence, and the Insights screen normalises daily, weekly, quarterly and annual plans to a monthly equivalent so they are actually comparable. The total is computed from the portfolio, never from a sample figure.

Renewals arrive as surprises

Who feels it: Budget owners, procurement, and anyone who has been charged for something they meant to cancel

What it costs them: Auto-renewals lock in a year of spend before anyone has reviewed the vendor, and notice windows close quietly. The option to leave is lost weeks before anyone knew there was a decision to make.

How Subscriber Bot answers it: Renewal dates are held on each record and bucketed into a six-month forward forecast, so a renewal quarter can be seen coming. A scheduled sweep also moves a subscription to past due when a bill goes unpaid and sends a throttled reminder rather than letting it lapse silently.

The important message is buried

Who feels it: Households and small teams where one inbox receives everything

What it costs them: A price-increase notice and a trial about to convert look exactly like the thirty-eight marketing emails around them. The two that mattered are found after the charge, not before it.

How Subscriber Bot answers it: The Universal Inbox merges provider messages into one stream with a category, an action-required flag and a confidence value on each. You can collapse it to only the messages that need a decision, and each message links back to the subscription it concerns.

Shadow IT and duplicate vendors

Who feels it: IT and security leads in growing companies

What it costs them: Tools bought on personal cards never reach the inventory, two teams buy competing products, and offboarding leaves licences paid for and access live. The estate is larger and leakier than the record says.

How Subscriber Bot answers it: Every subscription in the workspace carries an owner and a provider, so the estate is one list rather than several. Cancellation is a tracked lifecycle transition, and the workflow layer is built to hang follow-on actions such as access revocation off that event.

Invoices and contracts scatter

Who feels it: Freelancers, office managers, and anyone assembling evidence at audit or tax time

What it costs them: Receipts sit in email, contracts in a drive, licence keys in a password manager. Reconciling what was paid takes days, and the notice clause nobody can find is the one that costs money.

How Subscriber Bot answers it: The Digital Asset Vault keeps invoices, contracts, licences, receipts and certificates attached to the subscription they belong to, and an invoice ledger records issued, paid and overdue status per bill. Sensitive stored references are encrypted and revealed only to an authorised reader.

Automation you cannot trust

Who feels it: Anyone who has been offered an AI toggle with no guarantee behind it

What it costs them: A green badge implies an agent is watching renewals when nothing is. The failure is discovered as a charge that should have been cancelled, which is worse than having no automation at all.

How Subscriber Bot answers it: Agents are records with an owner, a kind and a stated setting — off, suggest-only, or autonomous — and rules are separate records with a condition and an action. Autonomous is refused today with an error that explains the enforcement engine has not shipped, rather than accepted as a setting that does nothing.

Enterprise tools start at an enterprise price

Who feels it: Teams of five to two hundred who have the problem but not the budget or the procurement cycle

What it costs them: The category's serious tools are quoted rather than priced, typically start in five figures a year, and need an implementation project. So the team stays on a spreadsheet nobody updates.

How Subscriber Bot answers it: Prices are published, the free tier has no time limit and no card, and the same roles, permissions, audit trail and tenant isolation ship on every plan. A team can start on its own and grow into the enterprise capabilities without changing platform or migrating data.

05 Value Proposition

Five things a partner can promise without overstating what has shipped.

One model from an individual to an enterprise

A personal portfolio and a company's vendor estate are the same shape of data here — a set of relationships with providers, plans, renewals and documents. Nobody has to migrate or relearn when a freelancer becomes a five-person team, or when a finance lead who used it personally rolls it out at work. No incumbent in this category spans consumer and enterprise on one platform.

Evidence: The consumer product and the SaaS-spend product run on the identical relationship record and the identical permission model.

The Universal Inbox is a category nobody else offers

Every rival either watches your bank feed or watches your contracts. None of them read the stream of messages providers actually send you, which is where price rises, trial conversions and termination notices arrive first. Subscriber Bot merges those messages, categorises each into one of seven buckets, and lets you filter down to the ones that need a decision.

Evidence: Category, action-required flag and a confidence value are first-class fields in the API, and the interface renders the confidence rather than hiding it.

Governance that arrives on day one, not at the enterprise tier

Every action is checked against role permissions at the edge before any service sees it, every write is scoped to the workspace, and every operation lands in an audit trail with the acting identity, action and resource. Fourteen resource types are enforced and six roles are seeded into every workspace automatically, from portfolio owner down to a read-only compliance auditor.

Evidence: Roles include a Spend Controller who touches funding sources, a Subscription Manager who cannot, and a Compliance Auditor who changes nothing.

Honest AI, which is rarer than good AI

The agent roster, the operating settings and the rule records are live, and the counts on the screen are computed from the customer's own agents. The evaluator that would fire those rules is not built, so the autonomous setting is refused with an error that says exactly why. That refusal is the reason a cautious buyer can take the rest of the AI story seriously.

Evidence: The autonomy gate fails closed — an unresolved or errored check denies rather than allows, which is the opposite of how the platform's other rollout switches behave.

Open to the tools the customer already uses

The whole domain is reachable through the API, and an MCP server exposes about forty tools so an AI client the customer already trusts can work against their portfolio directly. There is a command-line tool, a browser extension, and Node and Python libraries. Providers can publish an adapter through a submission and review pipeline instead of waiting for us to build one.

Evidence: Every MCP call runs as the signed-in person through the same permission check and audit trail as the web app — there is no service account and no bypass.

Published prices and a free tier that is genuinely free

The competitors in the enterprise half of this market publish nothing and quote everything. Subscriber Bot publishes its prices, offers a free tier with no card and no time limit, and prices regionally with the Indian market treated as first class rather than an afterthought. Add-ons are opt-in; there is no silent overage billing.

Evidence: Free covers 25 tracked relationships with a monthly allowance of AI actions and inbox messages; Plus is published at $9 a month.

06 Ideal Customer Profile

A finance, IT or procurement owner at a 50–1,000 person company who cannot produce a list of what renews next quarter, plus the individual power subscriber running thirty or more services who wants the overlap found.

SEGMENT	TYPICAL SIZE	WHY THEY BUY
Finance and FinOps teams	50–5,000 employees, hundreds of licences	Recurring software is one of their largest and least governed lines. They need the renewal calendar, the owner of each vendor, and a defensible savings plan before the budget review.
IT and SaaS administration	50–5,000 employees	They are accountable for an estate they cannot fully see. Shadow IT, duplicate tools and licences left live after offboarding are the daily problem, and the inventory has to be one list.
Procurement and vendor management	200+ employees	Their leverage exists only inside the notice window. A tracked termination date and a complete document trail per vendor changes the negotiation before it starts.
Freelancers, solo operators and small studios	1–15 people	Personal and business subscriptions run on the same cards. They need clean separation, receipts kept with the subscription for tax, and no renewal on a domain or licence they forgot.
Power subscribers and households	Individuals, 20–80 active services	Overlapping AI tools, monthly plans that should be annual, and family plans spread across accounts. The free tier makes the first conversation cost nothing.
Subscription providers	Any company selling recurring plans	A claimed profile in the provider registry and a published adapter puts them in front of people actively choosing a service, and the analytics side is a separate commercial track.

GEOGRAPHIES

Global and multi-currency by design, with published regional pricing across four bands. India is a first-class market with pricing in rupees; the United States, Europe, the United Kingdom and Asia-Pacific are covered at list. There is no geography where the product is unavailable, though local payment routing matters for paid plans.

NOT A FIT — DO NOT CHASE

- They want somebody to phone providers and negotiate their cable or phone bill on commission — that is a consumer bill-negotiation service, and it is not what this is.
- The purchase requires a completed security attestation today. Certifications are named as targets and none is held yet, so a buyer whose process cannot start without one will stall.
- They want an autonomous agent that cancels things by itself right now. Rules can be written and agents configured, but the engine that fires them has not shipped and we say so.
- Their spend is one-off purchases and hardware rather than recurring commitments — there is nothing here for a business with no renewal cycle.
- They need a large price-benchmark corpus or human negotiators to tell them whether they are overpaying. That is genuinely a competitor's strength and remains on our roadmap.
- They want a general accounting or expense system. Subscriber Bot governs recurring relationships; it does not replace the ledger.

07 Buyer Personas

The same product is bought for four quite different reasons. Open with the reason that belongs to the person in front of you.

Finance or FinOps lead

WHAT THEY WANT

Forecast recurring commitments accurately, take defensible cost out before the budget review, and stop being surprised by a renewal.

WHAT FRUSTRATES THEM

No single source of truth for licences and owners; duplicate vendors bleeding money; a renewal quarter that arrives without warning.

Open with: **If I asked you today what renews in the next ninety days and what it costs, how long would that take to answer?**

They will ask: What savings should I realistically expect, and how quickly can I show a number to my CFO?

IT or SaaS administrator

WHAT THEY WANT

A trustworthy inventory of the estate, shadow IT shrinking rather than growing, and clean offboarding that reclaims licences.

WHAT FRUSTRATES THEM

Tools bought on personal cards never reach the inventory; two teams pay for competing products; access outlives the subscription.

Open with: **How many tools do you think are in use across the company that never went through you?**

They will ask: How does it find things nobody told it about, and what does it do when a subscription is cancelled?

Procurement or vendor manager

WHAT THEY WANT

A governed intake, leverage at renewal, and never missing a notice window again.

WHAT FRUSTRATES THEM

Ad-hoc purchasing with no approval trail; termination clauses buried in documents; no comparison data when the renewal lands.

Open with: **When did a notice window last close on you before anyone noticed there was a decision to make?**

They will ask: Can it read our contracts and tell me the termination terms, and where does the alternatives data come from?

Power subscriber or household manager

WHAT THEY WANT

One total, the overlap found, and the low-value services cut without losing anything they actually use.

WHAT FRUSTRATES THEM

Thirty-plus services across several cards; monthly plans that should be annual; trials that convert while unwatched.

Open with: How many of the AI tools you pay for are doing more or less the same job?

They will ask: Does it cancel things for me, and what does it cost to start?

Security or compliance officer

WHAT THEY WANT

Know which vendors touch sensitive data, evidence the governance of that estate, and reduce concentration risk.

WHAT FRUSTRATES THEM

Unknown vendors processing company data; no view of vendor posture; audit evidence assembled by hand each time.

Open with: If an auditor asked for the list of vendors processing customer data and who approved each one, where would you go?

They will ask: What is your own compliance position, and can I get a read-only role that changes nothing?

Subscription provider or vendor

WHAT THEY WANT

Lower churn, cheaper acquisition of people who are actively choosing, and a direct channel to their own subscribers.

WHAT FRUSTRATES THEM

Churn they cannot predict in time to intervene; expensive low-intent acquisition; no relationship with customers managing them elsewhere.

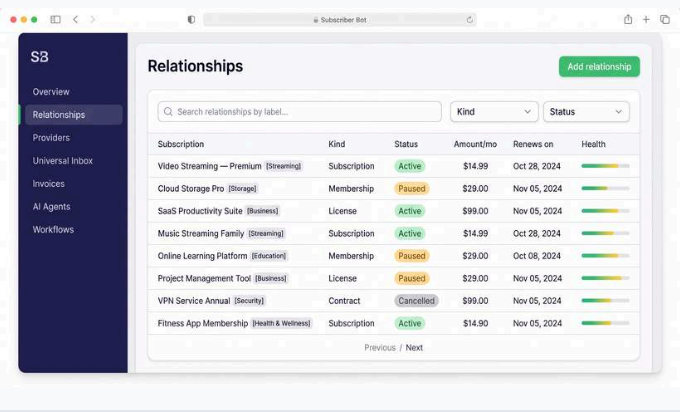
Open with: Where do your prospects actually compare you against the alternatives before they buy?

They will ask: What does building an adapter involve, and what do I get in return for it?

08 Top Use Cases

14 SCENARIOS

Fourteen situations, each drawn from what the product actually does today. Where a capability is still roadmap, the entry says so.



ANY SUBSCRIBER, PERSONAL OR COMPANY

See everything you pay for, in one list

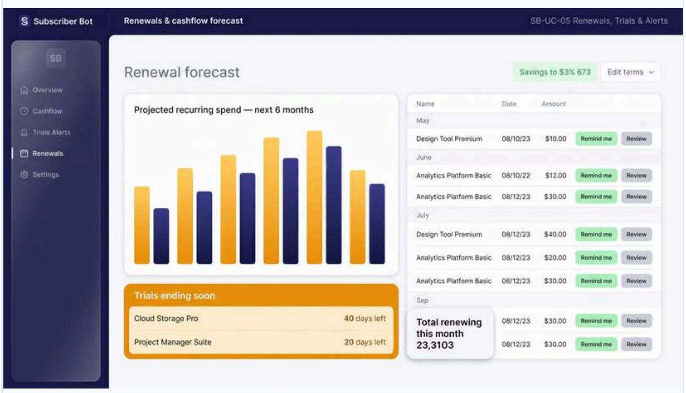
THE SITUATION

Charges are spread across two or three cards, several app stores, a work account and an old email address. The honest answer to how many subscriptions exist is a guess with a range.

WHAT HAPPENS WITH SUBSCRIBER BOT

Each subscription, membership, licence or contract is added as one record carrying its provider, plan, price, cadence, next renewal, entitlements and the documents attached to it. Look-alikes are consolidated so one service is one entry, not three statement descriptors.

One inventory and one total, both of which survive being challenged.



BUDGET OWNERS AND FINANCE LEADS

Know what renews before it renews

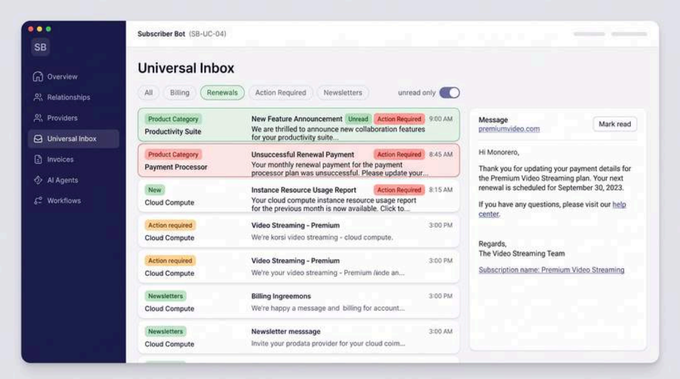
THE SITUATION

Renewals are discovered on the statement. By the time anyone reviews the vendor, another year has been committed and the notice window has closed.

WHAT HAPPENS WITH SUBSCRIBER BOT

Renewal dates are held on each record and bucketed into a six-month forward view. Plans on daily, weekly, quarterly and annual cadences are normalised to a monthly equivalent so the forecast is comparable, and the largest recurring costs are ranked.

A renewal quarter that is planned rather than absorbed.



HOUSEHOLDS AND SMALL TEAMS

One inbox for everything providers send

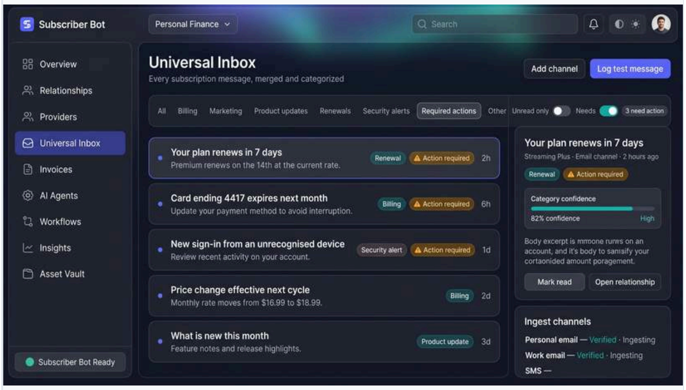
THE SITUATION

Renewal notices, invoices, security alerts and marketing all land in the same place and look alike. The two messages that mattered this month were read after the charge.

WHAT HAPPENS WITH SUBSCRIBER BOT

Messages arrive through channels the customer registers and verifies, and land in one categorised timeline — billing, marketing, product update, renewal, security alert, required action or other — each linked back to the subscription it concerns.

The messages that need a decision are one filter away.



ANYONE WITH A NOISY INBOX

Triage the mail that actually needs you

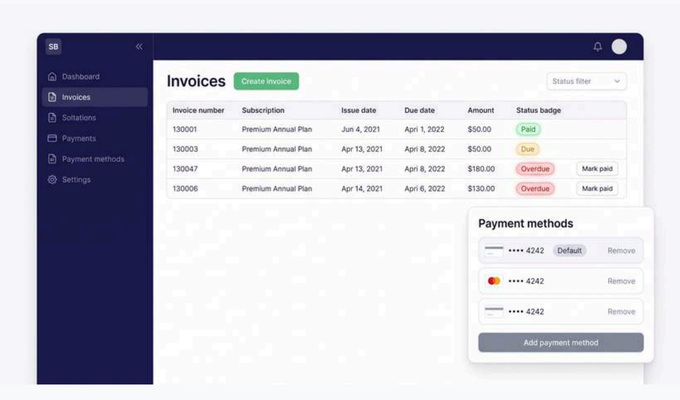
THE SITUATION

Out of forty provider messages a week, two matter. Reading all forty to find them is the current process, and it fails most weeks.

WHAT HAPPENS WITH SUBSCRIBER BOT

Every message carries a category, an action-required flag and, where present, a confidence value rendered as a labelled meter, so a category the classifier was unsure about looks visibly different from a confident one. An action-only filter collapses the stream to decisions.

Forty messages become the two that need you. Note that automatic classification is roadmap; categories are supplied at ingest today.



BUDGET PLANNERS, FREELANCERS, OFFICE MANAGERS

Reconcile what has actually been billed

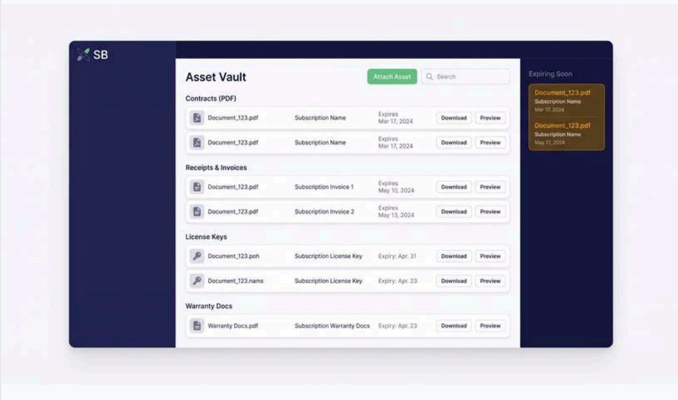
THE SITUATION

Invoices arrive across email, provider portals and attachments. Which are paid, which are due and which have quietly gone overdue is nobody's clear answer.

WHAT HAPPENS WITH SUBSCRIBER BOT

Every bill lands in one ledger with its provider, amount, currency, issue and due dates and a status of issued, paid or overdue, linked back to the subscription it belongs to. Marking a bill paid removes it from the outstanding total in a single action.

Nothing paid twice, nothing missed, and one screen for what is outstanding.



FREELANCERS, PROCUREMENT, ANYONE FACING AN AUDIT

Keep the contract with the subscription

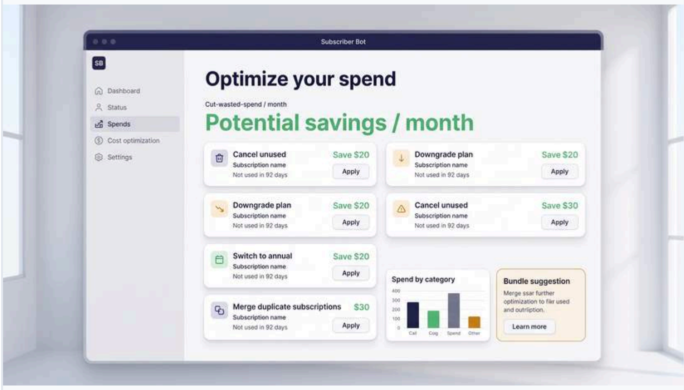
THE SITUATION

The licence key is in a password manager, the contract in a shared drive, the receipts in email. At the moment they are needed, none of them can be found quickly.

WHAT HAPPENS WITH SUBSCRIBER BOT

The Digital Asset Vault stores invoices, contracts, licences, receipts, warranties and certificates against the relationship they belong to, searchable and exportable. Sensitive stored references are encrypted and only revealed to an authorised reader.

Evidence assembled in minutes rather than days.



POWER SUBSCRIBERS AND COST-CONSCIOUS TEAMS

Find the money leaking into overlap

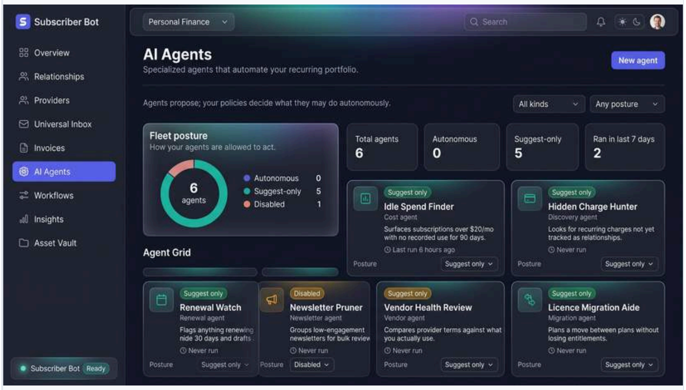
THE SITUATION

Several tools do roughly the same job, some monthly plans would be cheaper annually, and a handful of services have not been opened in months. Nobody has the time to work out which.

WHAT HAPPENS WITH SUBSCRIBER BOT

Spend is normalised to a monthly figure and ranked, and weak relationships land on a watchlist so the candidates for cutting are visible. Every figure comes from the customer's own portfolio, with an empty state rather than a demonstration number.

A shortlist to act on. The deeper overlap reasoning and price benchmarking are roadmap, and worth saying so.



PORTFOLIO OWNERS AND AUTOMATION STEWARDS

Set the limits before the automation

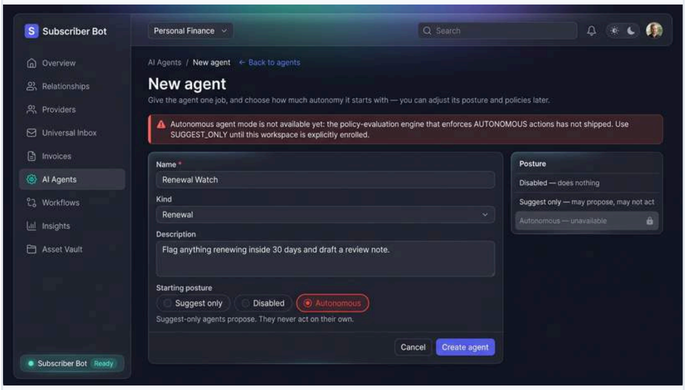
THE SITUATION

They want help with the reconciliation work but will not hand a chat box the ability to cancel their insurance. Most products offer the chat box first and the limits later, if at all.

WHAT HAPPENS WITH SUBSCRIBER BOT

Agents are records with one of nine kinds, an owner and a stated setting — off, suggest-only or autonomous — changeable inline. Rules are separate records with a condition and one of seven actions, plus an enabled switch, a trigger count and a last-triggered time.

The vocabulary of consent exists before the reasoning does, which is the right order.



CAUTIOUS BUYERS AND RISK OWNERS

Autonomy that cannot be switched on by accident

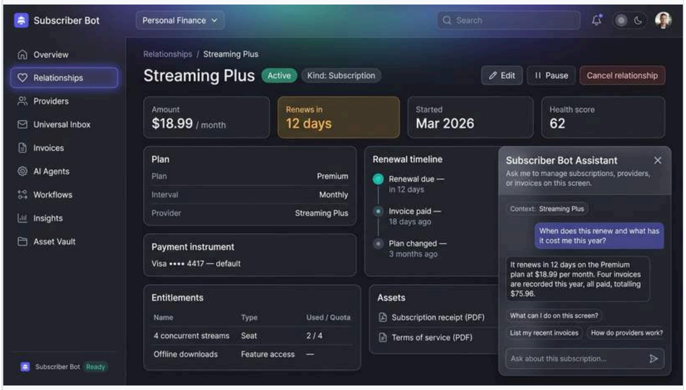
THE SITUATION

Their real fear is a green badge that means nothing — an autonomy switch no code honours, discovered as a charge they believed had been cancelled.

WHAT HAPPENS WITH SUBSCRIBER BOT

Setting an agent to autonomous is checked against a gate that fails closed: unresolved, unknown or errored means refused, not allowed. The refusal is a distinct, self-explaining error saying the enforcement engine has not shipped and to use suggest-only.

A limitation stated as a feature, which is usually the moment a sceptical buyer starts listening.



EVERYDAY SUBSCRIBERS

Ask about the subscription you are looking at

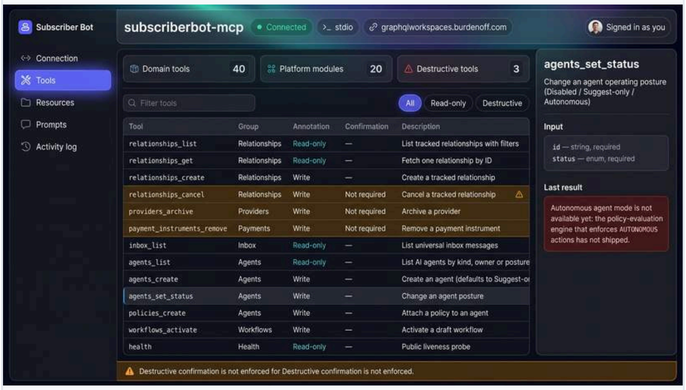
THE SITUATION

Product chatbots make you re-explain what you are already looking at, which is why most people stop using them after a week.

WHAT HAPPENS WITH SUBSCRIBER BOT

The assistant is mounted across every screen and grounds itself on the record you are viewing before the question is sent, resolving the subscription, provider, agent, invoice or workflow in view. On list screens it falls back to the active tab rather than guessing.

Short questions get useful answers, under the asker's own permissions.



DEVELOPERS, POWER USERS AND TECHNICAL FINANCE TEAMS

Point your own AI client at the portfolio

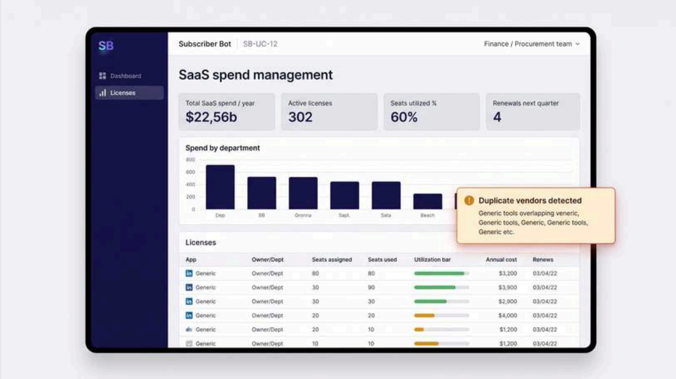
THE SITUATION

They already work inside an AI client they trust and do not want another captive chat window in another tab.

WHAT HAPPENS WITH SUBSCRIBER BOT

An MCP server exposes about forty tools spanning providers, plans, subscriptions, entitlements, assets, renewals, payment instruments, invoices, channels, the inbox, agents, rules and workflows, plus read-only resources and prompt templates for multi-step jobs.

The customer's own agent does the work, under their identity and their permissions.



IT AND FINANCE LEADERS

Bring SaaS spend and shadow IT under control

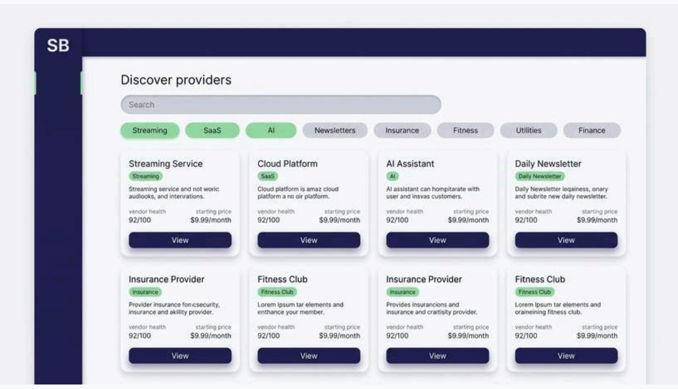
THE SITUATION

Licences bought outside procurement, duplicate tools across teams, and an inventory that was last accurate two reorganisations ago.

WHAT HAPPENS WITH SUBSCRIBER BOT

The organisation's vendor estate runs on the same relationship record as a personal portfolio, with owners, renewal dates, entitlements and documents per vendor, and role-based access separating who may see funding sources from who may edit subscriptions.

One governed estate. The control tower, risk engine and contract clause extraction are roadmap capabilities on this same foundation.



ANYONE CHOOSING A NEW SERVICE

Compare before you subscribe

THE SITUATION

Choosing a subscription today means scattered reviews, marketing pages and a price you cannot see until you talk to someone.

WHAT HAPPENS WITH SUBSCRIBER BOT

The provider registry is searchable by name, category and text, with plans listed per provider. Providers or third parties submit adapters through a review pipeline, and reported marketplace listings can be moderated.

A neutral place to compare. One-click subscribe where an adapter exists is roadmap.

POWER SUBSCRIBERS AND ANALYSTS

One connected map instead of five reports

THE SITUATION

The genuinely useful question — what renews soon, on this card, unused, over a threshold, with a cheaper alternative — is five reports in a normal system, so nobody ever asks it.

WHAT HAPPENS WITH SUBSCRIBER BOT

Providers, subscriptions, plans, invoices and agents are written into a connected map with named links as the records are created, so the map cannot drift from the tables it mirrors. Each node carries the workspace it belongs to, keeping isolation enforceable.

The substrate for cross-portfolio questions exists today; the reasoning layer over it is honestly still being built.

09 Product Capabilities

What is shipped, what is being built and what is still a plan. Anything not marked shipped should be described to a prospect as roadmap.

Relationship lifecycle

The core record and everything hanging off it.

Create, update, list and cancel subscriptions
Full lifecycle control over every recurring relationship, with trial, active, renewing, paused, cancelled and lapsed states and the history of transitions between them.

Plans, prices and entitlements
The tier, price, billing period and what the subscriber actually receives are recorded per relationship, so value for money can be reasoned about rather than guessed.

Renewal events and forward forecast
Renewal dates are tracked per record and bucketed six months ahead, with spend normalised to a monthly equivalent across every billing cadence.

Payment instrument tracking
Records which card, account or wallet funds which subscription, so the question of what hits a given card each month has an answer. This is an annotation layer — no card data is stored and no charge is taken here.

Overdue handling
A scheduled sweep moves an unpaid subscription to past due, lapses it after a grace period, and sends throttled reminders, re-checking current state before each change.

Bulk import from files or statements planned
Adding many existing subscriptions in one go. Today they are added individually or captured through the browser extension.

Universal Inbox

One stream for everything providers send, categorised and filterable.

Merged, categorised message timeline
Seven categories — billing, marketing, product update, renewal, security alert, required action and other — with unread filtering and read state, each message linkable to its subscription.

Action-required filter and confidence meter
Collapse the stream to only messages needing a decision, and see how sure the classifier was about each category rather than being asked to trust it blindly.

Registered and verified ingest channels
Channels are added and verified by the customer, and ingest is metered against the plan so a runaway connector cannot silently consume the allowance.

Automatic AI classification of message bodies in progress
Categories, confidence and the action flag are supplied at ingest today. A model reading the message body to set them is being built into the same fields.

Mailbox and statement connectors planned
Direct read-only connection to an email account or a bank feed, which would populate the inbox with no manual step. Gated behind an external assessment and legal review of the mail scopes.

Documents and invoices

The paperwork, kept where it belongs.

Digital Asset Vault
Invoices, contracts, licences, receipts, warranties and certificates stored against the relationship they belong to, searchable and exportable.

Encrypted sensitive references
Secret values attached to an asset are encrypted at rest and decrypted only when an authorised reader requests that specific field.

Invoice ledger
Every bill with provider, amount, currency, issue and due dates and issued, paid or overdue status, filterable and reconcilable against the renewal forecast.

Contract clause extraction planned
Reading renewal, auto-renewal, termination, service-level and penalty clauses out of an uploaded contract and alerting the owner before a window closes.

AI agents and rules

The governance model is live; the engine that acts on it is not.

Agent roster with nine kinds
Discovery, renewal, cost, newsletter, vendor, compliance, negotiation, migration and concierge agents, each with an owner, a configuration and live counts computed from the customer's own agents.

Operating setting per agent
Off, suggest-only or autonomous, changeable inline. Every agent is created suggest-only, meaning it may propose and never act.

Fail-closed autonomy interlock
Autonomous is refused with a distinct, self-explaining error until the enforcement engine ships; an unclear check denies rather than allows.

Rule records with seven actions
A condition plus alert, create task, renew, cancel, pause, upgrade or downgrade, with an enabled switch, a trigger count and a last-triggered time.

Workflows
Event-driven multi-step automation, created and activated by the customer, for sequences such as a renewal approaching creating an approval task.

Rule evaluation engine in progress
The component that reads a rule's condition against the portfolio on a schedule and decides whether to fire, together with destructive-action classification, a spend interlock and a confirmation step.

Digital Concierge planned
A conversational chief-of-staff for recurring spend, answering plain-language instructions across the whole portfolio.

Discovery and marketplace

Where a subscription is found before it is started.

Provider registry and plans

Searchable by name, category and text, with plans listed per provider and profiles maintainable by a registry curator role.

Adapter submission and review

Providers or third parties submit an integration, which is approved or rejected through a governed queue rather than a fork of the product.

Listing moderation

Reported marketplace listings can be reviewed and moderated, keeping the registry usable as it grows.

One-click subscribe through an adapter planned

Starting, upgrading or cancelling directly with a provider from inside the product where that provider has published an integration.

Price benchmarks and negotiation assistance planned

A corpus of real transaction pricing to say whether a customer is overpaying. This is a genuine strength of the enterprise incumbents and is not built here.

Governance and security

Inherited from the platform, enforced on every operation, on every plan.

Permission check before the request lands

Authorisation is enforced at the API edge from the composed schema before any service sees the call, so no surface — including AI agents — gets a private path.

Fourteen enforced resource types, six seeded roles

Portfolio owner, spend controller, subscription manager, automation steward, registry curator and a read-only compliance auditor, seeded automatically into every workspace.

Tenant-scoped writes and audit trail

Every write is scoped to the workspace and asserts exactly one row changed, and every operation is recorded with acting identity, workspace, action and resource, with credential-shaped values redacted.

Single sign-on and device-code login

Standards-based single sign-on for the web, and device-code login for the command-line tool and MCP server, with API keys for integrations.

Support-access masking with consent

Message subjects, previews and channel addresses are masked from support staff unless a time-bounded consent grant is present, and every unmasking is logged.

Independent security attestations planned

Service-organisation and information-security certifications are named as targets with owners and dates. None is held today, and no claim should be made that one is.

Surfaces and extensibility

The same API behind every way in.

Web app

The full product — portfolio, inbox, invoices, vault, provider registry, agents, workflows and insights.

MCP server for AI clients

About forty domain tools plus read-only resources and prompt templates, so an external AI client can operate the portfolio under the customer's own identity.

Screen-aware in-app assistant

Mounted on every screen, grounded on the record in view, running as the person asking with their permissions.

Mobile app

iOS and Android for renewals, approvals and the inbox away from a desk.

Command-line tool, browser extension and libraries in progress

Scripting for power users and finance teams, capture as you browse, and Node and Python libraries. Several of these are not yet published to their public registries.

Provider success analytics planned

Subscriber, churn, cohort and revenue analytics with retention automation for providers who integrate. A separate commercial track, not yet built.

10 Pricing & Plans

Quota-based and feature-complete: every plan unlocks every feature, and the price scales with the resource-heavy dimensions — how many relationships are tracked, how many AI actions and inbox messages are used a month, how many discovery sources are connected and how many seats. Privacy, encryption, roles, audit and single sign-on are never gated behind a higher tier. Prices are published by region across four bands, with rupee pricing treated as first class, and add-ons are opt-in with no silent overage billing.

PLAN	PRICE	WHO IT IS FOR	WHAT IS INCLUDED
Free	$0 No time limit and no card. Also published as ₹0, €0 and £0.	Individuals getting started	Up to 25 relationships tracked; 50 AI actions a month; 100 inbox messages a month; 1 discovery source; 1 workspace seat; Community support
Plus	$9/mo Also published as ₹299/mo, €8/mo and £7/mo. Annual discount available.	Power consumers running dozens of services	Up to 200 relationships tracked; 500 AI actions a month; 1,000 inbox messages a month; 5 discovery sources; 1 workspace seat; Priority email support
Family	$15/mo Indicative — also published as ₹499/mo. Not yet purchasable; confirm with us before quoting.	Households sharing plans across several people	Pooled household relationship allowance; Higher AI action and inbox allowances than Plus; Multiple identities in one workspace; Split and household billing view; Priority support
Team	$35/seat/mo Indicative — also published as ₹999/seat/mo. Not yet purchasable; confirm with us before quoting.	Finance and IT teams governing a shared estate	Pooled quotas across seats; 5–100+ seats; Licence tracking and renewal calendar; Approvals and exports; Priority support with a service level
Enterprise	Custom from $60/seat/mo Equivalent rupee pricing from ₹2,000/seat/mo. Annual contract, quoted per deal.	Large and regulated organisations	Custom quotas and seats; Single sign-on and automated user provisioning; Advanced roles and custom policies; Dedicated tenancy or self-hosting on request; Compliance packages and extended retention; Premium support with a named contact

Add-ons

ADD-ON	PRICE
Extra relationships tracked	Capacity blocks of 25, 100 or 1,000 — published by region
Additional AI action capacity	Published by region
Inbox volume pack	Published by region
Dedicated tenancy	Contact us
Compliance package — extended audit exports, retention, residency	Contact us
Premium support and service-level uplift	Contact us
Provider marketplace placement	Separate commercial terms

WHAT TO TELL A PROSPECT ABOUT PRICE

- Free and Plus are the plans available to buy directly today. Family, Team and Enterprise prices are published intent — quote them as indicative and let us confirm the current figure before anything goes in writing.
- Never convert a currency yourself. Each region has its own published price across four bands, and the rupee, euro and sterling figures are set independently of the dollar one.
- Add-ons are always explicit opt-in. There is no automatic overage billing, so a customer cannot be surprised by a bill for exceeding an allowance.
- Enterprise pricing depends on seats, custom quotas, deployment model, support level and any managed onboarding, and is issued as a written quote.
- Every plan includes the full feature set, roles, audit, encryption and single sign-on. If a prospect asks what they lose on the free tier, the answer is capacity, not capability.

11 Competitive Landscape

Five named alternatives, split between consumer cancellation apps and enterprise spend tools. Each of them beats us at something; say so before you say where we win.

ALTERNATIVE	WHAT IT IS	WHERE THEY ARE STRONG	WHERE WE WIN
Rocket Money	The best-known United States consumer app for finding and cancelling subscriptions, formerly Truebill, with budgeting and bill negotiation attached.	Deep bank coverage across United States institutions, a brand ordinary consumers already recognise, and a managed service that will actually phone a provider and negotiate a bill on your behalf. For a United States consumer who wants somebody else to do the cancelling, they are the better answer.	Global and multi-currency rather than United States-only, with households, teams and enterprises on the same platform instead of individuals alone. The Universal Inbox and the provider registry have no counterpart there, and the lifecycle continues after cancellation rather than ending at it.
Zylo	The enterprise standard for SaaS management — deep visibility into software spend, usage and renewals, sold through an implementation project.	An enormous benchmark dataset built from real enterprise spend, mature utilisation analytics, established analyst standing and a customer base of very large organisations. If a buyer's requirement is a proven vendor with a decade of enterprise references, that is genuinely them.	The same governance — roles, single sign-on, audit, tenant isolation — extended down to the individuals and small teams Zylo will not sell to, with published prices and a free self-service start rather than a sales cycle. Nobody has to be an enterprise to begin.
Sastrify, now part of Deel	A European SaaS spend and procurement platform combining automated inventory with human procurement support, acquired in 2026 and folded into a larger suite.	A large software benchmark database, managed procurement and negotiation by people rather than software, fast time to value through their connectors, and strong European compliance framing. For a mid-market company that wants humans negotiating, that is a real advantage we do not have.	Procurement is one stage of a relationship; we run the whole life of it, including the communications stream and the documents. And we serve the consumer, freelancer and small-team segments that have no self-service option there at all.

ALTERNATIVE	WHAT IT IS	WHERE THEY ARE STRONG	WHERE WE WIN
Tropic	An AI procurement and spend-intelligence platform, strongest at buying and renewing software with pricing benchmarks and expert negotiators.	Pricing intelligence drawn from a very large volume of real transactions, procurement orchestration through intake and approvals, and a hybrid of software with human negotiation experts. If the question is whether a specific quote is a fair price, they can answer it today and we cannot.	Their work largely ends when the deal is signed. Ours starts there: lifecycle transitions, renewal tracking, entitlements, invoices, documents and the provider message stream continue for the life of the relationship, for consumers and small teams as well as enterprises.
Vendr	A pricing-transparency and negotiation platform for procurement teams, now part of a larger group, with agents that handle supplier outreach through to final terms.	Benchmarks built on billions of dollars of real software spend, negotiation agents that genuinely run a supplier conversation end to end, buyer-only positioning with no supplier kickbacks, and a completed security attestation with published AI governance. All four are things we cannot claim.	Negotiating a contract is not the same as governing the relationship. We track it continuously, merge the provider communications, hold the documents, and cover consumer, team and enterprise tiers rather than procurement teams alone.

THE POSITIONING LINE TO HOLD

The incumbents either help consumers cancel or help enterprises negotiate; Subscriber Bot runs the whole recurring relationship for both, on one model, with prices published.

12 Why Us / Differentiators

If a prospect only remembers one of these, make it the first or the fourth.

One data model from an individual to an enterprise

Every competitor sits on one side of a line: consumer trackers cannot serve a finance team, and enterprise spend tools will not sell to an individual. Here a person can start free with their own subscriptions and the same model, roles and records scale to a company's vendor estate with no migration and nothing to relearn.

The Universal Inbox has no counterpart

Nobody else aggregates the messages providers send. That is where a price rise, a trial conversion and a termination notice arrive first, and it is the difference between finding out before the charge and finding out on the statement.

Honest limitation, stated in the product itself

The autonomous setting is refused with an error explaining that the engine which would enforce it has not shipped. Most vendors would show the toggle. That refusal is the single most persuasive thing in a room full of people who have been burned by AI claims.

Published prices against a category that quotes everything

The serious enterprise tools here publish nothing and typically start in five figures a year with an implementation project. Subscriber Bot publishes its prices, prices regionally, and starts free with no card and no time limit.

Governance on every plan, not at the top tier

Fourteen enforced resource types, six roles seeded into every workspace, permission checks at the API edge before a service sees the call, tenant-scoped writes and a complete audit trail — on the free tier as well as the enterprise one.

The subscription is the hub, not the payment

Most tools model transactions and infer subscriptions from them. Here the recurring relationship is the primary object, with the card, the invoice, the entitlement and the document hanging off it — which is why questions that span all of those can be asked at all.

Open to the customer's own AI client

About forty tools over MCP mean an agent the customer already trusts can operate their portfolio, under their identity, through the same permission checks and audit trail as the web app. There is no captive chat window requirement.

Providers extend it without our involvement

Integrations arrive as submissions through a review queue rather than as changes to the core, so the catalogue can grow faster than any single team could build it.

13 Customer Proof & Credibility

There are no customer references to lean on, so credibility here comes from the depth of what is actually built, the governance posture, and how plainly the gaps are stated. Show a prospect the refused autonomy switch and the roadmap labels before you show them a feature list — the willingness to name what is missing is the strongest signal available.

PERMISSION AND AUDIT ON EVERY OPERATION

Authorisation is checked at the API edge before any service sees a request, every write is scoped to the workspace and asserts exactly one row changed, and every operation is recorded with acting identity, action and resource, with credential-shaped values redacted.

A REAL ROLE CATALOGUE, SEEDED AUTOMATICALLY

Fourteen enforced resource types and six roles — from a portfolio owner who reaches everything to a compliance auditor who changes nothing — created in every workspace without anybody configuring them.

SENSITIVE DATA HANDLED DELIBERATELY

Secret references on stored assets are encrypted at rest and revealed only through an authorised field request. Message subjects, previews and channel addresses are masked from support staff unless a time-bounded consent grant is present, and each unmasking is logged.

FAIL-CLOSED AI GOVERNANCE

The autonomy gate denies when the check is unresolved, unknown or errored — the opposite of how ordinary rollout switches behave — so the setting cannot be enabled by accident or by a configuration mistake.

DEPTH OF SURFACE FOR A YOUNG PRODUCT

Web, mobile, browser extension, command-line tool, Node and Python libraries, and an MCP server with about forty domain tools, all against the same API with the same permission model.

COMPLIANCE TARGETS NAMED WITH OWNERS AND DATES

Service-organisation and information-security certifications, a privacy-management extension, and Indian and European data-protection readiness are each scheduled with an owner. None is held today, and the documentation says so rather than implying otherwise.

BACKED BY A PLATFORM, NOT A PROTOTYPE

Authentication, roles, billing, notifications, audit, files, tagging, localisation, accessibility and workflow are inherited from a shared platform used across a portfolio of products, which is why enterprise plumbing exists this early.

Be straight about this. Subscriber Bot is a young product. It is generally available and free to start, but there are no public reference customers, no published usage numbers and no completed security certification — those are named as targets with dates, not claims. Several headline capabilities are explicitly roadmap: automated discovery from mailboxes and bank statements, the conversational concierge, automatic classification of message bodies, computed health scores, price benchmarking, and the engine that would let an agent act autonomously. What exists today is the system of record, the inbox, the invoice ledger, the document vault, the provider registry and a complete governance layer. Tell a prospect to judge it on that, on the honesty of the roadmap labels, and on whether the free tier solves a problem for them in the first week — not on traction that does not exist yet.

14 Demo Information

There is no partner demo environment to hand out. The most effective move is to get the prospect onto the free tier during the call, or to book them onto a walkthrough with us — the product is more convincing when it is their own subscriptions on the screen.

HOW TO GET A DEMO

Anyone can create an account at app.subscriberbot.com and start on the free tier with no card. For a guided session, book time with Vignesh T.V. at https://calendly.com/vignesh-burdenoff/1-1 or email vignesh@burdenoff.com.

Runs about Twenty minutes for a first look; forty-five if finance, IT and procurement are all in the room and the enterprise questions are live.

WHERE TO LOOK

- **Product website** — `https://subscriberbot.com`
- **Sign in or create a free account** — `https://app.subscriberbot.com`
- **Documentation** — `https://docs.subscriberbot.com`
- **Use cases in detail** — `https://subscriberbot.com/use-cases`
- **Comparisons against the alternatives** — `https://subscriberbot.com/vs`
- **Book a walkthrough** — `https://calendly.com/vignesh-burdenoff/1-1`

The walkthrough, in order

1. **The portfolio list**
   Start here. Everything recurring is one record — the provider, the plan, what it costs, when it renews next and which card pays it. This is the list most people have never actually seen for themselves.
2. **Insights, with spend normalised to a monthly figure**
   Annual, quarterly and weekly plans are all converted to a monthly equivalent so they can be compared, renewals are bucketed six months out, and the biggest costs are ranked. Every number comes from your own portfolio.
3. **A single subscription record**
   Open one and the entitlements, the invoices, the renewal history and the documents are all attached to it. The contract and the licence key live with the subscription rather than in three other places.
4. **The Universal Inbox with the action-required filter on**
   Provider messages land in one stream, categorised, and one filter collapses it to the ones that need a decision. Note that the confidence is shown rather than hidden — a category the classifier was unsure about looks different.
5. **The invoice ledger filtered to overdue**
   This is the reconciliation half. What has been billed, what is settled, what has quietly gone overdue — and marking one paid takes it out of your outstanding total.
6. **The agent roster and one agent's rules**
   Nine kinds of agent, each with an owner and a setting. Every one starts as suggest-only, meaning it may propose and never act. The rules are readable records with a condition and an action, not a hidden prompt.
7. **Attempting to set an agent to autonomous**
   Watch what happens. It is refused, and the error explains that the engine which would enforce your rules has not shipped, so use suggest-only. That refusal is deliberate — we would rather say not yet than show you a switch that means nothing.
8. **The provider registry**
   Search providers and their plans, and see how integrations arrive through a submission and review queue rather than as changes we have to make ourselves.
9. **Roles and the audit trail**
   Six roles are seeded into every workspace automatically, including a spend controller who touches funding sources and an auditor who changes nothing. Every action is recorded with who did it and to what.

15 Sales Talking Points

Nine lines that hold up under questioning. Each one is defensible from what is actually built.

The recurring relationship is the record, not the payment.

It explains in one sentence why cross-cutting questions can be answered here and not in a tool that infers subscriptions from transactions. Everything else — the card, the invoice, the entitlement, the document — hangs off that single object.

Agents propose. Nothing cancels itself.

It is the fastest way to defuse the fear that stops most AI conversations in finance. Every agent starts as suggest-only, and the setting that would let one act is refused outright today.

Nobody else reads the messages providers send you.

It names a genuine category gap rather than a feature comparison. Price rises and trial conversions arrive by message first, which is why the inbox matters more than it sounds.

One platform from a single person to a whole company.

It removes the migration objection before it is raised, and it opens the land-and-expand route where a finance lead trials it personally and brings it to work.

The prices are published, and the free tier has no card and no time limit.

In a category where every serious tool says contact sales, this is a concrete, checkable differentiator that a partner can verify on the website in front of the prospect.

Roles, audit and single sign-on are on every plan, including the free one.

Security review normally arrives late and kills deals. Being able to say the governance is not an upsell shortens that conversation considerably.

We name what has not shipped, in the product and in the documentation.

A prospect who catches an overclaim discounts everything else you said. Leading with the roadmap labels buys credibility for the parts that are real.

Your own AI client can operate it.

For technical buyers it demonstrates the API is complete — an external agent has no interface to lean on — and it avoids the objection about being locked into somebody else's chat window.

Renewal windows are the money, and they close quietly.

It reframes the value from tidiness to leverage. The forecast is worth having because the option to leave expires before most people know a decision exists.

16 Objection Handling

12 OBJECTIONS

The hard ones are here on purpose. Answer the maturity and certification objections directly — an evasive answer on those two is worse than the objection.

> **"We already have a SaaS management tool."**
>
> Then keep it for what it does well. Ask them two things: can it show the messages their providers actually send, and does it cover the subscriptions people are buying on personal cards outside procurement. Those are the gaps this fills, and the free tier means the comparison costs them nothing to run in parallel for a month.
>
> PROOF · The Universal Inbox has no equivalent in Zylo, Sastrify, Tropic or Vendr, and none of them has a self-service tier that reaches individual employees.

> **"The AI features you are describing are not actually finished."**
>
> Several are not, and we say so in the product itself — automated discovery from mailboxes, the conversational concierge, automatic message classification and the engine that lets an agent act are roadmap. What is finished is the system of record, the inbox, the ledger, the vault and the whole governance layer. Judge it on those.
>
> PROOF · Setting an agent to autonomous is refused with an error explaining the enforcement engine has not shipped, rather than accepted as a setting that quietly does nothing.

> **"Why not just use a spreadsheet?"**
>
> Most prospects already are, and the spreadsheet is why they cannot answer what renews next quarter. It goes stale the week it is made, has no renewal alerts, no documents attached, no roles, and no record of who changed what. The free tier costs nothing to test against it.
>
> PROOF · Renewal dates, invoices, entitlements and documents are attached to the same record and updated as the subscription changes, with a full transition history.

> **"Are you certified? We need a security attestation before we can proceed."**
>
> We hold none today, and I would rather tell you that than let it surface in diligence. The targets are named with owners and dates, and the controls a certification would examine — permission checks at the edge, tenant isolation, encryption of sensitive references, a complete audit trail, consent-gated support access — are already in place and demonstrable.
>
> PROOF · Service-organisation and information-security certifications and a privacy-management extension are each scheduled with an owner; the documentation explicitly forbids claiming any of them today.

> **"You are a small company. What if you disappear?"**
>
> Fair, and worth pricing in. Three things reduce the risk: your data is exportable, the free tier means the initial commitment is nothing, and the product sits on a platform shared across a portfolio of products rather than a single-product startup's runway. Start small and let the product earn the expansion.
>
> PROOF · Authentication, roles, billing, notifications, audit, files and workflow are shared platform capabilities, and every plan includes export.

> **"This will lock us in the same way the vendors we are trying to manage do."**
>
> The opposite is the design intent. Records are exportable, the whole domain is reachable through a documented API, and provider integrations arrive through an open submission process rather than being ours alone. The product exists to make leaving a vendor easier, so making leaving us hard would be self-defeating.
>
> PROOF · Export is available on every plan, and the same API drives the web app, the command-line tool, the libraries and the MCP server.

> **"Rocket Money does this already and it is cheaper."**
>
> For a United States consumer who wants a service to cancel things for them, it may well be the right choice, and I would say so. It is United States-only, individual-only, has no inbox for provider messages, no provider registry, and no path to a team or a company. If any of those matter, this is a different product.
>
> PROOF · Households, teams and enterprises run on the identical relationship model here; there is no equivalent tier there.

> **"Why would we not just build this internally?"**
>
> The tracking table is a fortnight's work. What takes the year is everything around it — roles and permissions on fourteen resource types, tenant isolation, a real audit trail, consent-gated support access, encryption of sensitive references, a message ingest pipeline, an integration submission process, and six surfaces including an MCP server. And then somebody owns it forever.
>
> PROOF · Six roles are seeded automatically into every workspace, and every operation clears a permission check at the edge before it reaches a service.

> **“Nobody here has the time to enter hundreds of subscriptions.”**
>
> That is a real limitation right now and worth being straight about: bulk import and automatic discovery from mailboxes and statements are roadmap, so today records are added individually or captured through the browser extension. Start with the twenty vendors that carry most of the spend — that is usually enough to make the renewal calendar useful.
>
> PROOF · The product documentation states plainly that bulk import and the mailbox connector are not built, rather than implying otherwise.

> **“What about our data — you would be reading our financial information.”**
>
> Storage is deliberate and narrow. No card data is stored; payment instruments are recorded as an annotation saying which card funds which subscription. Sensitive stored references are encrypted at rest, support staff see masked message content unless a time-bounded consent grant exists, and every unmasking is logged. Your data is not sold and not used to train anyone else's models.
>
> PROOF · Encryption of secret references and consent-gated support unmasking, with each unmasking written to the audit trail, are both live today.

> **“The prices for the tiers we would need are marked indicative.”**
>
> They are, and I will not quote you a firm figure I might have to correct. Free and Plus are live at published prices; Family, Team and Enterprise are published intent. Tell me the seats and rough scale and we will come back with a written quote quickly rather than guessing on a call.
>
> PROOF · Enterprise pricing is quoted on seats, custom quotas, deployment model and support level, and issued in writing.

> **“Who supports us if something breaks?”**
>
> Community support on the free tier, priority email from Plus upward, and a service level with a named contact at Team and Enterprise. For a partner-introduced deal you also have a direct line to us during evaluation rather than a queue — that is part of what registering the opportunity gets you.
>
> PROOF · Support tiers rise with the plan, and premium support with a named contact is available as an add-on.

17 Discovery / Qualification Questions

Ten questions that qualify without sounding like a sales script. The first two do most of the work.

ASK THIS	LISTEN FOR
If I asked for a list of everything the company pays for on a recurring basis, who would produce it and how long would it take?	Hesitation, a name rather than a system, or an answer measured in days. If it is a spreadsheet owned by one person, that person is your champion and the pain is real.
What renews in the next ninety days, and what does it cost?	Whether they can answer at all. An approximate answer is fine; no answer, or an answer that requires asking three other people, is the opening.
When did a renewal or a price rise last catch you out?	A specific incident with a number attached. A remembered failure is far more useful than an abstract agreement that the problem exists.
Where do the emails from your providers currently land, and who reads them?	A shared inbox nobody owns, or one person's personal inbox. This is the question that surfaces the inbox use case, which most prospects have never considered.
How much software is being bought on personal or team cards outside procurement?	Either an honest shrug or a number they know is understated. Both indicate a shadow-IT conversation, which usually brings IT and finance into the same room.
Which tools do you suspect duplicate each other?	Named pairs. If they can name two, they have already done the analysis in their head and just lack the evidence to act on it.
Who owns the decision to cancel something, and what happens to the access when it is cancelled?	Whether cancellation is a governed step or an email to somebody. Orphaned access after cancellation is a security conversation as well as a spend one.

ASK THIS	LISTEN FOR
Where do your contracts, invoices and licence keys live today?	Three or more different places. This is the vault use case, and it lands hardest with anyone who has recently been through an audit or a tax filing.
How comfortable would you be with software cancelling something automatically on your behalf?	Almost always discomfort — which is the perfect setup for the refused autonomy switch. If they say very comfortable, they may be a fit for a competitor's negotiation agents instead.
What would you do with the money if you found ten per cent of this spend was waste?	Whether there is a budget owner with a motive. No motive means no urgency, however real the problem is.
Does your security or procurement process require a certification before you can trial software?	A hard yes is a disqualifier for now and worth finding out on the first call rather than the fourth.
What is your renewal or budget cycle, and when does the next one start?	A date. Recurring-spend tools sell against a calendar, and the eight weeks before a budget review is when this becomes urgent rather than interesting.

18 How to Identify a Good Opportunity

Read these before you invest time. A green-flag conversation usually converts to a meeting on the same call; a red one is better handed back than nurtured.

STRONG SIGNAL — PURSUE

- Nobody in the room can state the total recurring spend, and they are visibly uncomfortable about it
- A renewal or price rise surprised them in the last year and somebody still remembers the number
- The current system of record is a spreadsheet, and its owner is in the conversation
- Finance and IT are both present and disagree about how many tools are in use
- They are inside eight weeks of a budget review or renewal cycle
- Somebody mentions shadow IT, duplicate vendors, or software bought on personal cards
- They are already paying for an enterprise spend tool and complaining about what it costs

Introduce us straight away.

WORTH A CONVERSATION

- The pain is real but there is no named budget owner — find one before investing more time
- They want the AI story more than the record-keeping, which means expectation management will be most of the sale
- A very large estate with no appetite to enter anything manually, given bulk import is still roadmap
- Interest is coming from an individual enthusiast with no route into the organisation
- They ask for benchmarks or negotiation support early, which is a competitor's strength and not ours
- Heavily regulated buyer who may need attestations we do not yet hold

Qualify further before an introduction.

POOR FIT — DO NOT CHASE

- They want a service that will phone providers and negotiate bills for a share of the savings
- Procurement cannot begin without a completed security certification in hand today
- They expect autonomous cancellation running unattended from day one
- Their spend is one-off purchases with no renewal cycle at all
- The requirement is really an accounting or expense system, not recurring-relationship governance

Politely park it; suggest another product if one fits.

THE ONE-QUESTION TEST

Ask: what renews in the next ninety days, and what does it cost? If they cannot answer without going away to find out, you have a real opportunity — and if they answer instantly and accurately, they already have this solved and you should move on.

19 How to Introduce Us

Keep it short and keep it about their problem. You are not selling the product, you are offering to connect them to somebody who can show it. Never promise a capability from the roadmap section as though it exists today.

IN CONVERSATION

"Say something like: they run everything recurring — subscriptions, licences, contracts — from one place, with the renewal calendar and the provider emails in the same view. What I liked is that the AI is held to rules you write, and the fully autonomous setting is switched off on purpose until they can guarantee it. There is a free tier if you want to see it on your own subscriptions before you talk to anyone. Want me to introduce you?"

EMAIL — SUBJECT: THE RENEWAL QUESTION YOU COULD NOT ANSWER

Hi [Name],

You mentioned nobody could say what renews next quarter or what it costs. That is the exact problem Subscriber Bot is built for.

It keeps every subscription, licence and contract as one record — plan, price, renewal date, invoices and the contract itself attached — and merges the messages providers send into a single categorised inbox, so a price rise or a trial converting is caught before the charge rather than after it.

Two things worth knowing: there is a free tier with no card, so you can try it on your own list first; and where their AI is not finished, they say so in the product rather than shipping a switch that does nothing.

Happy to introduce you to Vignesh, who built it. Shall I?

[Your name]

SHORT MESSAGE / LINKEDIN

Saw your post about software spend. Worth a look at Subscriber Bot — every subscription, licence and contract as one record with the renewal calendar and provider emails in the same view, free tier to start. Happy to make an introduction if useful.

WARM THREE-WAY INTRODUCTION

Copy us both in and write two sentences: what they said about their recurring spend, and why you thought of us. Send it to vignesh@burdenoff.com — we will take it from there within one business day and always tell you what happened.

Please do not: Do not promise automated discovery from their email or bank statements. It is roadmap, it is gated behind an external assessment, and promising it is the fastest way to lose the deal at the demo.; Do not say autonomous agents will cancel things for them. The setting is deliberately refused today, and the refusal is a selling point when you explain it and an embarrassment when you do not.; Do not claim any security certification. None is held; there are named targets with dates and that is what you may say.; Do not quote a firm price for Family, Team or Enterprise. Free and Plus are published; the rest are indicative until we confirm.; Do not invent customers, savings percentages or usage numbers. There are none to cite, and a checkable fabrication ends the relationship.

20 Lead Handoff Process

The introduction is the whole job. You do not need to demo, scope or quote — send us enough to have an intelligent first conversation and we will keep you informed at every stage.

1. **Register the opportunity before the introduction**
   Email vignesh@burdenoff.com with the company name and contact before you connect us. Registration is what protects your commission and prevents two partners working the same account.

2. **Send the context in five lines**
   Who they are, roughly how many subscriptions or vendors, which of the problems in this playbook they described in their own words, the renewal or budget cycle, and who else will be involved in the decision.

3. **Make the introduction**
   A short email copying both sides, or a booking straight into https://calendly.com/vignesh-burdenoff/1-1. Either works; the calendar link is usually faster.

4. **Sit in on the first call if you want to**
   You are welcome on the introductory call and it often helps, but it is not required. If you would rather hand over cleanly, say so and we will keep you updated by email instead.

5. **We qualify, demonstrate and quote**
   We run discovery, show the product against their own situation, and issue any quote directly. You are copied on the outcome of each stage.

6. **Get told what happened**
   Won, lost or parked, you hear the result and the reason. Commission is calculated against the signed agreement and paid after the customer has paid.

SEND US THIS — IT IS ALL WE NEED

- Company name, the contact's name, role and email
- Roughly how many recurring vendors or subscriptions they hold, and whether this is personal, team or company scale
- The problem in their own words — the sentence they actually said is more useful than your summary of it
- Which region they buy from, since pricing and payment routing differ by band
- Their renewal or budget cycle, and any date that creates urgency
- Who else is involved: finance, IT, procurement, security or legal
- Anything already in place — a spend tool, a spreadsheet, or a competitor they have looked at
- Whether they need a security review or certification before they can trial anything

WHAT HAPPENS NEXT, AND WHEN

We acknowledge a registered opportunity within one business day and aim to have the first call scheduled within five. If a deal goes quiet on our side you will hear that too rather than being left guessing.

Deal registration: Register by email to vignesh@burdenoff.com, or call +91-7358445777 if it is time-sensitive. Registration must reach us before the introduction to qualify for commission, and a registered opportunity is protected for an agreed period so that a second partner cannot claim the same account.

21 Partner / Referral Commercials

Four partner tracks with different levels of involvement and different rates. Commission is calculated on collected net subscription value, applies to team, enterprise and provider deals, and is paid after the customer has paid us. Consumer conversions on the free and entry tiers run through the affiliate route instead. The figures below are the standard programme; the signed partner agreement is what governs.

PROGRAMME	YOUR ROLE	FIRST-YEAR	RENEWAL / ADD-ONS
Referral Partner	A registered introduction, with no ownership of the sales process	10% of first-year collected net subscription	0% unless separately approved · 3%, capped at $10,000
Consulting Partner	Introduction plus support through the customer's evaluation	12% of first-year collected net subscription	0–3% where the partner stays active in the success plan · 3%, capped at $15,000
Implementation Partner	Introduction plus delivery of the implementation	15% of first-year collected net subscription	3–5% where the partner is active in the renewal success plan · 5%, capped at $25,000
Authorised Reseller	Approved resale under the partner's own paper, owning the commercial relationship	Up to 15% reseller margin on the approved quote	Up to 8% while the account remains active and supported · Up to 5% on dedicated tenancy or managed services, where approved
Managed Service or Strategic Partner	Subscriber Bot bundled inside a managed or co-sold offering	Custom	Custom · Custom

THE RULES THAT MATTER

- Register the opportunity before the introduction. An unregistered deal cannot be claimed retrospectively, and registration is what prevents two partners working the same account.
- A registered deal carries protection for an agreed period, after which it may be released if there has been no progress.
- Commission is paid on collected net subscription value after the customer has paid — not on invoiced or committed amounts.
- Commission applies to team, enterprise and provider deals. Free and entry-tier consumer conversions are handled through the affiliate route, which has separate terms.
- Marketing claims about the product must be approved before publication, and nothing on the roadmap may be described as available.
- Discounts and non-standard terms are agreed with us before they are offered to a customer, never afterwards.
- Where a partner both implements and resells, the tracks are agreed per deal rather than stacked automatically.

GETTING PAID

Commission is calculated once the customer's payment has cleared and paid on the agreed cycle to the bank details held in the partner record. Currency follows the customer's billing currency unless the partner agreement says otherwise, and any withholding or local tax is handled per that agreement.

These are the standard partner programme terms and are indicative. The terms that actually apply to any deal are those in the signed partner agreement and in the quote issued to the customer — where they differ from this document, the signed agreement and the quote prevail.

22 Contact Information

YOUR CONTACT

Vignesh T.V.
vignesh@burdenoff.com
+91-7358445777

BOOK A 1-1 CALL

https://calendly.com/vignesh-burdenoff/1-1

Use this for anything — qualification, pricing, a joint call with your prospect, or a live demo.

EVERY BURDENOFF PRODUCT

https://burdenoff.com/products

If Subscriber Bot is not the right fit, the answer may well be on that page.

WHICH CHANNEL FOR WHAT

- **A live opportunity** — email with the handoff details in section 20, and copy the phone number in if it is time-sensitive.
- **A question you cannot answer** — book the 1-1 call; it is usually faster than email.
- **A prospect who wants to meet us** — send them the calendly link directly, or ask for a joint call.

23 Useful Links & Sales Assets

ASSET	WHERE	WHAT IT IS FOR
Subscriber Bot website	`https://subscriberbot.com`	Positioning, features, pricing and the full use-case library — safe to share with anyone.
Sign in or start free	`https://app.subscriberbot.com`	Where a prospect creates an account. The free tier needs no card and has no time limit.
Documentation	`https://docs.subscriberbot.com`	Guides, integration reference and the developer libraries. Useful for a technical evaluator.
Use cases	`https://subscriberbot.com/use-cases`	Nineteen detailed stories with the honest limits stated in each. The best link to send after a first conversation.
Comparisons	`https://subscriberbot.com/vs`	Side-by-side against Rocket Money, Zylo, Sastrify, Tropic and Vendr, including where each of them wins.
Security and trust	`https://subscriberbot.com/security`	The security posture and the compliance roadmap, with targets stated as targets.
Frequently asked questions	`https://subscriberbot.com/faq`	Answers you can lift verbatim, including the honest one about autonomous actions.
Community hub	`https://community.subscriberbot.com`	Discussion and integration showcase, signed in with the same workspace identity.
Book a 1-1 call with Vignesh T.V.	`https://calendly.com/vignesh-burdenoff/1-1`	The fastest handoff. Send this link directly to a prospect once they are warm.
All Burdenoff products	`https://burdenoff.com/products`	The wider portfolio, in case the conversation turns out to be about a different problem.
Email Vignesh T.V.	`mailto:vignesh@burdenoff.com`	Deal registration, partner questions and warm introductions. Phone +91-7358445777 if it is urgent.

WHAT YOU CAN SHARE, AND WITH WHOM

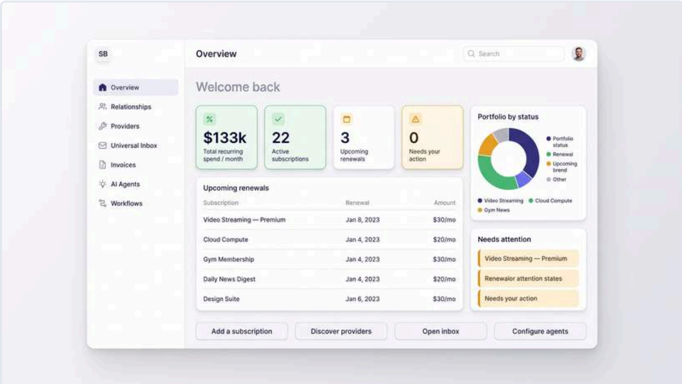
- Share freely: anything on subscriberbot.com, the documentation, the comparison pages and the security page. It is all public and already reviewed.
- Prospect-facing only: this playbook, the pricing detail for tiers marked indicative, and the demo flow. Send it to a named prospect if it helps, but do not post it publicly or publish it on your own site.
- Needs our sign-off before use: any published claim about the product, any co-branded material, any use of the Subscriber Bot name or logo in your own marketing, and any written pricing to a customer.
- Never share: commission rates and the partner commercial terms. Those are between you and us, not for the customer.
- Never create: customer references, savings percentages, usage numbers or testimonials. None exist, and inventing one ends the partner relationship as well as the deal.

24 Product Mockups — Complete Visual Appendix

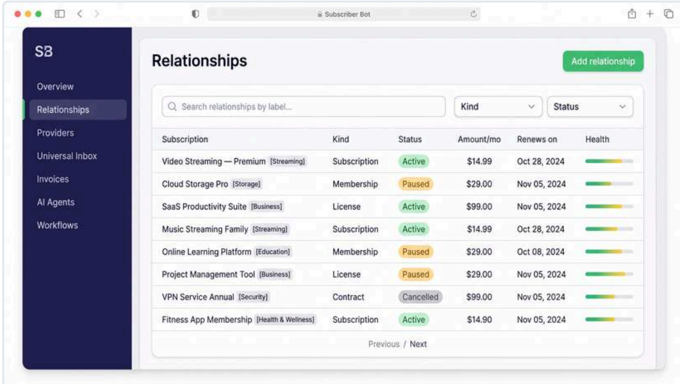
23 SCREENS

Every screen in the Subscriber Bot design set — 23 in total, none omitted. Use these to show a prospect what the product looks like before a live demo.

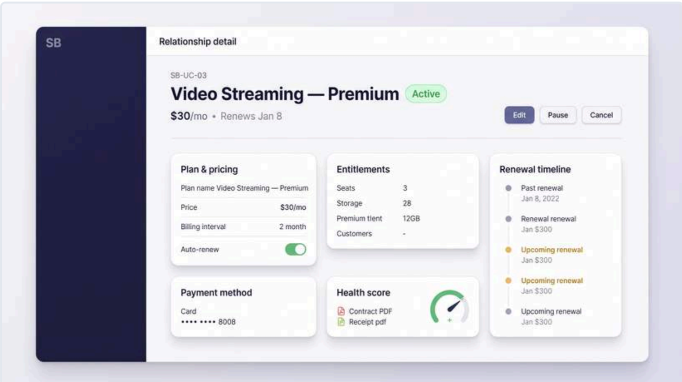
PRODUCT SCREENS · 23 SCREENS



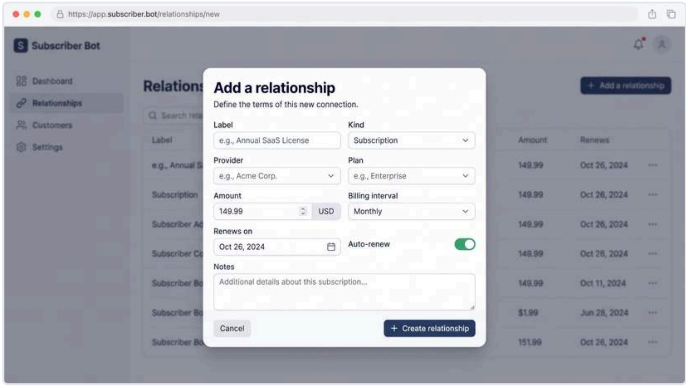
001 Sb 01 Overview Dashboard



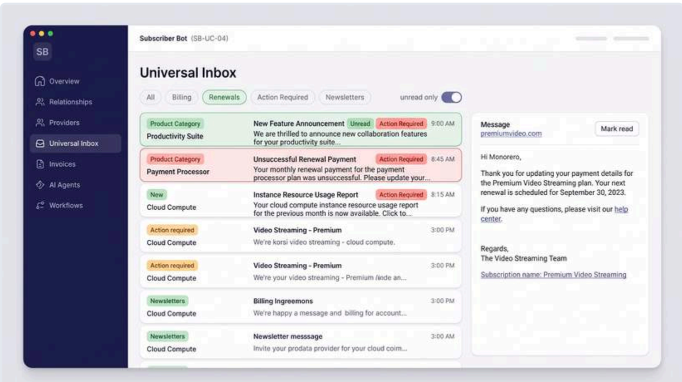
002 Sb 04 Relationships Portfolio



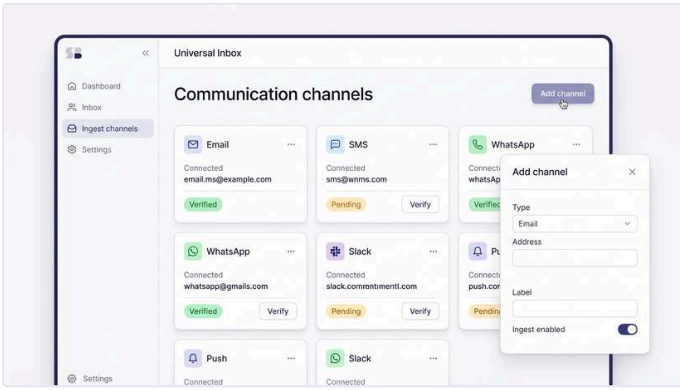
003 Sb 05 Relationship Detail



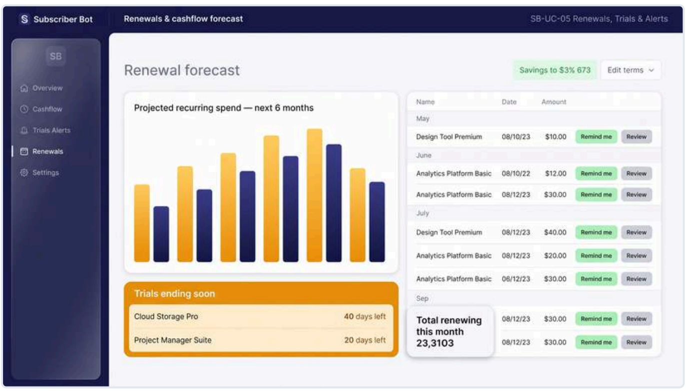
004 Sb 06 Add Edit Subscription



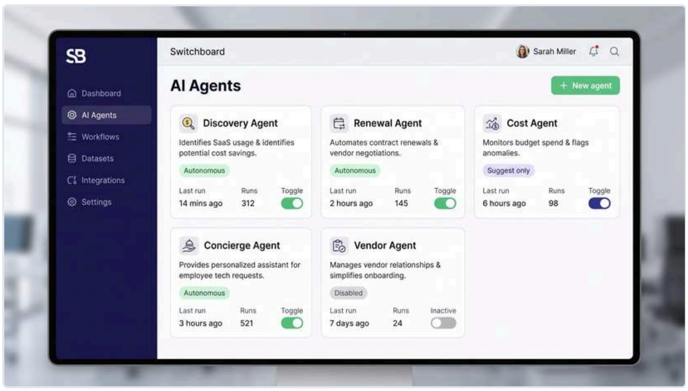
005 Sb 07 Universal Inbox



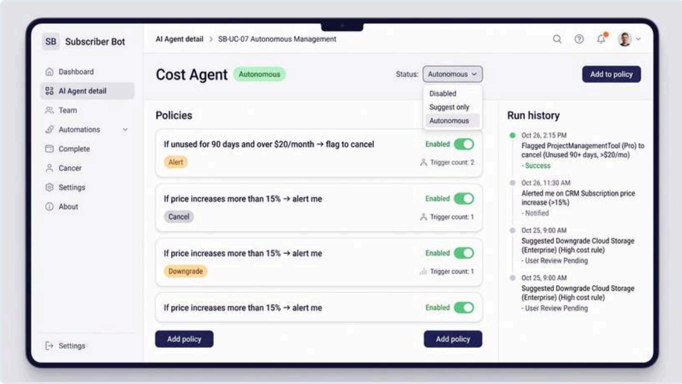
006 Sb 08 Channels Connect



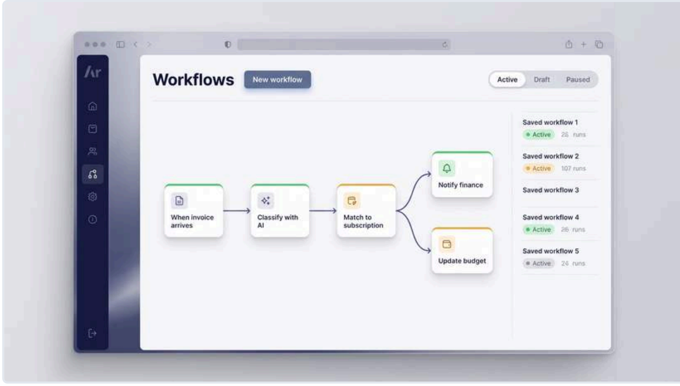
007 Sb 09 Renewals Forecast



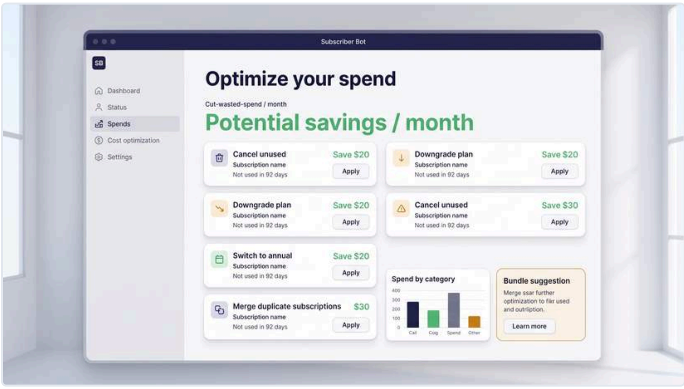
008 Sb 11 AI Agents



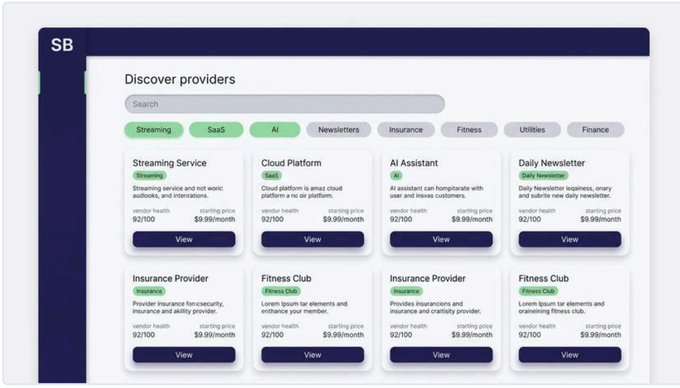
009 Sb 12 Agent Policies



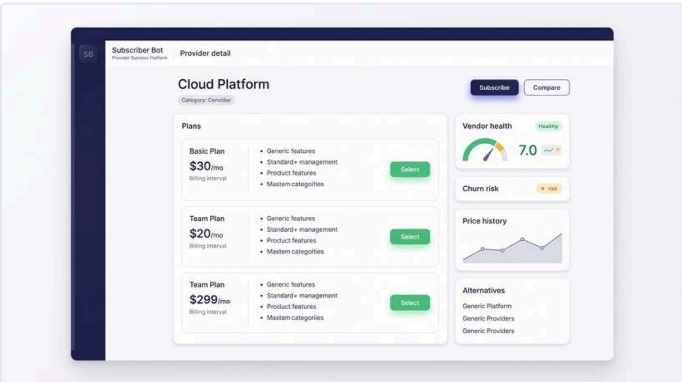
010 Sb 13 Workflows Automation



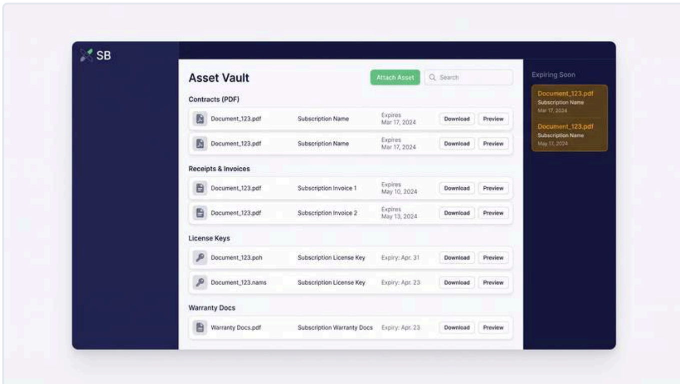
011 Sb 14 Cost Optimization



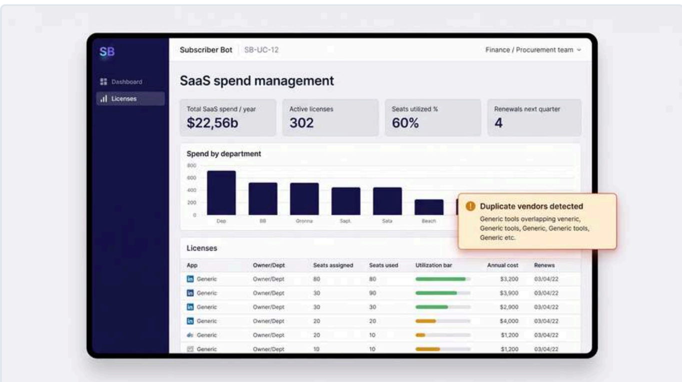
012 Sb 15 Discovery Marketplace



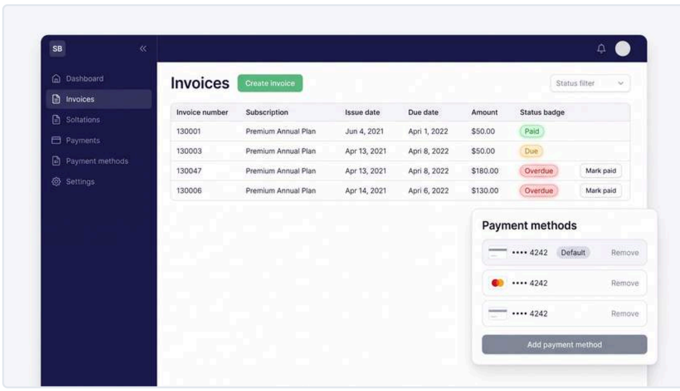
013 Sb 16 Provider Detail



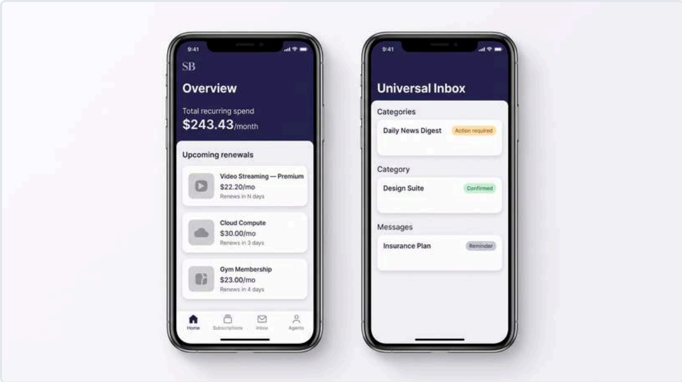
014 Sb 17 Asset Vault



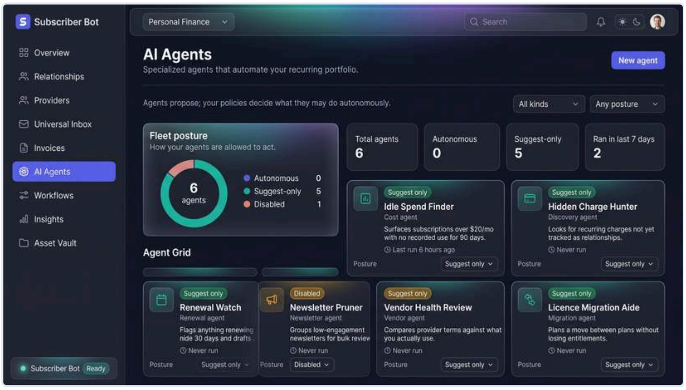
015 Sb 19 Enterprise Saas Spend



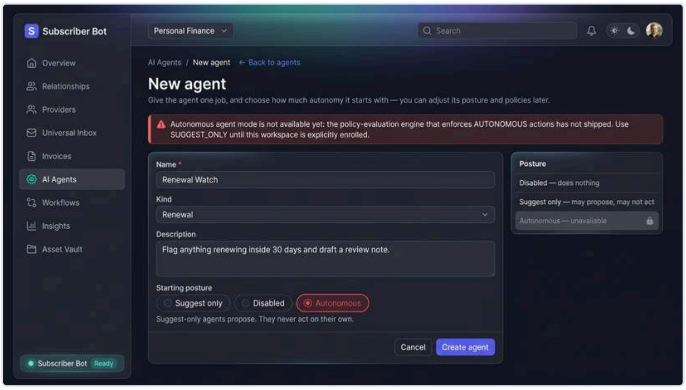
016 Sb 21 Invoices Billing



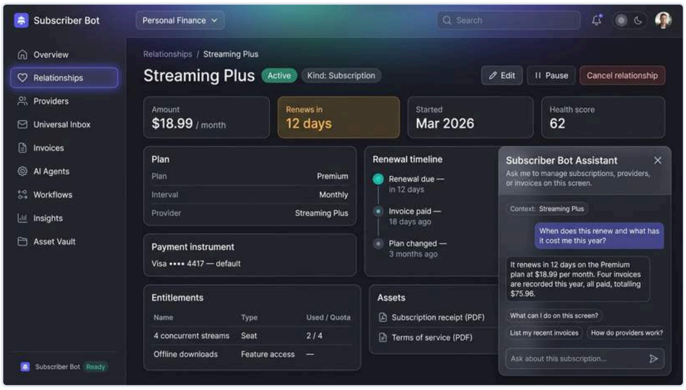
017 Sb 24 Mobile App



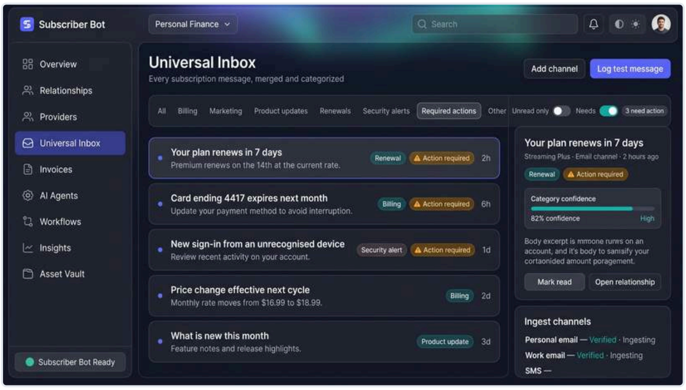
018 Sb 25 Agent Posture Control



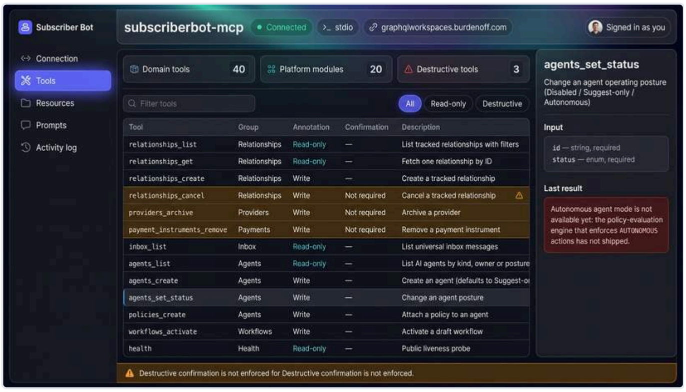
019 Sb 26 Autonomy Interlock



020 Sb 27 Screen Aware Assistant



021 Sb 28 Inbox AI Triage



022 Sb 29 MCP Agent Tools

023 Sb 30 Graph Insights

Found someone who needs Subscriber Bot?

You do not need to demo this product or answer deep questions about it — a spotted renewal problem and a warm introduction are the whole job. Send us the name, the company and the sentence they said, and we take it from there. You will always know what happened to a deal you registered.

EMAIL OR CALL
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vignesh@burdenoff.com
+91-7358445777

BOOK A 1-1 WITH VIGNESH
https://calendly.com/vignesh-burdenoff/1-1

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