

Kantata OX  
**Strategic Vision &  
Roadmap**

March 2026



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**Brett Norris**

Director, Product Management, OX Product Lead



**Martin Beil**

Director, Product Marketing

# Today's Agenda

**1. Product Strategy and Vision**

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**2. OX Core Recent Releases & Roadmap**

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**3. Expertise Engine Roadmap**

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**4. Q&A**

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**Kantata**

Always deliver amazing

Kantata OX

# 2026 Product Strategy & Vision

# Our Product Commitment

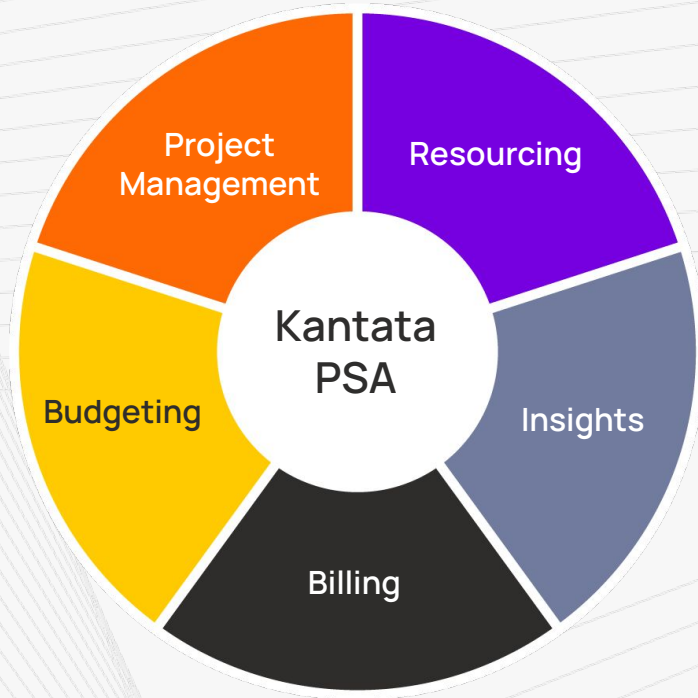
We are committed to building solutions, not just features.

- 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

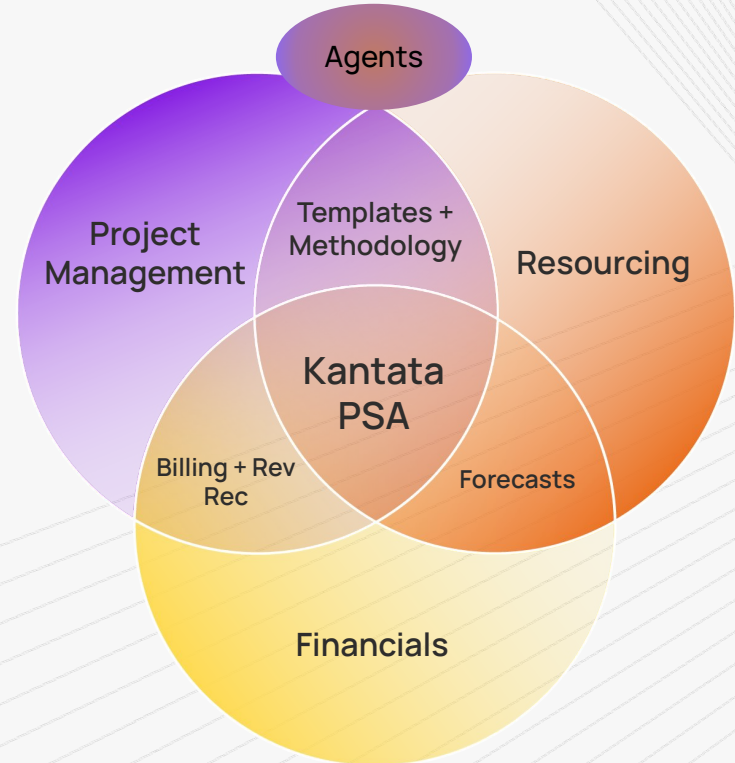
We're in this for the long game and everything we build will reflect that

# 2025 Product Investment

Start of 2025



Today



2026 and Beyond

# Kantata OX powered by Expertise Engine

## Core Capabilities

Strengthen our foundational experience

Project Financials

Resource Management

Project Management

Platform

## Next Generation AI Features

Supercharged by Expertise Engine

Insights

Agents

Automations

Integrations

 **Kantata Expertise Engine**

Proactively manage unpredictable projects by amplifying your firm's institutional knowledge



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## Kantata OX Recent Releases & Roadmap

# Core Capabilities

# Live Poll

## STATEMENT

“Kantata’s recent releases are effectively addressing my organization’s most critical business challenges.”

**A** Yes, we’re actively using them and seeing value

**B** We see the value, adoption in progress

**C** Capabilities don’t fully address our needs

**D** Not sure what we should be adopting

# Kantata OX Development Stages & Communication

## In Discovery

### Scope being defined

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We are actively exploring this area to understand the problem, validate the approach, and define what we might build. Your input matters here.

*\*No known date*

## Planned

### Scoped and on the roadmap

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Requirements are defined. Not yet in active build.

**Still can be deprioritized or removed**

*\*Target dates will be communicated once dev begins*

## In Development

### Actively being built

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Engineering is actively working on this. It is scoped, funded, and on its way.

**Able to communicate quarterly target dates** for beta, early access, or GA

*\*Timelines can still be subject to change*

## Delivered

### Shipped and available

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This capability has been released and is available in your Kantata account today.

Leverage your CS rep for adoption help where applicable

✓ Delivered

### Feature Highlights

Release Name	Date
API performance & reliability	Dec '25
Resource Center performance improvements	Nov '25
Redesigned API documentation	Feb '26

[View more releases →](#)

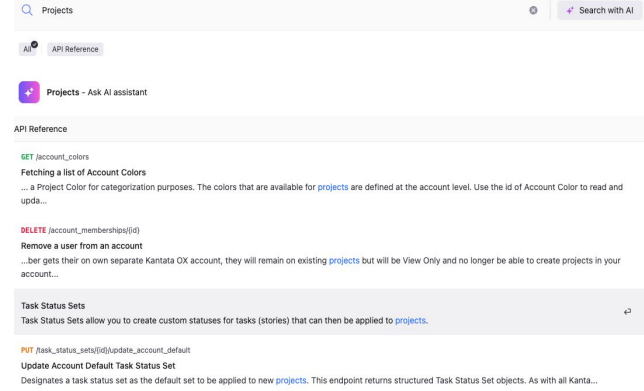
## Platform: Engineered for Performance & Reliability

*We invested in a high-performance foundation to ensure Kantata remains fast, reliable, and easily extensible as your organization scales.*

**Optimized System Performance:** Significant speed improvements to the Resource Center and API responses to handle complex, large-scale datasets with ease.

**Enterprise-Grade Reliability:** Enhanced platform stability and predictable performance under heavy loads to support your most critical global operations.

**Modernized Developer Experience:** A redesigned API documentation portal that simplifies building custom integrations and accelerates technical time-to-value.



### Planned

**Enhanced Audit History:** Extend audit history into Account Settings and Access Groups for a complete record of all administrative changes.

### In Discovery

**Enterprise Sandbox:** Explore dedicated environments to test new features, workflows and integrations with zero risk to production data.

**Business Unit Management:** Business Unit hierarchy that allows for independent operations within a single, unified account.

✓ Delivered

### Feature Highlights

Release Name	Date
Project Status Filter in Global Boards	Aug '25
Tags Filter in Global Boards	Jul '25
Timesheet Self-Approval Controls	Aug '25
Per- Project Time approval Configuration	Jan '26
Designated Time Approver Permissions	Feb '26

[View more releases →](#)

### Project Management: Precision and Flexibility

*We moved beyond one-size-fits-all project management by delivering targeted tools that adapt to your specific operational needs and delivery style.*

**Tailored Task Statuses:** Create color-coded Custom Task Status Sets to align the platform with your unique delivery methods.

**Enhanced Boards Visibility:** Leverage new status and tag filters in Global Boards to instantly isolate critical data across your entire portfolio.

**Granular Time Approval Governance:** Gain total control over time tracking with per-project approval settings and designated approver permissions.

Bottom Line: Provide your teams with a more personalized workspace while maintaining strict operational control.

**Time Approvals**  
Control who can approve timesheets.

Can approve their own submissions

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**Designated Time Approvers**  
Choose which project participants are automatically added as designated time approvers on projects.

Project Administrators  
 Edit Financials  
 Edit Financials and Provider Lead  
 View Financials  
 View Financials and Provider Lead

Default Manager Approval for New Projects  
This setting controls whether manager approval is required.

Prevent Manager Approval ▼

Gain precise visibility control of tasks for a seamless experience between clients and internal teams.

### Private Tasks

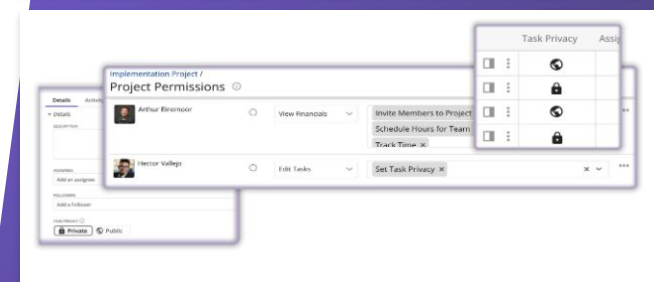
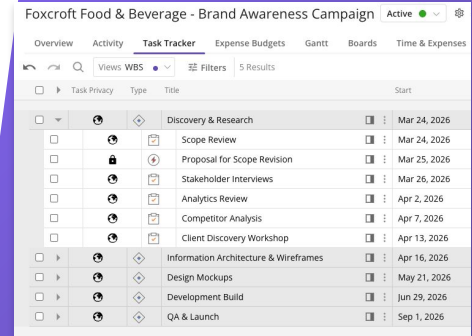


In Development

Targeted Release  
Q2 2026

- **Reduce Client Visibility:** Mark specific tasks, risks, or decisions as private to hide them from external project participants.
- **Internal Collaboration Safeguards:** Manage sensitive internal discussions and project health items in the same tracker without exposing them to the client.
- **Streamlined Execution:** Maintain a single source of truth for your project while controlling exactly when and what you share with your stakeholders.

Interested in Early Access? Reach out to your Customer Success Manager and we will do our best to accommodate.



✓ Delivered

### Feature Highlights

Release Name	Date
Out of Office Visibility	Feb '25
Visual Enhancements	Jul '25
New Resource Center Launched	Oct '25
Project Custom Fields in Resource Center	Oct '25
Shared Saved Views	Nov '25

[View more releases →](#)

## Resource Management: Reimagined for Scale & Flexibility

*We rebuilt the resource management experience to better fit your unique workflows, moving from a rigid tool to a configurable powerhouse.*

**High-Performance Experience:** A rebuilt Resource Center with visual updates designed to handle large-scale staffing with maximum speed and efficiency.

**More Configurable Columns:** Tailor your view with more options to the configurable columns to see the exact data that matters most to your unique process.

**Shareable Saved Views:** Share saved views to ensure consistent visibility across your entire team.

Spend less time navigating the tool and more time making the right call on the right resource.

The screenshot displays the 'Team Members' view in the Kantata OX Resource Management tool. It features a grid layout with columns for Team Member, Role, Skills, Job Code, and project assignments. The interface includes filters for 'Views' (Everything, All, Unnamed, Named) and 'Project Status' (3 Team Members). The main grid shows team members like Alex Trubel, Alexandros Jirina, and Allen Stark, along with their roles (Systems Architect, Product Designer) and project assignments (Alphabet Soup, ACME Digital...). Project assignments are visualized with colored bars and progress indicators (e.g., 100%, 172%, 128%). A calendar view on the right shows availability for May 18-24 and May 25-31, with a 'Holiday: Memorial Day' notification.

### Model staffing scenarios and evaluate candidates for strategic, portfolio-wide resource optimization.

#### Staffing Candidates In Discovery

- **Compare Before You Commit:** Assign multiple candidates to a single demand to evaluate the best fit before finalizing an assignment.
- **Multi-Factor Analysis:** Simultaneously analyze skills, availability, and cost across several options to ensure optimal placement.
- **Structured Evaluation:** Replace informal "one-off" staffing with a repeatable process for identifying the highest-value resource for any role.

#### Scenario Planning In Discovery

- **Side-by-Side Modeling:** Build and compare competing staffing plans to visualize how different decisions impact your portfolio.
- **Portfolio Ripple Effects:** Identify how a single staffing change affects other projects, preventing downstream conflicts before they happen.
- **Optimization-First Strategy:** Move beyond "first-available" staffing to select the path that maximizes utilization and project margin.

Team Member

Search by Name or Role

Recommended Resources

	Terry Hoffman Principal Software Engineer	9	100%	
	Kaylin Lewis Senior Software Engineer	8	85%	
	London Graham Software Engineer	5	70%	
	Dallas Campbell Senior Software Engineer	3	40%	
	Kerry Jordan Software Engineer	9	80%	
	Kaylin Lewis Senior Software Engineer	9	85%	

Approve Reject Cancel

Details Approver Activity Skills Custom Fields

▼ Details

Team Member

Search by Name or Role

Candidates

	Terry Hoffman Principal Software Engineer	9	100%	<span>Staff</span>	
	Kaylin Lewis Senior Software Engineer	8	90%	<span>Staff</span>	
	London Graham Software Engineer	8	90%	<span>Staff</span>	
	Dallas Campbell Senior Software Engineer	7	75%	<span>Staff</span>	

✓ Delivered

### Feature Highlights

Release Name	Date
Expense Budgets in Templates	Jan '25
Billing Schedule	Apr '25
Project Financials: Fees per Month	May '25
Revenue Management	Sep '25
Billing Types for Milestones	Feb '26
Multiple Currencies in Financials	Feb '26

[View more releases →](#)

### Project Financials: Unified Project Delivery and Financial Oversight

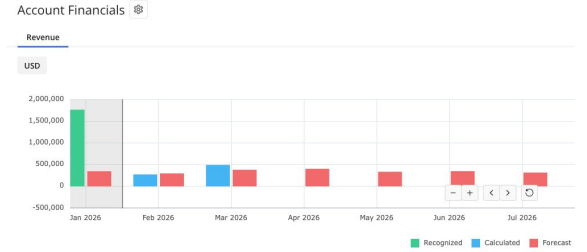
*We unified project delivery and financial oversight, replacing manual spreadsheets with real-time revenue and billing intelligence.*

**Native Revenue and Billing:** Centralized revenue recognition and billing schedules within a project to eliminate manual month-end reconciliation.

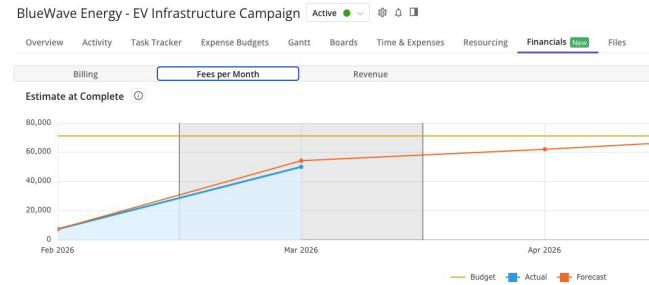
**Financial Insights:** Real-time visibility into financial forecasts vs. actuals to monitor project health against in real time.

**Unified Global Portfolios:** Streamline international operations with multi-currency support and standardized expense budgeting within project templates.

**Bottom Line:** Move from reactive accounting to proactive financial health for every project in your portfolio.



Project	Status	Revenue
The We Are the World P...	Approved	\$9,600.00
The Old Town Road Mer...	Approved	\$9,379.69



## The foundation is set—our next phase delivers the control and flexibility needed for complex financial operations.

 **In Development** Targeted Release **Q2 2026**

**Agile Period Management:** Reopen closed periods for critical corrections and track deadlines via automated status notifications.

**Revenue Auditing:** Ensure total accountability and compliance with a transparent audit trail for every financial adjustment.

 **Planned** Targeted Release **H2 2026**

**Multi-Model Billing:** Support a broader range of client engagements with native Time & Materials and Retainer-based billing.

**Portfolio Billing Governance:** Centralized billing activity across all projects with a "ready-to-invoice" checklist to prevent missed revenue.

**Advanced Revenue Recognition:** Match any accounting standard with customizable recognition methods, including straight-line and T&M.

October 2025 << >> ✕

📁 Expense Budgets 2025 ⬇

**Reopen** ↻

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Status Approved

Calc. Revenue \$102,500.00

Revenue \$100,000.00

### Financials

Control which financial notifications you receive and where.

Notification	Email	In-App	Slack
Invoice Billing Milestones Reminder	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Period Close Reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Submit Revenue Reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Approve Revenue Reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Project Revenue Submitted	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Project Revenue Approved	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Project Revenue Rejected	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

[Update Settings](#)

# Live Poll

What parts of the core product are you most interested in exploring next? (multi select)

**A** Private Tasks

**B** Revenue Recognition

**C** Billing

**D** Resource Management (Candidates + Scenarios)

**E** Enterprise Sandbox

**F** Business Units

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## Kantata OX Roadmap

# Expertise Engine

✓ Delivered

### Feature Highlights

Release Name	Date
AI Settings & Access Group Permissions	Apr '25
Project Agent	Apr '25
Status Report Agent	Apr '25
Kantata Connect Recipe Catalog	Jun '25
Resourcing Agent	Aug '25

[View more releases →](#)

## AI & Integrations: Intelligent Automation for Efficiency

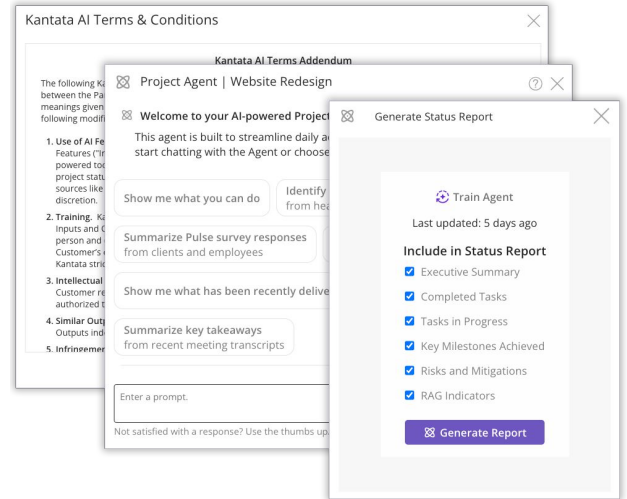
*We introduced our first generation of AI Agents and pre-built connectors to transform manual administration into automated, high-value execution.*

**Agentic Project Management:** Use natural language to automate task creation and updates, reducing daily administrative overhead.

**Automated Client Reporting:** Generate comprehensive, data-driven status reports in a single click to eliminate manual compilation.

**Intelligent Resource Optimization:** Identify hidden staffing risks and execute bulk actions to maintain high utilization.

**Connect Recipe Catalog:** Access 15+ pre-built automation workflows to instantly sync Kantata with your business tech stack.



# 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.

# 2026 Product Strategy: Expertise Engine

By continuously learning from every decision your firm makes, the Kantata Expertise Engine amplifies your institutional knowledge into a powerful AI platform designed to **eliminate unpredictability** and empower your professional services team to **scale exponentially**.

## Kantata OX powered by Expertise Engine



Insights



Agents



Integrations & Automations



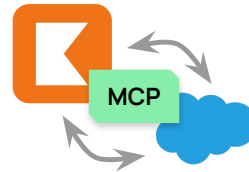
Next generation upgrades of core Kantata capabilities are transformed by Expertise Engine to help **uncover hidden insights** and **make teams radically more efficient**.

## Expertise Engine Accelerators



New end-to-end solutions unlock the full power of Expertise Engine and are designed around solving key business challenges.

## Expertise Engine Custom Solutions

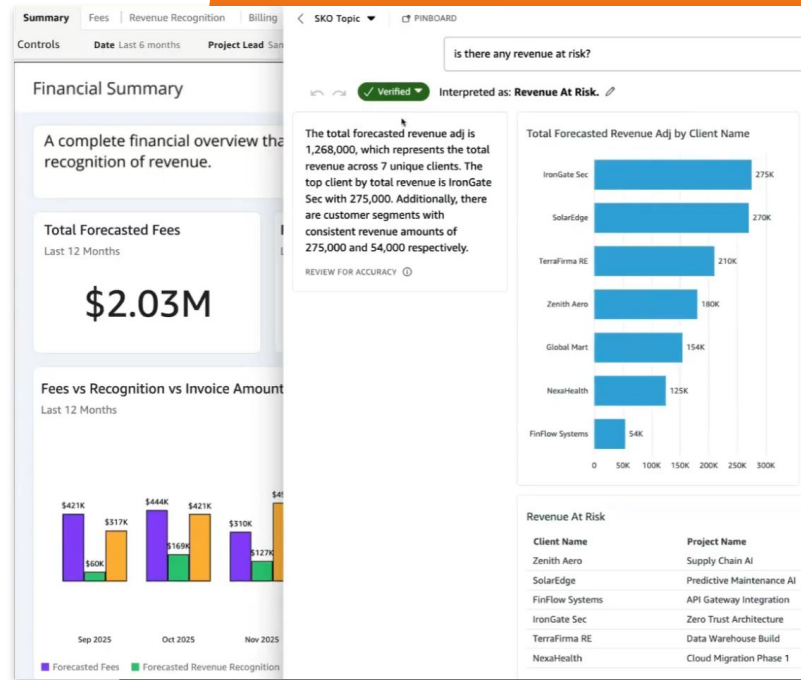


Solve any challenge by integrating with your existing AI stack, or by building directly on the Kantata platform.

Kantata’s next-generation BI solution allows you to query data and build reports in seconds using natural language. Expertise Engine unlocks deeper AI analysis by predicting and explaining trends, offering sophisticated scenario planning that lets you forecast with confidence.

### KEY FEATURES

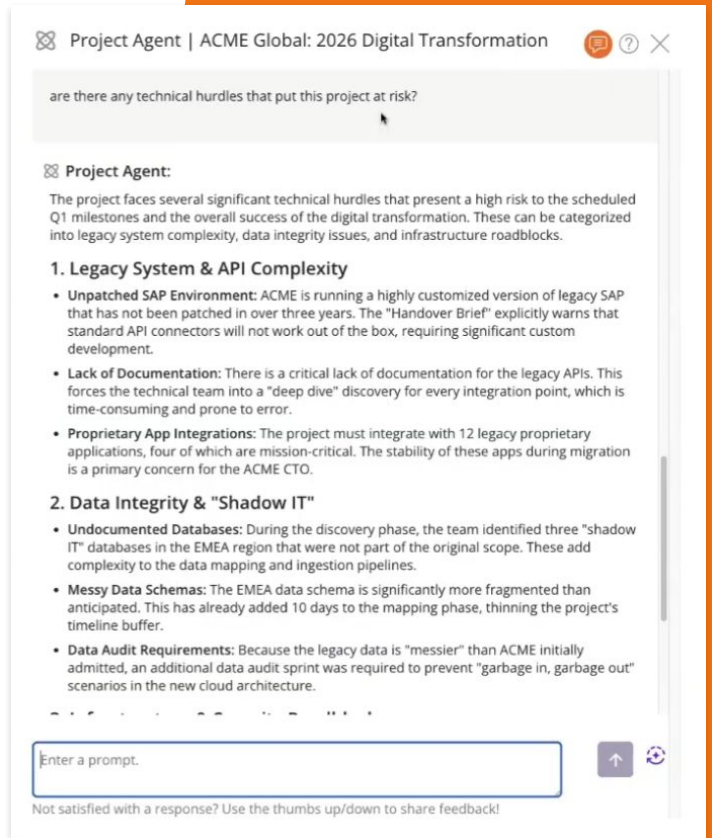
- 1. Conversational Querying:** Build powerful reports or answer questions about data in seconds using natural language, making critical insights accessible to non-technical users.
- 2. Advanced AI Analysis:** Replace manual spreadsheet analysis with AI-driven scenario planning and “Data Stories” that automatically surface hidden trends and risks.
- 3. Enterprise-Grade Performance:** A more powerful BI foundation featuring better performance at scale, deeper configuration, and robust permissions.



Powerful new agentic capabilities with a huge increase in response quality and performance. This next evolution in agent architecture is fully capable of fulfilling end-to-end automations and is accessible from anywhere within Kantata.

### KEY FEATURES

- Improved Performance & Reliability:** Significant upgrades to speed, accuracy, and reliability over previous agents to ensure enterprise-grade consistency.
- Customize with Agent Studio:** Create powerful agents that "speak the language" of your business and fine tune to perform critical tasks throughout Kantata.
- Powerful Automation:** Agents can now trigger workflows and other interactions directly, reducing manual effort and freeing up your team to focus on the client relationship and other strategic tasks.



The screenshot shows a chat window titled "Project Agent | ACME Global: 2026 Digital Transformation". The user's question is "are there any technical hurdles that put this project at risk?". The agent's response is structured as follows:

**Project Agent:**  
The project faces several significant technical hurdles that present a high risk to the scheduled Q1 milestones and the overall success of the digital transformation. These can be categorized into legacy system complexity, data integrity issues, and infrastructure roadblocks.

**1. Legacy System & API Complexity**

- Unpatched SAP Environment:** ACME is running a highly customized version of legacy SAP that has not been patched in over three years. The "Handover Brief" explicitly warns that standard API connectors will not work out of the box, requiring significant custom development.
- Lack of Documentation:** There is a critical lack of documentation for the legacy APIs. This forces the technical team into a "deep dive" discovery for every integration point, which is time-consuming and prone to error.
- Proprietary App Integrations:** The project must integrate with 12 legacy proprietary applications, four of which are mission-critical. The stability of these apps during migration is a primary concern for the ACME CTO.

**2. Data Integrity & "Shadow IT"**

- Undocumented Databases:** During the discovery phase, the team identified three "shadow IT" databases in the EMEA region that were not part of the original scope. These add complexity to the data mapping and ingestion pipelines.
- Messy Data Schemas:** The EMEA data schema is significantly more fragmented than anticipated. This has already added 10 days to the mapping phase, thinning the project's timeline buffer.
- Data Audit Requirements:** Because the legacy data is "messier" than ACME initially admitted, an additional data audit sprint was required to prevent "garbage in, garbage out" scenarios in the new cloud architecture.

At the bottom of the chat window, there is a text input field with the placeholder "Enter a prompt.", a thumbs up/down feedback icon, and a refresh icon. Below the input field, it says "Not satisfied with a response? Use the thumbs up/down to share feedback!"

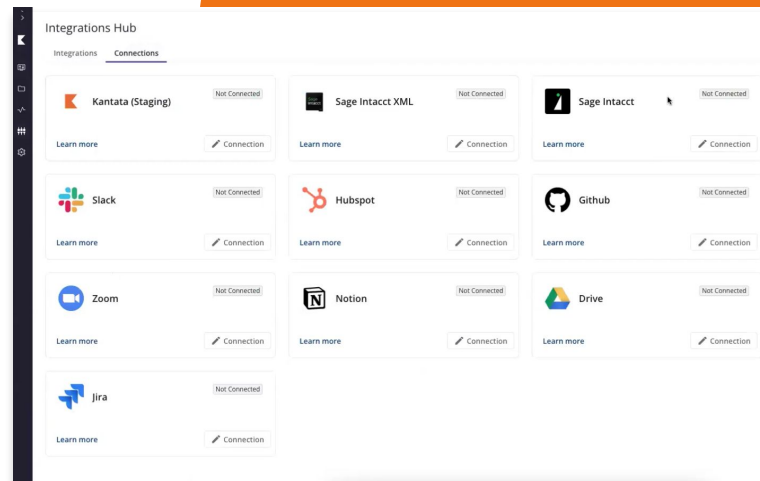
# Expertise Engine Integrations & Automation

Expertise Engine supercharges workflows by seamlessly connecting your critical business systems. By bringing in essential external context, it informs more accurate insights across Kantata and unlocks powerful automations that eliminate manual, time-consuming processes.

## KEY FEATURES

- 1. Automation Catalog:** Accelerate your operations with a library of pre-built automations designed by Kantata, or build advanced custom workflows tailored to your specific business needs.
- 2. Powerful Connectors:** Seamlessly sync tools like Zoom, Teams, SharePoint, and Email. These sources provide deep context for precise AI predictions and automated actions.
- 3. Beyond Integrations:** Use new dashboards to monitor KPIs, set conditional rules, and utilize multi-level approvals and notification logic to extend the reach of your workflows.

 In Development



## Automations

Basic Automations **Events**

Set Rate Card from Discount Custom Field

Inactive

Match Cost Rate to Account Role

Inactive

Map Custom Workweek to User via Custom Field

Inactive



Expertise Engine

# Accelerators

In Discovery

Leverage the full potential of Expertise Engine to address critical business challenges through new end-to-end, plug-and-play solutions, amplified by your firm's unique expertise.



## Sales Accelerator

Boost win rate and sell smarter deals by turning delivery data into sales intelligence.



## Forecast Accelerator

Drive financial certainty by protecting margins and predicting future performance.



## Delivery Accelerator

Ensure project health and timeline with predictive risk alerts and automated workflows for the delivery team.



## Resourcing Accelerator

Shorten time-to-staff and maximize utilization through intelligent talent matching and staff optimization.



Expertise Engine

# Custom Solutions

Leverage Expertise Engine's powerful, modular architecture to address diverse business challenges. Expertise Engine components work together to drive robust automation, generate critical insights, and boost collaboration and productivity across people and agents.

## 1 Build on Kantata

Build custom solutions with Expertise Engine within Kantata to unlock fully automated workflows, enforce validation, or help users automate elements of project delivery; all fine-tuned by your business. Leverage your own in-house experts or partner with Kantata's professional services team for added flexibility.

## 2 Integrate with Other AI Architectures

Supercharge your existing AI infrastructure by integrating Expertise Engine components. Use Expertise Engine's MCP to kick off external workflows or help inform powerful AI-powered insights with other external solutions.

In Discovery

 Knowledge Ingestion

 Generative BI

 Agentic Architecture


 Context Graph

 Embedded Workflow

 Conversational Intelligence

 Agent Ecosystem

 Integrated Task Management

 Smart KPI & Scorecards

 Ecosystem Integration



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## Quick Reminders & Final Poll

# 2026 Training Roadmap

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



We are evolving the **Kantata Training Center** 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

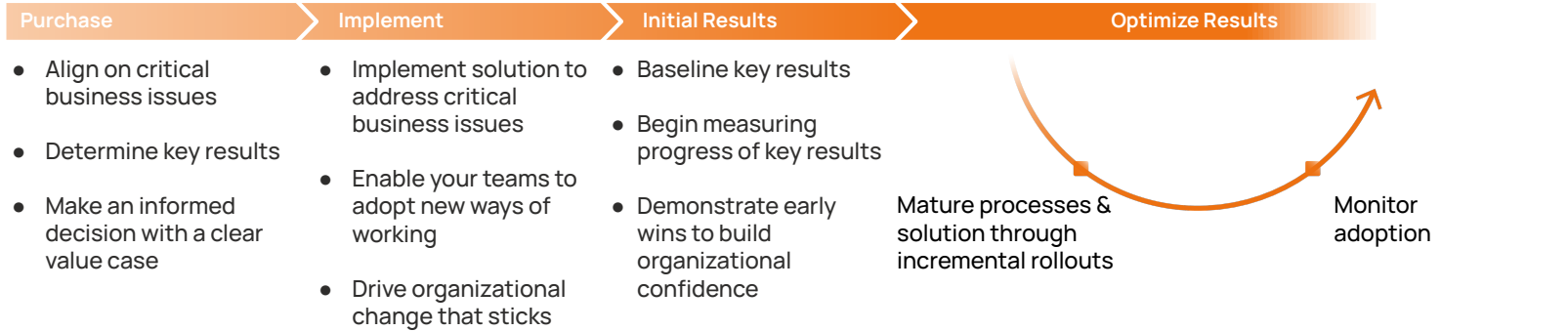
### Progress Tracker

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

# The Kantata Customer Journey

Partner with us to maximize your business results

## Customer Journey



Optimization is a journey that continually evolves alongside our product and your business.

# Live Poll

## STATEMENT

“Based on what I’ve seen today, I’m confident in Kantata’s product strategy and how it will drive value for my organization.”

**A** Yes, I trust the direction and know how to move forward

**B** The direction makes sense, but still have some questions

**C** I’ll have a better perspective once the new features are delivered and I can start testing them

**D** I don’t yet see how your product strategy applies to our organization.

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# Q&A

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# Thank You