



SALES & PARTNER PLAYBOOK

PlanMagnet

PlanMagnet gives product and engineering teams one workspace where the roadmap, the backlog, the sprint and the release are the same data.

Roadmaps

Sprints & boards

Feedback inbox

Releases

Delivery-ops

PREPARED BY

Burdenoff Consultancy Services Pvt. Ltd.

PRODUCT

planmagnet.com

BOOK A CALL

calendly.com/vignesh-burdenoff/1-1



00 How to use this playbook

Read the problems and the opportunity signals first; they tell you which conversations are worth having. Keep the elevator and the persona hooks close to hand for the first call, and use the objection pages when a prospect starts pushing on price, maturity or the incumbent. When someone qualifies, do not try to run the deal alone: send us the handoff details and we will take the technical conversation from there.

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.

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01 Product Overview

PLANMAGNET.COM

PlanMagnet is a product and project management platform for software teams. It holds the whole arc of building something — a roadmap of initiatives, a feedback inbox, a backlog, Kanban and Scrum boards, sprints, issues, dependencies, milestones and versioned releases — as one connected set of records rather than four tools kept in fragile sync. Around that core it carries the operational layer delivery leaders normally buy separately: portfolios and programs, a risk register, quality gates, budgets and expenses, time tracking and timesheets, custom fields, project templates and no-code automation. Because it is built on the Burdenoff platform, every workspace inherits role-based access, single sign-on, directory sync, audit history, billing and file storage without configuring any of it.

CATEGORY

Product and project management, for software product and engineering teams and the delivery leaders who run them.

WHERE IT STANDS TODAY

Generally available. You can create a workspace on the free plan today, and paid plans are published. It is an early product: there are no public reference customers yet, some capabilities named on the site are explicitly marked as roadmap, and formal certifications such as SOC 2 and ISO 27001 are not yet held.

HOW CUSTOMERS GET IT

Cloud service, reached in a browser at the workspace app; no installation. Data is hosted in compliance-grade cloud regions, with data residency, a dedicated tenant and self-hosting available as Enterprise options. Getting started is self-serve on the free plan; teams moving off an existing tracker use the built-in import or our migration service.

Web application — the complete product

GraphQL API with scoped keys

Model Context Protocol server for AI agents

Command-line tool (early)

Node.js and Python SDKs (early)

Documentation site

Mobile and desktop companions (roadmap)

02 One-Line Pitch

SAY EXACTLY THIS

"PlanMagnet gives product and engineering teams one workspace where the roadmap, the backlog, the sprint and the release are the same data."

SHORTER, FOR A CHAT MESSAGE

One workspace where the roadmap and the work are the same data.

THE CATEGORY SENTENCE

PlanMagnet is a product and project management platform for software teams who want strategy and delivery in one place.

03 30-Second Elevator Pitch

SPOKEN, ROUGHLY 30 SECONDS

"Most teams plan in one tool, track work in a second, write specs in a third and report progress in a fourth. By week two the roadmap no longer matches the backlog, and a status update becomes an afternoon of reconciliation. PlanMagnet puts them on one data model: an initiative on the roadmap points at the epics and tasks that deliver it, and those same items feed the board, the sprint and the release. One place to plan, build and ship."

IF THEY ARE TECHNICAL

PlanMagnet is a workspace-native planning platform with a federated GraphQL API, per-field role-based access enforced at the API gateway, and a published Model Context Protocol server so an external agent can drive the domain under the same permissions a human gets. Built-in sync imports and exports Jira, Linear, Asana, GitHub and Trello, so evaluating it does not mean a one-way migration. Identity, audit, billing, files, notifications and quotas come from the shared Burdenoff platform rather than being rebuilt per product.

IF THEY ARE A BUSINESS BUYER

Teams typically pay for a tracker, a roadmap tool, a wiki and a reporting spreadsheet, then spend hours a week keeping them agreeing with each other. PlanMagnet collapses that into one subscription priced per editor, with viewers and commenters free and unlimited, so adding executives or clients to the roadmap costs nothing. Portfolios, risk, quality gates, budgets and time tracking are included rather than sold as separate modules.

04 Problem We Solve

These are the binds that make a team go looking. You will hear them described as tool fatigue or as a reporting problem; underneath, they are all the same fracture between the plan and the work.

The roadmap and the tracker disagree by week two

Who feels it: Heads of product, VPs of engineering, founders

What it costs them: Leadership decides from a deck that expired days after it was made, and every status conversation starts with an argument about which system is right.

How PlanMagnet answers it: A PlanMagnet roadmap item points directly at the epic, tasks, project and milestone delivering it, so the plan and the work are the same records rather than two copies. Automatic progress roll-up back onto the roadmap is on the way; the links themselves work today.

Four subscriptions to cover one workflow

Who feels it: Finance, operations leads, engineering directors

What it costs them: A tracker, a roadmap tool, a wiki and a reporting layer are all billed per user, and the real cost is often several times the headline price once add-ons are included.

How PlanMagnet answers it: Feedback, roadmaps, boards, sprints, issues, releases and dashboards are one product on one bill, priced per editor. Portfolios, risk, quality gates, budgets and time tracking are included rather than sold as separate modules.

Status reporting is assembled by hand

Who feels it: Engineering managers, programme managers, PMOs

What it costs them: Hours a week disappear into copying numbers between systems, and the resulting slide is stale before the meeting ends.

How PlanMagnet answers it: Dashboards and reports read the same work items the team already moves, so velocity, cycle time, throughput and cumulative flow come from the records themselves. Trailing velocity is computed across completed sprints rather than typed in.

Customer feedback is scattered and the loudest voice wins

Who feels it: Product managers

What it costs them: The same request arrives four times under four names, splits its votes, and loses to one noisy item — the exact failure a feedback process exists to prevent.

How PlanMagnet answers it: The feedback inbox holds requests as first-class records with vote counts and a computed priority score, links them to competitors and to the roadmap items that address them, so prioritisation weighs demand and market context on the same object.

Switching trackers feels like a one-way door

Who feels it: CTOs, delivery leads, platform engineers

What it costs them: Teams stay on tooling they have outgrown because the migration risk is unquantified and nobody wants to own it.

How PlanMagnet answers it: Built-in sync imports and exports Jira, Linear, Asana, GitHub and Trello, so the move is reversible by design. Field, status and workflow mapping runs during the migration, and our services team will run a parallel period alongside it.

Stakeholders cost a seat each

Who feels it: Agencies, consultancies, teams with many observers

What it costs them: Executives and clients are kept out of the plan to save money, so they ask for reports instead — which costs more time than the seats would have cost.

How PlanMagnet answers it: PlanMagnet bills only editors, the people who create or change work. Viewers and commenters are free and unlimited on every plan, so widening visibility never raises the invoice.

Governance is bolted on late and badly

Who feels it: Workspace administrators, security reviewers

What it costs them: Access is managed by convention until an audit forces the issue, then a rushed permissions project lands on the wrong team.

How PlanMagnet answers it: Every query and mutation is guarded by a role directive enforced at the API gateway, with six PlanMagnet roles seeded into each workspace, project isolation, and an audit trail of who changed what — from the free plan up, not as an enterprise upgrade.

05 Value Proposition

Six things a prospect actually buys. Lead with whichever one matches the pain they opened with, and leave the rest for the follow-up.

One data model instead of four synced tools

Roadmap items, epics, tasks, sprints, boards, milestones and releases are connected records in one workspace. A change in one layer is visible everywhere it matters without an integration job or a copy-paste. That is the property everything else in the product depends on.

Evidence: Roadmap items carry direct links to the work item, project and milestone that deliver them; the same items feed boards, sprints and reports.

Product management and engineering delivery in the same place

Most teams buy an issue tracker and then buy a roadmap or feedback product on top. PlanMagnet ships the feedback inbox with voting and priority scoring, roadmaps, and versioned releases alongside native boards, sprints and dependencies. A request from a sales call can be traced through to the sprint that ships it without leaving the workspace.

Evidence: Feature requests, votes, competitor links, roadmap items and releases are all first-class records in the product today.

Delivery operations included, not sold as modules

Portfolios, programs, a risk register scored by likelihood and impact, quality gates with a recorded review verdict, budgets with expense lines, time tracking with a submit-and-approve timesheet cycle, custom fields, templates and automation rules are all built in. Agencies and consultancies get project finance and billable delivery on the same records they manage work on.

Evidence: These ship as real capabilities in the product rather than as paid add-ons or a second product.

Migration in and out, so evaluating is low risk

The built-in sync imports and exports Jira, Linear, Asana, GitHub and Trello. That answers the question every comparison stalls on: what happens if we change our minds. A prospect can pilot on real data and still walk back out.

Evidence: Import and export both ship, with published migration guides covering what maps where for each of the five tools.

Pricing that does not punish visibility

PlanMagnet charges per editor, the person who creates or changes work. Viewers and commenters are free and unlimited on every plan, including free. Regional pricing bands make the same product affordable outside high-income markets rather than treating a discount as a favour.

Evidence: Published plans: free at zero, Pro at \$9 per editor per month, Business at \$16, with lower annual rates and four regional price bands.

Enterprise governance from the first day

Role-based access is enforced at the API gateway on every operation, not re-implemented per feature. Multi-tenant isolation, single sign-on, directory sync, audit history, billing, quotas and file storage come from the shared platform. A security reviewer sees a consistent enforcement point rather than a patchwork.

Evidence: Six PlanMagnet roles across twenty-one resource types are seeded automatically into every workspace, with deny-by-default behaviour.

06 Ideal Customer Profile

A software product or engineering organisation of roughly fifteen to two hundred people that already runs sprints, already has a roadmap somewhere else, and is tired of reconciling the two.

SEGMENT	TYPICAL SIZE	WHY THEY BUY
Product-led software companies	20-300 staff, 10-80 editors	Product management and engineering have to stay aligned from idea to launch. They already pay for a tracker plus a roadmap or feedback tool and feel the seam between them every planning cycle.
Engineering organisations outgrowing a lightweight tracker	30-500 developers	They need portfolios, dependencies, risk and quality gates that a minimal tracker does not carry, but do not want the configuration weight and add-on stack that comes with the enterprise incumbent.
Digital agencies	20-200 staff	Many client projects at once, each with its own methodology, plus budgets, expenses and billable time on the same records. Free viewers mean clients can watch a project without buying seats.
Consulting and professional-services firms	25-500 consultants	Engagements, deliverables and consultant allocation need custom workflows and fields per engagement type, with timesheets that route through an approval step rather than a spreadsheet.
Startups scaling past their first process	10-60 people	The free plan covers ten editors and three projects, so a team can adopt it before there is budget, then grow into Pro and Business without re-platforming.
Remote and distributed teams	15-200 people across time zones	Decisions and context need to live on the work item rather than in a chat thread nobody can find at handover. Async visibility is the whole job.

GEOGRAPHIES

Sold globally, with four regional price bands: standard pricing across the US, UK, EU, Canada, Australia, Japan, Korea and Singapore; reduced bands for the Middle East, Eastern Europe, Taiwan and Hong Kong; lower bands for Latin America, Southeast Asia, Turkey and South Africa; and the lowest band including India, Bangladesh, Pakistan, Nigeria, Kenya and Egypt, with native rupee pricing in India. Support and documentation are in English; the interface is multi-lingual.

NOT A FIT – DO NOT CHASE

- Teams who need a mature native mobile app today — the launch is web-first and mobile is on the roadmap
- Buyers who require SOC 2 Type II or ISO 27001 certification before signing; those are not yet held
- Organisations that want a general-purpose work platform for marketing, HR and operations rather than an opinionated software-delivery tool
- Teams whose real requirement is a wiki or spec editor first — the in-platform spec editor is roadmap, and documents currently live in shared file storage
- Anyone whose deciding criterion is a large third-party app marketplace; the incumbent's ecosystem breadth will not be matched
- Solo makers and very small teams happy on a free plan of a tool they already like — there is no pain to solve

07 Buyer Personas

Five roles decide this and one blocks it. Open with the line that matches who is actually in the room, and expect the question underneath it.

Head of Product / VP Product

WHAT THEY WANT

One roadmap the whole organisation can see, grounded in real customer demand, that stays true without weekly manual upkeep.

WHAT FRUSTRATES THEM

The roadmap is a deck that expires. Feedback arrives in four channels and is prioritised by whoever shouted loudest. Nobody can trace a shipped feature back to the request that caused it.

Open with: When someone asks what is shipping this quarter and why, how many places do you have to look before you can answer?

They will ask: Does the roadmap actually move on its own, or is it another view I have to maintain?

VP Engineering / CTO

WHAT THEY WANT

Predictable delivery, less tooling overhead per developer, and a defensible answer when someone asks when it lands.

WHAT FRUSTRATES THEM

Developers switch between too many tools a day. Forecasts are guesses. The tracker is either too heavy to configure or too thin to carry dependencies and portfolios.

Open with: How much of your team's week goes into keeping tools agreeing with each other rather than shipping?

They will ask: How do we get our history out of the current tracker, and what happens if this does not work out?

Delivery lead / PMO / programme manager

WHAT THEY WANT

Cross-team visibility, credible timelines, risks caught early, and an auditable answer to whether something is ready to ship.

WHAT FRUSTRATES THEM

Portfolios and dependencies live in a spreadsheet. Risk is remembered rather than registered. Quality sign-off is an email chain.

Open with: Where does your risk register live today, and who would know if a quality gate was skipped?

They will ask: Can I see dependencies across projects, and can I prove a release passed its gates?

Scrum master / engineering manager

WHAT THEY WANT

A board the team will actually use, sprints that close cleanly, and metrics that need no assembling.

WHAT FRUSTRATES THEM

Status changes are a form rather than a drag. Velocity is recalculated by hand. Carry-over is messy at sprint close.

Open with: *If I asked for your last three sprints' velocity right now, how long would it take you to produce it?*

They will ask: Does it do proper Scrum and Kanban, with story points and velocity, or is it a task list with columns?

Agency or consultancy operations lead

WHAT THEY WANT

Many client projects run cleanly, margin visible per engagement, clients kept informed without extra licences.

WHAT FRUSTRATES THEM

Utilisation and profitability are invisible until invoicing. Client updates are assembled manually. Each new client means a new blank project.

Open with: *How many seats are you paying for that belong to people who only ever look?*

They will ask: Can clients see progress for free, and can I track budget and billable time on the same project?

Workspace administrator / security reviewer

WHAT THEY WANT

Least-privilege access, tenant isolation, attributable changes, and a vendor whose security answers are specific.

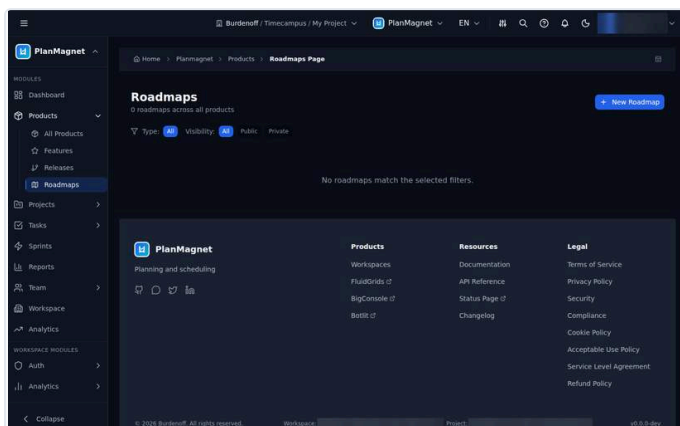
WHAT FRUSTRATES THEM

Permissions drift. Guest access is over-scoped. Nobody can show who changed what, when, without exporting a log.

Open with: *If an auditor asked who could delete a project last quarter, could you answer without a support ticket?*

They will ask: Where is authorisation enforced, and do you hold SOC 2?

Thirteen concrete situations. These are illustrative scenarios describing what the platform does — not customer stories. Pick the two nearest to the prospect and skip the rest.



HEAD OF PRODUCT

A roadmap the whole organisation can see

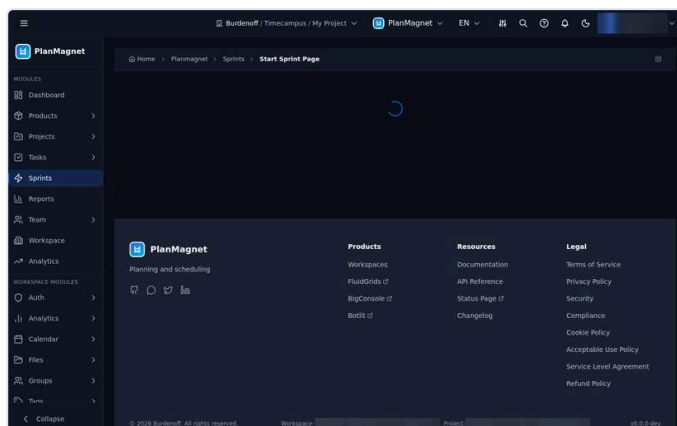
THE SITUATION

Every week the same question arrives: what are we working on and when does it land. Answering it means opening a slide deck, a tracker and a spreadsheet, then reconciling the three before anyone can be told anything.

WHAT HAPPENS WITH PLANMAGNET

Initiatives are grouped the way the organisation thinks — by quarter, by theme, or by objective — and each one links down to the epic, project and milestone that deliver it. Now / Next / Later and timeline views present the same records at whatever altitude the audience needs.

One link replaces the reconciliation, and the roadmap points at real work instead of at a memory of it.



SCRUM MASTER

Sprints on a board the team will actually use

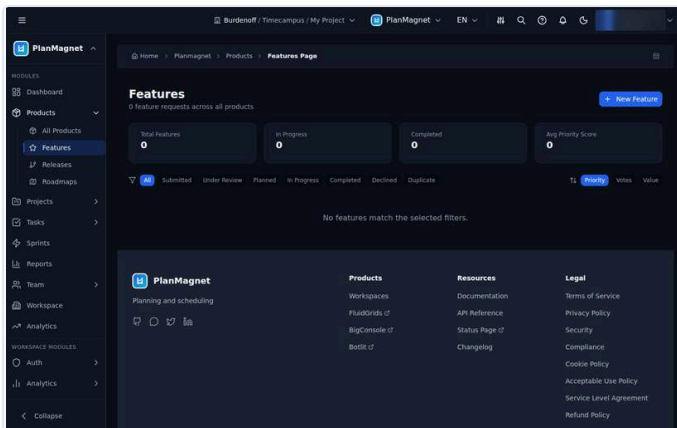
THE SITUATION

The team runs Scrum in a tool built for something else, so status changes are a form, carry-over at sprint close is manual, and velocity is worked out afterwards in a spreadsheet.

WHAT HAPPENS WITH PLANMAGNET

Work is pulled from a ranked backlog into a sprint and run on a configurable Kanban or Scrum board with columns, swimlanes and work-in-progress limits. Sprints start, complete or cancel as real operations, carrying story points, tracked velocity and point-based capacity.

The sprint closes with its numbers already computed, and the next one is planned from them.



PRODUCT MANAGER

Scattered feedback becomes a ranked signal

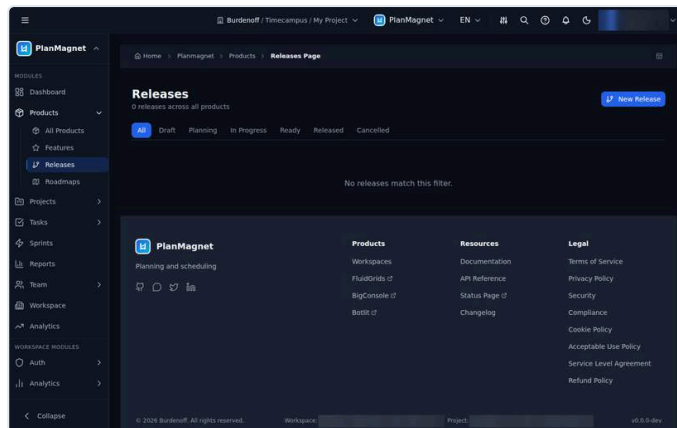
THE SITUATION

Requests arrive from sales calls, support tickets and internal ideas. The same need appears under four names, splits its votes, and loses to one loud request that happened to be filed once.

WHAT HAPPENS WITH PLANMAGNET

Requests land in a feedback inbox as records with vote counts and a computed priority score, can be linked to the competitors that make them urgent, and are tied to the roadmap items that address them.

Prioritisation weighs real demand and market context on the same object, rather than volume of noise.



RELEASE MANAGER

Ship a release and tell everyone, without a scramble

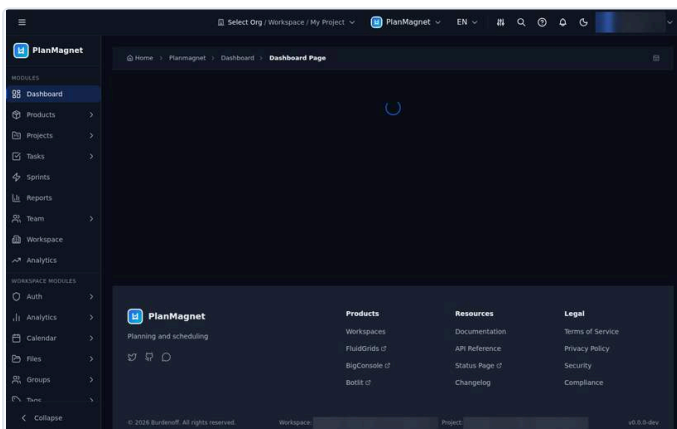
THE SITUATION

A release is coordinated across a spreadsheet, a chat thread and someone's memory. Readiness is asserted rather than checked, and the notes are written from scratch the night before.

WHAT HAPPENS WITH PLANMAGNET

Work is bundled into a versioned release with markdown release notes, tracked against a readiness checklist, and gated by quality gates that record an explicit review verdict before it goes out.

Whether something is ready to ship has an auditable answer instead of an opinion.



ENGINEERING MANAGER

Start the day from one command centre

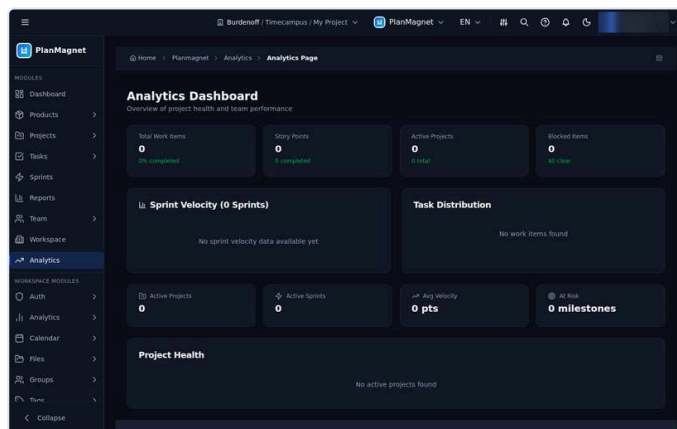
THE SITUATION

The morning begins with four tabs: what is in flight, what is blocked, what is assigned, and what somebody is waiting on you for. None of them agree and none of them are in one place.

WHAT HAPPENS WITH PLANMAGNET

The dashboard opens on active projects, running sprints and assigned work drawn live from the same records the team is moving, with a click straight into the item that needs attention.

The first ten minutes of the day become useful rather than administrative.



DELIVERY LEAD

Run delivery on evidence rather than gut feel

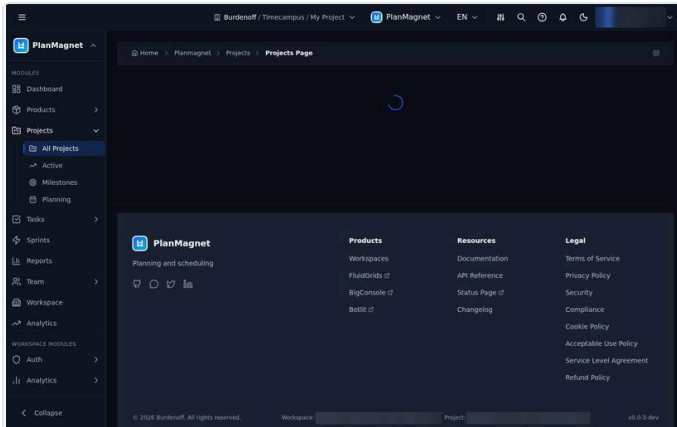
THE SITUATION

A timeline is challenged in a leadership meeting and there is nothing to defend it with except conviction, because the metrics live in a spreadsheet somebody maintains by hand.

WHAT HAPPENS WITH PLANMAGNET

Reports and analytics are built from real work data — velocity, cycle time, throughput and cumulative flow — with drill-down from a summary number into the specific items behind it. Trailing velocity is computed across completed sprints and offered as a next-sprint capacity figure, labelled as the average it is.

A commitment can be defended by opening the sprints it was grounded in.



CTO OR PLATFORM ENGINEER

Move off the incumbent without a one-way door

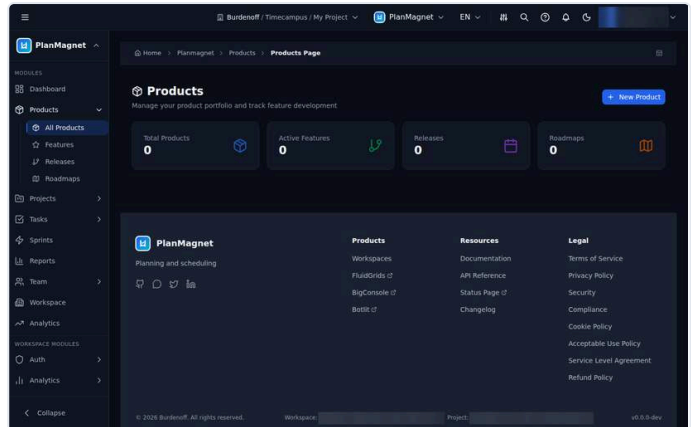
THE SITUATION

The team has outgrown its tracker, but nobody will sponsor a migration whose failure case is unrecoverable, so they stay.

WHAT HAPPENS WITH PLANMAGNET

Built-in sync imports projects, issues, boards, sprints, custom fields, comments and history from Jira, Linear, Asana, GitHub and Trello — and exports back out to them. Field, status and workflow mapping runs during the move; our services team can run a parallel period and a reversible cutover.

The evaluation becomes a low-risk pilot on real data rather than a bet.



PORTFOLIO LEAD

Keep multi-team planning organised at scale

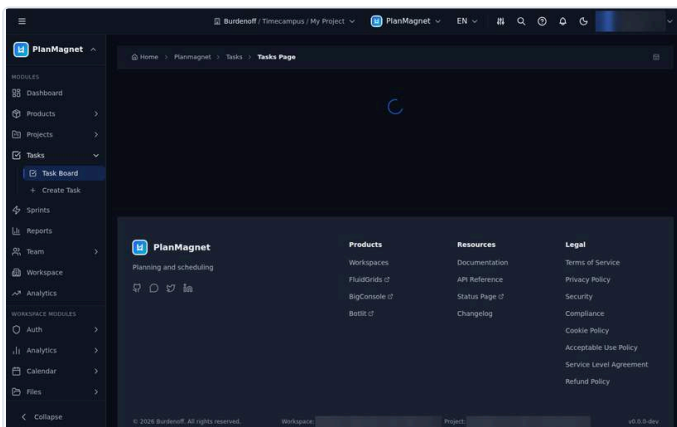
THE SITUATION

Six teams, three products, and a dependency map that lives in one person's head. Cross-project conflicts surface at the point they become delays.

WHAT HAPPENS WITH PLANMAGNET

Work is structured as a portfolio: products at the top, the projects that deliver them grouped beneath, programs across teams, and dependencies recorded as real relationships that can be traversed rather than inferred from text.

Cross-team conflicts appear on the plan instead of in the retrospective.



ENGINEER

Every issue from report to resolved

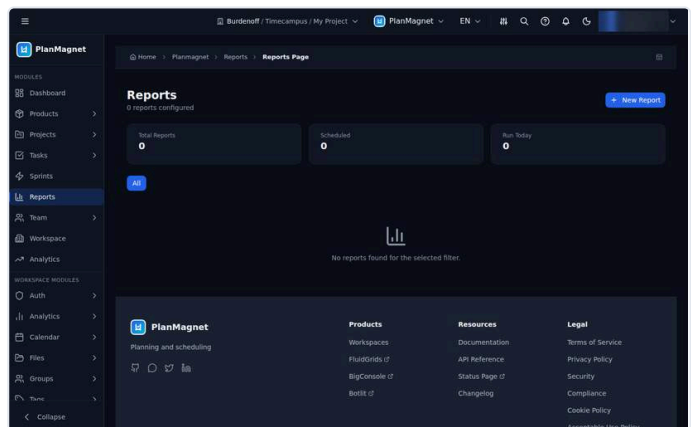
THE SITUATION

Bugs, spikes and tasks all follow the same rigid path because the tracker only has one, so half the fields are irrelevant and the workflow lies about where things are.

WHAT HAPPENS WITH PLANMAGNET

Custom work-item types carry their own fields and workflow states, so a bug, a task and a spike each follow the path that fits. Every change is recorded with who changed what and when, and dependencies mark what is blocking what.

The board reflects reality, and the history answers questions nobody has to remember.



AGENCY OPERATIONS LEAD

Budgets and billable time on the same record as the work

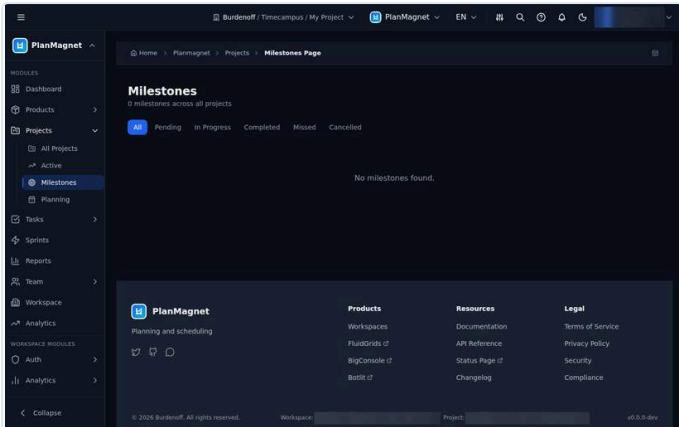
THE SITUATION

Project profitability is a monthly archaeology exercise across timesheets, an accounting tool and the tracker. Overspend arrives with the invoice.

WHAT HAPPENS WITH PLANMAGNET

A project carries a budget with expense line items and an approval step, while time entries logged against work items roll into timesheets that move through submit, approve or reject.

Planned against actual is visible on the project, so margin erosion surfaces while it can still be fixed.



DELIVERY OR QA LEAD

Catch risks and gate quality before shipping

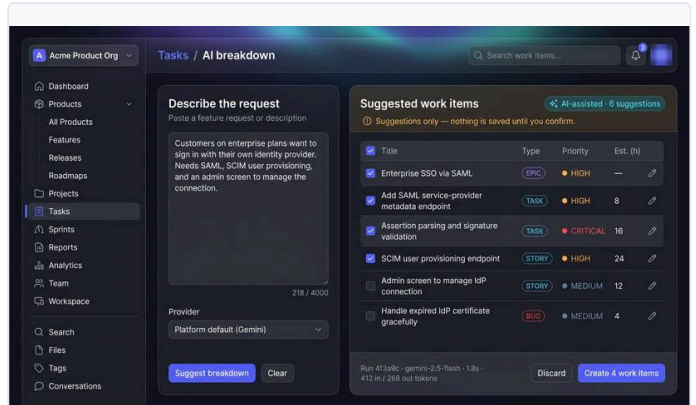
THE SITUATION

Risk management is a conversation in a meeting nobody minutes, and the answer to whether something is ready to release depends on who you ask.

WHAT HAPPENS WITH PLANMAGNET

Delivery risks are logged in a register scored by likelihood and impact, and quality gates define what a release must pass, each recording an explicit review verdict against the release it guards.

Risk is managed on purpose, and readiness is a record rather than a claim.



PRODUCT MANAGER

Turn a paragraph of feedback into a reviewable backlog

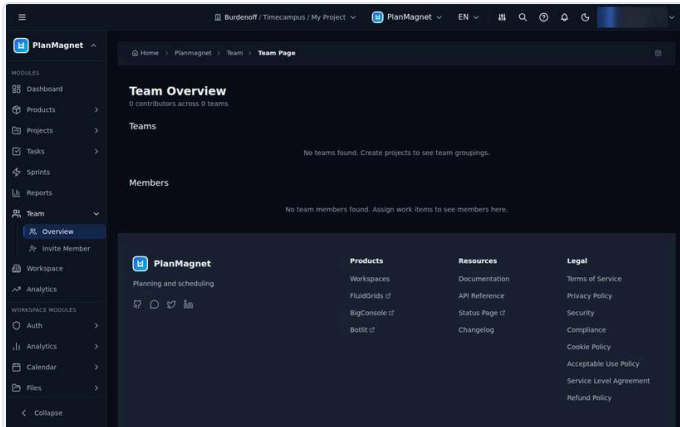
THE SITUATION

A feature request arrives as prose from a sales call. Turning it into an epic with correctly typed, roughly estimated children is an afternoon of clerical work everybody postpones.

WHAT HAPPENS WITH PLANMAGNET

The description goes to a work-item breakdown call that returns typed suggestions — item types, priorities and estimates checked against the real ones the product uses. Nothing persists: a reviewer edits or discards, and the ordinary creation flow saves the survivors. Every call writes a ledger row recording provider, model, tokens, latency and outcome, including failures.

The clerical half of backlog grooming shrinks, and the backlog never fills with items nobody agreed to.



WORKSPACE ADMINISTRATOR

One workspace, many teams, governed access

THE SITUATION

Access has been managed by convention. Guests can see more than they should, permissions have drifted, and the first audit question is one nobody can answer quickly.

WHAT HAPPENS WITH PLANMAGNET

Members are invited, grouped for bulk assignment, and given one of six seeded PlanMagnet roles spanning delivery owner, portfolio lead, product manager, quality lead, contributor and stakeholder viewer. Authorisation is enforced at the API gateway on every operation, with projects isolated and each change attributable.

Least privilege is the default state rather than a project someone has to run later.

09 Product Capabilities

What is actually there, grouped the way a buyer evaluates it. Anything not marked shipped is marked honestly — a partner who oversells one of these will be caught in the first demo.

Planning and roadmaps

The strategy layer, connected downward to the work rather than maintained beside it.

Roadmaps and initiatives

Group initiatives by quarter, theme or objective, with Now / Next / Later and timeline views for different audiences.

Roadmap-to-work linkage

A roadmap item points at the epic, project and milestone that deliver it, so the plan references real records.

Automatic roll-up onto the roadmap planned

Progress moving up from task completion to the roadmap item without anyone setting status by hand.

Objectives and key results in progress

Define objectives with measurable key results and track progress against the delivery that serves them. Surfaced in the app; the linkage between work and key-result progress is still deepening.

Portfolios and programs

Products at the top, projects grouped beneath, programs across teams, for multi-team planning at scale.

Milestones and dependencies

Sequence work against milestones with blocks, blocked-by and relates-to relationships recorded as real links that can be traversed.

Capacity-aware planning across the workforce in progress

Point-based sprint capacity works today. Planning against the wider team's real availability and skills through the CrewFoundry people platform is being built.

Delivery and execution

The daily heartbeat: boards, sprints, backlog and issues, built for software teams rather than generalised.

Kanban and Scrum boards

Configurable columns, swimlanes and work-in-progress limits; status is a drag rather than a form.

Sprints with points and velocity

Start, complete or cancel a sprint, with story points, tracked velocity and capacity expressed in points.

Backlog management

Triage, estimate, rank and split work so the top of the backlog is genuinely ready to build.

Issues and custom workflows

Custom work-item types with their own fields and workflow states, and a full change history on every item.

Projects by methodology

Configure a project for Agile, Scrum, Kanban, Waterfall, hybrid or a custom process, each with its own statuses and fields.

Burndown charting planned

The sprint burndown chart itself. Velocity and the underlying sprint data are shipped; the chart is not yet.

Product management

The spine from a customer signal to a shipped version, without leaving the workspace.

Feedback inbox

Feature requests as records with vote counts and a computed priority score, so demand is weighted rather than counted.

Competitive context

Track competitors and link them to the requests and roadmap items they influence, so market pressure sits on the object being prioritised.

Versioned releases

Bundle work into a versioned release with markdown release notes and a readiness checklist.

Auto-generated release notes planned

Notes composed from the work in the release rather than written by hand.

In-platform spec editor planned

Requirements and design docs written in the product and linked to the epics that implement them. Not built yet — documents currently live in shared file storage.

Semantic feedback de-duplication planned

Recognising that two differently worded requests are the same demand, and merging them without double-counting a voter.

Delivery operations

The layer most trackers leave to spreadsheets or sell as separate products.

Risk register

Log delivery risks scored on a likelihood-by-impact matrix, so risk is tracked deliberately rather than remembered.

Quality gates

Define what a release must pass and record an explicit review verdict against it.

Budgets and expenses

A project budget with expense line items and an approval step, showing planned against actual on the delivery record.

Time tracking and timesheets

Log effort against work items, roll a period into a timesheet, and route it through submit, approve or reject.

Project templates

Save a well-run project as a reusable blueprint — boards, statuses and starter work — and apply it in one action.

No-code automation

Compose rules from triggers and actions to route, assign, escalate and notify, with an execution log. Runs are metered by plan.

Custom fields

Workspace-defined field definitions whose values attach to individual records, so each team's vocabulary fits.

Insight and reporting

Numbers drawn from the work itself, with a path from a summary back to the items behind it.

Delivery dashboards

Velocity, cycle time, throughput and cumulative flow built from real work data rather than a maintained spreadsheet.

Reports with drill-down

Click from a summary figure into the specific items behind it, with filtering, grouping and time-range adjustment.

Trailing velocity and capacity

Velocity computed across the trailing completed sprints of a project, offered as a next-sprint capacity number and labelled as an average.

Grounded delivery forecast planned

A date range with a confidence signal that cites the sprints and velocity values it was grounded in, and says so explicitly when there is not enough history.

At-risk detection and scheduled sweeps planned

Per-item risk with a stated reason — stale, blocked by a named item, assignee over capacity — run daily and mid-sprint rather than on demand.

Platform, governance and integration

The parts a security reviewer and a platform engineer ask about, inherited from the shared Burdenoff platform rather than rebuilt.

Role-based access control

Six PlanMagnet roles across twenty-one resource types, seeded into every workspace, enforced at the API gateway on every operation and denied by default.

Multi-tenant isolation and project scoping

Every project, item, document and dashboard belongs to a workspace, with projects isolated inside it.

Single sign-on and directory sync

Standards-based sign-on and directory provisioning inherited from the platform, with production configurations available on Enterprise.

Audit and activity history

Actions recorded with actor, target and result, searchable and exportable; longer retention and streaming to a security information system are Enterprise options.

Migration sync in and out

Import and export for Jira, Linear, Asana, GitHub and Trello, with field, status and workflow mapping.

GraphQL API with scoped keys

The full domain available programmatically through one API, with keys scoped to what they are allowed to do.

Source control, delivery pipeline and chat connectors

in progress

Connectors so commits update items, deploys advance releases and notifications reach chat. Being rolled out and named as each ships.

Webhooks planned

Outbound events so a customer's own systems can react to changes in the plan.

AI and agent surface

Described strictly. One decision is live in the backend, the rest is committed design, and every call is recorded.

Model Context Protocol server

A published server exposing the PlanMagnet domain as typed tools, so an external AI agent can read and change the plan through the same gateway, permissions and audit path a person uses.

Agent run ledger

Every AI call writes an append-only row with provider, model, token counts, latency, parsed decision and outcome, including failures. Prompt summaries are stored, not raw prompt text.

Work-item breakdown from a description in progress

Turns a paragraph into validated, typed work-item suggestions that persist nothing until a human accepts them. The backend is live; the two-click reviewer inside the app is being built.

Ledger browsing and AI cost metering planned

An administrator view over the ledger, per-workspace cost metering and AI credits. The rows accumulate correctly today, but there is no console over them yet.

Thread summarisation planned

Condensing a long discussion into the decision and the next action, recorded on the item.

Confirmation gating on destructive agent tools planned

The agent tool surface includes deletions. Permissions still apply, but there is no protocol-level confirmation or dry-run step yet; scope the credentials you give an agent accordingly.

10 Pricing & Plans

PlanMagnet is priced per editor — a person who creates or changes work items, boards, sprints, roadmaps or configuration. Viewers and commenters are free and unlimited on every plan, so adding stakeholders never raises the bill. There is a free plan with no card required, monthly or annual billing on the paid plans, and four regional price bands so the price reflects the customer's billing market rather than a discount. Prices are before tax; AI model usage is not included in plan price because a customer connects their own AI provider key.

PLAN	PRICE	WHO IT IS FOR	WHAT IS INCLUDED
Free	\$0 No card required, no expiry	Trying PlanMagnet, or a small team getting its first project in one place	10 editors, unlimited viewers and commenters; 3 projects, 2 boards, 1 concurrent sprint, 1 roadmap; 3 custom fields and 1 workflow; 100 automation runs per month, 2 integrations; 1 GB shared storage, 30-day analytics history; Community support plus one ticket a month; Add-ons cannot be bought on Free
Pro	\$9/editor/mo or \$7.50/editor/mo annual India example: ₹399/editor/mo, or ₹329/editor/mo annual	A delivery team running agile that needs the full toolkit	Unlimited projects, boards, sprints and roadmaps; Unlimited custom fields and workflows; Dependency links with warnings; Time tracking and timesheets included; 1,000 automation runs per editor per month, 25 integrations; 25 GB shared storage, 365-day analytics history; Email support under 48 hours
Business	\$16/editor/mo or \$13/editor/mo annual India example: ₹699/editor/mo, or ₹579/editor/mo annual. 14-day trial available	Multi-team and portfolio planning with governance and deeper analytics	Everything in Pro, plus portfolios and programs; Critical-path view across dependencies; Risk register, quality gates and budgets included; Timesheet approvals included; 10,000 automation runs per editor per month, 100 integrations; 100 GB shared storage, 730-day analytics history; Priority support under 8 hours, 99.9% uptime target
Enterprise	From \$26/editor/mo list, custom annual Annual Enterprise starts from \$9/editor/mo at 250+ editors before regional, volume, multi-year or package adjustments. Annual contract	Larger or regulated organisations needing production identity controls, residency or a dedicated deployment	Custom editor, project, storage and API limits; Production single sign-on and directory sync included; Streaming to a security information system available; Data residency and customer-managed keys available; Multi-entity structures with consolidated billing; Dedicated tenant or self-hosting as add-ons; 99.95%+ availability depending on contract and deployment

Add-ons

ADD-ON	PRICE
5K Automation Run Pack	\$19/mo
25K Automation Run Pack	\$69/mo
50-Project Pack (Free/Pro)	\$29/mo
50 GB Storage	\$15/mo
250 GB Storage	\$49/mo
1 TB Storage	\$129/mo
50 Integration Pack	\$29/mo
Analytics Pro	\$99/mo

ADD-ON	PRICE
20 Guest Editors	\$89/mo
Support Retainer	\$4,000/mo

WHAT TO TELL A PROSPECT ABOUT PRICE

- Only editors are billed. Viewers and commenters are free and unlimited on every plan, which is usually the single biggest cost difference against seat-priced alternatives.
- Four regional bands apply: standard global pricing; a reduced band for the Middle East, Eastern Europe, Taiwan and Hong Kong; a lower band for Latin America, Southeast Asia, Turkey and South Africa; and the lowest band including India, Bangladesh, Pakistan, Nigeria, Kenya and Egypt. Price follows the billing country or legal entity, not preference.
- Verified education and non-profit organisations can receive up to 50% off, startups under three years old with fewer than 50 editors and under \$5M raised can receive 40% off for twelve months, and public open-source projects can receive Pro free. Discounts generally do not combine.
- Storage and API limits are shared across Burdenoff products on the same account, so subscribing to more than one product increases the shared pool.
- Pro and Business include a 30-day money-back guarantee on a first purchase. Taxes such as GST or VAT are added where required.
- Never quote a price you have not read on the published pricing page or been given in writing on a quote. Enterprise numbers depend on editor count, region, deployment and compliance scope.

11 Competitive Landscape

PlanMagnet sells into a crowded, mature category. Every one of these tools is good at something PlanMagnet is not, and saying so early is what makes the rest of the comparison credible.

ALTERNATIVE	WHAT IT IS	WHERE THEY ARE STRONG	WHERE WE WIN
Jira	Atlassian's dominant issue tracker and agile platform, and the default in most large engineering organisations.	The benchmark for agile execution at enterprise scale, with a marketplace of over four thousand apps, deep compliance credentials including SOC 2, ISO 27001 and a healthcare agreement, and an AI assistant already deployed broadly. PlanMagnet will not match that ecosystem breadth or those certifications at this stage.	Covering the same ground usually takes Jira plus a wiki, plus a discovery product, plus advanced roadmaps — several subscriptions and a real integration burden. PlanMagnet has feedback, roadmaps, releases, boards, sprints and delivery operations in one workspace on one bill, imports existing Jira issues in one action, and bills only editors while Jira bills every user.
Linear	A fast, opinionated issue tracker for software teams that deliberately leaves out product-management depth.	The most polished issue-tracking experience in the category, a strong developer following, mature native mobile apps, and a roadmap that already rolls progress up from issue completion. PlanMagnet does not claim roadmap-freshness superiority over Linear, and must earn its way on performance.	Linear has no feedback inbox, no versioned releases, and no portfolio, risk, quality-gate, budget or timesheet layer. PlanMagnet adds the product-management and delivery-operations breadth around a comparable execution surface, and imports directly from Linear.

ALTERNATIVE	WHAT IT IS	WHERE THEY ARE STRONG	WHERE WE WIN
Aha! Roadmaps	The deepest product-strategy and roadmapping suite, built around a strategy-to-feature hierarchy.	Roadmap presentation depth is the benchmark, the objectives framework is mature with health and roll-up, and the discovery research module has no equivalent in PlanMagnet. It is an established, self-funded business.	Engineering execution in Aha! means the separate Develop add-on or pushing work to another tracker, and the full stack compounds quickly once knowledge, ideas and discovery modules are added. PlanMagnet runs boards, sprints and releases natively in the same product, and viewers are free on every plan rather than only at the top tier.
Productboard	A feedback-to-roadmap intelligence platform that deliberately hands execution to a separate tracker.	Best-in-class feedback aggregation, a more mature public customer portal and voting experience, deeper native connections into support and sales tools, and an AI layer well ahead of PlanMagnet's today.	Productboard has no native sprints, boards or engineering execution, so a customer still pays for a tracker alongside it. PlanMagnet closes the loop from a request to the sprint that ships it, and adds the delivery-operations layer neither product carries.
monday.com	A flexible cross-functional work platform used across operations, marketing and HR, with a separate product for software teams.	Far greater cross-functional breadth, the strongest no-code automation builder in the comparison set, mature native mobile apps, and public-company compliance credentials PlanMagnet does not yet hold.	Software delivery depth requires their separate Dev product, objectives are maintained by hand, and viewers and guests are frequently billed as seats. PlanMagnet is opinionated for product and engineering work, links roadmap items to the epics delivering them, and never charges for a viewer.
Asana	An approachable cross-functional work-management platform strong on timelines, goals and coordination.	More mature mobile apps, a more polished workflow builder, a broader non-engineering user base, and years of operating scale as a public company.	Asana has no native sprints, story points, velocity or sprint reporting, and its feedback and specification capabilities are thin next to dedicated product tools. PlanMagnet is built for agile software delivery, carries portfolios, risk, quality gates, budgets and time tracking, and imports directly from Asana.
ClickUp	A very broad work platform bundling tasks, documents, whiteboards, chat, sprints and goals at an aggressive price.	More native modules for the money — documents, whiteboards and chat included — a far larger template and automation gallery, and a generous free tier. PlanMagnet cannot match that breadth of pre-built views and widgets.	Breadth comes with configuration weight and an interface that is inconsistent between modules. PlanMagnet is opinionated for software delivery rather than configurable for everything, and puts feedback, roadmap, execution and release governance on one model rather than one workspace with many surfaces.
Shortcut	A fast, opinionated project-management tool for agile software teams, positioned as a lighter alternative to the incumbent.	Already shipped and liked for developer speed, with more mature source-control integration and branch-to-story linking than PlanMagnet has today, and a clean low-configuration experience PlanMagnet has to match.	Shortcut carries no objectives framework, no feedback portal and no specification editor, and its roadmap and portfolio views are simpler. PlanMagnet adds the product-management spine and the delivery-operations layer on top of comparable agile execution.

THE POSITIONING LINE TO HOLD

PlanMagnet is the one workspace where the roadmap, the backlog, the sprint and the release are the same connected records, so the plan cannot quietly drift away from the work.

12 Why Us / Differentiators

If a prospect remembers only a few things, make them these. Each one is a property of how the product is built, not a feature that a competitor can add next quarter.

The plan and the work are the same records

This is not an integration between a roadmap tool and a tracker. A roadmap item holds a direct link to the epic, project and milestone delivering it, and those are the same rows a board and a report read. There is no sync job to fail and no reconciliation step to forget.

Product management and engineering delivery, in one purchase

No competitor in the set covers a feedback inbox, a roadmap, native sprint execution and versioned releases in a single product. Teams normally buy a tracker plus a wiki plus a roadmap or feedback tool to reach the same coverage, then pay again in integration effort.

Delivery operations included rather than sold as modules

Portfolios, programs, a scored risk register, quality gates with a recorded verdict, budgets with expense lines, and time tracking with an approval cycle all ship in the product. Most dedicated planning tools push these to spreadsheets or to a separate purchase.

Migration works in both directions

Import and export both ship for Jira, Linear, Asana, GitHub and Trello. That turns the riskiest question in any tool evaluation — what if we change our minds — into an answerable one, and lets a prospect pilot on real data instead of a sample.

Free viewers, priced per editor

Only people who create or change work are billed. Executives, clients and stakeholders read and comment for nothing on every plan, including free. For an agency or a team with many observers, that difference alone often decides the comparison.

Governance enforced in one place, from the free plan

Authorisation is checked at the API gateway on every operation from a declared rule, so it cannot be forgotten in a resolver, and access is denied unless something grants it. Isolation, sign-on, directory sync and audit come from the shared platform rather than being reimplemented per product.

AI described strictly, and recorded

One decision — turning a description into typed work-item suggestions — is live in the backend and writes nothing without a human accepting it. Every AI call, including failures and unparseable responses, writes an append-only ledger row. Forecasting, at-risk sweeps and semantic de-duplication are named as design, not sold as shipped.

13 Customer Proof & Credibility

There are no customer references to point at, so credibility has to come from what can be inspected: the product itself, the specificity of what is claimed, and the honesty of what is not. Invite the prospect to check rather than asking them to believe.

YOU CAN USE IT TODAY, FOR NOTHING

The free plan needs no card and no waitlist. Ten editors, three projects, unlimited viewers. A prospect can test the claims themselves within an hour rather than taking anyone's word.

PUBLISHED STATUS ON EVERY CAPABILITY

The website marks each differentiator as shipped, in progress or roadmap, including the ones that are not flattering — the spec editor, burndown charting, automatic roadmap roll-up, forecasting and mobile. A vendor who publishes its gaps is easier to verify than one who does not.

REVERSIBLE MIGRATION

Import and export ship for five major trackers, with published guides for each showing exactly what maps where. The exit is documented as clearly as the entrance.

AUTHORISATION ENFORCED AT ONE POINT

Every operation carries a declared access rule evaluated at the API gateway before a request reaches the product, denied unless something explicitly grants it. Six roles across twenty-one resource types are seeded into every workspace automatically.

ENCRYPTION, ISOLATION AND AN AUDIT TRAIL

Traffic is encrypted in transit and data at rest in compliance-grade infrastructure, every workspace and project is tenant-scoped, and actions are recorded with actor, target and result, searchable and exportable.

PUBLISHED SUBPROCESSOR LIST AND LEGAL TERMS

Terms, privacy policy, cookie policy, refund policy and the list of providers that process data are all public on the website, with anything still being finalised marked as such.

AI THAT LEAVES AN AUDIT TRAIL

Every AI call writes an append-only row recording provider, model, token counts, latency, the parsed decision and its outcome — including calls that failed or returned something unparseable. Prompt summaries are stored rather than raw prompt text.

Be straight about this. PlanMagnet is an early product. It is generally available and you can create a workspace today, but there are no public reference customers, no published usage or revenue figures, and no case studies — and any partner who implies otherwise will be found out. It does not hold SOC 2 Type II or ISO 27001; controls are being designed toward those standards and status will be published when it changes. Several capabilities named on the website are explicitly roadmap: the in-platform spec editor, burndown charting, automatic roadmap roll-up, delivery forecasting, at-risk sweeps, semantic feedback de-duplication, webhooks and native mobile apps. The launch is web-first, and the ecosystem clients — command line, SDKs — are early. What a prospect should weigh instead is the free plan they can test in an hour, the reversible migration that caps their downside, the depth of what does ship, and how specific this vendor is about its own gaps.

14 Demo Information

Do not attempt a full demo yourself. Your job is to get the prospect far enough to want one, and the fastest way is to open the free plan alongside them or walk the use-case pages on the website. Bring us in for anything technical, and always for a security or procurement conversation.

HOW TO GET A DEMO

The free plan is self-serve at the app with no card and no waitlist, so a prospect can create a workspace during the call. For a guided walkthrough on their own data, or anything involving migration, security review or Enterprise terms, book a call with Vignesh T.V. at the link below and we will run it.

Runs about 10 minutes to open a workspace and show the roadmap-to-work link. 30 to 40 minutes for a guided session with us.

WHERE TO LOOK

- **Product website** — <https://planmagnet.com>
- **Create a workspace** — <https://app.planmagnet.com>
- **Use-case walkthroughs** — <https://planmagnet.com/use-cases>
- **Comparisons against the incumbents** — <https://planmagnet.com/vs>
- **Migration guides** — <https://planmagnet.com/migrate-from>
- **Book a guided session** — <https://calendly.com/vignesh-burdenoff/1-1>

The walkthrough, in order

- 1 **A roadmap with initiatives grouped by quarter**
This is the artefact everyone recognises. The difference is what happens when you click one.
- 2 **An initiative opening onto the epic and tasks that deliver it**
The roadmap is not describing the work from a distance. It is pointing at the same records the team is moving today.
- 3 **The board and an active sprint**
Same items, different view. Status is a drag, points and velocity come with the sprint, and closing it does not require assembling anything.
- 4 **The feedback inbox with vote counts and priority scores**
This is what teams normally buy a second product for. A request here can be linked to a competitor and to the roadmap item that answers it.
- 5 **A versioned release and its quality gates**
Ready to ship stops being an opinion. The gate carries a recorded verdict, so the answer is auditable.
- 6 **Analytics and reports drilling from a number into its items**
Every figure here came from the work itself. You can click through to the items behind it and defend it in front of anyone.
- 7 **The import screen listing Jira, Linear, Asana, GitHub and Trello**
This works in both directions. If you decide against us in three months, your data goes back out the way it came in.
- 8 **Roles and permissions on the team page**
Six roles are seeded into every workspace, every operation is checked at the gateway, and viewers cost nothing — so bringing clients or executives in does not change your bill.

15 Sales Talking Points

Nine lines that hold up under questioning. Use them as they are; each one is defensible against a prospect who checks.

The roadmap and the tracker are the same system, not two systems kept in step.

This is the product's reason for existing and the one property competitors cannot bolt on. It reframes the evaluation away from feature-by-feature comparison.

You pay for people who change work. Everyone who only reads or comments is free, on every plan.

For agencies, executives-heavy organisations and anyone with a public roadmap, this is often a larger saving than the licence price difference itself.

Import and export both work for Jira, Linear, Asana, GitHub and Trello.

It removes the biggest objection in the category before it is raised. A reversible decision is a much easier one to sponsor.

Portfolios, risk, quality gates, budgets and timesheets are included, not modules.

Most comparisons are won or lost on total cost after add-ons. This is where a headline price stops being the real price for the incumbent.

Every capability on the website is marked shipped, in progress or roadmap — including the unflattering ones.

It gives the prospect a reason to trust the rest of the claims, and it protects the partner from selling something that is not there.

Access control is declared on every operation and enforced at one gateway, denied unless granted.

Security reviewers care far more about where enforcement happens than about a list of features. One consistent point is a stronger answer than per-feature checks.

Every AI call writes an audit row, and the one live AI feature writes nothing without a human accepting it.

Buyers are wary of AI in planning tools precisely because it invents things. Governability is a better pitch than capability here.

An external AI agent can drive the product through a published tool server, under the same permissions a person has.

It matters to technical buyers already working through agents, and it is a genuinely unusual surface for a planning tool.

There is a free plan with no card and no waitlist, so the evaluation costs an hour, not a procurement cycle.

It converts interest into a trial the same day, which is the only conversion a partner really controls.

Eleven things prospects say, in their words. Answer plainly; the concessions are as important as the rebuttals, and a partner who concedes well is believed on the rest.

"We already run Jira. Everyone knows it and moving would be chaos."

Familiarity is real and worth something. The question is what Jira alone actually covers — most teams also pay for a wiki, a discovery product and advanced roadmaps to reach the same ground, and carry the integration effort between them. PlanMagnet imports Jira issues, boards, sprints, custom fields, comments and history in one action, and exports back out if it does not work. Run one team on it for a sprint before deciding anything.

PROOF · Import and export both ship for Jira, with a published guide showing exactly what maps where, and our services team runs migrations with a parallel period and a reversible cutover.

"You are a small, new company. What happens if you disappear?"

A fair question and the honest answer is that you should not have to trust us on it. That is why export ships alongside import: your projects, issues, comments and history can go back out to Jira, Linear, Asana, GitHub or Trello whenever you want. Start on the free plan, keep the export path proven, and let the product earn the commitment rather than asking for it upfront.

PROOF · Two-way sync with five major trackers, a free plan with no card, and monthly billing so nobody is locked into an annual term to try it.

"Do you have SOC 2? Our security team will not approve a vendor without it."

Not yet, and we will not pretend otherwise — it is a real gap for a regulated buyer. What exists today is specific: encryption in transit and at rest, tenant isolation, authorisation declared on every operation and enforced at one gateway, an audit trail with actor, target and result, a published subprocessor list and a data-processing agreement. Controls are being designed toward those standards and we will publish status when it changes. If certification is a hard gate, say so now rather than after a pilot.

PROOF · The security page and subprocessor list are public, and the compliance section states the certification position plainly rather than implying more.

"This looks cheap. What is missing that the others have?"

Three things, named plainly: the in-platform spec editor is not built, so documents live in shared file storage today; burndown charting is not there, though velocity and the sprint data behind it are; and native mobile apps are roadmap, so the launch is web-first. The price is lower because you are buying one product instead of four, and because we bill editors rather than every person who looks.

PROOF · The website marks each capability shipped, in progress or roadmap, and those three are marked roadmap on it.

"Why would we not just build reporting on top of what we have?"

Because the reporting is not the hard part — the reconciliation underneath it is. A dashboard built over two systems inherits their disagreement, so someone still owns keeping them aligned, forever. PlanMagnet removes the second system rather than reporting over the seam. If your team genuinely wants to own a planning tool as an internal product, that is a legitimate choice, and this is not for you.

PROOF · The roadmap item, the epic, the sprint and the report all read the same records, so there is nothing to reconcile between them.

"Our teams are on Linear and they love it. Why change?"

We would not lead with speed against Linear; it is excellent at what it does and its roadmap already rolls up from issue completion. The case is breadth: Linear has no feedback inbox, no versioned releases, and no portfolio, risk, quality-gate, budget or timesheet layer, so you end up buying those elsewhere. If your team only needs an issue tracker, staying put is the right call.

PROOF · PlanMagnet imports directly from Linear, so the comparison can be made on your own data rather than in the abstract.

"How much does it really cost once we add everyone?"

Count only the people who create or change work — those are editors. Everyone who reads, watches or comments is free and unlimited on every plan, including free. So a twenty-person delivery team with sixty stakeholders is a twenty-editor bill. Regional pricing means the number also reflects where you are billed from rather than a single global rate.

PROOF · Published rates: Pro \$9 per editor per month, Business \$16, with lower annual pricing and four regional bands. India examples are published in rupees.

"Your AI is going to make things up in our backlog."

It cannot, structurally. The one AI decision that is live returns suggestions and writes nothing — there is deliberately no automatic creation path, so a human reviews and the ordinary creation flow saves whatever survives. Suggestions are validated against the real work-item types and priorities before you see them, and a response that cannot be parsed produces an error rather than a partial list. Every call, including the failures, writes an audit row.

PROOF · The suggestion path has no write access of its own, and the ledger records provider, model, tokens, latency, decision and outcome for every call.

"We need someone to answer the phone when something breaks."

Support scales with the plan: community plus a monthly ticket on free, email under 48 hours on Pro, priority under 8 hours on Business, and contracted support with an availability commitment on Enterprise. Support hour packs and a monthly retainer are available if you want a named block of time. Be honest with the prospect about which tier they are buying into.

PROOF · Response targets are published per plan, and Business carries a 99.9% uptime target with 99.95% and above available under Enterprise contracts.

"We are not just software — marketing and operations need to be in there too."

Then a general-purpose work platform is probably the better fit, and we would say so. PlanMagnet is opinionated for product and engineering delivery: sprints, story points, dependencies, releases. That opinion is why it fits software teams well and why it will feel narrow to a marketing team. Use it for the delivery organisation and let the rest of the business use what suits it.

PROOF · The product's own comparison pages concede cross-functional breadth to the broader work platforms rather than contesting it.

"We tried consolidating tools before and it failed."

Usually because the migration was one-way and the new tool was thinner than what it replaced. Both are addressable here: export ships alongside import so you can retreat, and the delivery-operations layer — portfolios, risk, quality gates, budgets, timesheets — means you are not trading depth for tidiness. Start with one team and one project rather than an organisation-wide cutover.

PROOF · Two-way sync with five trackers, plus a services team that runs migrations as a parallel period with a documented rollback.

17 Discovery / Qualification Questions

Eleven questions to ask in a first conversation. You are listening for a fracture between the plan and the work, and for who owns the pain badly enough to pay to fix it.

ASK THIS

LISTEN FOR

Where does your roadmap live today, and where does the day-to-day work live?

Two different tools is the qualifying answer. One tool with a bolt-on roadmap view is weaker but still workable. Same tool and happy is a walk-away.

How long does it take to produce a status update for leadership?

Anything measured in hours, or a named person whose week includes it. If the answer is a link they already have, there is no pain here.

How many tools does someone touch between a customer request and the release notes?

Three or more is a strong signal. Ask them to name each and what it costs — most have never added it up.

Who decides what gets built, and what do they look at to decide it?

A spreadsheet of requests, or a feeling about which customer shouted loudest. Both point straight at the feedback inbox.

How many people are in your tool who only ever read or comment?

A large number means they are either paying for observers or deliberately excluding them. Either way, free viewers is the lever.

What happened the last time a date slipped — when did you find out?

Late, and by accident. That opens dependency tracking, risk register and, honestly framed, the at-risk detection that is still being built.

Where do budgets, expenses and billable hours for a project live?

A spreadsheet or an accounting tool separate from delivery. Common in agencies and consultancies, and one of the strongest fits in the product.

What would have to be true for you to change tracker?

Migration risk and history loss are the usual answers, and both are directly addressable. If the answer is nothing, disqualify politely.

ASK THIS

LISTEN FOR

Does anyone need a certification from a vendor before you can sign?

SOC 2 or ISO 27001 as a hard gate means this is not a deal today. Better to know in the first call than the fourth.

How much of your team's work happens on a phone?

If field or on-the-go approvals matter, say clearly that mobile is roadmap. Do not let this surface in a demo.

If we set you up on the free plan this week, who would actually use it?

A named person and a named project is real interest. A vague we will look at it is not, and it is worth finding out now.

18 How to Identify a Good Opportunity

Use these to decide where to spend your time. The greens are worth a call this week; the reds are worth a polite no, which is more valuable to us than a poorly qualified introduction.

STRONG SIGNAL – PURSUE

- They name two different tools for the roadmap and the work
- Someone owns a weekly status report that is assembled by hand
- They are paying for an issue tracker plus a roadmap or feedback product
- An agency or consultancy tracking budgets and billable time in spreadsheets
- They have outgrown a lightweight tracker but do not want the enterprise incumbent
- Many stakeholders who only read, currently billed as seats or shut out
- A renewal or a contract review on their current tool in the next two quarters

Introduce us straight away.

WORTH A CONVERSATION

- Deeply embedded in an incumbent ecosystem with many marketplace apps in use
- A security review that mentions certification but has not yet made it a hard gate
- Significant work happening on mobile, where the launch is web-first
- Docs and specifications are the primary requirement, which is roadmap rather than shipped
- Interest sits with an individual contributor with no route to a budget holder
- They want one platform for engineering and for marketing or operations

Qualify further before an introduction.

POOR FIT – DO NOT CHASE

- SOC 2 Type II or ISO 27001 required before signature, without exception
- A non-software team looking for general work management
- Happy on their current tool with no reconciliation pain to describe
- Fewer than five people and no plan or budget to grow
- They want a large third-party app marketplace as the deciding factor
- A build-it-ourselves culture that has already staffed an internal planning tool

Politely park it; suggest another product if one fits.

THE ONE-QUESTION TEST

Ask: when leadership asks what is shipping this quarter, how many systems do you open to answer? If the honest answer is more than one, this is a real opportunity. If it is one, walk away warmly.

19 How to Introduce Us

Keep it short and keep it about their problem. You are not selling the product, you are making a connection worth twenty minutes of their time. Do not attempt the technical conversation yourself — hand it over early.

IN CONVERSATION

"Say something like: you know how your roadmap and your tracker never quite agree? There is a tool I have been looking at called PlanMagnet where they are literally the same records — the roadmap item points at the epics delivering it, so it moves when the work moves. It is priced per person who changes work, and everyone who only reads is free. There is a free plan you can try in an afternoon. Want me to introduce you to the founder?"

EMAIL — SUBJECT: THE ROADMAP-VERSUS-TRACKER PROBLEM YOU MENTIONED

Hi [Name],

You mentioned that pulling a status update together takes most of a morning because the roadmap and the tracker never agree. I came across something that tackles exactly that.

PlanMagnet is a product and project management platform where the roadmap, the backlog, the sprint and the release are the same connected records rather than four tools kept in sync. Two things stood out for me: it only bills people who create or change work — anyone who just reads or comments is free — and it imports and exports Jira, Linear, Asana, GitHub and Trello, so trying it is not a one-way move.

There is a free plan you can set up in an afternoon: <https://planmagnet.com>

Happy to introduce you to Vignesh, who runs it, if you would like a proper walkthrough.

Best,

[Your name]

SHORT MESSAGE / LINKEDIN

Saw your post about planning tools. Worth a look at PlanMagnet — roadmap, backlog, sprints and releases on one data model, so the roadmap moves when the work does. Free viewers, per-editor pricing, and it imports and exports Jira, Linear, Asana, GitHub and Trello, so trying it is reversible. Free plan at planmagnet.com. Happy to introduce you to the team if it is useful.

WARM THREE-WAY INTRODUCTION

Copy Vignesh T.V. (vignesh@burdenoff.com) into a short thread with one line on what the prospect said their problem was, roughly how many people would be creating or changing work, and which tools they run today. That is enough for us to take the next call properly prepared. If it is urgent, his number is +91-7358445777.

Please do not: Do not claim customers, usage numbers, logos or results. There are none, and being caught inventing one costs the whole relationship.; Do not describe the spec editor, burndown charts, delivery forecasting, at-risk sweeps, webhooks or mobile apps as available. They are roadmap and marked as such on the website.; Do not say the product holds SOC 2 or ISO 27001. It does not, and a security team will check.; Do not quote a price you have not read on the published pricing page, and never quote Enterprise numbers without a written quote from us.; Do not attempt a deep technical or security conversation alone — hand it to us before you get into architecture or compliance.

20 Lead Handoff Process

The moment a prospect is genuinely interested, bring us in. Handing over well is what protects your commission, because registration is what makes the opportunity yours.

1 Register the opportunity before anything else

Commission eligibility starts at registration, and there is no retroactive claim. Email Vignesh T.V. at vignesh@burdenoff.com with the company, the contact and what you know, before the first joint conversation.

2 Send the qualification you already have

One paragraph is plenty: what they said the problem was, how many editors, what they run today, and any timing pressure such as a renewal. It saves an entire discovery call.

3 Book the joint call

Use <https://calendly.com/vignesh-burdenoff/1-1> and invite the prospect. Stay on the call; you are the relationship, we are the product depth.

4 We qualify, demonstrate and scope

We run the technical walkthrough, the security conversation and any migration scoping. You stay copied on everything so nothing happens behind you.

5 We issue the quote and own the pricing

All pricing, discounting and contract terms are approved by us before anything reaches the customer. Never send a quote or promise a discount yourself.

6 Agree who does what after signature

If you are implementing or supporting, we document that before close, because renewal commission depends on having an approved ongoing role.

SEND US THIS — IT IS ALL WE NEED

- Company name, website and rough headcount
- The name, role and contact details of the person you spoke to
- What they said their problem was, in their words
- Roughly how many editors — people who would create or change work
- Which tools they run today, and whether a migration is in scope
- Any deadline, renewal date or budget cycle driving the timing
- Whether certification, data residency or self-hosting has been raised
- What you would like your role to be: introduction only, evaluation support, or implementation

WHAT HAPPENS NEXT, AND WHEN

We acknowledge a registration within one business day and aim to have the first joint conversation booked within five. If you have not heard back in two business days, call +91-7358445777.

Deal registration: Register by emailing vignesh@burdenoff.com before your first joint conversation with the prospect. An approved registration protects the opportunity for 90 days, with one 90-day extension available if there is active progress. There is no commission on an opportunity we already had in active pipeline unless you bring a new buying centre or materially expand the scope, and there is no retroactive registration.

21 Partner / Referral Commercials

Partners are paid on collected net subscription revenue, not list price — so if the customer is billed at a regional rate, commission is calculated from that billed amount. Net revenue excludes taxes, refunds, chargebacks, credits, payment fees, marketplace payouts, customer-owned cloud costs and AI provider costs. Rates rise with genuine contribution: introducing pays less than implementing.

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
PMO Consulting Partner	Introduction plus evaluation and advisory support	12% of first-year collected net subscription	0-3% if active in the success plan · 3% of first-year collected net add-ons, capped at \$15,000
Implementation Partner	Introduction plus rollout, migration, integration or training delivery	15% of first-year collected net subscription	3-5% if 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% if the account stays active and supported · Up to 5% on dedicated tenant or managed services, only if approved
Managed Service or Strategic Partner	Bundled, managed or repeat-pipeline offering	Custom wholesale or programme terms	Custom · Custom

THE RULES THAT MATTER

- Register the opportunity before commission eligibility starts. Approved registration protects it for 90 days, extendable once by 90 days with active progress. No retroactive registration.
- Deals above \$100,000 in first-year net subscription carry an extra incentive: 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 — where the deal was registered before procurement and the quote was approved before signature.
- Regional pricing does not reduce eligibility; it simply lowers the collected amount the percentage is applied to. Extra discounts, credits and coupons do reduce commissionable revenue.
- Dedicated tenant, self-hosted, air-gapped, compliance and managed-service packages carry lower partner economics and must be approved in the quote.
- Partner commission and affiliate rewards do not stack. A customer is attributed to one programme only, unless we approve an exception in writing.
- Marketplace take-rate and content publisher revenue are not commissionable; they follow a separate publisher programme.
- We control all final pricing, discounting, contract terms and commission eligibility. Never promise a feature, a compliance status, a discount or a timeline without written approval.
- Services you contract directly with the customer are yours to keep, provided they do not conflict with our contract.

GETTING PAID

Commission is paid on collected net revenue, 15 days after successful realisation of that revenue, once settlement, refund, cancellation, fraud, tax and payout-document checks clear. Multi-year deals pay as cash is collected rather than on total contract value unless separately approved. Refunds, chargebacks and credits reduce or reverse commission. You are responsible for your own invoices, tax forms and local compliance; we withhold and report where the law requires it. Payment currency follows the partner agreement.

These are the standard programme terms and are for guidance only. They are not an offer and they are not binding. The terms that apply to you are those in your signed partner agreement, and the terms that apply to a customer are those on the quote and order form we issue for that deal.

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 PlanMagnet 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
PlanMagnet website	https://planmagnet.com	Positioning, features, use cases and the published pricing page

ASSET	WHERE	WHAT IT IS FOR
Create a workspace	https://app.planmagnet.com	The product itself; the free plan needs no card
Documentation	https://docs.planmagnet.com	Product guides, API reference and integration tutorials
Use-case walkthroughs	https://planmagnet.com/use-cases	Scenario-by-scenario stories to share with a prospect
Pricing	https://planmagnet.com/pricing	The published plans; quote from here, never from memory
Comparisons	https://planmagnet.com/vs	Side-by-side against Jira, Linear, Aha!, Productboard, monday.com, Asana, ClickUp and Shortcut, with concessions stated
Migration guides	https://planmagnet.com/migrate-from	What maps where when moving off Jira, Linear, Asana, GitHub or Trello
Security	https://planmagnet.com/security	Encryption, isolation, access control and the current compliance position
Book a call with Vignesh T.V.	https://calendly.com/vignesh-burdenoff/1-1	For a guided walkthrough, a security conversation or an Enterprise quote
All Burdenoff products	https://burdenoff.com/products	The wider product family, if a prospect's need sits next door

WHAT YOU CAN SHARE, AND WITH WHOM

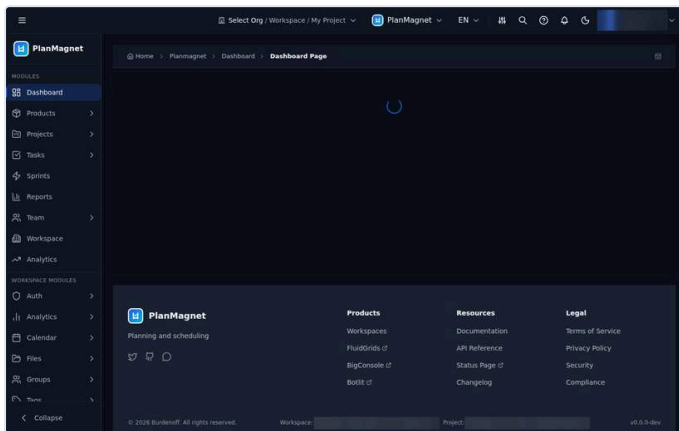
- Share freely: anything published on planmagnet.com, including the use-case pages, comparison pages, migration guides, security page and published pricing. It is already public and already checked.
- Prospects only: this playbook, the cheat sheet, and any screenshots or walkthroughs we send you for a named opportunity. Do not post them publicly or forward them to a competitor.
- Needs our written sign-off before it goes out: any quote or discount, any use of the PlanMagnet name or logo in your own marketing, any co-branded material, any public case reference, and any written claim about compliance status or a delivery date.
- Never share: internal pricing floors, margin structures, roadmap dates, or anything a customer told you in confidence.
- If you are unsure whether something can be shared, ask before sending it. A one-day delay costs nothing; a wrong claim in writing is very hard to withdraw.

24 Product Mockups — Complete Visual Appendix

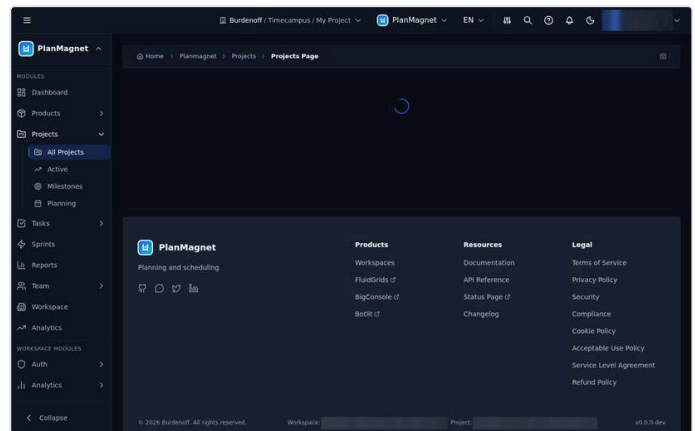
31 SCREENS

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

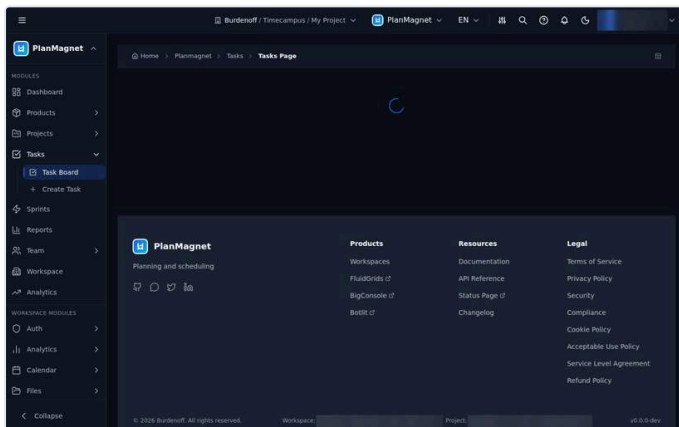
PRODUCT SCREENS • 26 SCREENS



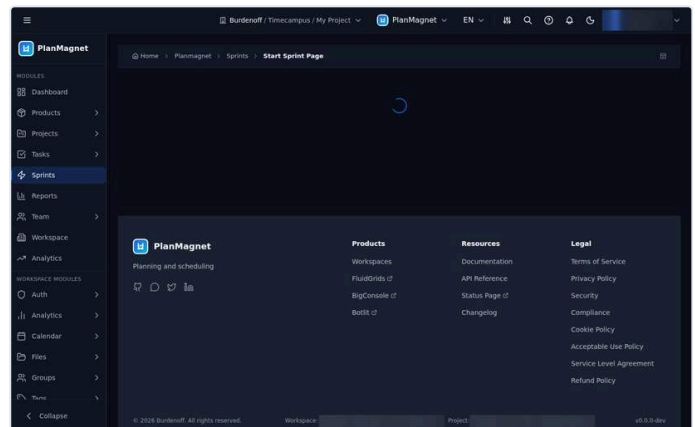
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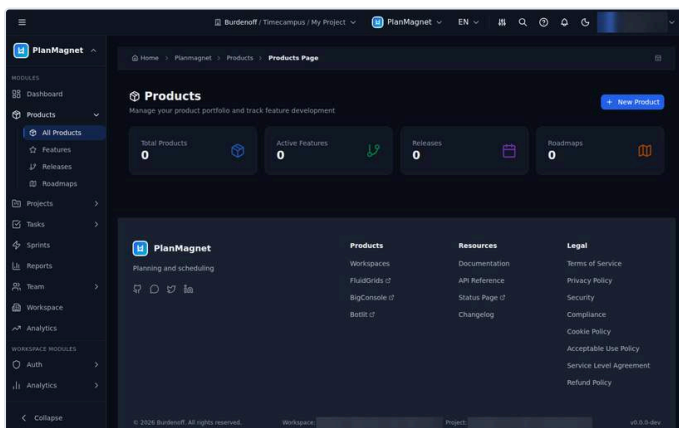
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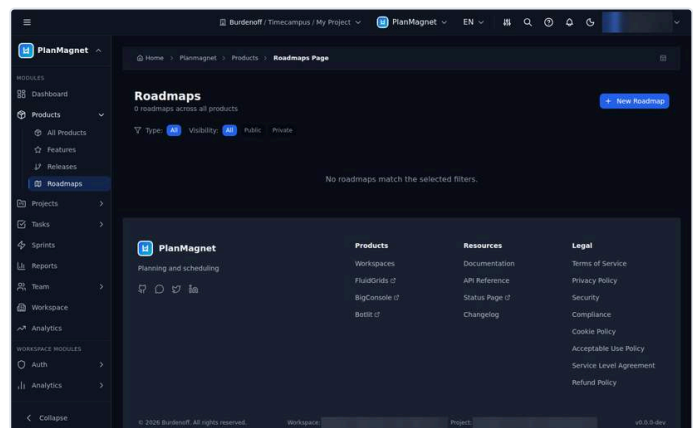
003 Tasks Board



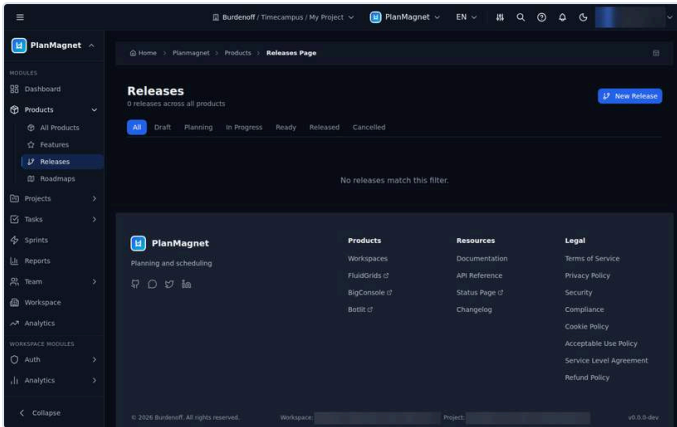
004 Sprints



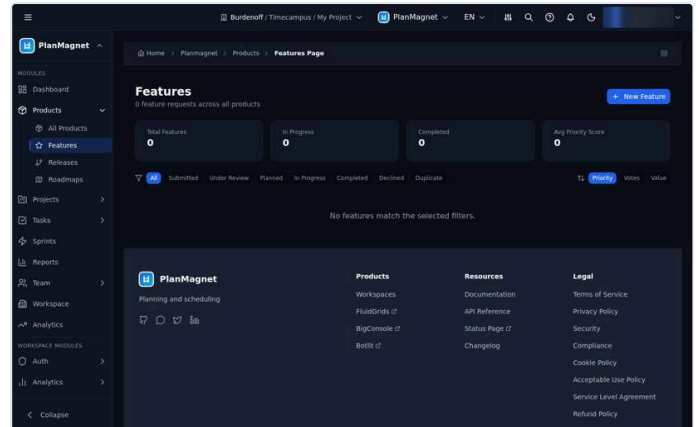
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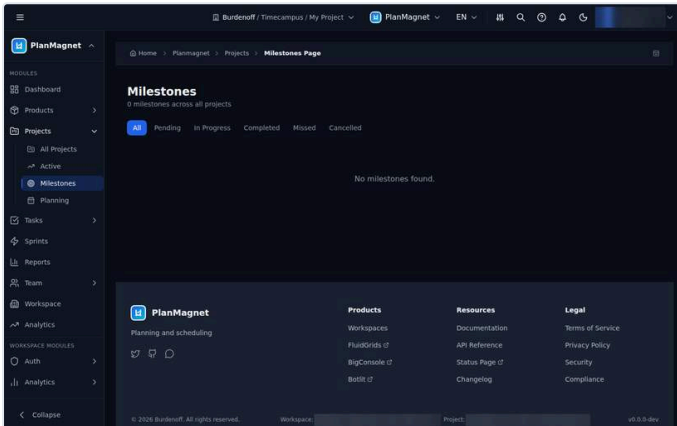
006 Roadmaps



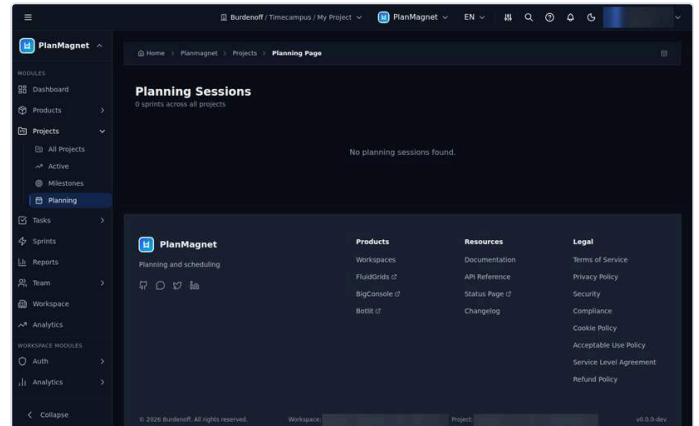
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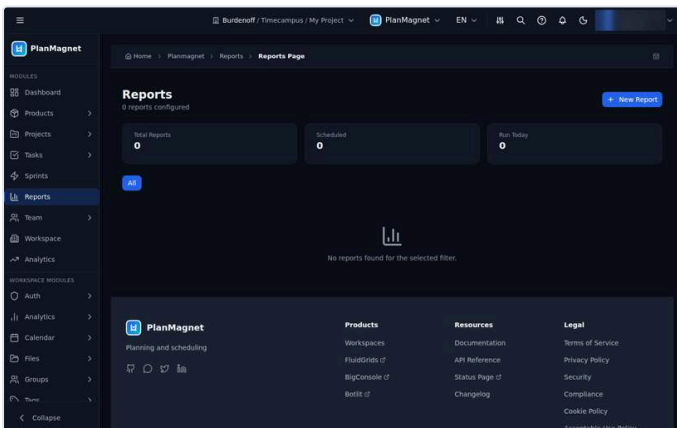
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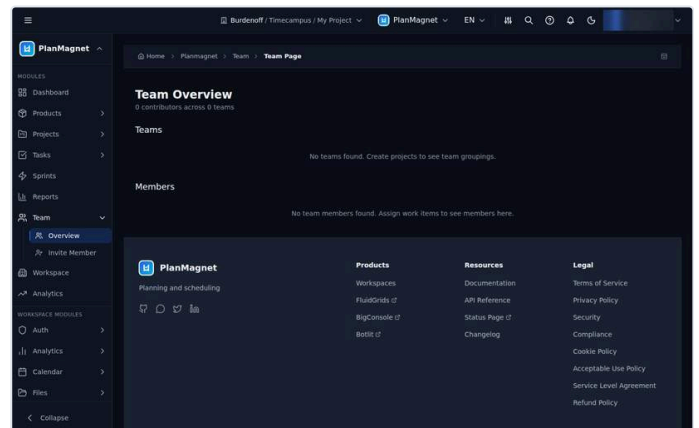
009 Milestones



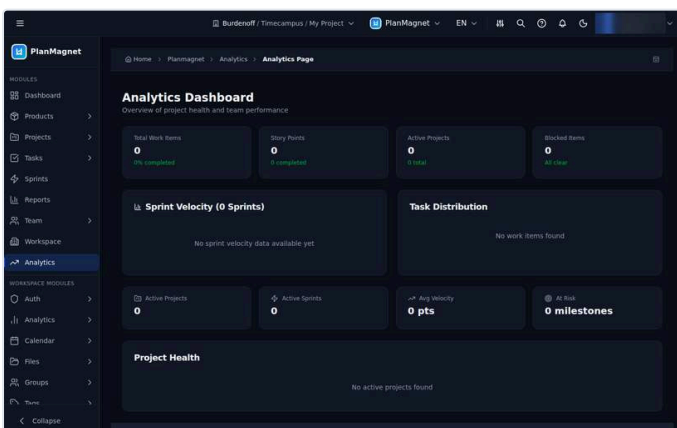
010 Planning



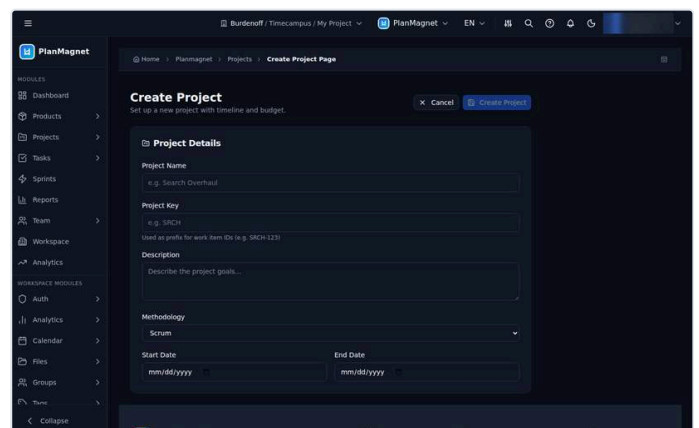
011 Reports



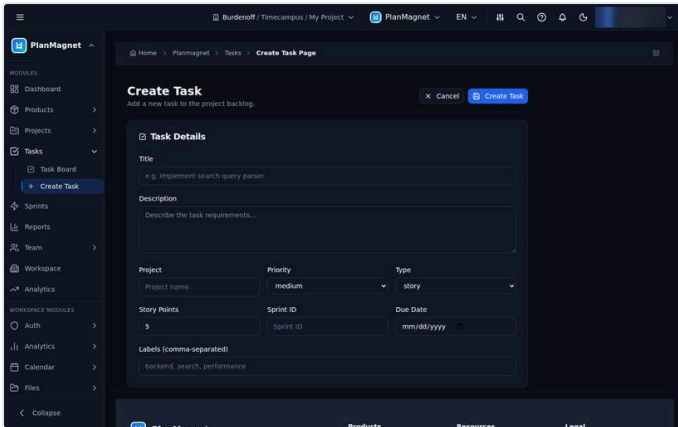
012 Team



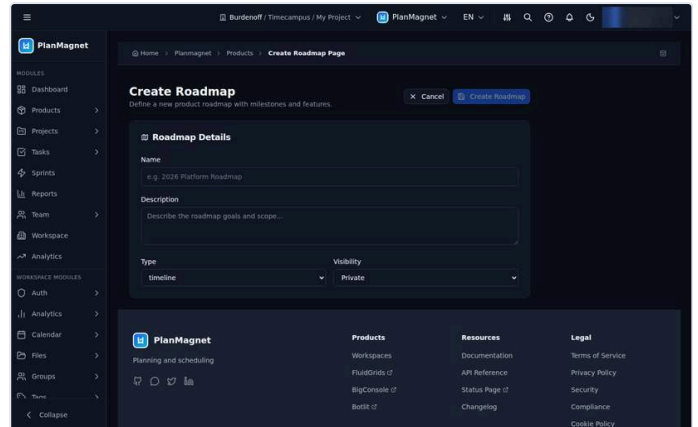
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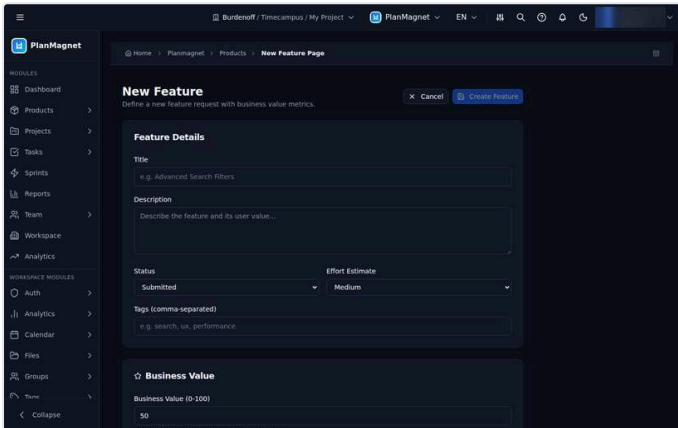
014 Create Project



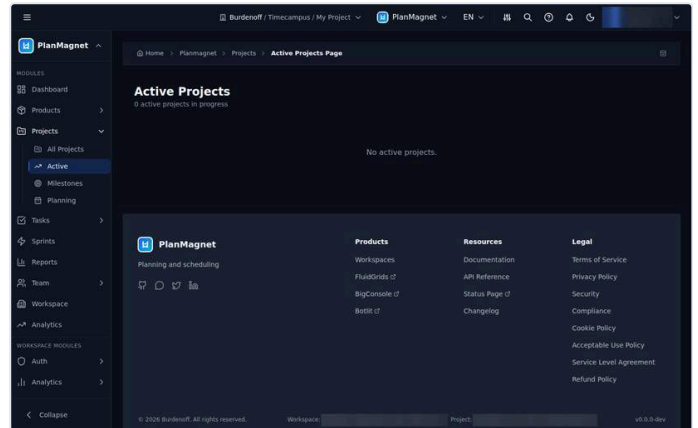
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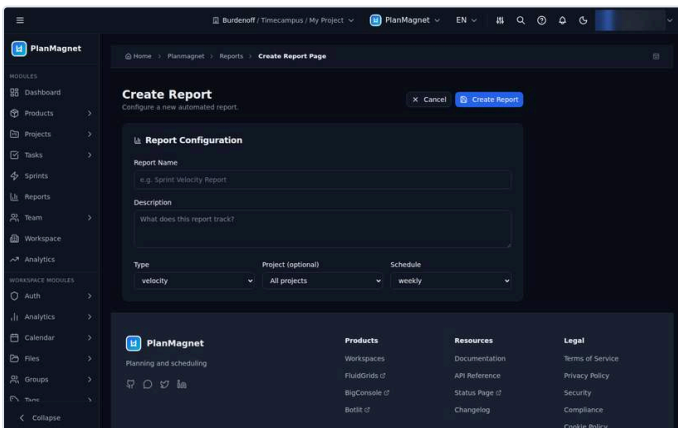
016 Create Roadmap



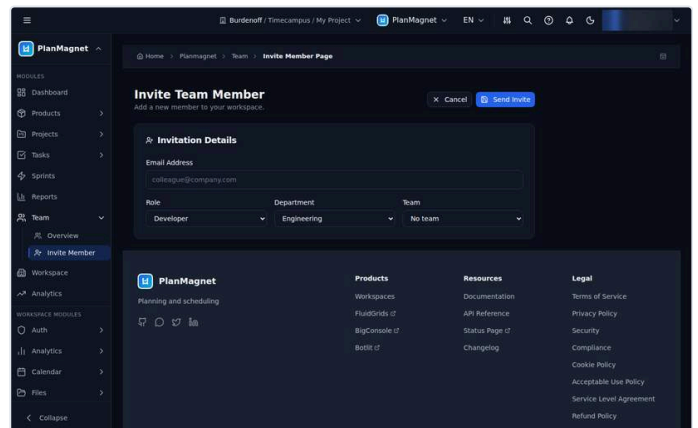
017 New Feature



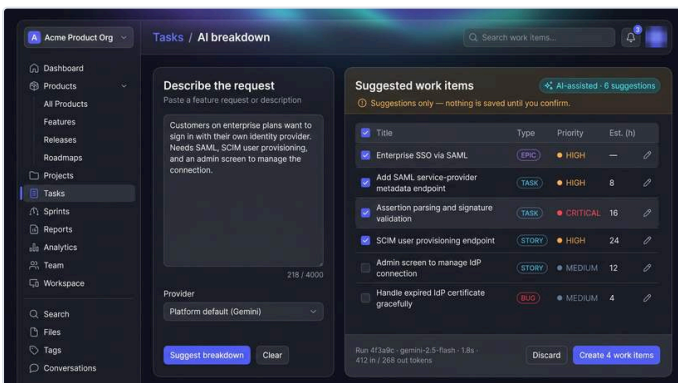
018 Active Projects



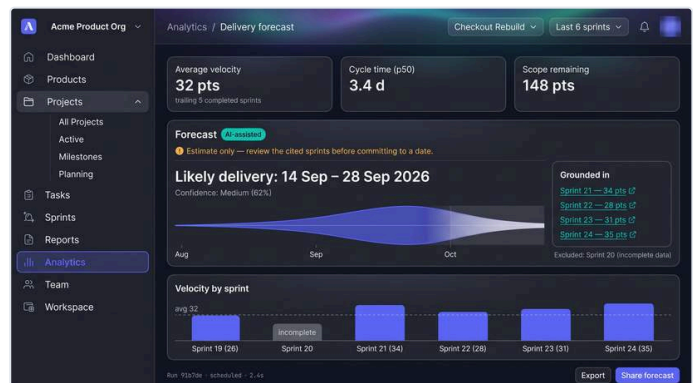
019 Create Report



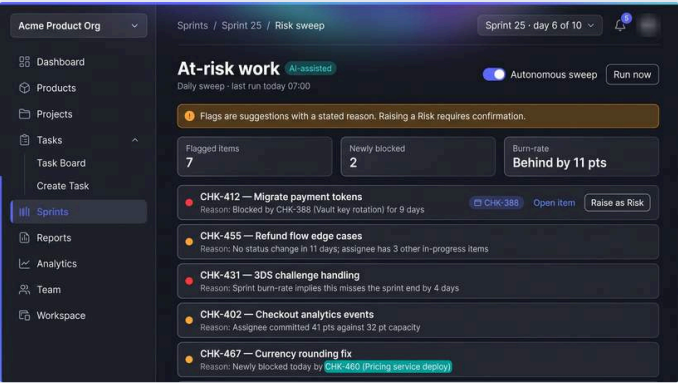
020 Invite Member



021 AI Work Item Breakdown



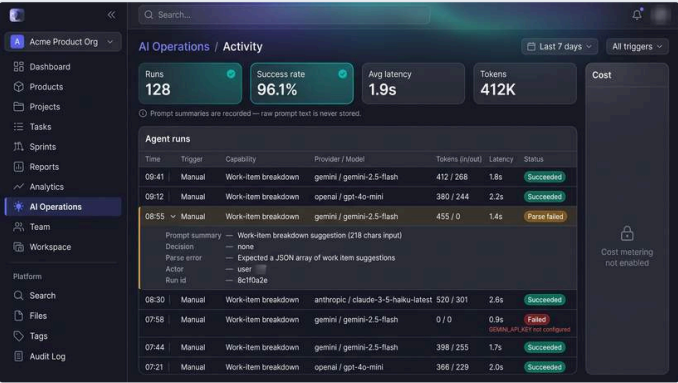
022 AI Delivery Forecast



023 AI At Risk Sweep



024 AI Feedback Dedup

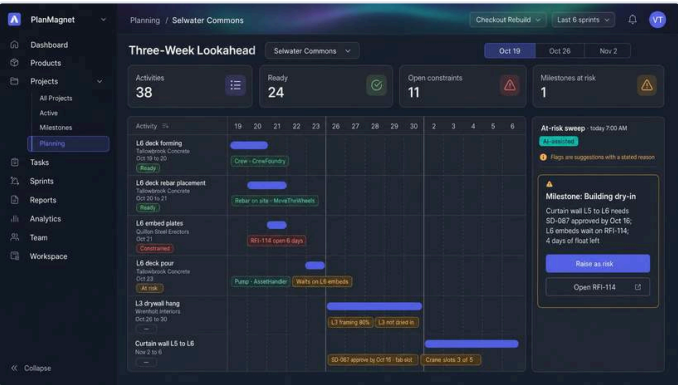


025 AI Agent Run Ledger



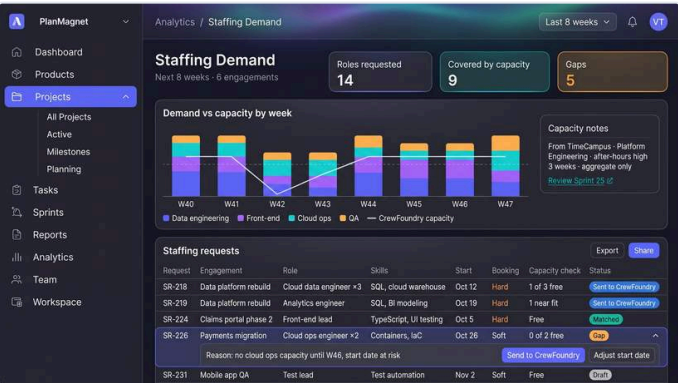
026 AI MCP Agents

CONSTRUCTION • 1 SCREENS

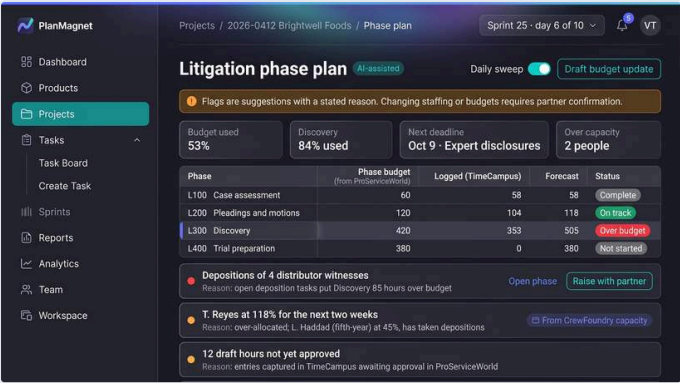


027 Construction Lookahead Constraint Board 1 Three Week Lookahead

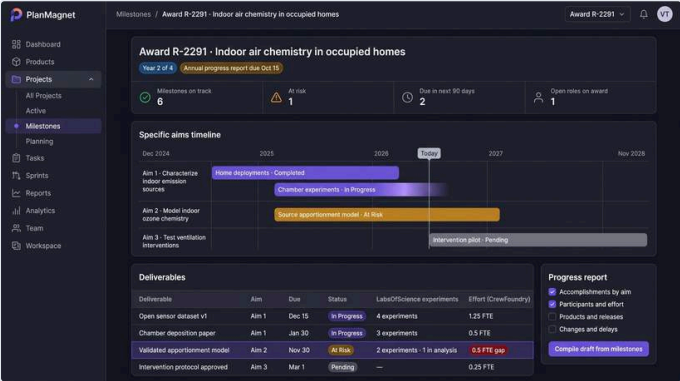
HR WORKFORCE • 1 SCREENS



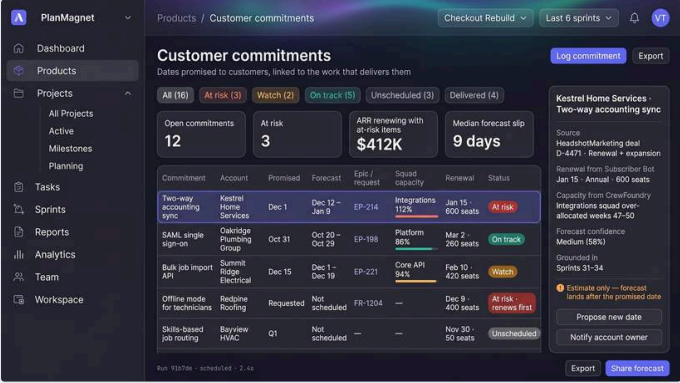
028 Project Staffing Demand Forecast 1 Staffing Demand By Week



029 Litigation Phase Plan And Staffing Forecast 1 Phase Plan And Sweep



030 Grant Aims And Deliverables Tracker 1 Award Aims And Deliverab



031 SaaS Roadmap Commitment Ledger 1 Commitment Ledger



Found someone who needs PlanMagnet?

You do not need to be a project-management expert to spot this one. If a team tells you their roadmap and their tracker disagree, or that a status update takes an afternoon, that is the opening. Make the introduction and we will handle the rest.

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>



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