



AUDITS, ONBOARDING & ADAPTERS

Expert hands on Subscriber Bot

Subscriber Bot is a product you can run yourself, but you do not have to do it alone. We help you adopt and get more from Subscriber Bot, and we deliver done-for-you outcomes powered by it: subscription audits, enterprise onboarding, new provider adapters, and managed optimization.

GROUNDED IN THE PRODUCT

RBAC & AUDIT THROUGHOUT

PRIVACY & CONSENT FIRST





01 What we do

Subscriber Bot is the universal system of record for every recurring digital relationship. The services wrap around it, across the whole Subscriber Bot lifecycle.

Every service is grounded in a real product capability. Engage one, or combine several into a program. Discover, manage, and optimize every subscription, membership, license, and contract in one place, with expert hands on.



TRACK 01

Improve your Subscriber Bot

Onboarding, setup, consulting, migration, security, and training so your team gets the full value of the platform, faster, and with governance from day one.

Onboarding & Setup · Provider Adapter Development · Enterprise Control-Tower Onboarding · Procurement & Contract Intelligence · Security, Privacy & Consent Setup · Training & Enablement

TRACK 02

Powered by Subscriber Bot

Done-for-you outcomes we deliver using the product (subscription audits, managed optimization, and provider distribution) so you can focus on everything else.

Subscription Audit · Managed Optimization · Provider Distribution & Success



02 · TRACK ONE

Improve your Subscriber Bot

Onboarding, setup, consulting, migration, security, and training so your team gets the full value of the platform, faster, and with governance from day one.

MISSING A PROVIDER?

We build it into the product

Tell us which provider is missing and our engineers add it to Subscriber Bot, working alongside your team where that helps. Every adapter is built against the open framework (subscribe, cancel, change plan, fetch invoices) and joins the network, so it ships in the product for everyone.

2.1 Onboarding & Setup

2.2 Provider Adapter Development

2.3 Enterprise Control-Tower Onboarding

2.4 Procurement & Contract Intelligence

2.5 Security, Privacy & Consent Setup

2.6 Training & Enablement





02

Improve your Subscriber Bot: connect and extend

2.1 · SETUP

Onboarding & Setup

We connect your inboxes, payment sources, and channels, tune AI discovery for your situation, and get your relationship graph clean and trustworthy from day one.

- Inbox, statement, and channel connection setup
- Discovery tuning to your providers and regions
- Duplicate merge rules and category configuration
- Renewal-reminder and inbox-categorization defaults
- A guided first-run for individuals or households

2.2 · ADAPTERS

Provider Adapter Development

Need a provider that is not supported yet? Tell us what is missing. We build the adapter into Subscriber Bot against the open framework, so that service becomes fully manageable for everyone who uses the product.

- Provider adapters implementing the action contract
- Subscribe, cancel, change-plan, and invoice endpoints
- Entitlement and renewal mapping for the provider
- Connectors and workflow automations on the event bus
- A path to publish into the Subscriber Bot Network

2.3 · ENTERPRISE

Enterprise Control-Tower Onboarding

We stand up the Enterprise Control Tower for your organization, connecting finance and SSO sources, modelling vendors and licenses, and configuring risk and renewal views.

- Company-wide discovery from finance, SSO, and expense
- Vendor, license, and shadow-IT inventory setup
- Control-tower dashboards: spend, renewals, utilization
- Risk Engine rules for duplicates and compliance
- SSO, SCIM, and RBAC role design



02

Improve your Subscriber Bot: govern and enable

2.4 · PROCUREMENT

Procurement & Contract Intelligence

We configure Contract Intelligence and the Procurement Platform so renewal, termination, SLA, and penalty clauses surface in time, and approvals flow through one place.

- Contract ingestion and clause-extraction setup
- Renewal and termination-window alerting
- Request / approve / compare / negotiate workflows
- Budget thresholds and approval routing
- Digital Asset Vault for contracts and invoices

2.5 · SECURITY

Security, Privacy & Consent Setup

We configure Subscriber Bot to your privacy and compliance bar: least-privilege roles, consent management, audit retention, and data-handling policies for sensitive sources.

- RBAC role design and least-privilege access review
- Universal Consent Management configuration
- Connected-source scoping and data-handling policy
- Audit-log retention and evidence workflows
- Privacy and GDPR-aligned setup review

2.6 · ENABLEMENT

Training & Enablement

We get your team genuinely productive, with role-based sessions, playbooks, and onboarding flows so finance, IT, and procurement use Subscriber Bot to its full potential.

- Hands-on workshops for finance, IT, and procurement
- Optimization and concierge playbooks
- Adapter-development enablement for your builders
- Onboarding checklists and curated learning paths
- Admin and reporting walkthroughs



03 · TRACK TWO

Powered by Subscriber Bot

Done-for-you outcomes we deliver using the product (subscription audits, managed optimization, and provider distribution) so you can focus on everything else.

OR HAND US THE WORK

Managed subscription optimization

When you would rather focus on everything else, we run the optimization for you. We define the policies with you, then continuously cancel waste, switch plans, and catch renewals before they cost you, with monthly savings reporting back to your team. Policy-driven, human-in-the-loop for high-stakes actions, and fully auditable, reversible, RBAC-scoped.

3.1 Subscription Audit

3.2 Managed Optimization

3.3 Provider Distribution & Success





03

Powered by Subscriber Bot

3.1 · AUDIT

Subscription Audit

We run a guided audit of every recurring relationship across your inboxes, cards, and vendor portals, then hand you a prioritized plan to cut waste and consolidate overlap.

- Discovery across email receipts, statements, and app stores
- Duplicate, overlapping, and unused subscription detection
- A prioritized savings plan with the reasoning shown
- Annual-switch and bundle opportunities surfaced
- A clean inventory you keep, modelled as relationships

3.2 · MANAGED

Managed Optimization

Prefer it done for you? We continuously optimize your subscription portfolio by policy: cancelling waste, switching plans, and catching renewals before they cost you.

- Policy design (e.g. cancel if unused 90 days and over \$20/mo)
- Continuous overlap, usage, and renewal monitoring
- Plan switches and bundle consolidation, executed for you
- Human-in-the-loop approval for high-stakes actions
- Monthly savings and portfolio-health reporting

3.3 · PROVIDERS

Provider Distribution & Success

For service providers: we help you build into the network, list in the marketplace, and stand up subscriber, churn, and cohort analytics with retention automation.

- Adapter build into the Subscriber Bot Network
- Discovery Marketplace listing and positioning
- Subscriber, churn, cohort, and revenue analytics
- AI churn prediction and retention automation
- One-click subscribe / cancel for new customers



04 How we engage

A clear path from intent to impact. The same loop whether it is a one-week setup or a multi-quarter platform program: scoped, reviewable, and audited at every step.

01

Discover

We map your environments, teams, tooling, and goals, and agree on what "done" looks like before any work starts.

02

Plan

A scoped, reviewable plan: target topology, plugins, RBAC model, and rollout sequence, with human-in-the-loop checkpoints where it matters.

03

Build

We connect your sources, set up the built-in agents, adapters, and automation, and validate each step before it goes live, shipping in increments you can see.

04

Operate

We hand over with docs and enablement, or stay on to run it: monitored, audited, and quota-aware from the first day.

ENGAGEMENT MODEL

Engage one service, or combine several into a program.

PRICING

Contact us. Tell us about your environments and goals and we will recommend the right mix.



05

We leave your team able to run it without us

Every engagement ships documentation, golden-path templates, and hands-on enablement. Whether you keep us on to operate or take the keys yourself, your team understands the platform, not just the dashboard.

- Role-based workshops for finance, IT, and procurement teams
- Adapter-development enablement so your team extends it themselves
- Onboarding checklists, tours, and curated learning paths

HOW TO START

Let's scope what you need

Tell us about your environments and goals. We will recommend the right mix of setup, configuration, operations, and enablement, and a plan to get there.

TALK TO OUR TEAM

subscriberbot.com/contact

PREFER A STRUCTURED PARTNERSHIP?

subscriberbot.com/partners



GET STARTED

Let's scope what you need.

Tell us about your environments and goals. We will recommend the right mix of setup, configuration, operations, and enablement, and a plan to get there.

TALK TO OUR TEAM

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SERVICES

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PARTNER PROGRAM

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GET STARTED FREE

app.subscriberbot.com

