



ENGAGE

Beyond AI Staffing:
Harnessing Agentic BI to Build the Case for
Where Your Workforce Goes Next

Kantata

Instantly Assemble the Ideal Team

BEFORE

“I don’t know who the right team is until it’s too late to staff properly.”



Resource Manager

“When the timeline shifts, I spend days figuring out what breaks.”



Project Manager

“My hiring decisions are based on gut feel, not what the pipeline actually needs.”



PS/ Finance Leader

“I want to grow into a new role but I don’t know exactly what skills I’m missing.”



Consultant/ IC

NOW

The right team is proposed before you even have to ask.

When the timeline moves, every downstream impact is mapped instantly.

Every headcount decision is grounded in what the pipeline actually demands.

When a skills gap is identified, the live project that closes it is surfaced.

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Even AI can’t help you put the right people with the right skills on a project if you never hired them.

85%

Reduce manual effort

35%

Enhance strategic
workforce planning

85%

Improve forecast
accuracy

“Organizations are currently turning to AI primarily to automate administrative work and improve productivity, with workforce planning and forecasting as secondary objectives. This reflects a **near - term focus on efficiency gains rather than broader workforce transformation.**”

RMI, Q3 2026, “Emergence of AI in Resource Management”

32%

#1 – Predictive and
scenario-based
planning

29%

#2 – AI-assisted
strategic workforce
planning

7%

#5 – Fully automated
scheduling and
allocation

“This suggests organizations view intelligence as improved decision quality and **workforce foresight rather than a simple automation task.**”

RMI, Q3 2026, “Emergence of AI in Resource Management”

In your organization,
compared with two
years ago, is it
harder or easier to
win approval to hire
ahead of demand?

Much harder

Somewhat harder

About the same

Somewhat easier

Much easier



When it comes to building the case for where your
workforce goes next, AI is making what was
already a hard recipe even harder

Expected Demand

1. Start with probability-weighted pipeline
2. Fold in likely start dates and project duration
3. Portion by role, skill, and delivery hours
4. Adjust for scope shifts and sales confidence

Expected Capacity

1. Measure availability after current commitments
2. Mix in verified skills and relevant experience
3. Adjust for utilization, leave, and attrition
4. Allow time to hire, develop, or contract

“We’ve been burned hiring against pipeline before. Give it another month. If the demand is real, we’ll know then.”

Yield: A five-person skill gap in four months

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Agentic Capacity

1. Separate the tasks agents can actually perform
2. Measure the human hours genuinely returned
3. Adjust for quality, consistency, and oversight
4. Account for agent cost and margin impact

“Wait, aren’t agents making it possible to do more with the same people?”

The hiring case now has to prove the gap after AI



Forecasts are forecasts – we'll always need to take them with a grain of salt.

But should you be taking yours with a grain of salt, a pinch of salt, or a bucket of salt?

How long would it take you to build a three - scenario headcount strategy for your upcoming fiscal year?

1– 8 hours

9– 16 hours

17– 24 hours

25– 32 hours

Too long – never been able to

AI That Puts Your Expertise to Work

Expertise Agent

The only superagent built for professional services

Agent Studio

Build custom agents with Expertise Agent

Expertise Insights

Enterprise-grade, predictive insights on-demand

Workflow Studio

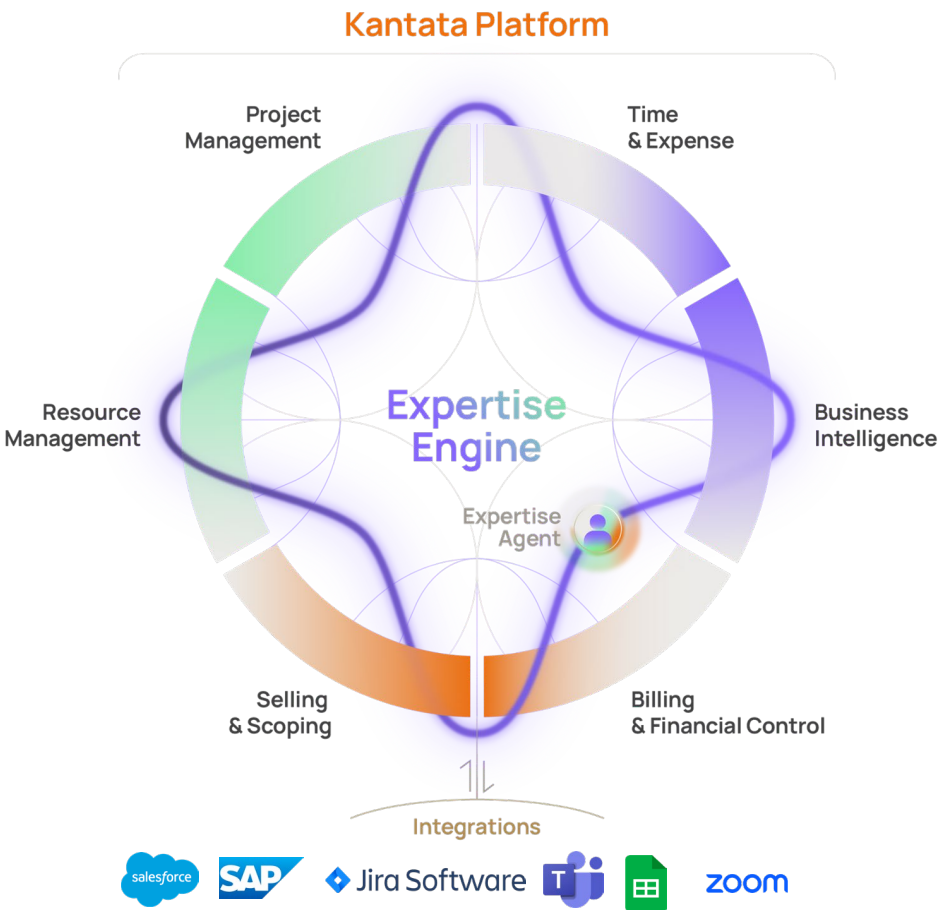
Build custom workflows and embed agents

Integrations

System Integrations & Unified API Frameworks
Connect to front and back office (CRM, ERP, HCM, Jira)

Data Aggregators
Ingest and analyze conversational data from email, Zoom, Slack, Teams, and more

MCP
Connect Kantata to your existing AI tools like Claude, ChatGPT, and Copilot



Agentic business intelligence is not the same as an agent with access to your data that's been trained to “act like an analyst”

Expertise Insights



Looking at last quarter's forecast versus actuals, where do I have risk in my forecast for the next two quarters?

Based on last quarter's variance data, I've identified 3 areas of elevated forecast risk heading into Q3-Q4.

1. **Utilization overestimation:** Your Q2 forecast assumed 78% billable utilization across delivery staff...
2. **Late-stage pipeline conversion rate:** Deals entering Q2 at "Commit" converted at 62% vs. a forecasted 80%...
3. **Scope expansion assumptions on active engagements:** Q2 actuals show 4 of 11 active projects closed flat or below original scope...

Want me to model Q3 and Q4 scenarios adjusting for utilization variance, conversion rate, and scope risk? I can show you a base case, a stress case, and a recovery path.



Questions



ENGAGE

THANK YOU