Sales agents on Katonic: the list

35 agents across nine areas, for a sales team in any industry

A sales team's work runs through its customer records, its email and calendar, its quoting and contract tools, and the price book, playbooks and answer library around them. Every agent reaches them in one of four ways, all through the same tool gateway and the same approval rules:

	HOW EACH AGENT CONNECTS
01	**A file the user uploads** in the conversation: a request for proposal, a customer's contract, meeting notes, a questionnaire.
02	**A knowledge source.** The price book, the discount policy, product documents, the answer library, playbooks and approved competitor notes are indexed in the Knowledge Engine, with each reader's permissions kept.
03	**An imported API.** The company gives Katonic the description of an API it already runs, and the operations it chooses become tools. This is the route to systems of record: accounts, contacts, deals, quotes, calendars.
04	**An MCP server from the catalogue,** deployed inside the company's own cluster. This is the route to the data warehouse, reporting databases and web search.

System names are left out on purpose. The company supplies the address and the sign-in. Nothing here is a tested integration with a named product.

THE NINE AREAS

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AREA 01

Account research

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Account Research Agent	Prepares a brief on a company: what it does, its size and structure, recent filings and news, and the seller's own history with it, each line with its source	Company registries, filings and the company's website through web search; the seller's records through an imported API	The salesperson reads the brief and decides the approach
Company Record Enrichment Agent	Proposes missing or out-of-date company fields (legal name, registered address, sector, size) from registries, with the source of each	Registries through web search or an imported API; the record through an imported API	A sales operations analyst accepts or rejects each change. The agent writes nothing to the record
Target Account List Agent	Builds a list of companies that fit the stated ideal customer criteria, from registries and the seller's records, with the reason for each	Registries through web search; records through an imported API; the criteria as a knowledge source	The sales manager approves the list
Account News Agent	When asked, lists recent public events at the accounts a salesperson names (a filing, an announcement, a change of officers), with links	Public sources through web search	The salesperson decides whether anything calls for contact

AREA 02

Leads and outreach

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Inbound Lead Check Agent	Checks an inbound enquiry against the qualification criteria, lists what is known and what is missing, and proposes the next step	The enquiry through an imported API; the criteria as a knowledge source	A salesperson qualifies the lead and replies
Lead Routing Agent	Proposes the owner for a new lead from the territory and routing rules, and says which rule applied	The lead through an imported API; routing rules as a knowledge source	A sales operations analyst or a manager confirms the owner
Duplicate Record Check Agent	Lists account and contact records that look like the same company or person twice	Records through an imported API or a reporting database	A sales operations analyst merges or keeps them
Outreach Drafting Agent	Drafts a first email to a business contact from the account brief and the messaging guide, checks the do-not-contact list, and says what it found	The brief and the contact record through an imported API; the messaging guide and the list as a knowledge source	The salesperson edits and sends every email. The agent sends nothing and enrols no one in a sequence

AREA 03

Meetings

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Meeting Preparation Agent	Prepares the brief for a meeting: the account, the open deal, past meetings and the questions still open	Records and past notes through an imported API	The salesperson runs the meeting
Meeting Notes Agent	Drafts the notes and the actions from a transcript the company holds of a meeting recorded with the participants' knowledge	The transcript as an uploaded file or through an imported API	The salesperson corrects and saves the notes
Deal Follow-up Agent	Lists the actions each side took on after a meeting and drafts the follow-up email	Notes and the deal record through an imported API	The salesperson edits and sends every follow-up
Mutual Action Plan Agent	Drafts the plan of steps and dates to a decision from the meeting notes and the company's template	Notes through an imported API; the template as a knowledge source	The salesperson agrees the plan with the customer

AREA 04

Pipeline and records

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Record Check Agent	Lists deals with missing fields, a close date in the past, no next step or an amount that disagrees with the quote	Deals and quotes through an imported API or a reporting database	The deal owner corrects each record
Record Update Proposal Agent	Proposes the updates a meeting or an email implies for a deal record: a contact to add, a next step, a date	Notes and email the salesperson selects; the record through an imported API	The salesperson accepts or rejects each update. The agent moves no stage
Stalled Deal List Agent	Lists the deals that meet the company's stated rules for a stalled deal: no activity for a set time, a pushed close date, no named buyer	Deals through an imported API or a reporting database; the rules as a knowledge source	The sales manager and the deal owner decide what to do
Pipeline Review Pack Agent	Assembles the pack for a pipeline review: deals by stage, what changed since the last review, and the open questions on each	Deals from a reporting database, read only	The sales manager runs the review

AREA 05

Quotes and proposals

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Proposal Drafting Agent	Drafts a proposal from the deal record, the meeting notes and the approved content, in the company's template, with the source of each claim	The deal through an imported API; approved content as a knowledge source	The salesperson edits, and the proposal goes out under their name after any approval the policy asks for
RFP Response Agent	Drafts answers to a request for proposal from the answer library, cites the source of each, and marks the questions the library does not cover	The request as an uploaded file; the answer library as a knowledge source	The bid owner reviews every answer and submits the response
Security Questionnaire Agent	Drafts answers to a customer's security questionnaire from the approved security answers and policies, and marks what needs the security team	The questionnaire as an uploaded file; approved answers as a knowledge source	The security team approves the answers and the salesperson sends them
Quote Check Agent	Checks a draft quote against the price book and the discount policy, and lists each line that needs an approval and from whom	The quote through an imported API; the price book and the policy as a knowledge source	The approver named in the policy approves or refuses. The agent sets no price and issues no quote

AREA 06

Deal desk

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Deal Approval Pack Agent	Assembles the approval request for a non-standard deal: the terms asked for, how they differ from standard, and past approvals of the same kind	The deal and the quote through an imported API; the policy as a knowledge source	The deal desk and the named approvers decide
Customer Terms Comparison Agent	Compares a customer's contract paper with the company's standard terms and lists each difference with the clause	The customer's paper as an uploaded file; standard terms as a knowledge source	Legal decides every term. The agent agrees nothing
Order Form Check Agent	Checks an order form against the approved quote and the contract: products, quantities, prices, dates and signatories	The form as an uploaded file; the quote through an imported API	Sales operations corrects it and the authorised signatory signs

AREA 07

Forecast and reporting

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Forecast Preparation Agent	Assembles the forecast pack from the figures salespeople have committed and the pipeline behind them, and lists where the two disagree	Deals and commits from a reporting database, read only	The sales manager sets the forecast. The agent changes no figure
Forecast Change Report Agent	Lists what moved in the forecast since the last one: deals in, out, pushed and changed in amount, with the reason recorded	Deals from a reporting database, read only	The sales manager reviews the changes
Win and Loss Summary Agent	Groups the recorded reasons for won and lost deals into themes by segment and product, with examples	Closed deals and notes from a reporting database	The sales leader and product marketing own the findings. The summary is by segment, never by salesperson
Sales Report Agent	Drafts the weekly or monthly sales report by segment and region, with each figure traced to its source	Sales data from a reporting database, read only	The sales operations lead reviews and issues the report

AREA 08

Accounts and renewals

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Renewal Preparation Agent	Prepares the renewal file for a contract: terms, dates, notice periods, usage, open issues and the price that the contract allows	The contract as a knowledge source; usage and tickets through an imported API	The account manager leads the renewal and agrees any change
Account Plan Drafting Agent	Drafts the account plan from the records, the contracts and the notes, in the company's template	Records through an imported API; the template as a knowledge source	The account manager edits and owns the plan
Usage Summary Agent	Summarises how a customer uses the product over a period, by team and feature, for the account manager	Usage data from a reporting database, read only	The account manager decides what to raise with the customer
Business Review Pack Agent	Assembles the pack for a customer business review: usage, delivery against the agreed goals, open issues and next steps	Usage, tickets and records through an imported API or a reporting database	The account manager presents and agrees the next steps

AREA 09

Enablement, partners and competitors

AGENT	WHAT IT DOES	READS FROM	WHERE IT STOPS FOR A PERSON
Product and Policy Q&A Agent	Answers a salesperson's question from product documents, the price book and sales policies, cites the source, and says when they are silent	Documents and policies as a knowledge source	It informs. Anything outside policy goes to the deal desk
Competitive Information Agent	Prepares a comparison with a named competitor from that competitor's published material and the company's approved notes, with the source and date of each line	Published sources through web search; approved notes as a knowledge source	Product marketing approves what salespeople may say
Partner Deal Registration Check Agent	Checks a partner's deal registration against the programme rules and existing deals, and lists conflicts	The registration through an imported API or as an uploaded file; programme rules as a knowledge source	The partner manager accepts or refuses
Training Content Agent	Drafts a short training note or a quiz from a product document or a playbook, in the company's format	Documents as a knowledge source	The enablement lead approves the content. The agent assesses no one

WHAT EVERY AGENT HAS IN COMMON

01 **It runs on the company's own infrastructure or private cloud,** with a model the company serves. Customer records, prices and deal terms stay there.

02 **Every tool call passes the company's policy.** A policy can allow a tool, record its use, hold it for a person's approval, or block it, for the whole company or for one team or region.

03 **A tool that changes something waits for approval** unless the company has decided otherwise for that tool. That is how no email, stage change, quote or signature request goes out unapproved.

04 **A person sends.** Everything a prospect or a customer receives has been read and sent by a named salesperson, who answers for what it says.

05 **The agent acts as the person using it.** Where the company's API checks the caller, Katonic passes the signed-in user's identity, so a salesperson sees their own accounts and a manager sees their team's.

06 **Every call is recorded,** with who asked, which tool, and what was decided, and an agent, a tool or a whole server can be switched off at once.

WHERE TO START

Pick work where reading is slow, the decision stays with a person, and nothing reaches a customer on the agent's word.

THREE PLACES THAT FIT

Product and Policy Q&A

Salespeople ask what the documents and the price book say and get the answer with the source. No record is touched, so it can run on day one.

RFP Response

The agent drafts from the answer library and marks the gaps. The bid owner reviews every answer.

Record Check

The agent lists what is missing or out of date. The deal owner corrects each record.

One team, one process, invented data first. Then beside the manual process, measured against it.

Each one prepares the work. A named person decides.

About Katonic AI

Katonic AI builds the platform that organisations use to build, run and govern AI agents on their own infrastructure: in their own data centre, in a private or sovereign cloud, or with no connection to the internet at all. The platform is in production with governments, banks, telecom operators and utilities. Katonic is certified to ISO 27001.

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