



SALES & PARTNER PLAYBOOK

CollabKin

CollabKin gives a family one private space where everyone builds the tree, keeps the photos and stories, and nothing is ever public.

Family tree

Memory archive

Oral history

Private by default

Family pricing

PREPARED BY

Burdenoff Consultancy Services Pvt. Ltd.

PRODUCT

collabkin.com

BOOK A CALL

calendly.com/vignesh-burdenoff/1-1



00 How to use this playbook

Read the opportunity signals and the one-question test first, then keep the objection and discovery pages open during the conversation. The use cases are written so you can pick the one closest to the person in front of you and tell it in ninety seconds. Everything here is safe to say out loud to a prospect; anything marked in progress or planned is exactly that, and saying so is what keeps the introduction credible.

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

02 One-Line Pitch

03 30-Second Elevator Pitch

04 Problem We Solve

05 Value Proposition

06 Ideal Customer Profile

07 Buyer Personas

08 Top Use Cases

09 Product Capabilities

10 Pricing & Plans

11 Competitive Landscape

12 Why Us / Differentiators

13 Customer Proof & Credibility

14 Demo Information

15 Sales Talking Points

16 Objection Handling

17 Discovery / Qualification Questions

18 How to Identify a Good Opportunity

19 How to Introduce Us

20 Lead Handoff Process

21 Partner / Referral Commercials

22 Contact Information

23 Useful Links & Sales Assets

24 Product Mockups — Complete Visual Appendix

01 Product Overview

COLLABKIN.COM

CollabKin is a private space where a whole family builds and preserves its history in one place. Everything sits under a Family Tree — the product's name for the private family space — which holds the relatives and ancestors in it, the relationships between them, the photographs, scans and recordings the family has rescued, the stories only the elders carry, and a dated timeline running across the generations. Relatives are invited by name and given a role, so many hands build one record instead of a dozen private copies. The living family and the ancestral line share the same record, so the cousin you invite today and the great-grandparent you trace back to are part of one thing, never two systems that have to be kept in step.

CATEGORY

Private family collaboration and ancestry platform, for households and extended families, and for heritage institutions that hold family archives on behalf of their members.

WHERE IT STANDS TODAY

Generally available. The family tree, memories, stories, timeline, roles and visibility controls, GEDCOM import and export, relationship-path answers, story prompts and keepsake-book PDFs are all live, and the Free, Pro and Business plans are published. The product launched in 2026 and has no public reference customers yet; native app-store listings, shared albums and the family-aware AI assistant are still being finished.

HOW CUSTOMERS GET IT

Cloud service, reached through any modern browser at the family's own workspace. Single sign-on is standard, the interface is multilingual, and a family can start on the free plan without a card. Larger customers can be placed on a dedicated tenant, and self-hosting is available under a heritage agreement. A family can export its whole record as a standard GEDCOM file at any time.

Web app — the complete product in any browser

Marketing site and documentation at collabkin.com

GEDCOM import and export for moving research in and out

Keepsake-book PDFs generated from the family's own record

Agent connector, so a family researcher's own AI assistant can work the record under their roles

iOS and Android builds, in progress and not yet listed in the app stores

02 One-Line Pitch

SAY EXACTLY THIS

"CollabKin gives a family one private space where everyone builds the tree, keeps the photos and stories, and nothing is ever public."

SHORTER, FOR A CHAT MESSAGE

One private space where a whole family builds and keeps its history together.

THE CATEGORY SENTENCE

CollabKin is a private family collaboration and ancestry platform for families who want to build and preserve their history together rather than alone.

03 30-Second Elevator Pitch

SPOKEN, ROUGHLY 30 SECONDS

"Most families keep their history in five places at once. A genealogy subscription one relative pays for, a phone full of unlabelled photos, a group chat that scrolls away by morning, and the stories only a grandparent still carries. CollabKin puts all of it in one private space the family controls. Relatives are invited with a role, so a cousin adds names, an aunt uploads the old albums, and a grandchild records the elder telling the story behind them. One bill for the whole family, and nothing is ever public."

IF THEY ARE TECHNICAL

CollabKin models the living family and its ancestors as one graph: people carry a life status, relationships are directed and typed and carry a certainty flag from confirmed to disputed, and memories, stories and dated events hang off the people they belong to. Access is decided before any data is returned — four family roles, per-item visibility on every memory and story, tighter defaults for anyone recorded as living, and private defaults for minors — with every change written to an audit trail. It is an API-first product: the same governed interface behind the web app also backs GEDCOM import and export and an agent connector, so nothing reaches the record through a looser path.

IF THEY ARE A BUSINESS BUYER

A family pays once for the whole family rather than per researcher, which is the difference between one relative doing the work and everyone doing it. The commercial argument is preservation with control: the record is private, exportable at any time, and priced by the size of what you are keeping instead of by how many relatives log in. For institutions holding family archives, the same product runs under a heritage agreement with single sign-on, longer audit retention and dedicated-tenant options.

04 Problem We Solve

These are the five or six binds that make a family reach for something like CollabKin. If you hear two of them in one conversation, there is an opportunity in the room.

The family history lives in one person's head

Who feels it: The relative everyone calls the family historian

What it costs them: Research stalls whenever that person is busy, and when they die the work is often unreadable to anyone else. Relatives who know a maiden name or an immigration date have nowhere to put it.

How CollabKin answers it: CollabKin makes the tree a shared record with invitations and roles. Cousins get contributor access, elders get viewer access, and every addition lands in the same record with the contributor's name against it, so the history stops depending on one laptop.

Photographs and documents are fading and scattered

Who feels it: The keeper of the box of prints, scans and certificates

What it costs them: One spill, one house move or one dead hard drive removes the only copy. Even the surviving images have no dates, no places and no names attached.

How CollabKin answers it: Photographs, scans, audio, video and heirloom artefacts are stored as memories attached to the people and moments they belong to, with the date the moment actually happened recorded separately from the day it was uploaded, so a 1962 wedding photograph sits in 1962.

The stories go quiet with the people who hold them

Who feels it: Adult children and grandchildren of ageing relatives

What it costs them: The account of how the family arrived, why a dish appears at every celebration, who is in the photograph — all of it is lost in a single funeral, and nobody thought to write it down first.

How CollabKin answers it: Stories are first-class records: written, or recorded as audio or video with a transcript and a named narrator, attached to the relatives they concern. A built-in library of interview prompts, sorted by life stage and relationship, tells a grandchild what to ask on Sunday.

Family trees on public sites expose living relatives

Who feels it: Privacy-conscious parents and family administrators

What it costs them: Public world trees make deceased profiles editable by strangers and leak details of the living through matches and shared branches. Families quietly stop contributing rather than argue about it.

How CollabKin answers it: A CollabKin space is members-only with no public profiles at all. Every memory and story carries its own visibility — the whole tree, stewards only, or private — and anyone recorded as living gets a tighter default automatically, with minors defaulting to private.

Per-researcher pricing punishes the whole family for taking part

Who feels it: The relative paying the genealogy subscription

What it costs them: One person pays and everyone else is a spectator. Inviting the cousins who actually hold the knowledge means buying more seats, so nobody does.

How CollabKin answers it: CollabKin charges for the size of the record — trees, people, memories, storage — not for the number of relatives. Twenty-five invited members are included on the Pro plan and a hundred and fifty on Business, so inviting the family costs nothing extra.

Nobody can work out how two relatives are actually related

Who feels it: Family historians and anyone at a reunion

What it costs them: The tree is on screen and the answer still takes a pen, a napkin and an argument about what second cousin once removed means.

How CollabKin answers it: Ask for the path between two people and CollabKin walks the recorded relationships and returns it in plain language, along with ancestor and descendant views grouped by generation. Where the chain runs through a link the family marked probable or disputed, the answer says so.

Existing research is trapped in another tool

Who feels it: Genealogists with years of work on a subscription site

What it costs them: Moving means re-keying hundreds of people, and the fear of being locked in again stops them starting at all.

How CollabKin answers it: CollabKin imports a standard GEDCOM file from Ancestry, MyHeritage or any other tool, and exports the whole tree back to GEDCOM at any time, with an explicit control to leave living relatives' sensitive fields out of the export.

05 Value Proposition

Six reasons a family picks CollabKin over adding another app to the pile. Each one is something the product does, not a promise about how it feels.

One record, many hands

The tree, the archive and the timeline are a single shared record that relatives contribute to under their own names. There is no merging of private copies, no emailing files back and forth, and no single point of failure in one relative's laptop. What the aunt remembers and what the cousin scanned land in the same place.

Evidence: Invitations, four family roles and a formal invite, accept, decline or remove lifecycle are built into membership rather than bolted on as sharing links.

Private by construction, not by policy

There are no public profiles in CollabKin, so there is nothing to accidentally expose. Visibility is decided per memory and per story, and the decision is applied when the data is fetched rather than hidden in the interface. Living relatives are treated more cautiously than ancestors by default, and minors more cautiously still.

Evidence: Per-item visibility scopes, tighter automatic defaults for anyone recorded as living, private defaults for minors, and a guardian request path a steward must resolve.

Honest genealogy

Real family history is uncertain, and CollabKin says so on the record. Every relationship carries a certainty flag — confirmed, probable, unverified or disputed — and dates can be marked approximate so the timeline reads circa 1890 rather than asserting a year nobody knows. That honesty is what stops a guess hardening into family truth once it is copied into somebody else's tree.

Evidence: Certainty flags on relationships, approximate-date handling on timeline events, and relationship-path answers that name the weakest link in the chain.

Rich media the family can actually keep

Photographs, scans, documents, audio, video and artefacts are all first-class memory types from the free plan, including video — which is rare in this category. Stories can be written or recorded with a transcript and a named narrator. Media is held in durable storage with signed access while CollabKin keeps the family meaning around it.

Evidence: Five memory types and three story formats, each attachable to a person and a moment, each with its own visibility setting and tags.

One bill for the whole family

Pricing follows the record, not the roster. A family pays for the number of trees, people, memories and gigabytes it is keeping, and invites as many relatives as the plan allows at no extra cost. Regional pricing means a diaspora family pays the normal price of the market it is billed in rather than a converted dollar figure.

Evidence: Pro at 9 dollars a month includes 25 invited members; Business at 29 dollars a month includes 150. Four regional bands are published, down to 3.50 dollars a month for the India band.

Governance a heritage institution can sign off

CollabKin sits on a shared platform, so single sign-on, role-based access enforced before any request reaches the data, audit trails, quota metering, notifications, tagging, multilingual interfaces and accessibility all come as standard rather than as a roadmap item. That matters when the buyer is a family association or an archive rather than a household.

Evidence: Single sign-on, workspace isolation, an audit record on every change with the most identifying fields deliberately redacted, and dedicated-tenant or self-host options on the heritage agreement.

06 Ideal Customer Profile

An extended family of ten to a hundred relatives, spread across at least two cities, with one motivated organiser and at least one elder whose stories nobody has written down.

SEGMENT	TYPICAL SIZE	WHY THEY BUY
The family heritage keeper and their extended family	10-60 relatives across two or more households	Usually a middle-generation relative already paying for photo storage and a genealogy subscription, who wants the rest of the family to take part rather than watch. Buys on the free plan and upgrades when the members and storage run out.
Serious genealogists with non-genealogist relatives	1 researcher, 5-25 invited relatives	Has years of research in another tool and cousins who will never learn wiki markup. GEDCOM import protects the investment, roles let them give cousins contributor access and children viewer access, and certainty flags match how they already think.

SEGMENT	TYPICAL SIZE	WHY THEY BUY
Diaspora and multi-branch families	25-150 relatives across three or more countries	A group chat is the only shared space and it loses everything. Regional pricing, multilingual interfaces and a role model that lets one organiser manage a large roster are what make this workable rather than theoretical.
Family associations, clan and lineage societies	Institutional buyer serving 50-1,000 member families	Needs governance, single sign-on and retention commitments rather than a consumer app, and buys on an annual heritage agreement. The dedicated-tenant option is usually the reason the conversation gets serious.
Senior-living communities, heritage organisations and archives	Institutional buyer, one site or a small group	Wants a governed space where resident or member families can gather and preserve their own history, set up and administered by the institution. Early-stage segment for us — treat it as a discovery conversation rather than a proven motion.

GEOGRAPHIES

Sold worldwide with four published regional pricing bands. Strongest fit today in English-speaking markets and in India, where local-currency pricing and multilingual interfaces make it viable for families that dollar-priced genealogy platforms price out. Billing is handled from India for Indian and regional customers and from the United States for international ones.

NOT A FIT — DO NOT CHASE

- Anyone who wants DNA testing, matching or genetic reports — CollabKin deliberately never collects genetic data and never will
- A researcher whose main need is searching billions of historical records; that is Ancestry, MyHeritage or FamilySearch, and CollabKin is where the findings go afterwards
- Someone who wants a printed hardcover memoir as the deliverable; CollabKin generates a keepsake PDF but print fulfilment is not part of the product
- A family that wants to be found by distant cousins on a public world tree — CollabKin is members-only, so there is nothing public to match against
- Any health, medical or clinical family-history use case; CollabKin has no health-records product and processes no protected health information
- A team looking for real-time simultaneous editing; several relatives can work in the same space today, but changes are saved and seen asynchronously

07 Buyer Personas

Five people you will meet in a CollabKin conversation. The organiser is almost always the one who signs up, but the elder is usually the reason the family finally acts.

The family organiser

WHAT THEY WANT

Get the whole family contributing instead of asking her for copies, and know the photographs are somewhere safe and shared.

Open with: You are the only person keeping your family's history — what happens to it when you get busy for a year?

They will ask: Will my relatives actually use it, or will I end up doing all of this myself again?

WHAT FRUSTRATES THEM

Everything lands on her. Photographs sit in her phone, her sister's albums and a cousin's hard drive, and nothing she builds survives her attention lapsing.

The family historian or genealogist

WHAT THEY WANT

Bring years of research into a space the family can read, and keep working with sources and certainty rather than guesses.

WHAT FRUSTRATES THEM

Public world trees produce merge arguments, subscription tools are solitary, and non-genealogist relatives cannot use wiki-style interfaces.

Open with: You have the research. What you do not have is a way to hand it to your cousins without them needing to learn your tools.

They will ask: Can I import my GEDCOM, and can I get everything back out if I leave?

The keeper of memories

WHAT THEY WANT

Rescue the box before it fades, and record the elders while they can still tell it.

WHAT FRUSTRATES THEM

Six hundred scans with no dates, no places and no names, and a stalled project because labelling them is unbearable alone.

Open with: Everything in that box has one copy. How much of it would you lose to a burst pipe?

They will ask: How do I get the photographs in, and can I record my mother telling me who is in them?

The privacy-minded parent or administrator

WHAT THEY WANT

Share the family's record with the family and nobody else, and keep control of what is said about the children.

WHAT FRUSTRATES THEM

Public genealogy sites expose living relatives through matches, and social feeds turn family photographs into someone else's advertising surface.

Open with: Where does your family's history live today, and who else can see it?

They will ask: Who can see my children, and what happens to all of this if we stop paying?

The institutional buyer at an association or archive

WHAT THEY WANT

Offer member families a governed space, administered by the institution, to preserve their history without owning the operational risk.

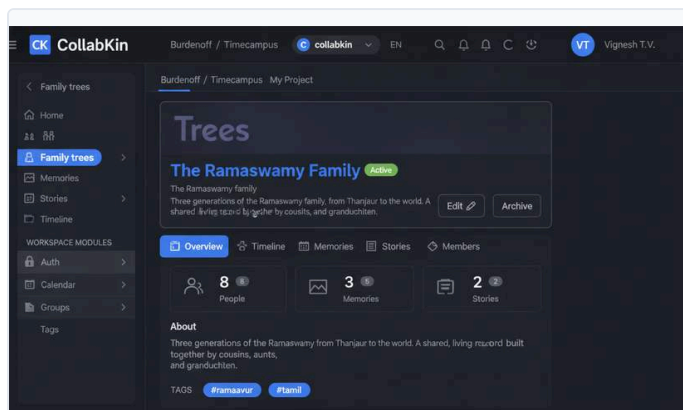
WHAT FRUSTRATES THEM

Consumer tools cannot meet governance requirements, and building something bespoke is far beyond the budget.

Open with: Your members are each losing their family history separately. You could give them one place to keep it.

They will ask: What are your certifications, where does the data live, and can we run on a dedicated tenant?

Twelve situations CollabKin was built for. Pick the one closest to the person in front of you and tell it as a story — these are illustrative scenarios, not customer accounts.



THE FAMILY ORGANISER

Turn one person's project into the family's record

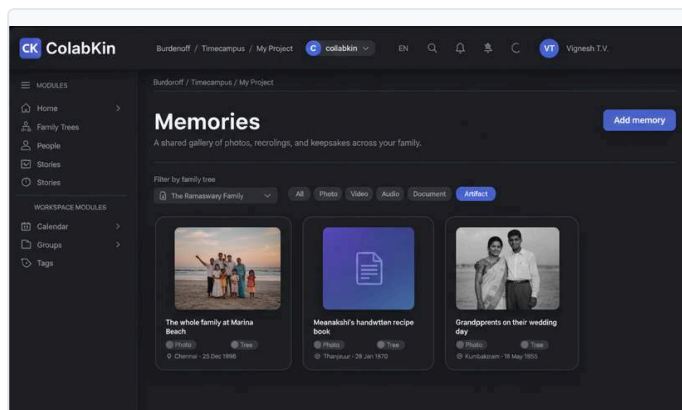
THE SITUATION

One relative has been building a tree in a spreadsheet for years. The aunt who knows the old surnames, the cousin with the albums and the grandparent who can name everyone in the photograph have never been asked, because there was nowhere to put their answers.

WHAT HAPPENS WITH COLLABKIN

The organiser creates a Family Tree — the private family space — adds herself and the closest relatives as people, links the relationships, then invites cousins, aunts and a grandparent with a role each. As they accept, their membership is linked to the person record that represents them, so the relative and the node in the tree are one identity.

Within a week the tree stops being one person's project and becomes the family's.



THE KEEPER OF MEMORIES

Rescue the box of photographs before it fades

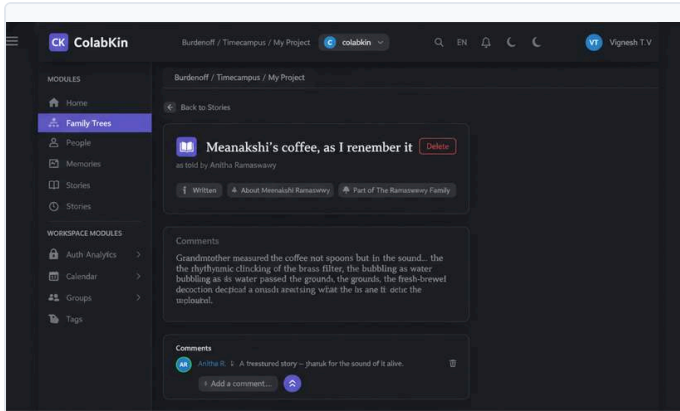
THE SITUATION

A shoebox of curling prints, a folded marriage certificate and a child's first drawing sit in a cupboard. There is one copy of each and no record of who is in them.

WHAT HAPPENS WITH COLLABKIN

Each scan becomes a memory with the date the moment actually happened, the place it happened, and the people in it linked to their records. Media is held in durable storage with signed access; the family context — who, when, where, what it means — stays with the memory. Other relatives comment on the photograph to name faces and correct dates.

A fragile private pile becomes a durable shared archive the whole family can search.



A GRANDCHILD, OR THE MEMORY KEEPER

Record the elders before the stories go quiet

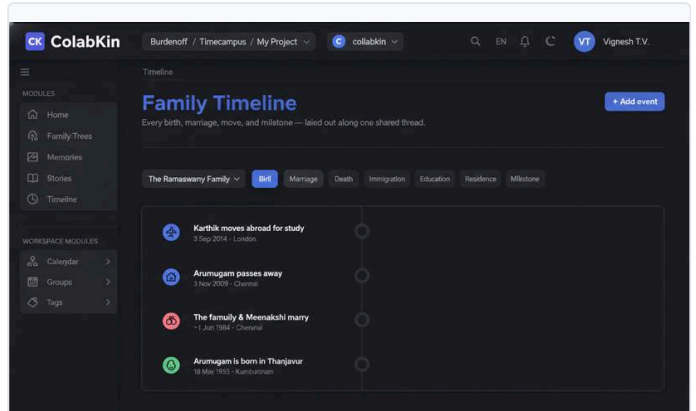
THE SITUATION

A grandparent in their eighties holds the account of how the family arrived, why a certain dish appears at every celebration, and what the village was called. Nobody has written any of it down, and nobody knows what to ask.

WHAT HAPPENS WITH COLLABKIN

The family opens the story prompt library, filters by life stage and relationship, and picks fifteen specific questions to ask on Sunday. The answers are saved as stories — written, or recorded as audio or video with a transcript — with the grandparent named as narrator and each story attached to the relatives and moments it concerns.

Knowledge that lived in one memory becomes a permanent, searchable part of the family record.



THE FAMILY HISTORIAN

See four generations on one timeline

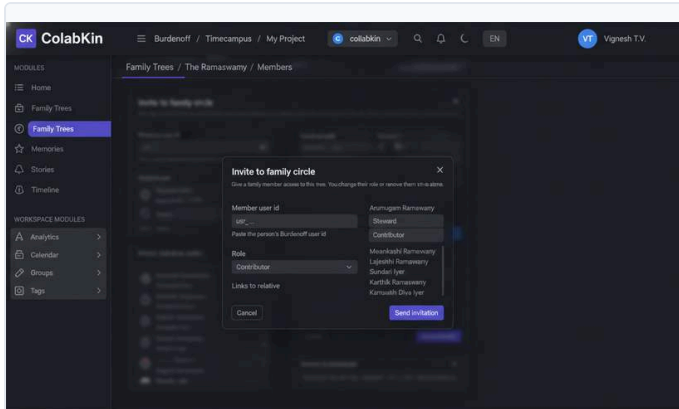
THE SITUATION

The family knows a scatter of dates — a marriage, a crossing, a war record, three births — but they live in different notes and nobody can see the shape of them together.

WHAT HAPPENS WITH COLLABKIN

Births, marriages, migrations, military service, education, residences and milestones are entered as dated timeline events, tied to a person or marked family-wide. Dates that nobody is sure of are flagged approximate, so the timeline shows circa 1890 rather than inventing a year. The memories and stories already attached to those people appear alongside them.

A pile of dates becomes a narrative the family can scroll through and show a child.



THE FAMILY ADMINISTRATOR

Invite the family without losing control of it

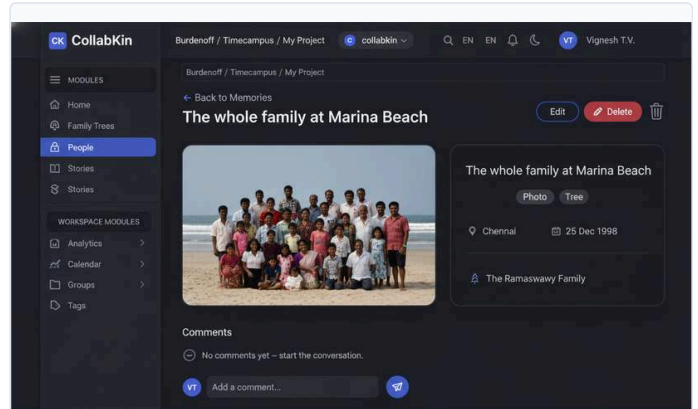
THE SITUATION

Forty relatives, mixed technical confidence, a couple of estranged branches and two children. Handing everyone the same access is not an option, and neither is doing all the work alone.

WHAT HAPPENS WITH COLLABKIN

Each relative is invited by name and given one of four roles — owner, steward, contributor or viewer. Stewards curate and manage invitations, contributors add people, photographs and stories but cannot delete the family's record, and viewers read. Every invitation moves through invited, then active, declined or removed, with a record of who invited whom and when.

A large family collaborates properly while one person still knows exactly who can do what.



THE PRIVACY-MINDED STEWARD

Keep the tender records for the right eyes only

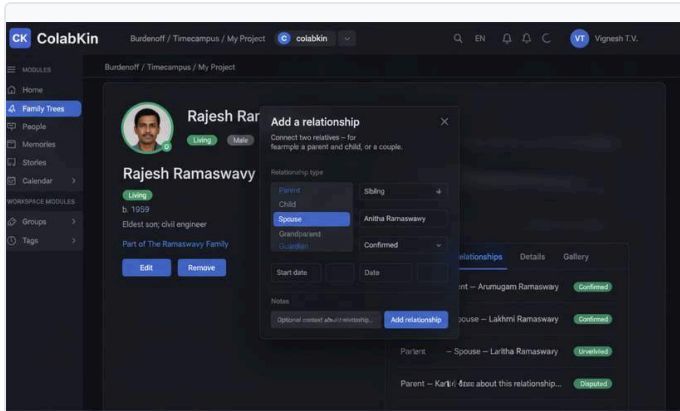
THE SITUATION

Some items in a family archive are not for casual browsing — a final letter, a medical note, a photograph of a living child. Treating them like the wedding album would be a mistake.

WHAT HAPPENS WITH COLLABKIN

Every memory and story carries its own visibility: the whole tree, stewards only, or private. The setting is applied when data is fetched rather than merely hidden in the interface. Anything attached to a relative recorded as living is tightened to stewards-only by default, and to private if their recorded birth date makes them a minor. Defaults only ever tighten.

Sensitive material is preserved and shared without ever reaching people it was not meant for.



THE GENEALOGIST

Record what you know without pretending to know more

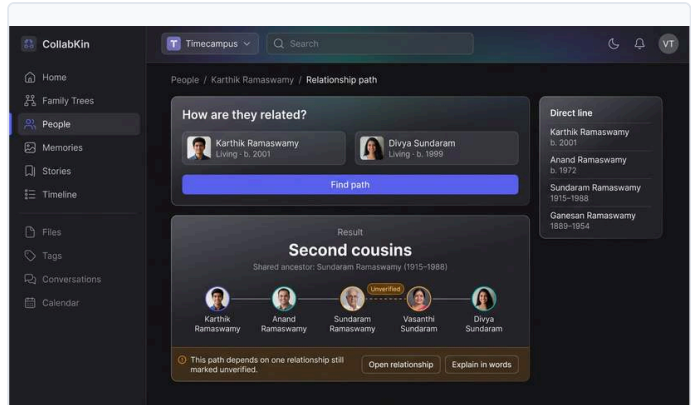
THE SITUATION

A marriage is probable, a parentage is disputed by two branches of the family, and a birth year is a guess from a census. Most tools force all of it into the same confident-looking box.

WHAT HAPPENS WITH COLLABKIN

Each relationship is recorded with a type and a certainty flag — confirmed, probable, unverified or disputed — plus optional start and end dates for a marriage or partnership. Supporting certificates and documents are attached as memories on the person concerned, so anyone reviewing the tree can see why a date is what it is.

The difference between we think and we know stays visible instead of hardening into family truth.



ANYONE AT A FAMILY GATHERING

Answer how am I related to her in one step

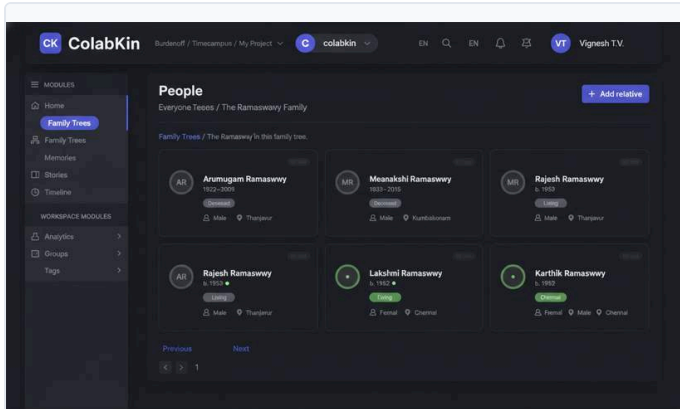
THE SITUATION

Two people are clearly related and nobody can say how. Working it out by hand means tracing edges, counting generations and disagreeing about what second cousin once removed means.

WHAT HAPPENS WITH COLLABKIN

Ask ColabKin for the path between two people and it walks the recorded relationships and returns the chain in plain language, alongside ancestor and descendant views grouped by generation. Because the path is computed from the recorded ties rather than guessed, it is repeatable — and where the chain runs through a link marked probable or disputed, the answer says so.

A reunion argument is settled in seconds, and the uncertainty in the answer is stated rather than buried.



THE GENEALOGIST MOVING FROM ANOTHER TOOL

Bring years of research in, and keep the right to take it out

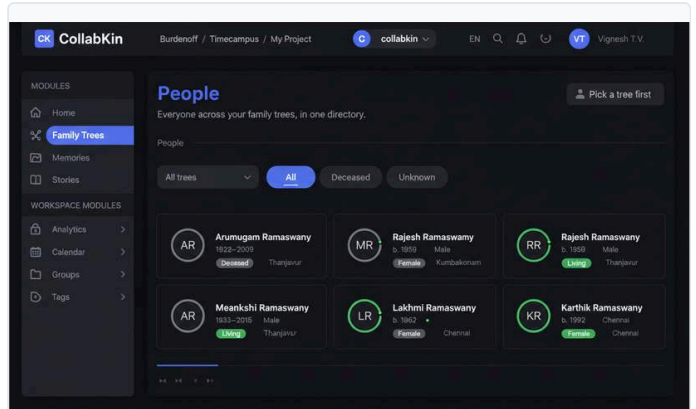
THE SITUATION

Ten years of work sits on a subscription site. Re-keying hundreds of people is unthinkable, and the fear of being locked in a second time is what stops the move.

WHAT HAPPENS WITH COLLABKIN

A standard GEDCOM file from Ancestry, MyHeritage or another tool is imported to build the tree in CollabKin. The whole tree can be exported back to a standard GEDCOM file at any time, with an explicit control to exclude living relatives' sensitive fields from the export.

The research moves in an afternoon, and leaving remains possible — which is usually what makes staying comfortable.



ANY FAMILY MEMBER

Keep a living directory of everyone in the family

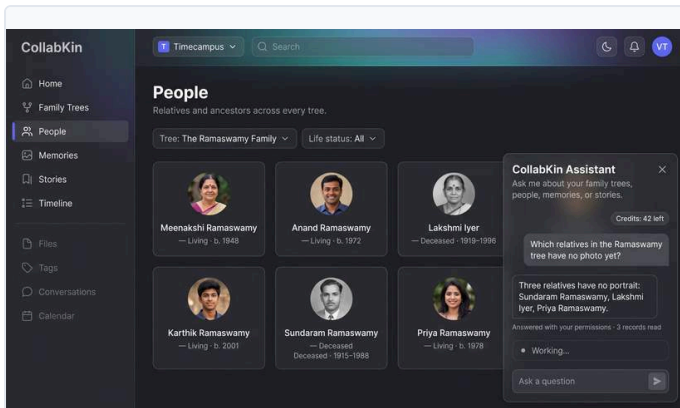
THE SITUATION

Beyond ancestry there is a simpler problem: the cousin who moved, the new baby, the uncle whose number changed. Birthdays are missed and addresses go stale.

WHAT HAPPENS WITH COLLABKIN

Each relative has a person record with names, nicknames, dates, places, a biography and a portrait, and can be linked to their own member account so they keep it current themselves. People can be tagged and browsed as a directory rather than only navigated through the tree.

The family's own contact details stay accurate because the family maintains them.



THE FAMILY ORGANISER WITH A LARGE ARCHIVE

Ask the archive a question instead of hunting for it

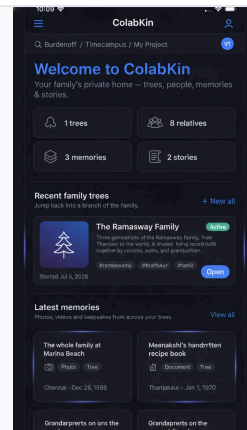
THE SITUATION

Four generations, nine hundred photographs and stories from three aunts. What you want is definitely in there, and finding it means remembering which tree, which tab, which filter.

WHAT HAPPENS WITH COLLABKIN

An assistant sits in the app. You describe what you want in ordinary language and it works against the live record on your behalf, running with your own membership and role, so a viewer never receives a steward's answer and a stewards-only memory stays invisible. There is no separate copy of the family that could quietly ignore the privacy settings.

The archive stays usable as it grows, without a second index that sees more than you do.



YOUNGER RELATIVES AT A REUNION OR WEDDING

Contribute from a phone, at the gathering

THE SITUATION

After a big family event the photographs end up on a dozen phones and the complete set exists nowhere. By the time anyone collects them, half have been deleted to free up space.

WHAT HAPPENS WITH COLLABKIN

Relatives open CollabKin on their phones during or straight after the event, upload what they took as memories, tag the people who appear, and add the day to the family timeline as a dated, located milestone. The web app is built for phones; native iOS and Android builds exist but are not yet listed in the app stores.

The day is preserved together, including for the relatives who could not be there.

09 Product Capabilities

What the product does, grouped the way a family experiences it. Anything not marked shipped is genuinely not finished, and saying so is what keeps you credible when the prospect goes looking.

The family tree

One graph holding both the living family and the ancestral line, built collaboratively and honest about what is uncertain.

Multiple family trees

A workspace can hold several trees — one per branch or family line — each with a surname or house name, cover image, status and tags.

People with genealogical depth

Given, family and maiden names, nickname, gender, life status, birth and death dates and places, biography and portrait.

Typed relationships with certainty

Parent, child, spouse, partner, sibling, guardian, grandparent and grandchild ties, each flagged confirmed, probable, unverified or disputed, with optional start and end dates.

Member to person linking

A relative's account can be linked to the person record that represents them, so the family and the tree are one identity rather than two lists.

Relationship paths and lineage views

The computed chain between any two people, described in plain language, plus ancestors and descendants grouped by generation.

GEDCOM import and export

Bring a tree in from another tool in the standard genealogy format, and export the whole tree at any time with a control to exclude living relatives' sensitive fields.

Source and evidence attachment per fact planned

Documents can be attached to a person today; formally binding a specific source to a specific fact or relationship is still to come.

Memories and the archive

Photographs, scans, recordings and artefacts kept with the family meaning around them rather than as loose files.

Five memory types

Photo, video, audio, document and artefact, all first-class from the free plan — video included, which is unusual in this category.

The real date and place

A memory records when the moment happened and where, separately from when it was uploaded, so old material sits correctly on the timeline.

Per-memory visibility and tags

Whole tree, stewards only, or private on every item, plus shared tagging across trees, people, memories and stories.

Durable media storage

Media is held in the platform's shared file store with signed access; CollabKin holds the context, never the raw files.

Comments on memories and stories

Threaded discussion attached to the item itself, so naming a face or correcting a date happens where the photograph is.

Shared albums in progress

Grouping memories around a wedding, festival or decade that the whole family fills. Being built on top of the memory model.

Photo intelligence in progress

Caption suggestions on a memory work today. Face grouping, duplicate detection and era hints are roadmap, and any suggestion will always need a person to accept it.

Stories and oral history

The part families feel most: capturing what only one person still knows, before they stop being able to tell it.

Written, audio and video stories

Three formats, each with a transcript field for the spoken word and a named narrator, even when that narrator is not yet a tracked relative.

Stories attached to people and moments

Each story links to the relatives and events it concerns and carries its own visibility setting.

Interview prompt library

A curated set of questions organised by life stage and relationship, with a flow that turns an answer into a saved story on the right person.

Keepsake book PDF

Compile stories, memories and timeline events into a formatted, downloadable book for a whole tree or one person, rendered on demand and able to exclude sensitive living-relative fields.

Professional print fulfilment planned

The PDF exists; posting a printed hardcover to the family is not part of the product.

AI-drafted biographies planned

Drafting a first-pass life story from the family's own dated events, places and photographs, always as a draft a relative edits before it is saved.

Timeline and milestones

The whole family's story laid out chronologically, honest about the dates nobody is sure of.

Ten kinds of timeline event

Births, deaths, marriages, divorces, immigration, military service, education, residences and milestones, tied to a person or marked family-wide.

Approximate dates

Events can be flagged as imprecise so the timeline reads circa 1890 rather than asserting a year the family does not have.

Whole-family and per-person views

The same events read as one chronology across the generations or as a single relative's life.

Reunions, invitations and reminders planned

Event planning built on the timeline and calendar — organising the gathering rather than only recording it afterwards.

Privacy, roles and consent

The reason families trust this with material they would not put anywhere else. All of it is enforced before data is returned, not in the interface.

Members-only space

No public profiles, no open world tree, no advertising, and family data is never sold.

Four family roles

Owner, steward, contributor and viewer, shaped for how families actually divide the work. Only the owner can retire a tree.

Invitation and consent lifecycle

Invited, then active, declined or removed, with an auditable record of who invited whom and when.

Tighter defaults for the living

Anything attached to a relative recorded as living defaults to stewards-only, and to private where their recorded birth date makes them a minor. Defaults only tighten.

Guardian correction requests

A guardian can formally file a correction or removal request about a minor, which a steward must resolve.

Audited, redacted changes

Every change is recorded with the actor and target, with the most identifying fields — birth dates, birthplaces, maiden names, biographies — deliberately kept out of the stored audit metadata.

Client-side encryption planned

End-to-end encryption for the most sensitive material is a stated goal, not something you can buy today.

AI and agents

Suggestion-only by design. The model proposes and a relative decides, and it can never see more than the person asking.

In-app assistant

Ask questions about your own record in ordinary language; the assistant reaches the data through the same governed interface your screens use, with your membership and role.

Suggestion review queue

AI proposals arrive as items to accept, adjust or reject, and an accepted suggestion is recorded as an ordinary change attributable to the person who approved it.

Caption suggestions on memories

Ask the assistant to propose a caption for a photograph or memory from the metadata you can already see. It never writes to the record without approval.

Agent connector in progress

A family researcher can point their own AI assistant at the record, signed in as themselves, with every action checked against their roles and recorded like any other change. Confirmation gates on destructive actions are still outstanding, so we do not recommend unattended write access yet.

Family-aware fluency in progress

Teaching the assistant the vocabulary of trees, certainty flags, memories and stories so questions like which relatives have no photograph resolve first time.

AI decision ledger planned

AI answers are covered by the general audit trail today; dedicated AI-specific logs and an evaluation set are still to be built.

Platform, access and support

What comes from sitting on a shared enterprise platform rather than being a standalone consumer app.

Single sign-on and role enforcement

Identity is validated at the edge and every operation is checked against the caller's role before it reaches the family's data.

Workspace isolation

Each family's record is separated at the data layer with fail-closed rules — a missing family context returns nothing rather than everything.

Quotas and metering

Trees, people, memories and members are metered per family, which is what makes one price for the whole family possible.

Multilingual and accessible

Interface translation, locale-aware formatting, keyboard shortcuts, screen-reader semantics and a high-contrast theme, so an eight-year-old and an eighty-eight-year-old can both take part.

Notifications and support

In-app and email notifications with per-user preferences, plus in-product help and ticketing.

Native mobile apps in progress

iOS and Android builds are working but are not yet listed in the app stores, so mobile access today is through the browser.

Command line and language libraries planned

Terminal tooling and typed libraries for bulk import, export and automation.

Real-time co-editing planned

Several relatives can work in the same space today, but changes are saved and seen asynchronously rather than live.

10 Pricing & Plans

CollabKin is priced per family, not per researcher or per seat. A family pays for the size of the record it is keeping — trees, people, memories and storage — and invites relatives up to the plan's member allowance at no extra cost. Prices are published in four regional bands, so a family is billed the normal price of its own market rather than a converted dollar figure. Free, Pro and Business are self-serve; Enterprise (Heritage) is an annual contract.

PLAN	PRICE	WHO IT IS FOR	WHAT IS INCLUDED
Free	\$0 Free forever; no card required. ₹0 in India.	A family starting one tree and preserving a first batch of photographs	1 family tree; 50 people; 5 invited members; 200 memories and 25 stories; 2 GB storage, 100 MB maximum upload; Community forum and public documentation for support
Pro	\$9/mo or \$7/mo annual Band A. India example: ₹399/mo or ₹319/mo annual.	An engaged family historian building out the tree and the archive	3 family trees; 1,000 people; 25 invited members; Unlimited memories and stories; 50 GB storage, 2 GB maximum upload; 30-day audit history; Add-ons available
Business (Family)	\$29/mo or \$24/mo annual Band A. India example: ₹1,199/mo or ₹959/mo annual. 14-day trial.	Large, multi-branch and diaspora families with many collaborators	Unlimited trees and people; 150 invited members; 500 GB storage, 5 GB maximum upload; 1-year audit history; Priority support; 99.9% uptime target
Enterprise (Heritage)	Custom (from ~\$2,400/yr) Annual contract, quoted regionally.	Family associations, clan and lineage societies, family offices, archives and heritage institutions	Unlimited everything; Single sign-on; Dedicated tenant or self-host options; Archival retention commitments and governance review; Managed onboarding; Uptime commitments of 99.9%, 99.95% or 99.99% available as a separately priced add-on

Add-ons

ADD-ON	PRICE
100 GB storage	\$4/mo
1 TB storage	\$25/mo
1,000-people pack	\$5/mo
50-member pack	\$6/mo
5-tree pack	\$4/mo
Extended audit history (up to 3 years, with CSV export)	\$4/mo
Priority support	\$9/mo
Story session (one recorded and edited oral-history story)	\$150 one-time
Quick Start migration (guided setup of the first tree, invitations and memories)	\$500 one-time

WHAT TO TELL A PROSPECT ABOUT PRICE

- Regional bands are published: Band A covers the US, EU, UK, Japan, Korea, Australia, Canada and Singapore; Band D covers India, Bangladesh, Pakistan, Nigeria, Kenya and Egypt at \$3.50/mo or local equivalent for Pro. A regional price is the normal price of that market, not a discount.
- Add-ons are available on Pro, Business (Family) and Enterprise. A family on the free plan must upgrade before buying one.
- Pro and Business (Family) carry a 30-day money-back guarantee on the first purchase. Fees exclude GST, VAT and withholding taxes.
- On downgrade or cancellation, records above the new limit become read-only. The family record is never deleted and remains exportable.
- Registered non-profits, societies, libraries, museums, archives and schools can qualify for up to 50% off with verification. Discounts do not usually stack.
- There is no DNA product, no health-records product, and no advertising. Never quote a price for any of those.

11 Competitive Landscape

Seven alternatives you will hear named. Each of them genuinely wins somewhere, and conceding that is what buys you the right to explain where CollabKin does not lose.

ALTERNATIVE	WHAT IT IS	WHERE THEY ARE STRONG	WHERE WE WIN
Ancestry	The largest subscription genealogy service: an enormous historical-record archive plus consumer DNA testing, sold per researcher.	Record depth and DNA are not close. Tens of billions of historical records and the biggest consumer DNA network mean serious record research starts and often ends there. Mature mobile apps as well.	It is a research subscription for one person; the rest of the family are viewers. CollabKin is priced for the whole family, has real family roles and a consent lifecycle, keeps photographs, audio, video and stories as first-class records, and puts births, marriages and migrations on one family timeline. The honest pitch is research there, preserve here.
MyHeritage	Records, DNA and the strongest consumer AI photo tooling — animation, colourisation and enhancement — sold per user.	AI photo features are ahead of anything CollabKin offers and are genuinely delightful. Deep European record coverage, 42 interface languages and mature mobile apps.	Family sites are open to visitors by default and matches expose fragments of your tree; CollabKin has no public surface at all. Their pricing is per user, so every relative who wants full features pays again. CollabKin has four family roles rather than owner and collaborator, and a unified timeline they do not offer.
FamilySearch	A free, non-profit shared world tree and record archive with billions of free record images.	It is free, permanently, with a record collection and handwriting search no paid product matches, plus two mobile apps. For pure research on a budget it is unbeatable.	Deceased ancestors are publicly editable by anyone and ancestor memories default to public — which is exactly what privacy-conscious families object to. No video, no family timeline, no roles and no consent lifecycle. Position them as complementary: research on FamilySearch, preserve privately on CollabKin.
Geni	A collaborative single world tree with hundreds of millions of profiles, freemium with a Pro subscription.	If your goal is to be found by distant cousins, a shared world tree does something CollabKin deliberately cannot. Their relationship-path discovery between users is genuinely good and their free tier is useful.	Semi-public profiles and merge disputes between strangers are the standing complaint. CollabKin is family-scoped, so there are no external merge conflicts, plus rich media, stories and a timeline they do not have. Browser-only on mobile.

ALTERNATIVE	WHAT IT IS	WHERE THEY ARE STRONG	WHERE WE WIN
StoryWorth	Weekly prompted questions to one storyteller, compiled into a printed hardcover book, sold per storyteller per year.	The printed hardcover is a real, physical deliverable and a proven gift, and their prompt library and simplicity for non-technical elders are excellent. CollabKin generates a PDF but does not print and post a book.	One storyteller per book, no family tree, no timeline, text-first with audio only on higher tiers and no video. CollabKin captures the whole family's stories into a living archive that keeps growing, with the prompt library included on every plan — free included.
WikiTree	A free, volunteer-run wiki-style world tree with a strong sourcing culture.	Free, donation-supported, with citation standards better than most paid products and an active volunteer community. Living people are kept private.	Every deceased profile is public, wiki markup is a wall for non-technical relatives, media support is thin and there is no mobile app or family timeline. CollabKin is the private, media-rich, modern-interface option a whole family can actually use.
23andMe	Consumer DNA testing with ancestry and health reports.	The largest direct-to-consumer DNA database and the health and trait reports. CollabKin will never do any of this — it deliberately does not touch genetic data.	Percentages without stories. There is no meaningful tree, no memory or story preservation and no collaboration. The natural pairing line is that DNA tells you where you are from and CollabKin tells the story of how you got here.

THE POSITIONING LINE TO HOLD

Ancestry and FamilySearch help a family research its past; CollabKin is where the family keeps what it finds — privately, together, in one record.

12 Why Us / Differentiators

If a prospect only remembers a few things, make it these. Each one is structural — a competitor cannot add it in a release.

One graph for the living and the ancestral

The cousin you invite this week and the great-grandparent you trace back to are records in the same tree. There is no social app on one side and a genealogy database on the other, and nothing has to be re-keyed between them. Every other product in the category makes you choose.

Members-only with no public surface

There is no public profile, no world tree and no matching against strangers, so there is nothing to accidentally expose. That is a different thing from a privacy toggle on a product that is public by default, and it is the single most common reason a family chooses CollabKin over a free world tree.

Roles and consent shaped for families, not workplaces

Owner, steward, contributor and viewer map onto how families actually divide the work: the organiser, the trusted relative who curates, the cousins who add, the elder who reads. The invitation lifecycle handles minors, elders and estranged branches deliberately rather than by improvisation.

Genealogy that admits doubt

Certainty flags on relationships and approximate dates on events are in the model, not a notes field. A relationship-path answer names the weakest link in the chain it walked. This is what stops a guess being copied into someone else's tree and hardening into fact.

Priced by the record, not by the relative

Twenty-five invited members on Pro and a hundred and fifty on Business, at one price for the family. Per-researcher and per-storyteller pricing is exactly what stops the people who hold the knowledge from taking part, and removing it changes who contributes.

AI that cannot see more than you can

The assistant reaches the record through the same governed path a person's own screens use, with their membership and role, so a viewer never receives a steward's answer. There is no separate index of the family that could quietly ignore the visibility settings, because there is no separate index at all.

Enterprise governance without an enterprise project

Single sign-on, role enforcement, audit trails, quota metering, workspace isolation, multilingual interfaces and accessibility come from the shared platform underneath, so they were not deferred to a later release. That is what makes a heritage agreement with an association or an archive a realistic conversation.

13 Customer Proof & Credibility

CollabKin has no reference customers to point at, so credibility has to come from what the product demonstrably does, how it is governed, and how honest we are about the gaps. Every item below can be shown in a live session rather than asserted.

EVERYTHING IS DEMONSTRABLE

The tree, roles, memories, stories, timeline, GEDCOM import and export, relationship paths, prompt library and keepsake PDF can all be shown end to end in a single call. Nothing on the shipped list is a mock-up.

PRIVACY IS ENFORCED, NOT PROMISED

Visibility is applied when data is fetched, family data is isolated at the data layer with fail-closed rules, and defaults for living relatives and minors only ever tighten. A prospect can test this by inviting a viewer and trying to see a stewards-only item.

AUDITED BY DEFAULT

Every change carries an actor and a target, with the most identifying family fields deliberately kept out of the stored audit metadata. Audit history is 30 days on Pro, a year on Business, and up to three years with the extended add-on.

PORTABILITY IS A COMMITMENT, NOT A SLOGAN

GEDCOM export works on every plan and the family record is never deleted on downgrade — records above the new limit go read-only. A family can leave with everything it put in.

A REAL PLATFORM UNDERNEATH

Single sign-on, role enforcement, quota metering, notifications, tagging, multilingual interfaces and accessibility are shared platform services, which is why a product this young has governance a standalone start-up would take years to build.

DELIBERATE REFUSALS

No DNA, no genetic data, no health records, no advertising, and family data is never sold. These are stated design decisions, not gaps waiting to be filled, and they are often the reason a privacy-anxious family relaxes.

LEGAL AND COMPLIANCE GROUNDWORK IN PLACE

A data processing agreement, security exhibit, acceptable-use policy and subprocessor list are published, and incident-reporting obligations under India's CERT-In directions are addressed by design. Formal certifications are not yet held — see the honesty note.

Be straight about this. CollabKin launched in 2026 and is early. There are no public reference customers, no published usage figures and no testimonials, and any partner who claims otherwise will be caught. It holds no SOC 2 or ISO 27001 certification today — both are on a stated post-launch roadmap with auditors not yet engaged — and it will never offer DNA testing, historical-record search at the scale of Ancestry or FamilySearch, printed book fulfilment, or real-time simultaneous editing. Native mobile apps are built but not yet in the app stores, shared

albums and the family-aware assistant are unfinished, and the agent connector still lacks confirmation gates on destructive actions. What a prospect should weigh instead is what they can see working in a live session, the depth of the privacy and role model, the fact that the record can be exported in a standard format from day one, and the governance inherited from the platform underneath.

14 Demo Information

A CollabKin demo works best told as a story about one family rather than a feature tour. Start empty, build a small tree in front of them, and let the privacy model land at the point where it matters rather than as a slide.

HOW TO GET A DEMO

Anyone can create a free family space at app.collabkin.com and follow along on their own screen — no card, no sales approval. For an institutional prospect, ask us for a guided session with a pre-populated example family so the timeline and relationship paths have something to show. Partners should request their own demo space rather than reuse a customer's.

Runs about Twenty minutes for a household prospect, forty-five for an association, archive or senior-living buyer who will want the governance and export conversation.

WHERE TO LOOK

- **Start a free family space** — <https://app.collabkin.com/register>
- **Product site and use cases** — <https://collabkin.com/use-cases>
- **How CollabKin compares** — <https://collabkin.com/vs>
- **Documentation** — <https://docs.collabkin.com>
- **Book a guided walkthrough with Vignesh** — <https://calendly.com/vignesh-burdenoff/1-1>

The walkthrough, in order

- 1 An empty family space, then create a Family Tree with a surname and a cover image**

This is the private space. Everything from here — every relative, photograph, story and date — belongs to it, and nobody outside it can see any of it.
- 2 Add three people across two generations and link the relationships, setting one to probable**

Watch this field. Real family history is uncertain, so a relationship is recorded as confirmed, probable, unverified or disputed. Most tools make you pretend you are sure.
- 3 Invite a relative and pick each of the four roles in turn**

This is how a family divides the work. Stewards curate and invite, contributors add but cannot delete the family's record, viewers read. The invitation has to be accepted — nobody is added silently.
- 4 Upload a photograph, set the date the moment happened and link the people in it**

Notice the date is when the photograph was taken, not when it was uploaded. That is why a 1962 wedding photograph lands in 1962 on the timeline instead of today.
- 5 Change one memory to stewards-only, then view the space as a viewer**

That is the whole privacy argument in one move. It is not hidden in the interface — the viewer's request simply never returns it.
- 6 Open the story prompt library, pick a question, and save an answer as a story with a narrator**

The hardest part of recording an elder is not the recording, it is knowing what to ask. These are the fifteen questions to take to Sunday lunch.
- 7 Open the timeline, then ask for the path between two relatives**

The path is computed from the relationships you recorded, so it is repeatable — and if it runs through something marked probable, the answer tells you.
- 8 Export the tree to GEDCOM with living relatives' sensitive fields excluded**

You can leave with everything, at any time, on any plan including free. That tends to be the moment a genealogist relaxes.
- 9 Generate a keepsake book PDF for one person**

This is what the family gets at the end — their own material, formatted, and it can leave out sensitive details about living relatives.

15 Sales Talking Points

Eight things worth saying out loud in almost any CollabKin conversation. Say them in your own words; the point is the substance.

The living family and the ancestral line are one record

It is the structural difference that everything else follows from, and every competitor forces a choice between a social app and a genealogy database.

Members-only means there is nothing public to expose

Most family objections to genealogy tools are privacy objections. This answers them structurally rather than with a settings promise.

One price for the whole family

Per-researcher pricing is precisely what stops the relatives who hold the knowledge from contributing. Removing it changes who takes part, not just what it costs.

Relationships carry certainty and dates can be approximate

Genealogists notice this within thirty seconds and it signals that whoever built the product understands their work.

You can export everything as standard GEDCOM from day one

It removes the lock-in objection before it is raised, and it is unusually generous — the export works on the free plan too.

AI proposes, a relative decides

Identifying a person in a family photograph is a claim about a real human being. Families are right to be wary, and the suggestion-only rule is the answer.

Stories are first-class, with prompts to draw them out

This is the emotionally urgent part. Elders are the reason families finally act, and the prompt library removes the excuse of not knowing what to ask.

No DNA, no health records, no advertising, ever

Three refusals that reassure exactly the buyer most likely to hesitate, and they are permanent design decisions rather than gaps.

The eleven things prospects actually say. Answer with the concession first where there is one — a partner who only ever defends the product stops being believed.

"We already use Ancestry — why would we pay for something else?"

You probably should not stop. Ancestry has the records and the DNA network and CollabKin has neither, and never will. The gap Ancestry leaves is that it is a research subscription for one person: your cousins are viewers, there is no family timeline, no roles and no place for the photographs and recordings. Research there, preserve here, and import what you have already built as a GEDCOM file.

PROOF · GEDCOM import and export ship on every plan, so the tree you built there comes across in an afternoon and can go back out at any time.

"FamilySearch is free. Why pay at all?"

For research, use it — it is free permanently and the record collection is extraordinary. The reason families still want CollabKin is that FamilySearch's deceased profiles are publicly editable by anyone and ancestor memories default to public, so it is a research library rather than a family's private archive. It also has no video, no family timeline, no roles and no consent lifecycle.

PROOF · A CollabKin space has no public surface at all, and every memory and story carries its own visibility setting.

"This looks expensive for a family app"

Compare it against what the family is already spending. A genealogy subscription runs from around 25 dollars a month for one researcher, and StoryWorth is charged per storyteller. CollabKin's Pro plan is 9 dollars a month, or 7 on annual billing, for the whole family including 25 invited relatives — and there is a free plan good enough to run a first reunion through. If they are in India or another band, the published price is lower again.

PROOF · Published plans: Free at zero, Pro at \$9/mo or \$7/mo annual, Business (Family) at \$29/mo or \$24/mo annual, with four regional bands down to \$3.50/mo for Pro in the India band.

"You are a young product from a small company. What if you disappear?"

That is a fair risk and the honest mitigation is portability rather than reassurance. The whole tree exports to standard GEDCOM on every plan including free, and if a family downgrades or cancels, records over the limit go read-only — nothing is deleted. So the worst case is that they leave with everything they put in, which is more than most incumbents offer.

PROOF · GEDCOM export on every plan, a documented no-deletion policy on downgrade, and a published data processing agreement and subprocessor list.

"Are you SOC 2 or ISO 27001 certified?"

No, and I would rather say so plainly than let you find out later. Neither certification is held today; both are on a stated post-launch roadmap and no auditor has been engaged yet. What does exist is a published data processing agreement, a security exhibit, a subprocessor list, single sign-on, role enforcement before any data is returned, workspace isolation with fail-closed rules and an audit record on every change. For a regulated institutional buyer, that gap may be decisive today and we should say so early.

PROOF · Published certification roadmap, data processing agreement and security exhibit; CERT-In incident-reporting obligations addressed by design.

"Why not just use a shared drive and a group chat?"

Because neither knows who anyone is. A drive stores files with no relationships, so a photograph has no date, no place and no names attached, and a chat loses everything by morning. CollabKin's whole point is the context: this photograph, of these people, at this moment, told about in this story, on this date in the family's timeline. That context is what a grandchild can actually use in thirty years.

PROOF · Memories, stories and events all attach to person records; the memory's real date and place are recorded separately from the upload date.

"Could we not build this ourselves?"

You could build a photo store and a tree in a few months. What takes years is the rest: four family roles enforced before any request touches data, per-item visibility applied at fetch time, tighter defaults for living relatives and minors, guardian correction requests, audit with the identifying fields redacted, quota metering, single sign-on, translation and accessibility. Building it is not the problem; operating it safely for a family's most sensitive material is.

PROOF · All of the governance above is shipped and inherited from the shared platform, not scheduled.

"My family will never actually use it"

That is the real risk, and it is worth planning for rather than dismissing. The pattern that works is not asking everyone to build a tree — it is one organiser starting a space, then giving relatives one small job each: the aunt uploads her albums, a grandchild takes fifteen prompt questions to Sunday lunch, the cousin confirms names on photographs. Viewer roles mean the elders who will never contribute can still be included without any pressure.

PROOF · The prompt library, four roles including read-only, and per-item commenting are all designed for uneven participation.

"What happens to our data — do you train AI on it or sell it?"

No to both. Family data is not sold and it is not an advertising surface; the product is funded by subscriptions. The assistant reaches your record through the same governed path your own screens use, with your membership and role, so there is no separate copy of your family that could ignore your visibility settings. Suggestions are proposals a relative accepts or rejects, and the accepted change is recorded against the person who approved it.

PROOF · Suggestion-only AI with a review queue, no separate index, and every accepted suggestion recorded as an attributable change.

"Does it do DNA?"

No, and it never will — that is a deliberate refusal rather than a missing feature. CollabKin does not collect, store or process genetic data at all. If the family wants DNA, they should test with a specialist and bring the family-history context here; the two pair well and CollabKin never becomes another company holding their genome.

PROOF · No DNA product, no health-records product, and no protected health information processed.

"What support do we actually get?"

It scales with the plan and I would not oversell it. Free is community forum and public documentation only. Paid plans get email and ticket support in Indian business hours, Business (Family) adds priority handling and a 99.9% uptime target, and Enterprise (Heritage) gets extended hours with a separately priced uptime commitment available on the order form. There is no bundled service-level agreement below Enterprise — that is a genuine limitation for an institutional buyer.

PROOF · Published support tiers and severity definitions; uptime commitments of 99.9%, 99.95% or 99.99% available as an Enterprise add-on.

17 Discovery / Qualification Questions

Eleven questions that surface whether this is a real opportunity. Ask three or four, not all of them, and listen for the emotional trigger as much as the requirement.

ASK THIS

LISTEN FOR

Where does your family's history live today — the tree, the photographs, the stories?

Three or more places named in one breath, especially a mix of a genealogy subscription, a phone, a chat group and someone's hard drive. Scatter is the core signal.

Who in your family is the one everybody asks about family history?

Whether they name themselves. If they do, you have found the buyer. If they name someone else, ask for an introduction to that person.

How old are the oldest relatives whose stories nobody has written down?

Anyone in their eighties, or a recent death in the family. This is the urgency question and it is usually what turns interest into action.

If your house flooded tomorrow, what family material would be gone permanently?

A box, an album, a hard drive. If the answer is nothing, they have already solved storage and you need a different angle — probably collaboration or privacy.

How many relatives would you want to be able to add things, and how many just to look?

The split between contributors and viewers, which tells you the plan and confirms whether the role model matters to them.

Are you paying for a genealogy service today, and who else in the family can actually use it?

One seat, everyone else locked out. That is the per-seat pain and the clearest commercial wedge.

How do you feel about your family's photographs and children's details being on a public site?

Any hesitation at all. Privacy anxiety is the most reliable predictor of a CollabKin fit in the household segment.

Do you already have research in another tool you would want to bring across?

A GEDCOM file, an Ancestry tree, a spreadsheet. Existing work is a strong buying signal, not an obstacle.

ASK THIS**LISTEN FOR**

Is anyone in the family in a different country or working in a different language?

Diaspora patterns. Multilingual interfaces and regional pricing become the deciding factors rather than nice extras.

For an institution: how many member families would you want to serve, and who administers them?

Volume, administration model and whether they expect a dedicated tenant. If they hope to put their own brand on it, say early that CollabKin is offered under its own name, with no white-label or rebranded edition, and is configured to how they work. This sets up the Heritage conversation.

What has stopped you from starting something like this before?

Cost, complexity, or a family that would not join in. Each one maps to a specific answer, and the third is the hardest — plan for uneven participation openly.

18 How to Identify a Good Opportunity

How to tell in ten minutes whether to spend more time on it. Green means introduce; amber means keep talking; red means say so kindly and move on.

STRONG SIGNAL — PURSUE

- They name three or more places their family history currently lives
- There is an elder in their eighties whose stories are unrecorded, or a recent bereavement
- One motivated organiser already does the work and wants the family to join in
- They already pay for a genealogy service and complain that relatives cannot use it
- They raise privacy about children or living relatives without being prompted
- An extended or diaspora family spread across countries with a group chat as its only shared space

Introduce us straight away.

WORTH A CONVERSATION

- Strong interest but no elder or archive at risk — real, but the urgency is low and the deal will drift
- An institutional buyer who needs certifications we do not yet hold; qualify the timeline before investing
- A genealogist who mainly wants historical-record search; there may still be a preservation opportunity underneath
- A family where the enthusiast is not the person who would pay
- Someone who wants a printed hardcover book as the outcome — the PDF may be enough, but check

Qualify further before an introduction.

POOR FIT — DO NOT CHASE

- DNA testing, genetic matching or health-history reporting is the requirement
- They want to be discoverable to distant cousins on a public world tree
- The need is record search at Ancestry or FamilySearch scale, with no preservation element
- A regulated buyer who requires SOC 2 or ISO 27001 certification in hand today
- They want live simultaneous co-editing as a hard requirement rather than a preference

Politely park it; suggest another product if one fits.

THE ONE-QUESTION TEST

Ask: whose family history would be lost if something happened to one particular person or one particular box? If they can answer that question with a specific name or a specific object, you have a real opportunity. If they cannot, you have a nice conversation.

19 How to Introduce Us

Keep the introduction short and human. CollabKin sells on recognition rather than specification — the person either has a box of photographs and a grandparent in mind, or they do not.

IN CONVERSATION

"there is a product I have come across called CollabKin. It is a private space where a whole family builds its family tree together and keeps the photographs, the recordings and the stories in one place — properly private, no public profiles, and one price for the whole family instead of per person. It made me think of what you said about your grandmother's photographs. Would it be useful if I introduced you to the person who runs it?"

EMAIL — SUBJECT: A PRIVATE PLACE FOR YOUR FAMILY'S PHOTOGRAPHS AND STORIES

Hi [Name],

You mentioned [the box of photographs / your grandmother's stories / the family tree you have been building alone], and I came across something that fits it.

CollabKin is a private space where a whole family builds the family tree together and keeps the photographs, recordings and stories in one place. Everyone is invited by name with a role — some relatives add, some just look — and nothing is ever public. It imports and exports the standard genealogy file format, so nothing you have already done is wasted and you can leave with everything.

There is a free plan at collabkin.com if you want a look first. If it seems worth a proper conversation, I can introduce you to Vignesh, who runs it — vignesh@burdenoff.com, or book directly at <https://calendly.com/vignesh-burdenoff/1-1>.

Best,
[Your name]

SHORT MESSAGE / LINKEDIN

Saw your post about family history. There is a product called CollabKin — a private family space where the whole family builds the tree and keeps the photographs and recorded stories together, priced per family rather than per researcher. Free plan at collabkin.com. Happy to introduce you to the founder if it is useful.

WARM THREE-WAY INTRODUCTION

When you introduce us by email, copy Vignesh T.V. at vignesh@burdenoff.com and say in one line what triggered it — the elder, the box of photographs, the family spread across countries, or the institution and how many member families it serves. That single sentence is worth more than any attachment, because it tells us which conversation to have. Add the 1-1 link at <https://calendly.com/vignesh-burdenoff/1-1> so they can book without waiting for us.

Please do not: Do not claim customers, user numbers or testimonials — there are none, and it is easy to check; Do not say SOC 2 or ISO 27001; neither certification is held and asserting one is a serious problem; Do not promise DNA, genetic matching, historical-record search or a printed hardcover book — none of those are or will be part of the product; Do not describe shared albums, native app-store apps or real-time co-editing as available today; Do not quote a custom Heritage price or offer a discount; all quotes and discounts come from us

20 Lead Handoff Process

Register the opportunity before you introduce it. Registration is what makes the commission payable, and it is also how we avoid two partners arriving at the same family association in the same week.

1 Register the opportunity

Email vignesh@burdenoff.com with the prospect's name, organisation if there is one, country, and one line on what triggered the conversation. Registration must happen before the introduction — there is no retroactive registration.

2 Get confirmation

We confirm the registration and tell you whether the account is already in an active conversation with us. An approved registration is protected for 90 days, with one 90-day extension possible where there is real progress.

3 Make the introduction

Introduce by email with us copied, or send the prospect the 1-1 booking link at <https://calendly.com/vignesh-burdenoff/1-1>. Say in the introduction what the trigger was; it saves a whole discovery call.

4 Hand over the qualification

Tell us what you learned: family size, whether there is an elder or archive at risk, existing tools, privacy concerns, and any deadline such as a reunion or an anniversary. Anything you know that we would otherwise have to ask for twice.

5 Stay in the room if you want to

You are welcome on the first call. Consulting and implementation partners are paid more precisely because they stay involved through evaluation and delivery, so say up front which role you want.

6 Let us own the quote

Pricing, discounting and contract terms come from us. Every reseller quote must be approved before it reaches the customer, and no side agreements, rebates or off-contract promises are permitted.

SEND US THIS – IT IS ALL WE NEED

- Prospect name, role and email, plus the organisation if it is an institutional opportunity
- Country or billing market, because the regional band determines the published price
- Roughly how many relatives or member families would be involved
- What triggered the conversation — the elder, the archive, the privacy concern, the cost of the current tool
- What they use today and whether existing research needs importing
- Any deadline that matters: a reunion, an anniversary, a budget cycle, a bereavement
- Whether they have asked about certifications, data residency or a dedicated tenant
- Your confirmation that you have not promised any feature, price, certification or timeline on our behalf

WHAT HAPPENS NEXT, AND WHEN

We acknowledge a registration within two working days and aim to make first contact with the prospect within three. If a registration is declined because the account is already active with us, we will tell you rather than let it sit.

Deal registration: Registration is required before commission eligibility starts and cannot be applied retroactively. An approved registration is protected for 90 days, extendable once by a further 90 days where there is active progress. Where two partners claim the same opportunity, the first approved registration with real contribution normally takes priority, and any split requires written approval. If we already had an active opportunity, commission does not apply unless you open a new buying centre or materially expand the scope.

21 Partner / Referral Commercials

Partners are paid on collected net subscription revenue — what the customer actually paid us, after taxes, refunds, credits and pass-through costs are removed. Rates rise with how much of the work you do, from a registered introduction through to full implementation delivery or approved resale. Regional pricing does not reduce your eligibility; it simply means the amount collected is the normal price of that customer's market.

PROGRAMME	YOUR ROLE	FIRST-YEAR	RENEWAL / ADD-ONS
Referral Partner	Registered introduction, no sales ownership	10% of first-year collected net subscription	0% unless separately approved · 3% of first-year collected net add-ons, capped at \$10,000
Heritage Consulting Partner	Introduction plus evaluation support	12% of first-year collected net subscription	0-3% where active in the success plan · 3% of first-year collected net add-ons, capped at \$15,000
Implementation Partner	Introduction plus implementation, migration, integration or training delivery	15% of first-year collected net subscription	3-5% where active in the renewal success plan · 5% of first-year collected net add-ons, capped at \$25,000
Authorised Reseller	Approved resale with first-line commercial ownership	Up to 15% reseller margin on the approved quote	Up to 8% where the account stays active and supported · Up to 5% on dedicated tenant or managed services, only where approved
Heritage-Tech, MSP or Strategic Partner	Bundled, managed or repeat-pipeline offering	Custom	Custom · Custom

THE RULES THAT MATTER

- Commission is calculated on collected net subscription revenue, excluding taxes, refunds, chargebacks, credits, payment fees, marketplace payouts, customer-owned cloud costs and any AI provider costs the customer pays directly.
- Larger opportunities carry an additional incentive on first-year net subscription: 1% capped at \$2,500 from \$100,000, 2% capped at \$7,500 from \$250,000, and 3% capped at \$25,000 from \$500,000 — all subject to registration before procurement and an approved quote.
- Partner and affiliate rewards do not stack. A customer is attributed to one programme only unless we approve a written exception.
- Dedicated tenant, self-hosted, air-gapped and managed-service packages carry lower partner economics because of the delivery effort, and must be approved in the quote.
- Marketplace take-rate and publisher revenue are not partner-commissionable; they follow a separate publisher programme.
- Services you contract directly with the customer — migration, training, oral-history production — are yours to keep, provided they do not conflict with our contract with that customer.
- Never promise a feature, price, discount, certification or timeline without our written approval. Misrepresentation is the fastest way to lose both a deal and a registration.
- Refunds, chargebacks and customer credits reduce or reverse commission, and heavy discounting on a deal may reduce the commissionable amount.

GETTING PAID

Commission is paid on collected revenue, not on booked contract value, and is payable 15 days after successful realisation of that revenue once settlement, refund, tax and payout-document checks clear. Multi-year contracts pay as the customer's cash is collected unless the partner agreement says otherwise. Partners handle their own invoicing and tax compliance; we withhold and report where the law requires it.

These are the standard programme terms and are indicative. The terms that actually govern any payment are those in your signed partner agreement and in the quote we issue to the customer. CollabKin is early and pre-reference, so all figures here are planning terms rather than a record of what has been paid.

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 CollabKin 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
CollabKin website	https://collabkin.com	Positioning, features, use cases and pricing — the public claim, safe to share with anyone
The app	https://app.collabkin.com	Where a family signs up and works. A free family space needs no card and no approval
Documentation	https://docs.collabkin.com	Product guides and reference; still filling out, so check a page before sending it
Use cases	https://collabkin.com/use-cases	Twenty-one illustrative scenarios by persona — the best link to send a prospect who is still deciding whether this is for them
How CollabKin compares	https://collabkin.com/vs	Side-by-side pages against Ancestry, MyHeritage, FamilySearch, Geni, StoryWorth, WikiTree and 23andMe
Security and privacy	https://collabkin.com/security	The published security posture; use it rather than describing our controls from memory
Subprocessors	https://collabkin.com/subprocessors	For institutional buyers and anyone doing a data-protection review
Book a 1-1 with Vignesh T.V.	https://calendly.com/vignesh-burdenoff/1-1	Send this to a qualified prospect after you have registered the opportunity
Every Burdenoff product	https://burdenoff.com/products	Useful when a prospect's need turns out to sit with a different product in the family
Direct contact	mailto:vignesh@burdenoff.com	Vignesh T.V., +91-7358445777 — registrations, introductions and anything you are unsure about

WHAT YOU CAN SHARE, AND WITH WHOM

- Share freely: anything published on collabkin.com — the website, use cases, comparison pages, pricing, security page and documentation. It is already public and already reviewed.
- Share with a named prospect only: this playbook, the cheat sheet and product screenshots. Do not post them publicly, put them on your own site, or hand them to a competitor.
- Needs our written sign-off before it goes anywhere: any custom quote or discount, any use of the CollabKin or Burdenoff name and marks in your own marketing, co-branded material, press mentions, and any public claim about certifications or roadmap timing.
- Never share or create: invented customer names, usage figures, testimonials or case studies. There are none, and inventing one ends the partnership.
- Screenshots must come from your own demo family space, never from a customer's. Family records are the most personal data we hold and a single leaked screenshot would be a serious incident.

24 Product Mockups — Complete Visual Appendix

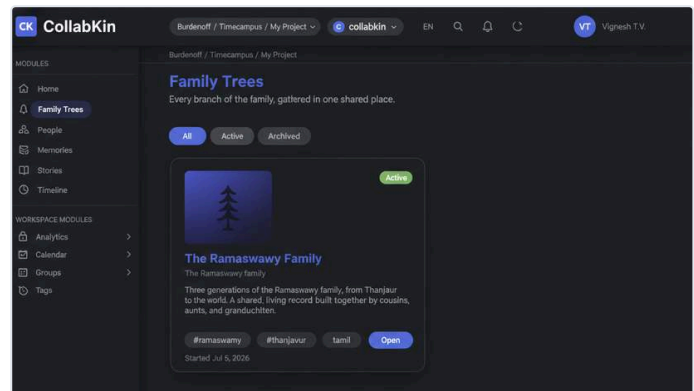
31 SCREENS

Every screen in the CollabKin design set — 31 in total, none omitted. Use these to show a prospect what the product looks like before a live demo.

PRODUCT SCREENS • 30 SCREENS



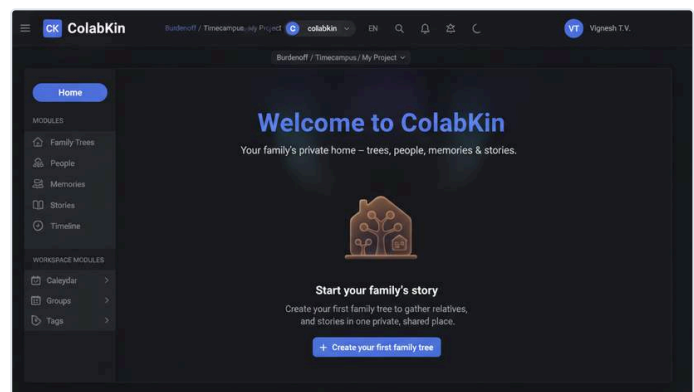
001 Col 01 Dashboard



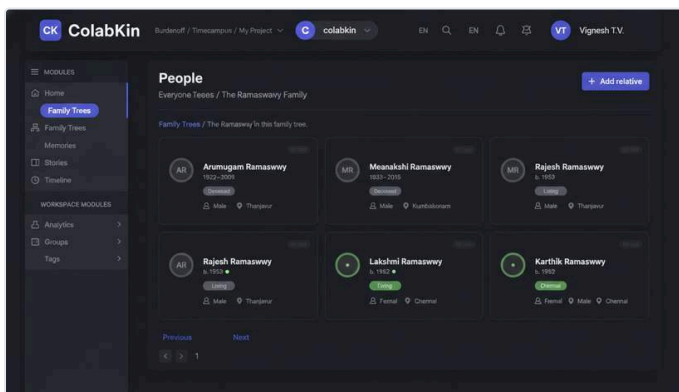
002 Col 02 Trees List



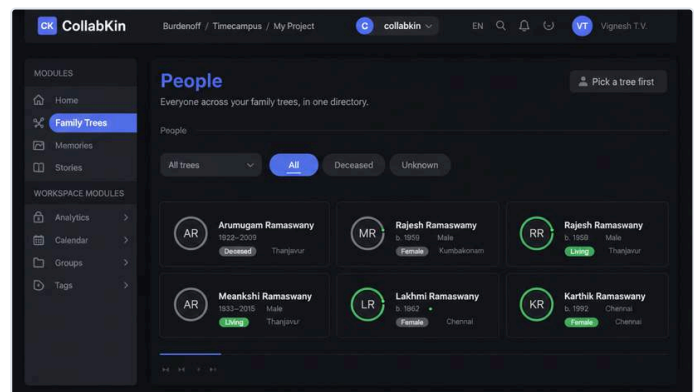
003 Col 03 Tree Overview



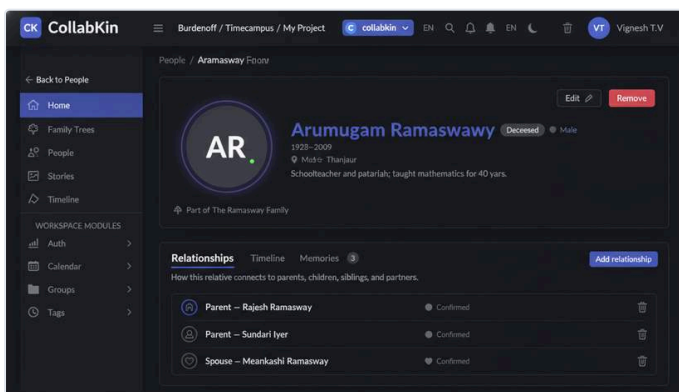
004 Col 04 Onboarding Empty



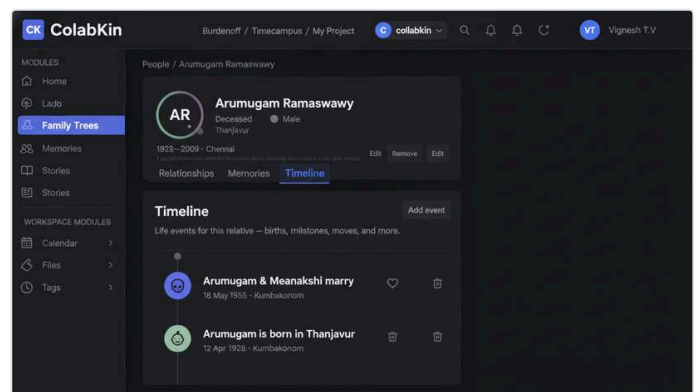
005 Col 05 Tree People Tab



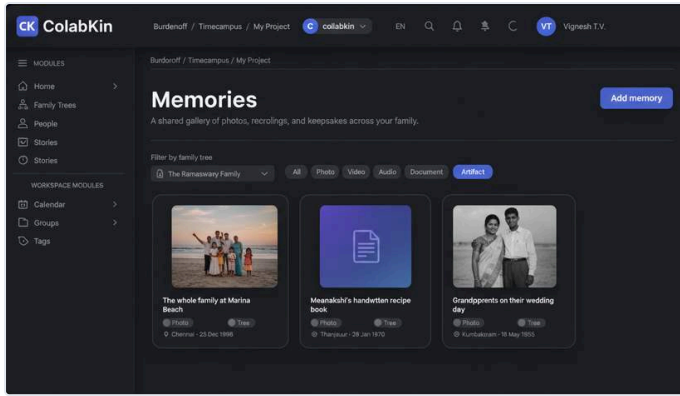
006 Col 06 People Directory



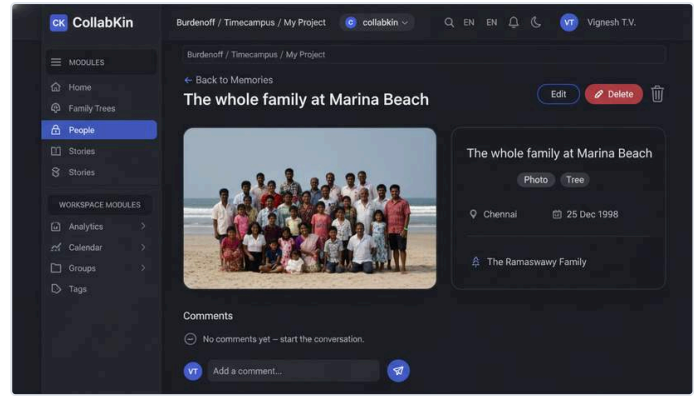
007 Col 07 Person Detail Relationships



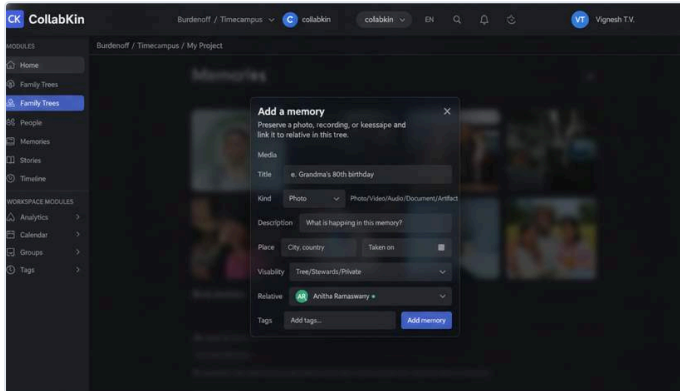
008 Col 08 Person Detail Timeline



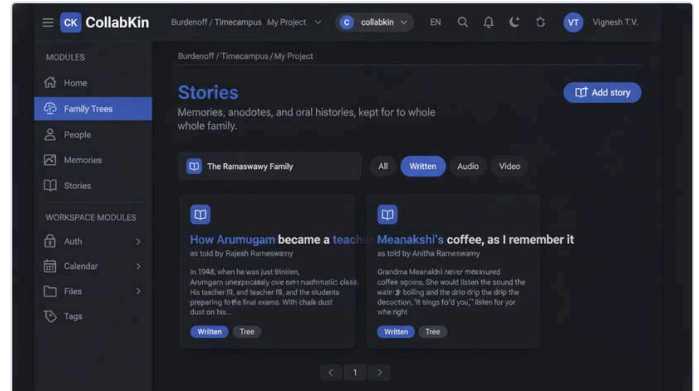
009 Col 09 Memories Gallery



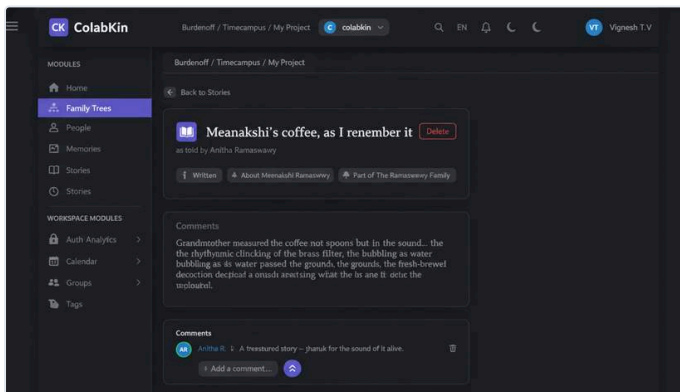
010 Col 10 Memory Detail



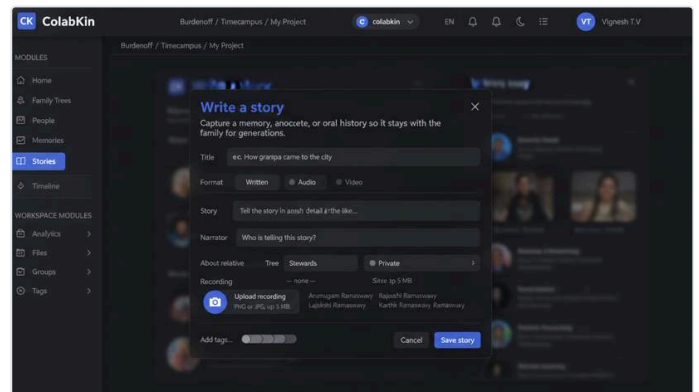
011 Col 11 Memory Form Create



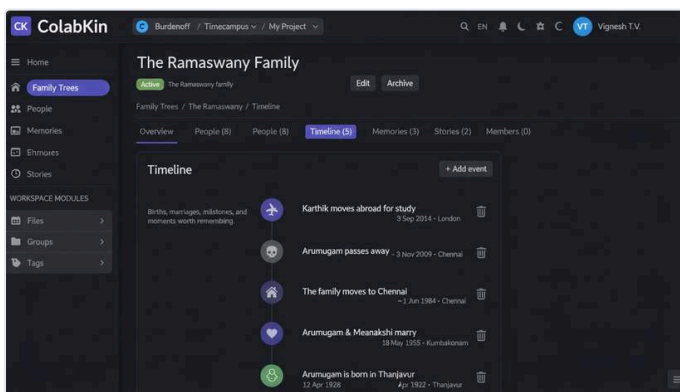
012 Col 12 Stories List



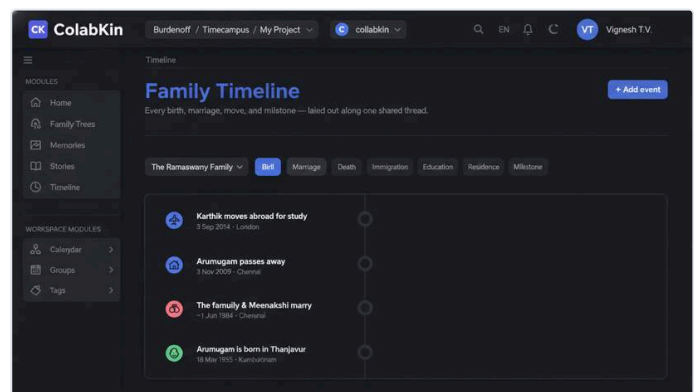
013 Col 13 Story Detail



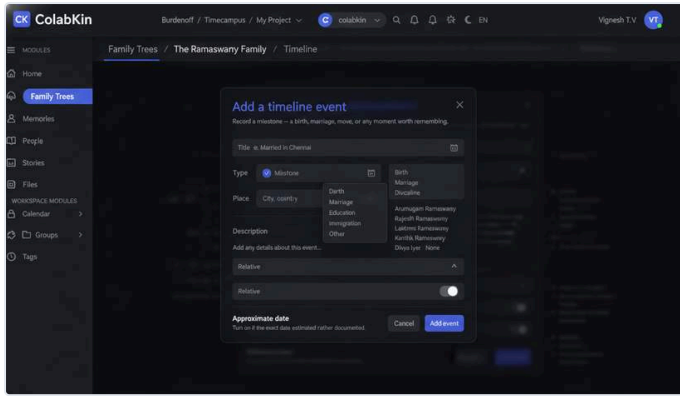
014 Col 14 Story Form Create



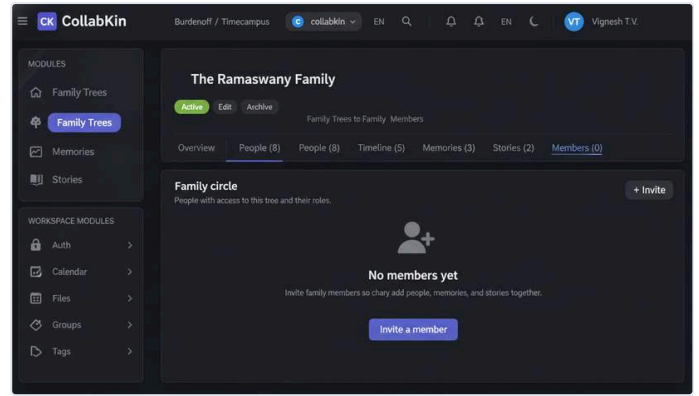
015 Col 15 Timeline Tree Tab



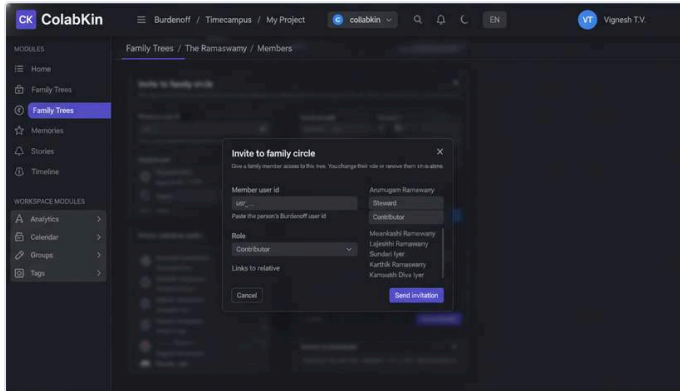
016 Col 16 Timeline Whole



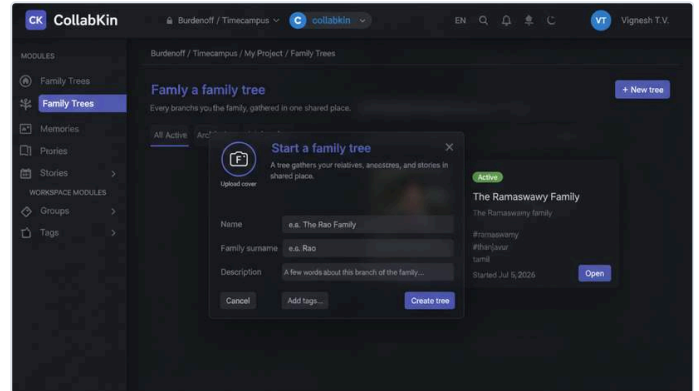
017 Col 17 Event Form Create



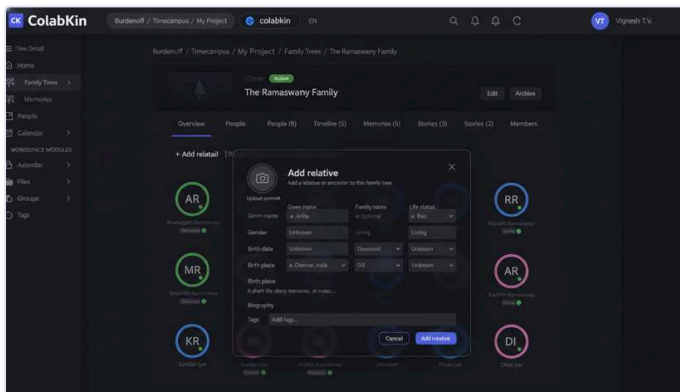
018 Col 18 Tree Members Tab



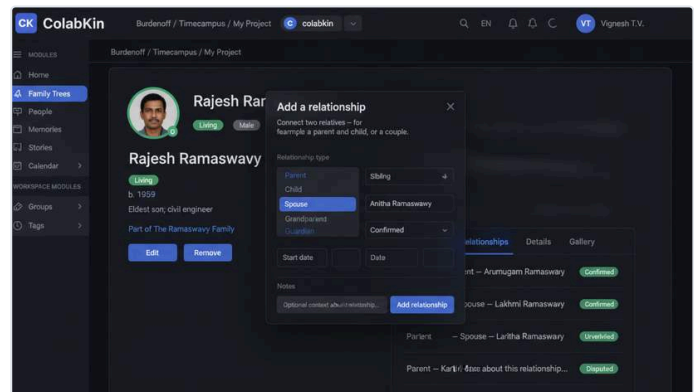
019 Col 19 Invite Member Dialog



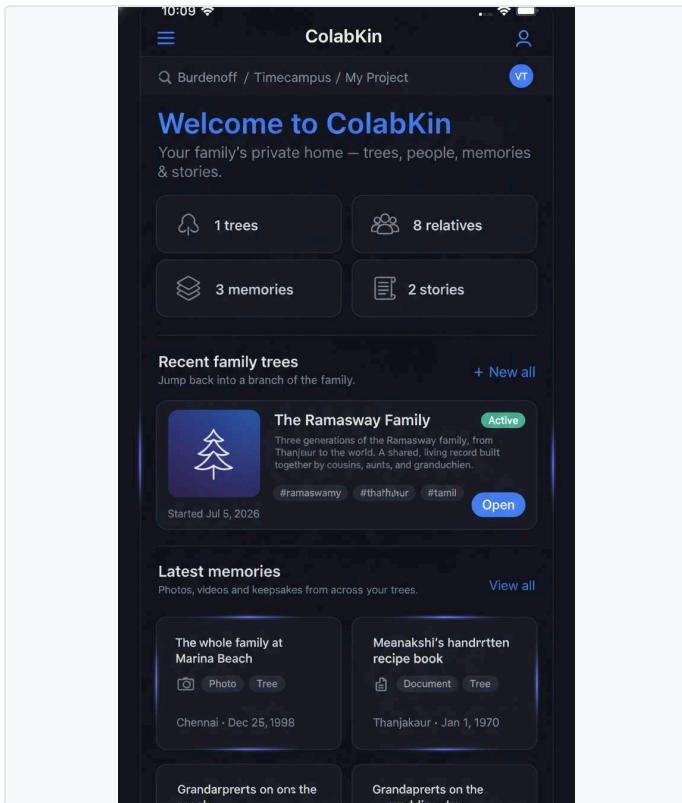
020 Col 20 Create Tree Dialog



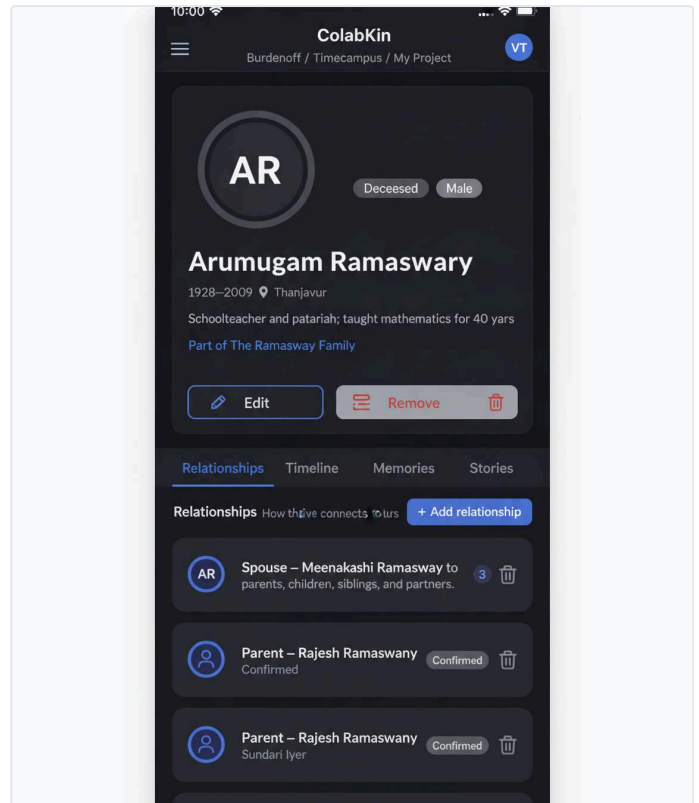
021 Col 21 Person Form Create



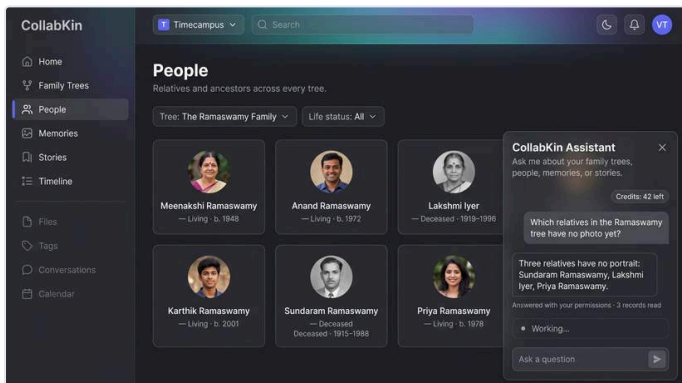
022 Col 22 Relationship Form



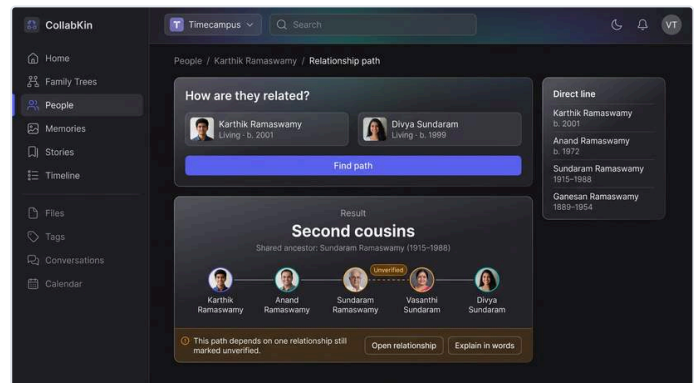
023 Col 23 Mobile Dashboard



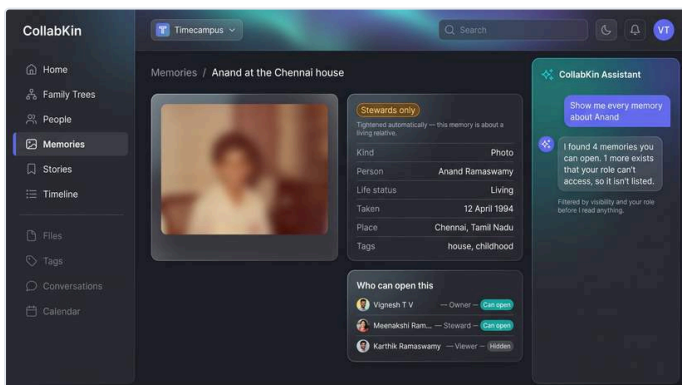
024 Col 24 Mobile Person Detail



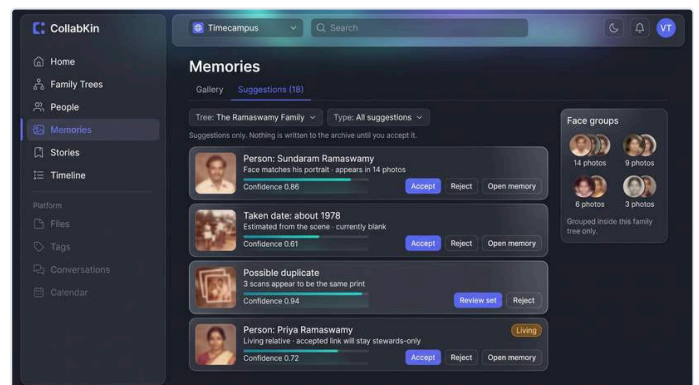
025 Col 25 AI Assistant Panel



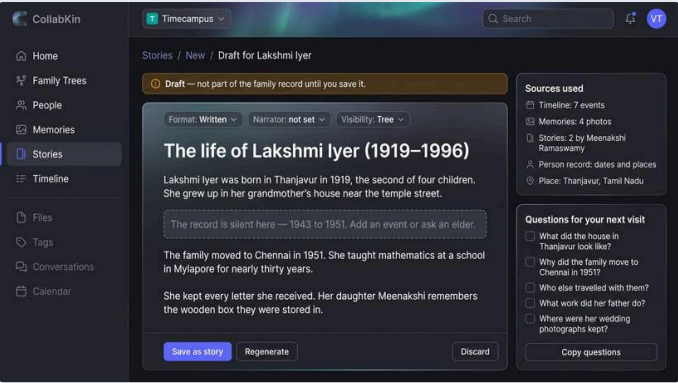
026 Col 26 AI Relationship Path



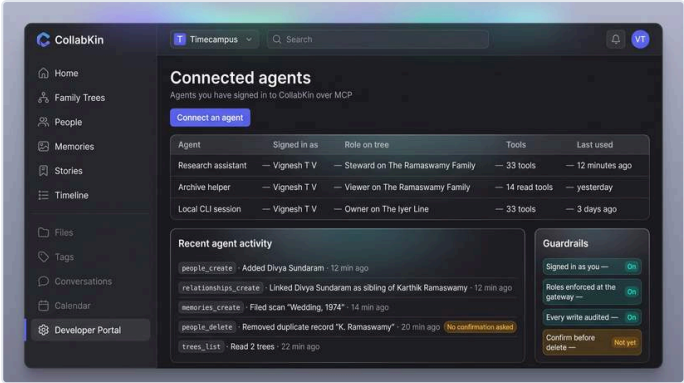
027 Col 27 AI Visibility Boundary



028 Col 28 AI Photo Suggestions

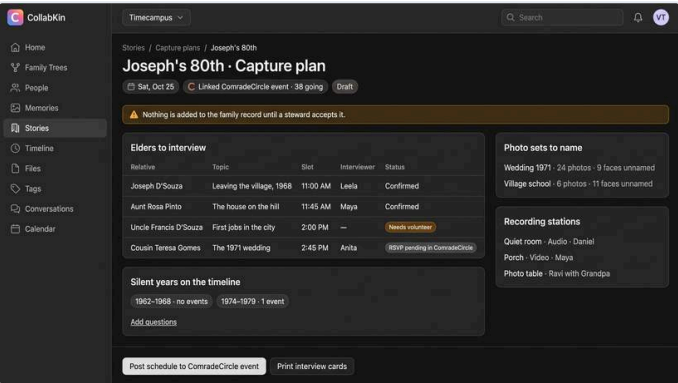


029 Col 29 AI Story Draft



030 Col 30 AI MCP Agent Session

FAMILY HOME · 1 SCREENS



031 Family Reunion Story Capture Plan 1 Reunion Capture Plan



Found someone who needs CollabKin?

You do not need to be a genealogist to spot this one. Anyone who has been asked to scan a box of old photographs, or who keeps the family group chat alive, is already living the problem CollabKin solves. Send the introduction and we will take it from there.

EMAIL OR CALL

Vignesh T.V.

vignesh@burdenoff.com

+91-7358445777

BOOK A 1-1 WITH VIGNESH

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

ALL BURDENOFF PRODUCTS

<https://burdenoff.com/products>



Burdenoff Consultancy Services Pvt. Ltd. • CollabKin is available at collabkin.com.

This playbook is confidential and intended for Burdenoff partners. Figures, plans and capabilities are current at the date of issue and may change; final commercial terms are those set out in your partner agreement and in the quote issued to the customer.