

Kantata SX Strategic Vision & Roadmap

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An industry expert with over a decade of experience building and implementing products at Kantata, Martin possesses deep expertise in Business Intelligence and Artificial Intelligence.



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Lucy brings over 20 years of experience in Professional Services, having worked with companies like IBM and Hitachi Consulting. Since joining Kantata in 2013, she has held leadership roles in Sales and Customer Success. She now leads the SX Product team. Her career reflects deep industry expertise, strategic vision, and a passion for delivering enterprise services solutions.

Today's Agenda

1. Product Strategy and Investment
2. Committed, Planned, and Targeted Capabilities
3. Expertise Engine Roadmap Update

Confidentiality & Safe Harbor

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Market & Client Feedback Informing Product Strategy

AI Disruption & Opportunity

Scaling through AI

"We need to grow our revenue by leveraging AI rather than simply adding more headcount."

AI Platform Flexibility

"It is critical that our AI ecosystem remains flexible so we aren't locked into a single path."

Business-Specific Context

"We need AI that actually understands our specific business context instead of giving us generic responses."

Core Product Foundations & Governance

Scalable Governance

"We need mature core capabilities that allow us to scale and configure the platform without losing control or oversight."

User Experience

"Our users expect a modern, unified experience that feels consistent across the entire product."

2026 Core Product Investment Areas

Finance

Strengthen financial capabilities with advanced automation and governance to **handle complex billing at enterprise scale**.

- **High-Volume Automation:** Re-worked automated batch generation and dispatch.
- **Pricing Transparency:** Explicit surcharge visibility and margin protection.
- **Invoice Flexibility:** Configurable presentation to speed up cash velocity.
- **Intercompany:** Expanded features: period management, payment currencies, invoiceable adjustments

Expertise Engine

A modular AI engine that transforms collective knowledge into **automated workflows** to enable **exponential scaling**.

- **Conversational AI:** Chat-based interface for Resourcing and Delivery.
- **API Framework:** Business logic validation layer for permissions and UI.
- **Agent Studio:** Self-serve creation and evolution of AI agents.
- **Accelerators:** Project benchmarking and RAG variance analysis tools.

Platform Foundations

Infrastructure modernization to **unify user experiences** while ensuring **enterprise-grade performance and reliability**.

- **Enhanced Monitoring:** Replacing New Relic with Observe.
- **Modern UI:** Reimagining core flows with Lightning Web Components (LWC).
- **Legacy Cleanup:** Deprecating old VF pages and Kimble T&E mobile.
- **Guardrails:** tighter config rules, improved error handling and self-healing

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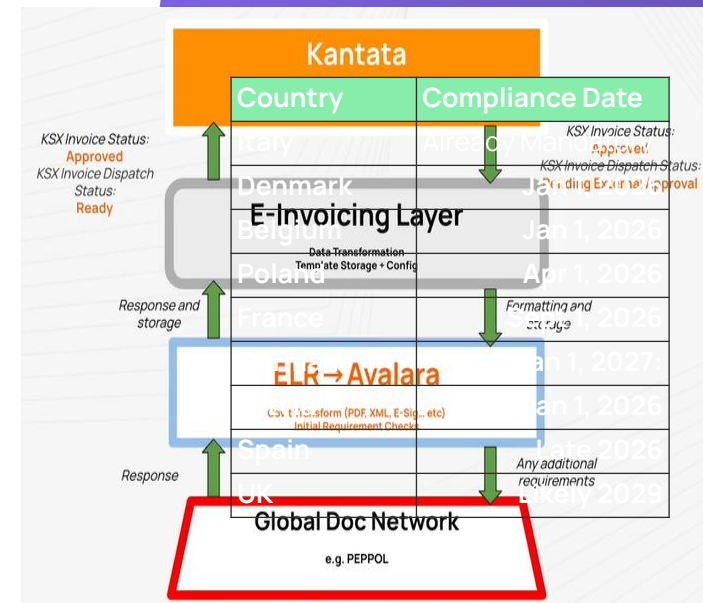
Kantata SX
Committed

E-invoicing: Global Tax Compliance

Extend existing billing processes with the Avalara / Kantata E-invoicing connector to support the EN16931 directive for tax compliance.

KEY FEATURES

- 1. Pre-built Connector to Avalara** - designed to support all countries & networks
- 2. Simplified and automated compliance** - 12 European countries going live in 2026 including Belgium, Croatia, Poland, and France
- 3. Configurable mandates across Trading Entities** - support for specific data points and formats that vary by country, such as unique Scheme IDs, company identifier and Status



“E-invoicing has become a global mandate, not a local checkbox, and businesses need scalable technology to keep up,” **Meg Higgins**, SVP of Global Partners at Avalara

Live Poll

What stage are you in adopting e-Invoicing?

A My company has already adopted an E-Invoicing solution.

B My company is in the process of implementing an E-Invoicing solution.

C My company does not have an E-Invoicing solution, but we need one.

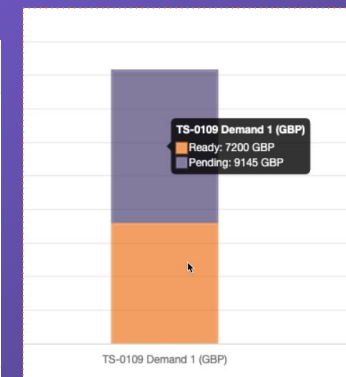
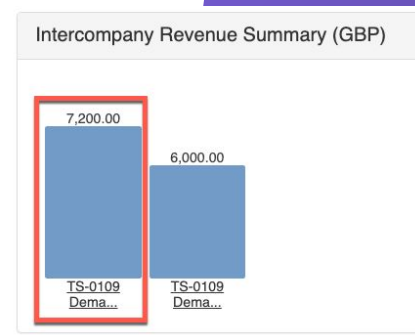
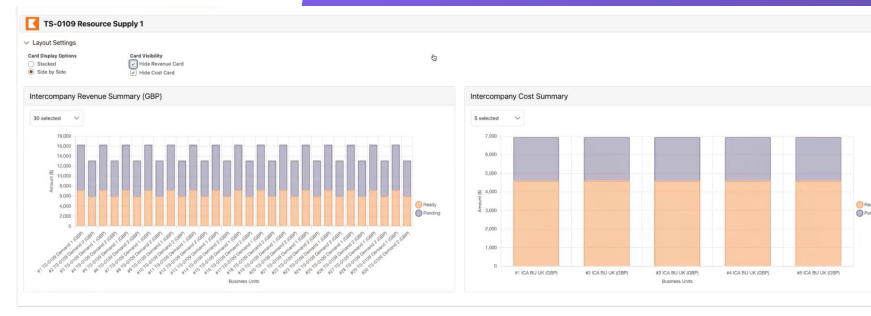
D This isn't a priority for us right now, but keep me informed on future updates.

Intercompany Governance & Guardrails

Adding insight and guardrails to improve data integrity and help finance teams manage internal invoice volume.

KEY FEATURES

1. **Simplified LWC workflow** to support volume and accommodate new 'PendingPeriodClose' process to improve internal billing governance.
2. **Temporal rate audit tracking** to show historical internal rates and when / why they have changed
3. **Guardrails** to ensure supporting config that drives creation of intercompany invoicing are programmatically managed and stop when no longer applicable
4. **Resource Group Actuals** - option to use *Individual's* internal revenue rate not *Group* rate when actualising usage

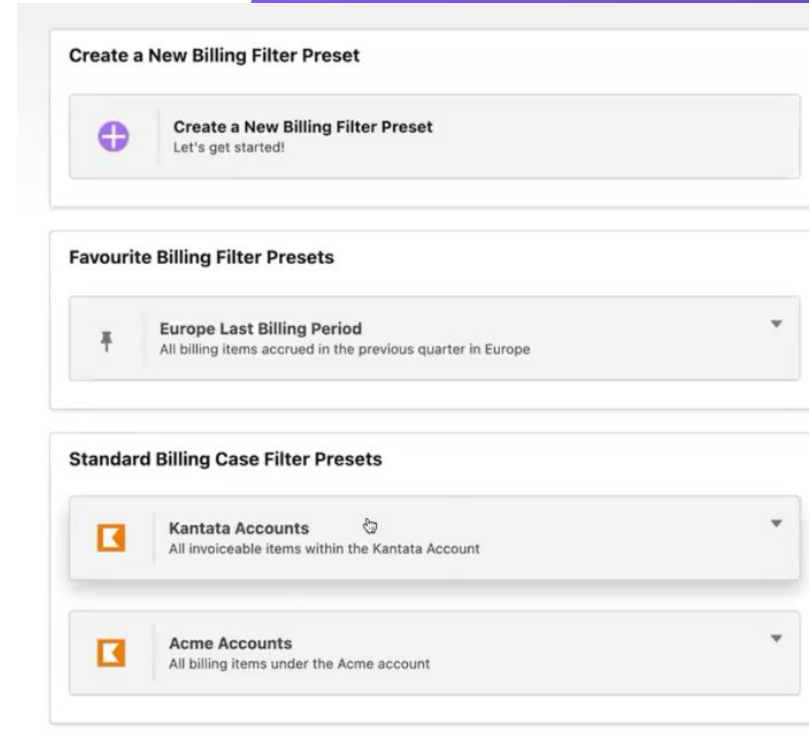


Invoicing - Automate and Scale

Increase invoice volume with reduced manual effort - support for finance teams to batch generate / dispatch invoices with reimagined billing engine

KEY FEATURES

1. **Simplified LWC workflow** and support for separation of Generate, Dispatch and Scheduled Dispatch.
2. **Speed and scale** - improved navigation and efficiencies in invoice generation to accelerate invoice dispatch and quicker payment.
3. **Configurable Billing Presets** filter, save and repeat with configurable billing presents to use again and again



Pulse - Custom Branding & Question Sets

Improved configurability for admins to control survey presentation, content and sender for tailored collaboration and higher response rates

KEY FEATURES

1. Customizable and reusable **question sets** within surveys that can be created for different project types or different events.
2. Customizable survey **branding** allows customers to add their own logo and 2 brand colors to the survey format.
3. **Control** over which email the surveys are sent from.

The image displays two screenshots from the Pulse survey configuration interface. The top screenshot shows the 'Themes and Branding Settings' panel, which is currently active. It includes a toggle switch for 'Active' and a descriptive paragraph about custom branding. Below this, there are two main sections: 'Brand Logo' and 'Brand Favicon'. The 'Brand Logo' section features the 'KANTATA' logo, a 'Primary brand color' dropdown set to '#5EDA41', and a 'Header color' dropdown set to '#1F1411'. The 'Brand Favicon' section shows a plant icon, a 'Secondary brand color' dropdown set to '#7070FE', and a 'Brand Name' field containing 'Kantata Pulse Custom'. The bottom screenshot shows the 'Edit Question Set' dialog. It has a 'Question Set Name' field with 'q test' entered. Below this is a text field for a descriptive name. The 'Type' dropdown is set to 'Project Start'. Two questions are visible: 'Question 1' with category 'Confidence' and text 'How confident are you in our team's ability to deliver the project on time and with...', and 'Question 2' with category 'Happiness' and text 'How excited are you to begin working on this project with our team?'. At the bottom right of the dialog are 'Close' and 'Save' buttons.

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Kantata SX **Planned**



Agent Orchestration

Supports recommendations and on platform actions.
Completes Resourcing tasks via APIs and generative AI.

KEY FEATURES

- 1. Chat based** - user led prompts e.g. build a CV, update these assignments, and recommendations e.g. find me a replacement resource
- 2. API Framework** - 'safe path' for agents and integrations to read and update SX data while enforcing business logic and respecting user permissions.
- 3. Makes it easy to action changes** - with in natural language without lots of clicks and navigation
- 4. Native to Salesforce** - context aware, not autonomous, supports bulk requests, business logic and guardrails

The image displays two screenshots from the KimbleOne + Core + Delivery system. The left screenshot shows a 'Delivery Engagement' overview for 'Horizon (E000258)' under the 'Unicredit' account. It features a 'Stage Summary' bar with a green 'Planning' segment and a dark blue 'Delivery' segment. Below this is a 'Timeline' starting on 02/06/2025. A 'Cost' summary shows a total of EUR 233,124.83, which is 63% above the baseline of EUR 143,045.48. Other metrics include Revenue (EUR 291,044.00, +5% over baseline), Margin Amount (EUR 57,9...), WIP (EUR 72,124.99), Usage (363.00 d, +45% over baseline), and Resourcing Sum (363.00 d). The right screenshot shows the 'Engagement Manager' interface. It lists resources with roles, start dates, forecast end dates, and utilization. A chat window is open with a user asking to switch Alejandro Rodriguez to another resource. The system provides several options: Kate Stephens (Principal, US), Madhu Sokolsky (Senior, US), Alan Crowley (Senior, UK), Bente Odegarde (Senior, UK), and Damien Croft (Senior, UK). The system also provides instructions on how to perform the switch: 1. Split Alejandro's current assignment on Friday, 13th March 2026. 2. Update the new assignment (starting on the 13th) to the resource you choose. A chat input field at the bottom says 'Chat with the agent here...'.

Invoicing: Scale, Surcharges, Ad hoc layouts

End to end redesign to move full invoicing workflow into LWC, extend feature set and improve navigation.

KEY FEATURES

1. **Separate "definition" and "presentation" grouping** - supports precise control for invoice scope and more accessible layout options
2. **'Surcharges'** - apply pricing changes at billing to to support recovery of regulatory and operational costs whilst maintaining rate transparency.
3. **Scale** - improved navigation and support for larger invoices

The screenshot displays the 'Draft the Invoice' step in the Invoicing Management system. It features a navigation bar with 'Step 1 Scope the Invoice' and 'Step 2 Draft the Invoice'. The main content area is divided into three sections:

- Invoicable Items:** A table listing items to be added to the invoice.

Invoicable Item	Currency	Net Amo...	Description	Allocation Status...
AI Consulting (E000...	GBP	#,###.##		Not selected
AI Agent Build (E0...	GBP	#,###.##		Not selected
Mike Black	GBP	#,###.##	Time - Mike Black, Analyst, from 01/01 to 31/01/2025, 50hrs at GBP 220 per hour	Not selected
Jan Green	GBP	#,###.##	Time - Jan Green, Engineer, from 01/01 to 31/01/2025, 50hrs at GBP 220 per hour	Not selected
Phil White	GBP	#,###.##	Time - Phil White, Lead, from 01/01 to 31/01/2025, 50hrs at GBP 220 per hour	Not selected
- Invoice Index:** A table listing draft invoices.

Invoice	Presentation Grouping	Invoice Date	Currency	Net Amo...	Tax	Gross A...	Invoice Status...
INV00005	Default Project Manager Inc...	dd/mm/yyyy	GBP	#,###.##	#,###.##	#,###.##	Label
INV00004	Default Project Manager Inc...	dd/mm/yyyy	GBP	#,###.##	#,###.##	#,###.##	Outstanding Approval
INV00003	Services & Expenses Invoice...	dd/mm/yyyy	GBP	#,###.##	#,###.##	#,###.##	Approved
INV00002	Services & Expenses Invoice...	dd/mm/yyyy	GBP	#,###.##	#,###.##	#,###.##	Outstanding
INV00001	Shared Time & Expenses wt...	dd/mm/yyyy	GBP	#,###.##	#,###.##	#,###.##	Outstanding
- PO Allocation & Credit Allocation:** A summary section showing POs for selected items. It includes a bar chart and a legend for 'Invoiced', 'Credited', and 'Not Invoiced'.

Figma Prototype Design Only

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Targeted (1.45+)

Driving value and innovation across key pillars

COMMITTED

PLANNED

TARGETED



Usability & AI

ICA Period Close Billing Governance

Simplified LWC workflow to support volume and accommodate new 'PendingPeriodClose' process to improve internal billing governance.

Agents & APIs

An AI-powered chat experience for Resourcing & Delivery agents, enabling end users to take action and access insights faster—streamlining daily operations.

Resource Pools

Groups with ring fenced capacity from named resources to more easily tracked supply vs demand for shared 'pools' of resources. Suited to internal teams like Managed Services and Shared Services



Enterprise Operations

Pulse: Branding & Question Sets

Customisable survey branding lets customers apply their logo and brand colours, while reusable question sets enable consistent surveys tailored to different project types or events.

ICA Extended Use Cases

Support for invoiceable internal revenue adjustments, configurable payment currencies & more than 1 interco rule on a parent / child element.

Invoice Presentation

Configurable support for a 'presentation grouping' and a 'definition grouping' where the definition of invoice scope is separate from the final presentation.



Automation & Scale

ELR - extended status support

Updates to ELR to ensure delayed rejections and unresponsive validations are supported and user guidance to self serve issues improved.

Scaled up billing

Speed up the creation, approval and dispatch of sales invoices including billing 'presets' to enable accelerated invoice dispatch and quicker payment.

Surcharges

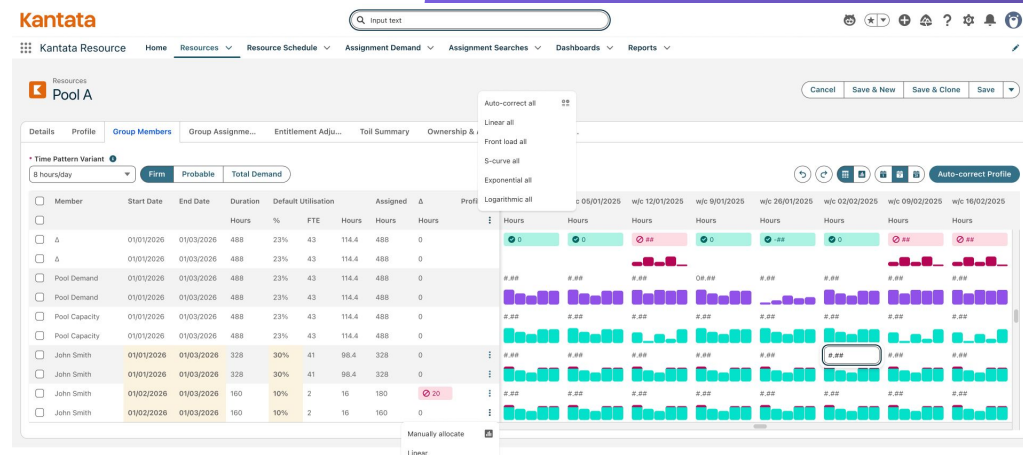
Configurable surcharge support that allows organisations to recover regulatory and operational costs transparently.

Resource 'Pools' and Planners

Enhance pool based resourcing where ring fenced teams constitute supply and demand - to improve capacity planning and resourcing across shared resources

KEY FEATURES

1. Centralised resource planners dedicated to comparing pool capacity vs demand
2. FTE based capacity - measuring forecast usage across time patterns
3. Reworked planners to - on the fly editing to help with centralised pool management



Figma Prototype Design Only

Kantata

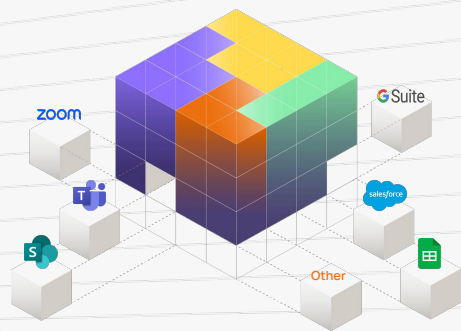
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Kantata SX **Expertise Engine**

GAME CHANGER

Kantata Expertise Engine™

AI that Unlocks the Power of Your Expertise



Integrates Information

Combines structured and unstructured data from core data sources



Unlocks Your Expertise

Mines your data, captures your expertise & continuously learns



Real-Time Activation

Surfaces your expertise just in time when your team needs it the most

Live Poll

Which of the following best describes how AI is currently being used within your organization?

- A** We are mostly researching tools or using AI individually for basic tasks like writing emails.
- B** We have one or two specific pilot projects or "Proof of Concepts" running in a single department.
- C** AI is integrated into some of our daily workflows, and we are focusing on building the right data infrastructure to scale it.
- D** AI is a core part of our business strategy and is used across multiple departments to drive major decisions.

Expertise Engine Capabilities Roadmap

Kantata SX

H1
2026

Native Agents

Empower teams to make faster resourcing decisions, build CVs in seconds, and automate parts of project delivery.

Enhanced Agents

Take full advantage of the Expertise Engine's learning and reasoning capabilities. They understand critical business context to provide deeper insights and manage full end-to-end workflows.

H2
2026

Custom Solutions & Accelerators

API and MCP access to the Expertise Engine enables new fully agentic solutions. These solutions can be developed either on the Kantata platform or integrated with your existing AI infrastructure.



Expertise Engine

Enhanced Agents

Next-generation agents are deeply integrated within Kantata, allowing them to **uncover hidden insights** and **dramatically increase team efficiency**. By utilizing the Expertise Engine, these agents gain rich business context and the complete automation of tasks both inside and outside of Kantata.

Project Health

Eliminate unpredictable projects
by moving from subjective health logging to automated, data-driven health benchmarking.

- Expertise Engine correlates "hard" PSA metrics with "inferred status" mined from Pulse surveys, emails, and meeting transcripts.
- Agents gain context on project health, allowing PMs to auto-generate RAID reports and leadership to have visibility into a "second opinion".

Resource Scenarios

Always assemble the right team
by instantly resolving staffing conflicts and optimizing resource value.

- Expertise Engine learns from historical data to identify teams proven to excel together, matching resources based on skills, experience, and historical fit.
- Accelerates deal closure with immediate staffing options while proactively identifying capacity gaps and suggested upskilling paths.



Expertise Engine

Custom Solutions & Accelerators

The Expertise Engine offers capabilities that go beyond simple point-solution agents. It allows users to leverage Kantata's complete, end-to-end turnkey solutions, customize agentic experiences directly within the app, or easily integrate existing AI infrastructure to meet specific needs.

Accelerators

Turnkey AI solutions built on Kantata's industry expertise

Sales

Delivery

Resourcing

Finance

Agent Studio

Easily build and tune bespoke agents within Kantata SX



Configure agent behavior

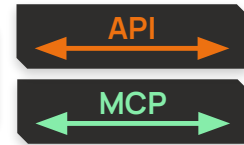
Manage guardrails

Monitor usage

Fine tune instructions

Seamless AI Integration

Power your existing AI architecture by connecting Kantata



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Reminders

Architecture

- Kantata SX (KimbleOne) is the main package which all other packages are dependent on
- Easier to maintain independent releases
- Ensures quicker time to value
- Reduces org storage where packages are not required

1st Gen Package Namespace

Kantata SX
KimbleOne

Kantata Sense
KimbleAgent

Kantata ClearSight
KimbleAnalytics

Kantata Collaboration Hub
KimbleOneC

Kantata Avalara
KimbleAvalara

Kantata Intacct
KimbleIntacct

2nd Gen Package Namespace

Kantata Pulse

Kantata Delivery

Kantata Core

Kantata Enterprise Billing
Kantata EB

Kantata E-invoicing

Kantata AI

Kantata CPQ Automation Layer
Kantata CPQ

KantataSX

Multiple Services Options to Help You

→ Contact your CSM for more information

Kantata Professional Services

Partner with Kantata experts to implement best practices and drive results



Trusted Delivery Partners



Headquarters:
Eschborn, Germany
Website:
www.entero.de



Headquarters:
Twickenham, UK
Website:
www.felberconsulting.com



Headquarters:
Andwell, UK
Website:
www.iqlink.co.uk



Headquarters:
New Hampshire, US
Website:
www.solvit.io

See more at: kantata.com/partners

2026 Training Roadmap

Go-Live: Full system access scheduled for Q2 2026.



We are evolving the **Kantata Training Centre** into the **Kantata Academy**. This investment in our education infrastructure better aligns our content with your specific business goals, ensuring your team has the expertise to drive real results.



Precision Learning

Micro-Learning Framework

Moving from "marathon sessions" to high-impact, searchable content consumed in the flow of work.



Persona-Driven

Curated Collections

Smart, "Netflix-style" recommendations tailored specifically to your unique professional profile and goals.



Choose Your Own Adventure

On-demand & Self-service

You're in the driver's seat. Learn what you want, when you want.



Full Visibility

Progress Tracker

Real time easy to read reporting to track your team's progress.

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Q&A

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Thank You