

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.**



Kantata

Always deliver amazing

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

Search...

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
<input checked="" 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 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
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<input type="checkbox"/> KSX Test Account	KSX105535	31/03/2026	30/04/2026	GBP	2,500.00	0.0

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

<input type="checkbox"/>	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
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<input type="checkbox"/>	KSX Test Account	KSX105535	31/03/2026	30/04/2026	GBP	2,500.00	0.0

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

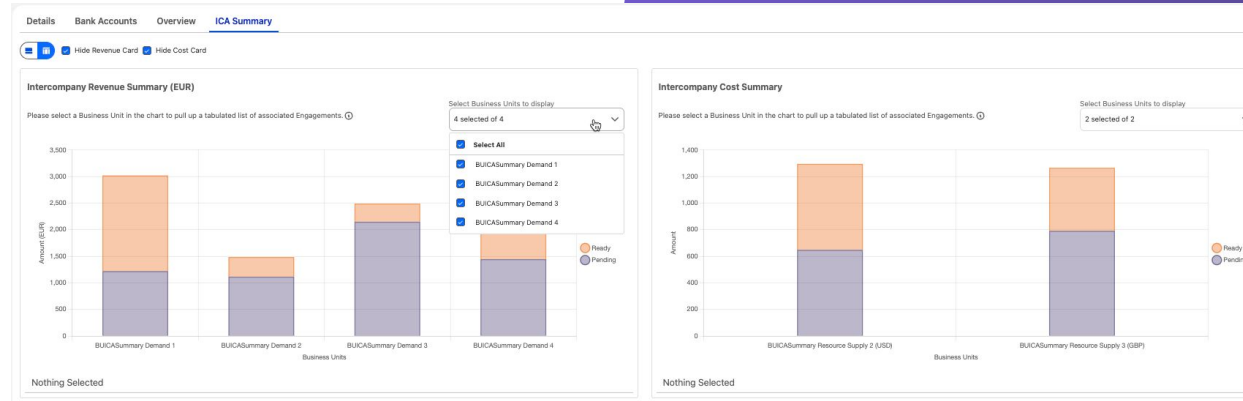
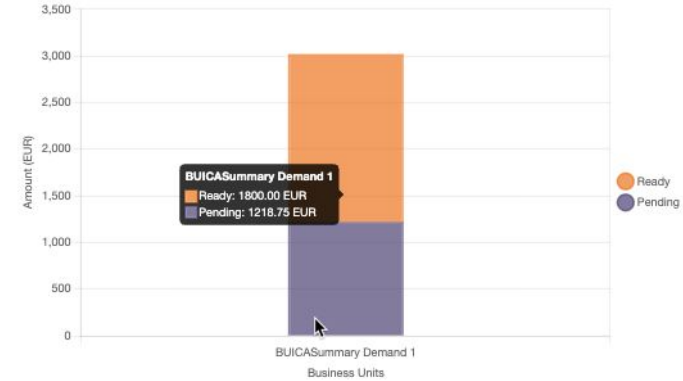
Run your billing cycles at a time that suits your global operations

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 rate of 66.35 USD Per Hour is shown, with an 'Override Internal Rate' checkbox. A tooltip titled 'Internal Rate' provides historical data:

Effective Date	Internal Rate	Forecast Internal Cost Rate	Supply Business Unit	Business Unit Internal
From 01/03/2023	EUR 21.38	GBP 18.27	BUICASummary Resource Supply 1	BUICASummary Demand 3
From 01/04/2026	USD 66.35	GBP 48.08	BUICASummary Resource Supply 2	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.

The image shows two overlapping screenshots of the Pulse configuration interface. The top screenshot is titled 'Themes and Branding Settings' and features a toggle switch labeled 'Active'. Below the toggle, there is explanatory text: '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.' The interface is divided into two main sections: 'Brand Logo' and 'Brand Favicon'. The 'Brand Logo' section includes a logo preview for 'KANTATA', a 'Primary brand color' dropdown set to '#5EDA41', and a 'Header color' dropdown set to '#1F1411'. The 'Brand Favicon' section includes a favicon preview, a 'Secondary brand color' dropdown set to '#7070FE', and a 'Brand Name' field containing 'Kantata Pulse Custom'. The bottom screenshot is titled 'Edit Question Set' and shows a form for configuring a question set. It includes a 'Question Set Name' field with the value 'q test', a descriptive text field, and a 'Type' dropdown set to 'Project Start'. Below this, there are two question entries. 'Question 1' has a category of 'Confidence' and the text 'How confident are you in our team's ability to deliver the project on time and with...'. 'Question 2' has a category of 'Happiness' and the text 'How excited are you to begin working on this project with our team?'. At the bottom right of the 'Edit Question Set' window are 'Close' and 'Save' buttons.



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

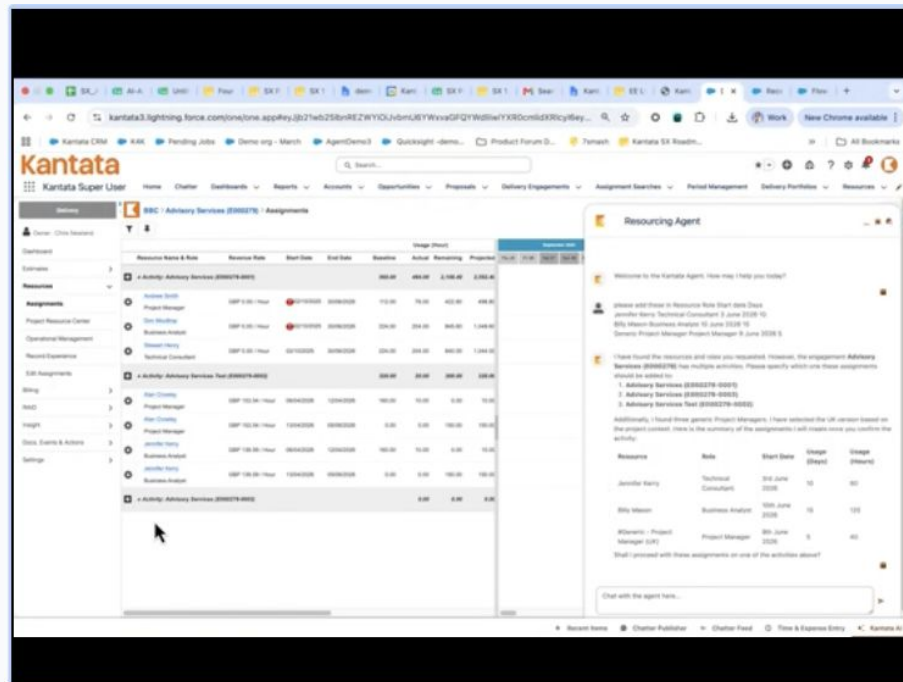
What's coming this year

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

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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

The screenshot displays the Kantata IC Console interface. At the top, the user is greeted with a personalized message: "Good morning Dave! You're new here. Welcome to you personalised IC Console." The interface is divided into several sections:

- Context:** Shows details for an "Internal" engagement, including the engagement name "Health & Safety Consulting (0000010)", account name "Kantata", engagement owner "Nancy Mitchell-Burton", close date "4/1/2025", amount "\$500,000", and a description.
- Task Manager:** A central section with a "New" button and "Last Session" / "History" filters. It contains a "Task" card with instructions: "Identify Competent Persons. Clearly list who is responsible for each fire safety task." and "Identifiable Findings. Clearly list all findings to be fixed, who is responsible, and by when." Below this, a "Competent" card asks "Who they think you" and "So I can better focus my recommendations I will first confirm which Delivery Engagement, Delivery Element, Assignment, Work Item or Task this pertains to." A "Related Actions" card asks "Would you like to update any supporting documentation, images or other information to support the drafting process. You may also attach a better response to help build out the report?" and offers buttons for "Upload Support Materials", "Answer Questions", and "Back".
- Precedent:** A section titled "You've Done this Less Well..." with a search bar and a "View" button. It lists a "Hazard & Operability Study (0000046)" with account "Kantata" and engagement "Hazard & Operability Study (0000046)".
- Guidance:** A section with a search bar and a "Submit" button. It provides a "Five Sales Risk Assessment Report in the UK to a legal requirement under the Regulatory Reform (Fire Safety) Order 2005 for non-domestic premises. It involves identifying the hazards, assessing them to groups, and..."

The bottom of the interface shows a navigation bar with "Widget Manager", "Recent Items", "Chatter Publisher", "Chatter Feed", and "Time & Expenses Entry".

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 is a search bar and navigation tabs for Home, Delivery Progress, Delivery Engagements, Dashboards, Reports, and Delivery Portfolios. A welcome message reads: "Good morning Cheryl! You're new here. Welcome to your personalised Project Manager Console".

The main content area is titled "Insights" and features a search bar and a "Newest first" dropdown. It contains several cards:

- Zoom Call:** A card with a "New" badge and a "Resolve" button. It includes sections for "Source Details", "Summary", "Recommended Actions" (with a list of actions like "Capture the proposed Risk in your Risk Register and Issues Log"), and "Proposed Risks" (with a table of risk details).
- Outcome Si...:** A card with a "New" badge and a "Resolve" button. It includes a "Summary" section with text about "Outcome Increase Utilisation by 5%" and "Recommended Actions".
- Slack:** A card with a "New" badge and a "Resolve" button. It includes a "Source Details" section and a "Summary" section with text about a "Slack Channel #a-engineering-questions".

At the bottom of the insights section, there are two cards with a cloud and rain icon and the text "Nothing to display".

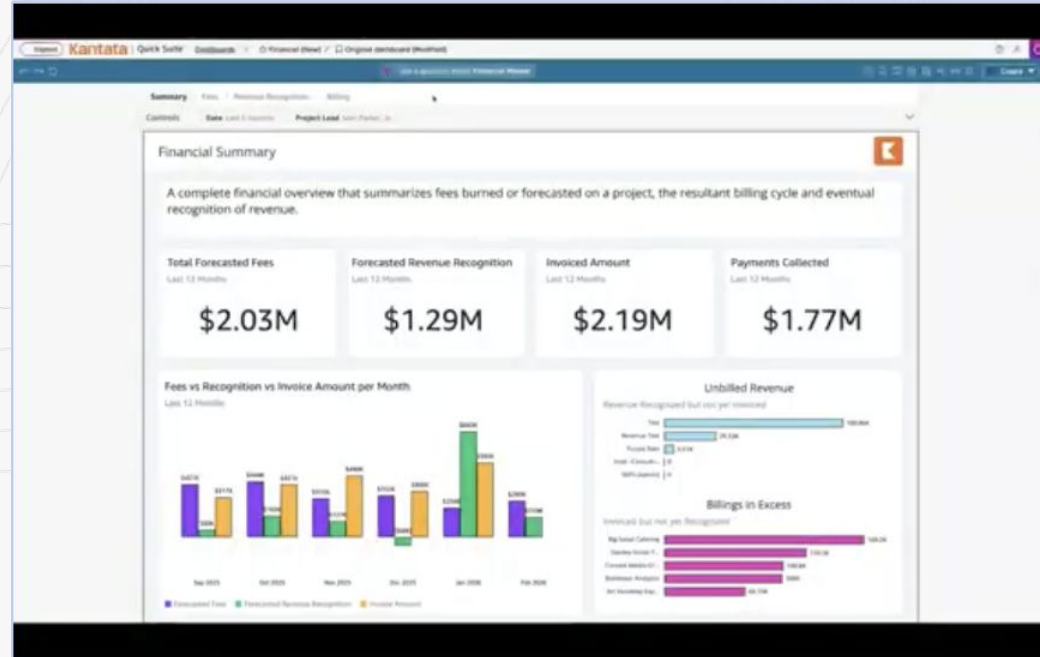
On the right side, there is an "Analyst" panel with a "New" badge and a "History" tab. It contains a list of actions and a "Requires User Action" button.

The bottom of the interface shows a status bar with "84 Insights", "Load More", and "As of Today at 9:37 AM".

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



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

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Q&A

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Thank You