

# Kantata SX 1.45

## Deepening Finance and Launching the Expertise Engine

# Meet the Team



**Tori Ballantine**

**Snr Product Marketing  
Manager**

Defines messaging and GTM strategy. Joined Kantata in 2025.



**Kate Oliver**

**Snr Product Manager**

Leads Finance area of SX. 8-year tenure with deep technical roots.



**Lucy Butterson**

**VP, Product Management**

20+ years in Professional Services. Leads the SX Product team.



**Chris Newland**

**Product Manager**

9 years at Kantata. Former Content Design lead.

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# Agenda

**01** Product Strategy and Investment

**02** 1.45 Release Features

**03** Expertise Engine Roadmap Update (GA Availability dates)

**04** Upgrade Approach

# 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 Product Investment Areas



## Finance

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



## Expertise Engine

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



## Platform

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



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## 1.45 Release Highlights

# Config options

## 0. Upgrade

Automatic enhancements active upon upgrade. Generally usability improvements that simplify existing features.



## 1. Settings

Documentation provided for setup:

- Reference Data tab
- Salesforce Object Manager



## 2. Admin

Raise a case for Customer Success guidance through analysis, design, and testing.



## 3. Config

Advanced features requiring Service Delivery or Professional Services engagement.



# Kantata Finance

## Delivered Solutions

### Available now:

#### Enterprise Billing

Streamlined billing preparation for time entry eligibility for invoicing



#### Withheld Contingency

Optimized revenue management for outcome-based pricing models



#### E-invoicing

Compliant, automated electronic document exchange.



## Coming in 1.45

### Pending release:

#### Centralised Billing Engine

Engineered for high volume invoice generation.



#### ICA enhancements

Unified and expanded ICA workflows across BUs



## 2026 H2

### In development:

#### Invoice redesign

Reminaging invoice generation & support for large invoices



#### Pricing Transparency

Explicit surcharge visibility and margin protection



#### Invoice flexibility

Configurable presentation to speed up cash velocity



#### Further ICA enhancements

Expanded ICA features including payment currencies and invoiceable adjustments



Continuous investment in scale, compliance and user experience



# Centralized Billing Engine: Automate and Scale

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

Create a New Billing Filter Preset

Create a New Billing Filter Preset  
Let's get started!

Favourite Billing Filter Presets

Kantata Accounts

Standard Billing Case Filter Presets

UK BU - Monthly

Kantata Delivery Home Delivery Programs Delivery Engagements Dashboards Reports \* Kantata Accounts | Billing Filter Preset

Billing Filter Presets Kantata Accounts

Account	Engagement	From	To	Currency	Services	Expenses
<input type="checkbox"/> KSX Test Account	KSX102507	28/02/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX102700	31/03/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX102842	30/04/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX103039	31/03/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX103220	30/04/2026	30/04/2026	GBP	2,500.00	0.0
<input checked="" type="checkbox"/> KSX Test Account	KSX103348	31/01/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX103532	31/03/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX103701	28/02/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX103909	31/01/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX104053	30/04/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX104239	31/03/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX104440	31/01/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX104641	31/03/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX104812	31/03/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX104950	31/03/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX105140	30/04/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX105340	31/03/2026	30/04/2026	GBP	2,500.00	0.0
<input type="checkbox"/> KSX Test Account	KSX105535	31/03/2026	30/04/2026	GBP	2,500.00	0.0

Filters

- Standard Filters
- Custom Filters
- Settings
  - Generate Invoice Date: 22 May 2026
  - Generate Invoice Per Element:
  - Include Previously Failed Engagements:
  - Generate to Draft:

Apply Filters

Go to the Dispatch Queue Generate All Generate Invoices for Selected Items

“Generate All” invoices according to the filters added- *no 200 batch limit*

“Generate Invoices for Selected Items” to choose specific Engagements to generate invoices for

Billing Filter Presets Kantata Accounts

Account	Engagement	From	To	Currency	Services	Expenses
<input checked="" type="checkbox"/> KSX Test Account	KSX102507	28/02/2026	30/04/2026	GBP	2,500.00	0.0
<input checked="" type="checkbox"/> KSX Test Account	KSX102700	31/03/2026	30/04/2026	GBP	2,500.00	0.0
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Go to the Dispatch Queue Generate All Generate Invoices for Selected Items

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[Go to the Dispatch Queue](#) **Generate All** Generate Invoices for Selected Items

**Filters**

- > Standard Filters
- > Custom Filters
- ▼ Settings

**\* Generate Invoice Date**

22 May 2026

Generate Invoice Per

Include Previously F

Generate to Draft

**Apply Filters**



Schedule invoice generation using background processing

### Schedule Invoice Generation

Frequency: Monthly

Day of Month: 1

- 17
- 18
- 19
- 20
- 21
- 22
- 23
- 24
- 25
- 26
- 27
- 28

Last Day of the Month

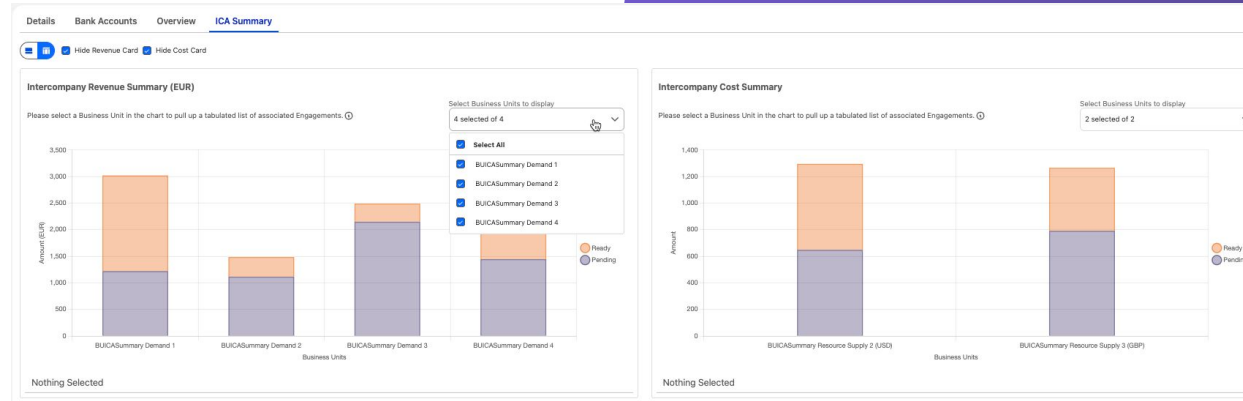
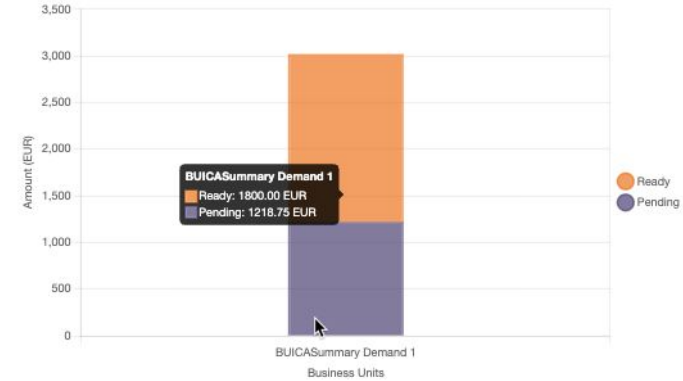
Run your billing cycles at a time that suits your global operations

# Intercompany Period Close



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

1. New 'PendingPeriodClose' - status to improve internal billing governance
  - a. Revenue sharing recalculates continuously, values are stable and ready for billing when periods are closed
2. Simplified LWC workflow to support volume and usability
3. Data filters and flexible page formats - for ease of navigation and invoice processing





# Intercompany Rate Governance

Guardrails to improve data integrity and visibility of rate history

## KEY FEATURES

1. **Temporal rate audit tracking** to show historical internal rates and when / why they have changed
2. **Guardrails** to ensure supporting config that drives creation of intercompany invoicing are programmatically managed and rates go to 0 when no longer applicable (e.g. background change to Supply:Demand mapping and intercompany applicability)
3. **Resource Group Actuals** - option to use *Individual's* internal revenue rate not *Group* rate when actualising usage

The screenshot displays the 'Intercompany Rates' configuration page. A table shows the 'Internal Rate USD' set to '66.35 Per Hour'. An 'Override Internal Rate' checkbox is present. A tooltip titled 'Internal Rate' is open, showing a calendar for February 2023. The tooltip lists two periods: 'From 01/03/2023' with an 'Internal Rate EUR 21.38', 'Forecast Internal Cost Rate GBP 18.27', and 'Supply Business Unit BUICASummary Resource Supply 1 Business Unit Internal BUICASummary Demand 3'; and 'From 01/04/2026' with an 'Internal Rate USD 66.35', 'Forecast Internal Cost Rate GBP 48.08', and 'Supply Business Unit BUICASummary Resource Supply 2 Business Unit Internal BUICASummary Demand 3'.

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## Pulse and Platform



# 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 address the surveys are sent from.

**Themes and Branding Settings** Active

Custom survey branding can allow better communication with client recipients, by making it more obvious who the surveys are coming from, instead of the Kantata default. You can set up a custom logo and accessible colour scheme to adopt in Pulse surveys else the default settings will apply. Alternatively, you can adopt it or apply the logo and color settings from Kantata SX Themes and Branding settings.

**Brand Logo**

KANTATA

Primary brand color ? #5EDA41

Header color ? #1F1411

**Brand Favicon**

Secondary brand color ? #7070FE

Brand Name ? Kantata Pulse Custom

**Edit Question Set**

\*Question Set Name

q test

Enter a descriptive and unique name to help Project Administrators select the correct question set in their projects.

\*Type

Project Start

**Question 1**

Category Happiness Confidence Collaboration

\*Choose a question from your Question Library

How confident are you in our team's ability to deliver the project on time and with...

**Question 2**

Category Happiness Confidence Collaboration

\*Choose a question from your Question Library

How excited are you to begin working on this project with our team?

Close Save



# Platform Guardrails & Diagnostics

Adding guardrails, diagnostics and scheduled Operations to mitigate recurring support issues and drive service efficiencies

## KEY FEATURES

- 1. Site Reliability Data Capture**  
Proactive Support & faster issue resolution, enabled by default
- 2. Process Context & Field History Tracking** - ability to track changes to the value of a record, and how those changes were made, across key Kantata SX Objects
- 3. Scheduled Operation Fix Activity Assignment Usage Pattern Actuals**  
Fix UsagePattern and Remaining Usage on an Assignment
- 4. Schedule Operation Cleanup Job**  
Resolve Orphaned PA records, enabled by default

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# Expertise Engine

## Update

# The Expertise Engine

Scaling through intelligence. An AI engine that transforms collective knowledge into automation and insights to enable **exponential growth** without headcount dependency. Making every Consultant and every Project your best.

# | 2026 / 2027 Highlights

**September (GA) 2026**

## **Agentic Orchestration**

Chat based interface - designed to automate tasks users do via the UI with 'safe path' of API framework for insight and updates.

APIs exposed via REST and invocable

**December 2026**

## **Unified Agentic Architecture**

Connect Headless and Conversational Agents via Flows, REST and MCP for end to end automation and accessible insight

**H1 2027**

## **Accelerators: Delivery First**

AI powered delivery excellence: updates to risk, sentiment, stakeholder analysis

Access expertise with methodology guidance and enhanced reasoning

**H1 2027**

## **Insights: Resourcing First**

Generative BI platform enables instant, natural-language answers and visualizations to your most critical business questions

# GA: September 2026: Agentic Orchestration Framework



## Expertise Agent

- Chat-based interface for Resourcing & Delivery.
- Completes tasks efficiently via APIs and provides insight and reasoning to help end users work.
- Built natively for high-efficiency bulk actions and services specific insight.



## API Framework

- The "Safe Path" for AI interaction
- Enforces identical business logic as the UI while validating enterprise permissions
- Ensure accuracy, and preserves business logic
- Exposed via REST & Salesforce Invocable



## Agent Studio

- Administrative control centre.
- Permissioned separately.
- Customers can fine-tune agent instructions tailor the specific ontology of your business context.
- Manage guardrails, and track adoption metrics and token usage

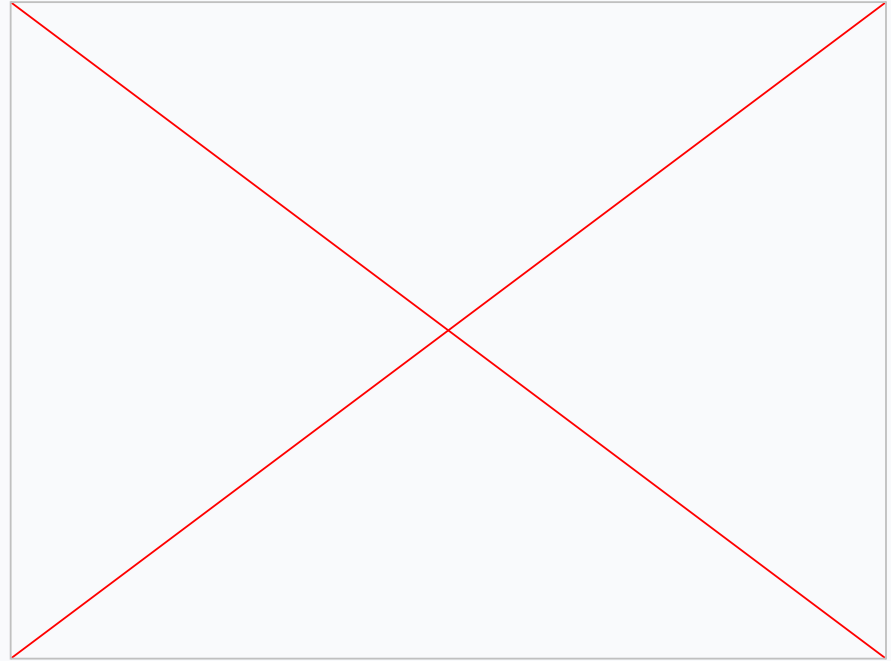
# | What's coming this year

## September 2026: Native Agents

Expertise Agent, Studio, and API  
Framework

Automate resourcing and delivery tasks  
like CV building, revenue and cost  
modelling, delivery and assignment  
updates

Beta



# | What's coming this year

## September 2026: Native Agents

Expertise Agent, Studio, and API  
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Automate resourcing and delivery tasks  
like CV building, revenue and cost  
modelling, delivery and assignment  
updates

Pilot

## H2 2026: Unified Agentic Enterprise

Headless and conversational agents  
for integration with wider data sources

Automate project set up with SOWs,  
update your risk register with inference  
from Zoom transcripts, and submit time  
via Slack.

# Persona based Accelerators

My accelerator helps me prioritize and complete my work, receive notifications, insights, recommendations and risks

- **Task-Oriented:** Designed to help each individual complete tasks efficiently and expertly
- **Dynamic:** Surfacing and aggregating content from multiple data sources seamlessly, breaking down standard data silos.
- **Curated Content:** Empowering consultants to actively curate and organize content as it is surfaced to them



# Delivery Accelerator

"An AI-powered system that captures how a firm delivers, makes that knowledge available to every team member, and gets smarter with every engagement."

- Understand all key metrics and projects at a single glance.
- Ideal methodology and precedents insight surfaces in context
- Delivery Managers drive each project to success with learnings from other projects, other data sources - efficiently, intuitively and profitably

The screenshot displays the Kantata Delivery Accelerator interface. At the top, there's a navigation bar with 'Kantata Delivery' and various menu items like 'Home', 'Delivery Progress', 'Delivery Engagements', 'Dashboards', 'Reports', and 'Delivery Portfolios'. A search bar is also present.

The main content area is titled 'Good morning Cheryl! You're new here. Welcome to your personalised Project Manager Console'. Below this, there's a section for 'Insights' with a search bar and filters. The insights are categorized into 'Autonomous', 'Risk', 'Sentiment', 'KPIs & Metrics', 'User Interventions', and 'Archived'. The 'Risk' category is selected, showing a 'Zoom Call' insight with details like 'Source Details', 'Summary', and 'Recommended Actions'. The 'Recommended Actions' section lists several tasks such as 'Capture the proposed Risk in your Risk Register and Issues Log' and 'Schedule an internal meeting to discuss next steps'.

Below the actions, there's a 'Proposed Risks' section with a table showing risk details:

Reference	Description	Category	Severity	Probability	Impact	Responsible Party	Date
R000043	Zoom Call - Phase I Issues	Commercial	Critical	High	High	Aaron Black	11th May 2026

At the bottom of the insights section, there are buttons for 'Archive' and 'Resolve'.

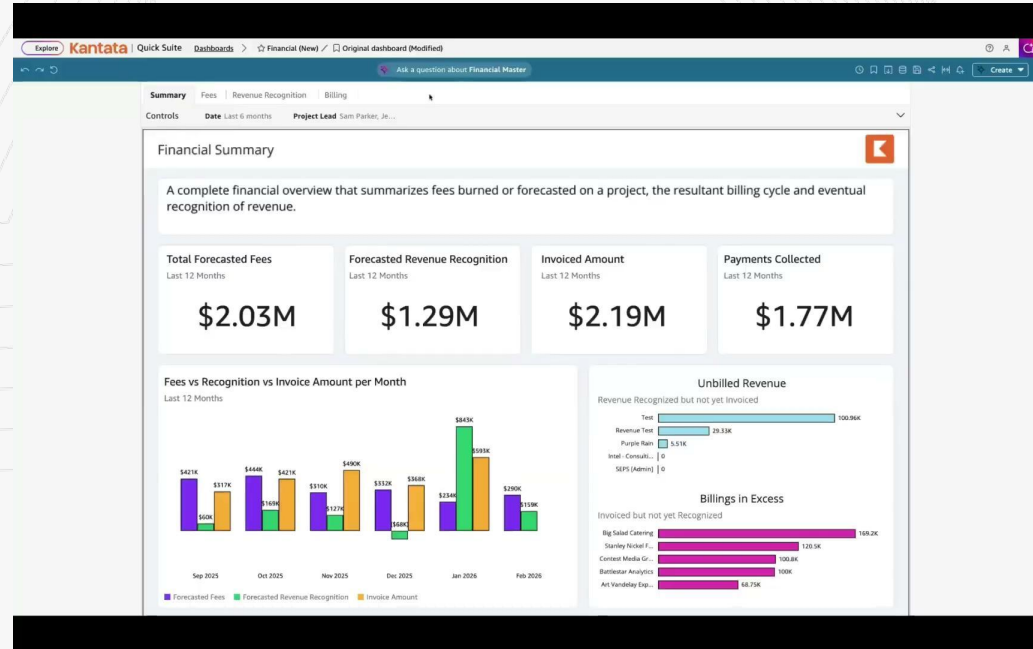
On the right side, there's an 'Analyst' section with a search bar and a list of actions taken, such as 'The proposed Risk has now been added to your Risk Register and Issues Log' and 'A draft internal meeting invite has been scheduled to discuss next steps - Phase I Review - Next Steps'.

The interface also includes a 'Recent Items' section at the bottom right, with items like 'Chatter Publisher', 'Chatter Feed', and 'Time & Expenses Entry'.

## Expertise Engine Insights

Future generative BI capabilities to bring deep analytical and modelling capabilities across your data sources.

- Get instant, natural-language answers and visualizations to your most critical business questions.
- Connect Kantata's deep project data with your entire external data stack.
- Gain a single, autonomous source of truth for 360-degree visibility.



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# Upgrade logistics

# 1.45 Release Schedule

## May-July

### Sandbox Dates:

May 31, 2026  
June 7, 2026  
June 14, 2026  
June 21, 2026  
June 28, 2026  
July 5, 2026

## June-September

### Production Dates:

June 28, 2026  
July 12, 2026  
July 26, 2026  
August 9, 2026  
August 23, 2026  
September 6, 2026

## 1.43 - 1.45: 'KimbleOne' + Core + Delivery

- Orgs on 1.38 or earlier are no longer supported,
- Customers will go from 1.39 to 1.45 directly via multi-hop upgrade
- As a prerequisite of the 1.45 release, customers will require installation of KSX Core and Delivery packages
- If you do not have Core and Delivery installed upon upgrade, both 2nd generation packages will be installed on your behalf on your upgrade weekend
- **Site Reliability Data Capture through Observe will be enabled by default**
  - Customers who wish to opt out will be able to then toggle this off. See the [Feature Guide](#)

# 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](http://www.entero.de)



**Headquarters:**  
Twickenham, UK  
**Website:**  
[www.felberconsulting.com](http://www.felberconsulting.com)



**Headquarters:**  
Andwell, UK  
**Website:**  
[www.iqlink.co.uk](http://www.iqlink.co.uk)



**Headquarters:**  
New Hampshire, US  
**Website:**  
[www.solvit.io](http://www.solvit.io)

See more at: [kantata.com/partners](http://kantata.com/partners)

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# Q&A

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# Thank You