

Kantata

Always deliver amazing

What's next for Kantata: OX Product Roadmap Webinar

October 28



Submit your questions any time using the **webinar Q&A**



Agenda

What we'll cover today

Recently Delivered
& Coming Next Month



Martin Beil

Director, Product Marketing

Product Roadmap



Brett Norris

Director, Product Management

Confidentiality & Safe Harbor

Confidentiality

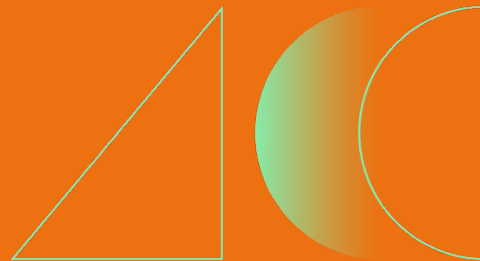
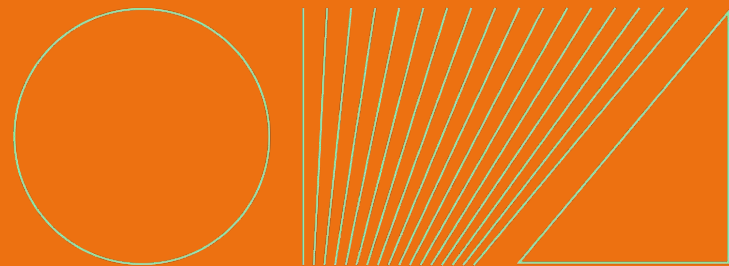
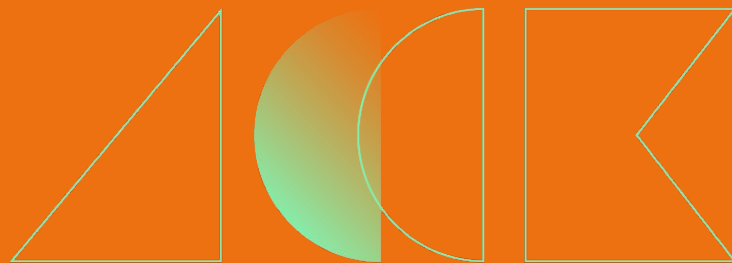
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Safe Harbor Statement

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Clients who purchase Kantata should make their purchase decisions based upon features that are currently available.

Recently Delivered & Coming Soon

Martin Beil



Recently Delivered

Recent OX releases

SPOTLIGHT



Private



Public

Private Tasks

Control who can see a task. Keep internal or sensitive work on the project plan, visible only to the people who need it, so your plan stays complete without oversharing.

Available now in Kantata OX →

More Subscribed Events

Access Groups changes are now in Subscribed Events and Recent History.

Changes to EAC Calculations

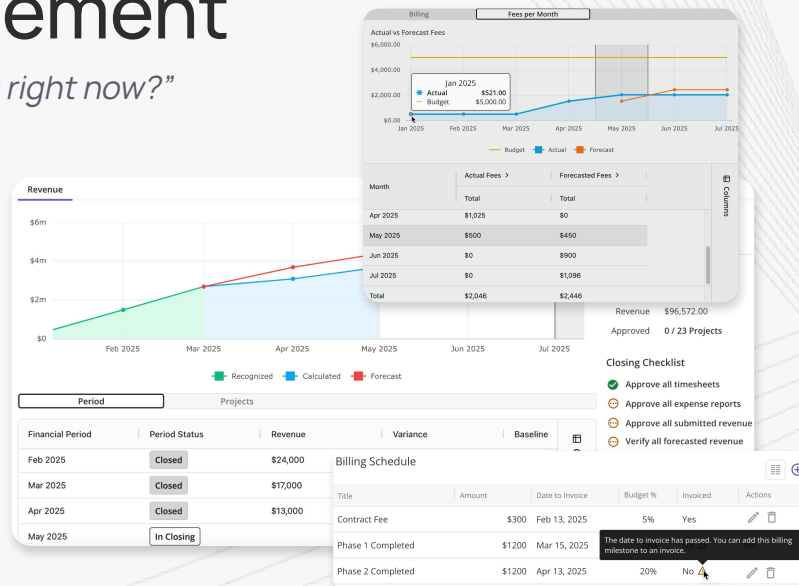
EAC calculations now have an option to include both soft and hard allocations.

Recently Delivered

Enhanced Financial Management

Move from “How did we do last month?” to “How are we tracking right now?”

- **Billing:** Billing schedules, milestone billing, and Fees per Month, so every invoice date is tracked.
- **Revenue recognition:** Four revenue methods, multi-currency, and overrides with a calculation worksheet.
- **Forecast & EAC control:** Lock the monthly forecast, then compare EAC to budget and plan to actual by person, task, and hour.
- **Month-end close:** Snapshot at submission, a close-readiness checklist, approvals, and a full audit trail.



4.5%

of earned revenue leaks away
before it's ever realized
SPI Research, 2026

62%

higher EBITDA when PSA and core
financials are integrated
SPI Research, 2026

~800

hours a year saved by Kantata's
own PS & Finance teams
Kantata internal estimate

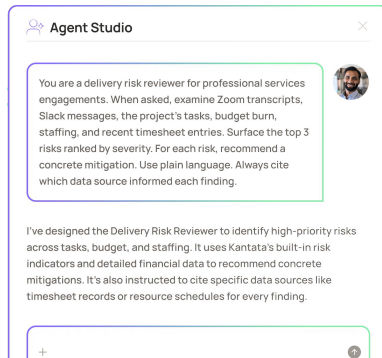
Recently Delivered

Kantata Expertise Engine



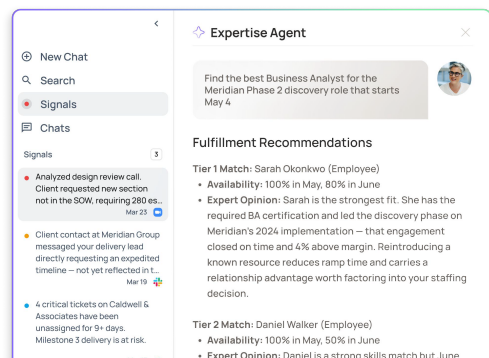
Agent Studio

Create custom agents tuned
to your firm's best practices



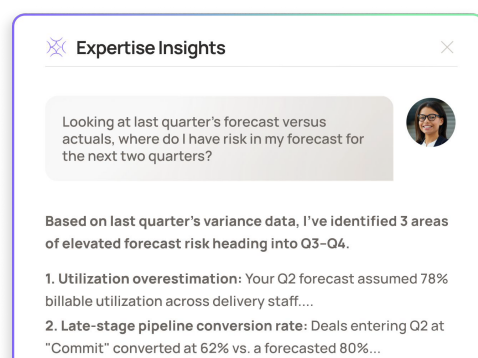
Expertise Agent

The only superagent built for PS –
context-aware, proactive, end-to-end



Expertise Insights

Enterprise-grade, predictive
business intelligence



Workflow Studio

Build custom workflows and embed automated agents



MCP

Connect the Expertise Engine to existing AI tools like Claude



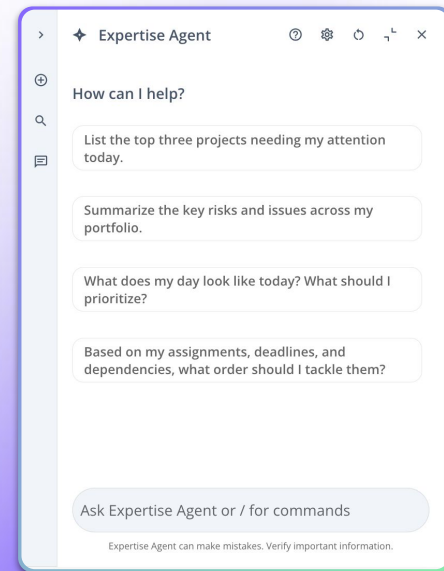
Expertise Agent · Activations Underway

Get started with Expertise Agent in your account today

The only superagent built for professional services. Context-aware and proactive, Expertise Agent answers with precision and takes action.

REQUEST ACTIVATION FOR YOUR ACCOUNT →

Fair usage guidelines for Expertise Agent take effect in 2027.



Guided setup

A 1:1 session with your CSM to configure the Agent for your team.



Expert office hours

Drop-in sessions with our Expertise Engine specialists to get answers as you go.

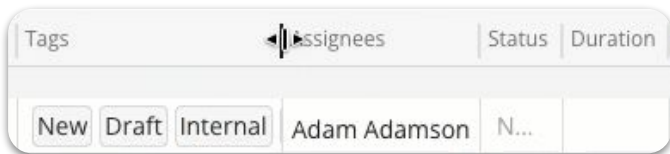


Training & peer use cases

Best-practice guides, documentation, and inspiration from clients seeing results.

Coming Soon

November Releases



Task Tracker

Resize Columns

Resize columns to better fit the way you work.

Resource ↑	Allocated Hours	Estimated Hours	Scheduled Hours	Actual Hours	Future Hours
 Dorothy Davis	232h	0h	32h	0h	96h

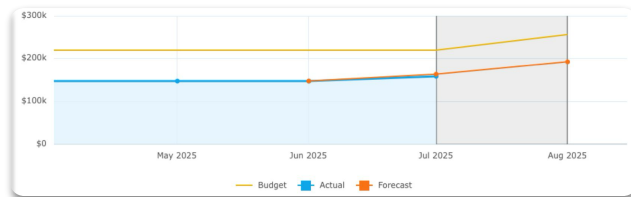
Project Resourcing

Configure Columns

Select and rearrange columns to set up Saved Views.

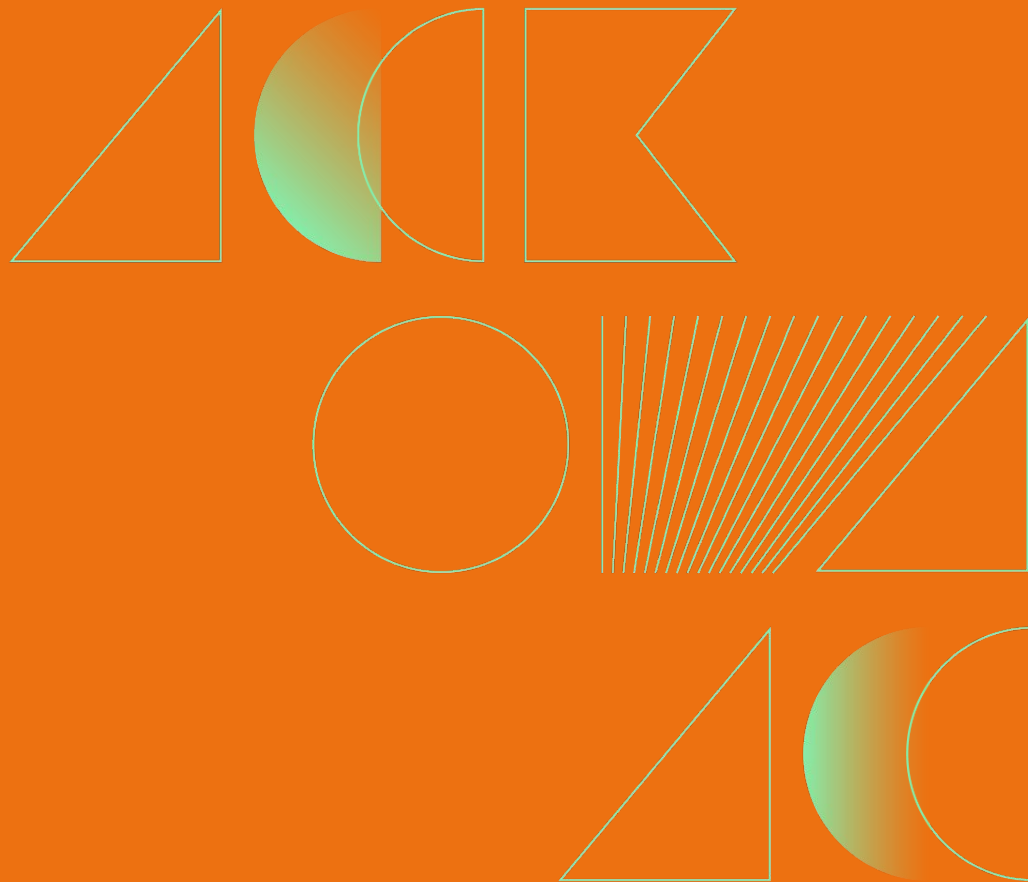
Fees per Month Chart

Moving from early access to general availability for all customers.



Kantata OX Roadmap

Brett Norris



Our Product Commitment

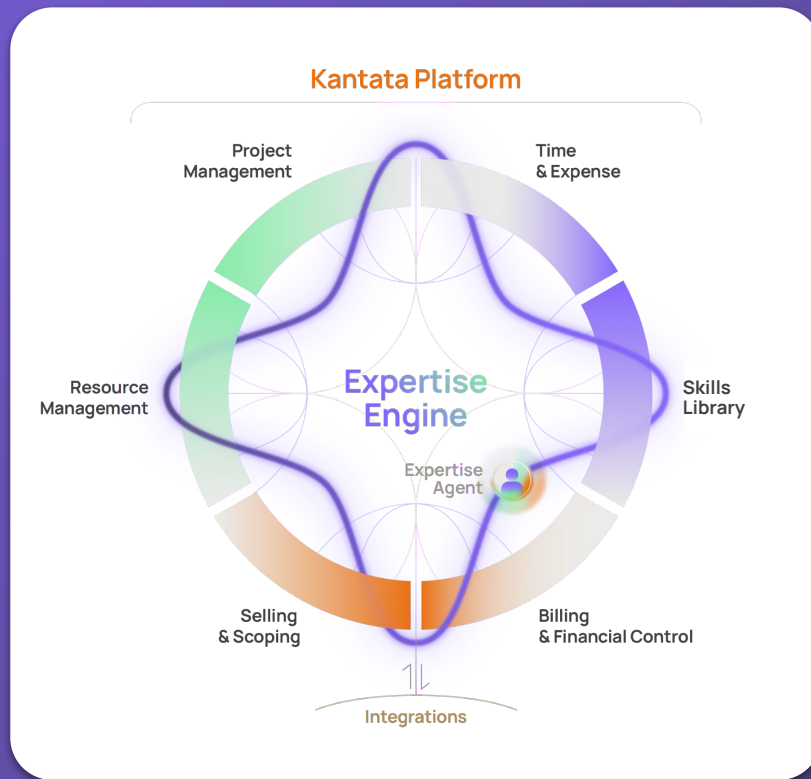
We are committed to building solutions, not just features.

- We build functionality that moves the needle for your business and **helps you achieve your results**
- We listen to your feedback — **your voice matters** even when we can't act on everything
- We ground our decisions in market research and customer evidence — **so what we build reflects where the industry is heading**
- We build in sequence — **so our solutions compound over time**
- **We will be transparent** about where we stand, why we make the decisions we do, and what's driving our priorities

We're in this for the long game and everything we build will reflect that.

Our Vision

Kantata is where you've laid the foundation for how your organization works.



Imagine a Kantata that knows your business like your best people do

One place that advises you on what matters, and acts on it, before you have to ask.

WHAT IT KNOWS



Your collective expertise

Every project, person, and outcome already in Kantata



Your playbooks

How your firm delivers, its best practices, and its goals



Where the work happens

Meetings, email, messages, and the systems you use

Kantata · Home

Good morning. 3 things need you today.
Based on your projects, your playbooks, and this week's client conversations

RISK

Fixed-fee project trending over budget
Scope added on Tuesday's client call isn't in the plan

Draft change order

OPPORTUNITY

Client asked about a Phase 2 rollout
Matches your expansion playbook and past wins

Build estimate

DONE FOR YOU

Next week's staffing gap is covered
Best-fit consultant assigned per your resourcing rules

Review

WHAT IT DOES



Advises

Flags risks and opportunities as they emerge, with the why



Acts

Recommends the next step and takes it with one click



Automates

Handles routine work on its own, within your guardrails

Illustrative concept, not a product screenshot

Every layer makes Kantata smarter

The engine is only as good as what you put in. Each investment builds on the last, so Kantata can see what's coming.



Teach

Show the engine how you operate and what success looks like.



Expand

Bring in data and context from the other tools your team uses every day.



Govern

Adopt AI with confidence with agent governance, usage and cost visibility, and row-level security



Anticipate

Surface risks and opportunities before anyone has to ask.

Business Units & Services

Teach Kantata how your business is organized

Business Units



- Split people and projects by department or location
- Attach rate cards, workweeks, and time tracking rules to each unit
- Run many businesses in one instance, not one flattened business

Services



- The repeatable offerings you sell, like Strategy, Implementation, and Support
- Kept separate from the projects that deliver them
- Gives finance a view of what you sell, not only how delivery is structured

KPIs

Teach the Expertise Engine the metrics that matter most

Define the operational goals your business runs on. Kantata measures actual activity against each target. You can monitor things like:

- Resource fulfillment
- On-time delivery
- Margin realization
- Billable utilization
- Budget attainment
- Revenue attainment vs. forecast

Outstanding Resource Requests

Resource Requests within Goal

98.5%

● Positive Events	28
● Negative Events	9
● Total Events	202

Project Completion Rate

Project Completion Rate within Goal

90%

● Positive Events	90
● Negative Events	10
● Total Events	100

Days to close period

Day to close period within Goal

60%

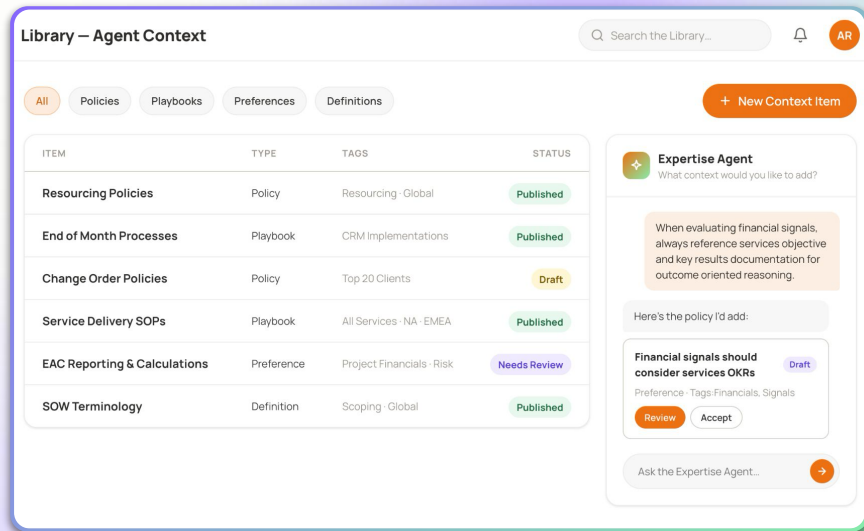
● Positive Events	120
● Negative Events	80
● Total Events	200

Agent Context

Teach the Expertise Agent how you operate

Ensures the Expertise Agent truly understands your unique business goals and exactly how your teams get things done.

- Load company playbooks, preferences, and objectives into a centralized location.
- Agent reasons against this context to make recommendations aligned with desired outcomes.



Connectors

280+ connectors to power your custom workflows

Build it your way

Use any connector as a step in a custom workflow: sync a field, trigger an alert, or kick off a process in another tool.

Triggered from anywhere

Kick off a workflow from an event in Kantata or in another system, the moment it happens.

Ask from the Expertise Agent

Query directly into your external tools from Expertise Agent, using MCP.



Integrations

Deeply connected systems your teams use daily

Deep two-way sync with the systems that run your business, built on our new integrations platform for simpler setup, with bi-directional, scenario-based sync for heavy data flows like financials and delivery work.

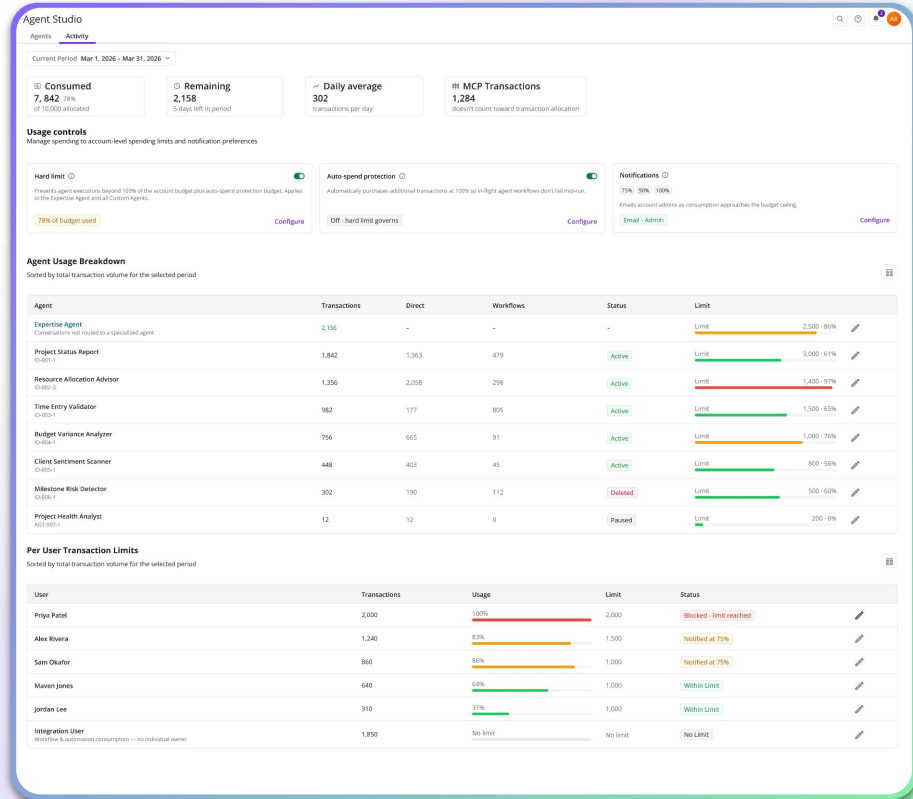
**NetSuite***In active testing***Jira***In active testing***Xero***In design***Sage Intacct***In design***QuickBooks***On roadmap***Workday***On roadmap***MS Dynamics***On roadmap***Rippling***On roadmap*

Agent Governance

Scale agent adoption without losing control

The operational guardrails that let your team scale, audit, and optimize your AI workforce.

- See every transaction, by agent and by user
- Set budget caps and hard limits, with alerts before anyone hits them
- Control who can use what with access groups
- Turn open-ended AI spend into a predictable investment

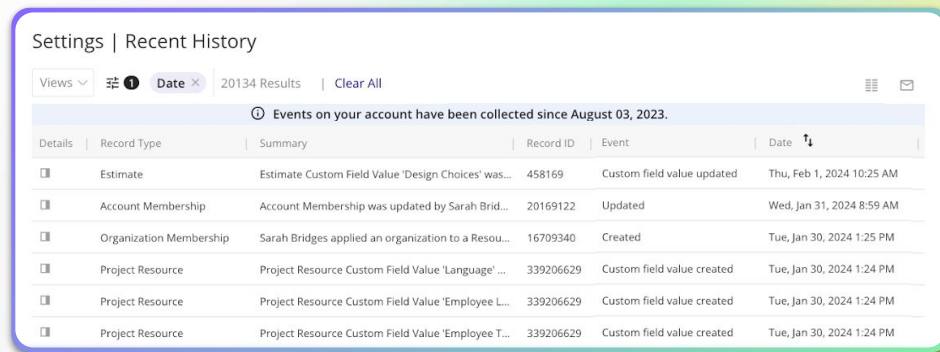


Extended History

Move fast without losing your audit trail

A longer, auditable record of what happened in your account.

- Builds on Recent History and Project History
- Retain and audit account activity for up to 7 years
- Starts storing data once the feature is activated for your account



The screenshot displays the 'Settings | Recent History' page. At the top, there's a header with 'Views' (dropdown), a filter icon, 'Date' (dropdown), '20134 Results', and a 'Clear All' button. Below this is a blue banner stating 'Events on your account have been collected since August 03, 2023.' The main content is a table with columns: Details, Record Type, Summary, Record ID, Event, and Date. The table lists several events, including updates to custom field values and creation of new resources.

Details	Record Type	Summary	Record ID	Event	Date
	Estimate	Estimate Custom Field Value 'Design Choices' was...	458169	Custom field value updated	Thu, Feb 1, 2024 10:25 AM
	Account Membership	Account Membership was updated by Sarah Brid...	20169122	Updated	Wed, Jan 31, 2024 8:59 AM
	Organization Membership	Sarah Bridges applied an organization to a Resou...	16709340	Created	Tue, Jan 30, 2024 1:25 PM
	Project Resource	Project Resource Custom Field Value 'Language' ...	339206629	Custom field value created	Tue, Jan 30, 2024 1:24 PM
	Project Resource	Project Resource Custom Field Value 'Employee L...	339206629	Custom field value created	Tue, Jan 30, 2024 1:24 PM
	Project Resource	Project Resource Custom Field Value 'Employee T...	339206629	Custom field value created	Tue, Jan 30, 2024 1:24 PM

Enterprise Sandbox

Test changes in an exact copy of production



Safely test new processes and features in a separate environment, using a copy of your production data.

Signals

Surface risks and opportunities before anyone has to ask

AI-generated Risk and Opportunity alerts scored continuously on quality, impact, and urgency.

CONVERSATION SIGNALS FOR

Financials: Budget health, rates, and margins

Schedule: Deadlines, milestones, and delays

Scope: Creep, deliverable changes, and tasks

Sentiment: Client satisfaction and team morale

Staffing: Allocations and resource constraints

Signals

Search to filter

Signals

- Milestone completion timing risk
- Timeline slip risk - Vertex Analytics dashboard launch
- Resource conflict - Fintech Partners Phase 2 Rollout
- Scope creep detected - Fintech Partners Phase 2 Rollout
- Urgent opportunity identified - Cascade Insurance Annual Renewal
- Five items is significant enough to scan
- Urgent opportunity identified - Cascade Insurance Annual Renewal

Signal Brief

Milestone completion timing risk

Two milestones have shifted more than ten business days.

- Downstream dependencies have not been adjusted to match.
- Client-side review cycles have introduced recurring delays.
- Remaining schedule buffer is compressed to near zero.
- No mitigation has been proposed on the call or in the project plan.

Source

Evidence type: Zoom Meeting: Vertex Weekly Status Call
Date: 9 MAR 2027
Transcript excerpt:
"Yeah, both milestones are now more than ten working days late. We're still waiting on the client's feedback—this keeps happening every review round. The tasks after those milestones are still showing the old dates in the plan, so there's basically no buffer left. We haven't put a recovery plan together yet, and there isn't one in the project plan either."

Related

Projects: ☐ Vertex Implementation

Tasks: ☐ Phase 1 ☒ Phase 2

People: Ada Barbosa Terry Hoffman Doran Shaw

Analysis

Why it matters

Left unaddressed, the compounding shifts risk pushing the final deliverable past the contractual deadline and triggering penalty clauses — this is a deadline that has been communicated externally to the client, not just tracked internally.

Recommendation

- Escalate to steering committee; propose a revised schedule absorbing the review delay.
- Model the re-sequenced plan first to see projected completion date with the delay accounted for.
- Draft the escalation recommending team expectations realignment.
- Once the modeled plan is approved, correct the new dates using the **Shift Milestone Dates** workflow.

[Model revised schedule](#) [Draft escalation to the steering committee](#)

[Adjust milestone dates with "Shift Milestone Dates" workflow](#)

Precedent

Comparable signals resolved in 3 prior cases:

- Project Alpha** (Apr 13-Apr 24) — milestones slipped over ten business days — re-baselined downstream dates and assigned handoff owners.
- Project Delta** (May 02-May 10) — recurring client reviews exhausted buffer — agreed review deadlines and an escalation path.
- Project Gamma** (Jun 10-Jun 20) — no recovery plan after delays — assigned a mitigation owner and sequenced a recovery plan.

Expertise Agent

Revised Schedule Modeling Options

Below are modeled schedule scenarios based on standard adjustment paths.

Scenario 1: Shift Entire Milestone Phases 1 & 2 by 1 Week (+5 Business Days)

Useful if upstream deliverables or client readiness delayed the start of Milestone 1.

- Adaptation Impact: Project Management extends to 2027-02-28.
- Go Live: 2027-01-13 to 2027-01-20
- Go Live: 2027-01-14 to 2027-01-14
- Go Live: 2027-01-15 to 2027-01-28
- Go Live: 2027-01-29 to 2027-02-05
- Go Live: 2027-02-06 to 2027-02-06
- Go Live: 2027-02-07 to 2027-02-07
- Go Live: 2027-02-08 to 2027-02-08
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- Go Live: 2027-07-30 to 2027-07-30
- Go Live: 2027-07-31 to 2027-07-31
- Go Live: 2027-08-01 to 2027-08-01
- Go Live: 2027-08-02 to 2027-08-02
- Go Live: 2027-08-03 to 2027-08-03
- Go Live: 2027-08-04 to 2027-08-04
- Go Live: 2027-08-05 to 2027-08-05
- Go Live: 2027-08-06 to 2027-08-06
- Go Live: 2027-08-07 to 2027-08-07
- Go Live: 2027-08-08 to 2027-08-08
- Go Live: 2027-08-09 to 2027-08-09
- Go Live: 2027-08-10 to 2027-08-10
- Go Live: 2027-08-11 to 2027-08-11
- Go Live: 2027-08-12 to 2027-08-12
- Go Live: 2027-08-13 to 2027-08-13
- Go Live: 2027-08-14 to 2027-08-14
- Go Live: 2027-08-15 to 2027-08-15
- Go Live: 2027-08-16 to 2027-08-16
- Go Live: 2027-08-17 to 2027-08-17
- Go Live: 2027-08-18 to 2027-08-18
- Go Live: 2027-08-19 to 2027-08-19
- Go Live: 2027-08-20 to 2027-08-20
- Go Live: 2027-08-21 to 2027-08-21
- Go Live: 2027-08-22 to 2027-08-22
- Go Live: 2027-08-23 to 2027-08-23
- Go Live: 2027-08-24 to 2027-08-24
- Go Live: 2027-08-25 to 2027-08-25
- Go Live: 2027-08-26 to 2027-08-26
- Go Live: 2027-08-27 to 2027-08-27
- Go Live: 2027-08-28 to 2027-08-28
- Go Live: 2027-08-29 to 2027-08-29
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- Go Live: 2027-08-31 to 2027-08-31
- Go Live: 2027-09-01 to 2027-09-01
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- Go Live: 2027-09-03 to 2027-09-03
- Go Live: 2027-09-04 to 2027-09-04
- Go Live: 2027-09-05 to 2027-09-05
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- Go Live: 2027-09-07 to 2027-09-07
- Go Live: 2027-09-08 to 2027-09-08
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- Go Live: 2027-09-12 to 2027-09-12
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- Go Live: 2027-09-14 to 2027-09-14
- Go Live: 2027-09-15 to 2027-09-15
- Go Live: 2027-09-16 to 2027-09-16
- Go Live: 2027-09-17 to 2027-09-17
- Go Live: 2027-09-18 to 2027-09-18
- Go Live: 2027-09-19 to 2027-09-19
- Go Live: 2027-09-20 to 2027-09-20
- Go Live: 2027-09-21 to 2027-09-21
- Go Live: 2027-09-22 to 2027-09-22
- Go Live: 2027-09-23 to 2027-09-23
- Go Live: 2027-09-24 to 2027-09-24
- Go Live: 2027-09-25 to 2027-09-25
- Go Live: 2027-09-26 to 2027-09-26
- Go Live: 2027-09-27 to 2027-09-27
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- Go Live: 2027-10-01 to 2027-10-01
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- Go Live: 2027-12-28 to 2027-12-28
- Go Live: 2027-12-29 to 2027-12-29
- Go Live: 2027-12-30 to 2027-12-30
- Go Live: 2027-12-31 to 2027-12-31
- Go Live: 2028-01-01 to 2028-01-01
- Go Live: 2028-01-02 to 2028-01-02

Looking Ahead

Features in Discovery

Hybrid Workforce

Track AI agent usage and cost against projects

Portfolio Management

Run multi-project programs that share one budget

Scoping and Estimation

Model multiple scenarios and support sales before a project starts

Staffing Candidates

Weigh multiple candidates against a placeholder role

Kantata OX Roadmap

Each horizon makes Kantata OX more powerful and easier to use.

DELIVERED — LIVE TODAY

✔ Expertise Agent

Natural-language insight and action across scope, sell, resource, deliver, and finance

✔ Agent Studio & Workflow Studio

Create custom agents and integration flows

✔ Expertise Insights

AI-driven, natural language deep analytics and natural language report generation

✔ Financial Management

Billing through month-end close, all in one place

✔ Private Tasks

Control who can see a task

NOVEMBER

Resize Columns

Ability to resize columns in Task Tracker

Configure Columns

Choose the columns you see in Project Resourcing

Fees per Month Chart

Real time fees reporting

Q1 2027

Business Units

Segment people and projects by department or location

Services

The repeatable offerings you sell, separate from the projects that deliver them

Agent Governance

Make agent usage and AI spend visible and accountable

Agent Context

Expertise Engine Premium

Teach Expertise Agent how your business operates

Signals

Expertise Engine Premium

Risk and opportunity alerts, surfaced in plain language before anyone asks

More Integrations

Q2 2027 + BEYOND

KPIs

Enterprise Sandbox

More Integrations

Items in Discovery

Q&A