AI agents for the work around the deal and the quote

Agents that read your price book, your answer library and your account, deal and quote records, prepare the work, and stop for a named person. On infrastructure you control.

THE PROBLEM

A company is held to what its agent tells a customer. Among the vendor documents we read, one describes a mode in which the agent sends outreach emails itself, and two say nothing is sent until a person says so. Of 261 public interface descriptions from 16 publishers, all import; they carry 4,625 operations, 2,748 sent as changes, so tools are chosen one by one.

HOW IT WORKS, IN THREE STEPS

STEP 01

Connect what the agent may read.

The price book, the discount policy, product documents, the answer library and playbooks become knowledge sources, with each reader's permissions kept. Accounts, contacts, deals and quotes are reached through the description of an interface you already run; pipeline figures through a reporting database, read only.

STEP 02

Decide where it stops.

Every tool call passes your policy. A tool that changes a record waits for a named person. No agent is given a tool that sends an email, moves a deal stage, sets a price or issues a quote. Research is about companies.

STEP 03

Run it where the data lives.

In your data centre or your private cloud, on a model you serve.

THE RULE EVERY AGENT FOLLOWS

It prepares. A named person decides.

Thirty-five agents in nine areas

Account research	Account Research. Company Record Enrichment. Target Account List. Account News
Leads and outreach	Inbound Lead Check. Lead Routing. Duplicate Record Check. Outreach Drafting
Meetings	Meeting Preparation. Meeting Notes. Deal Follow-up. Mutual Action Plan
Pipeline and records	Record Check. Record Update Proposal. Stalled Deal List. Pipeline Review Pack
Quotes and proposals	Proposal Drafting. RFP Response. Security Questionnaire. Quote Check
Deal desk	Deal Approval Pack. Customer Terms Comparison. Order Form Check
Forecast and reporting	Forecast Preparation. Forecast Change Report. Win and Loss Summary. Sales Report
Accounts and renewals	Renewal Preparation. Account Plan Drafting. Usage Summary. Business Review Pack
Enablement, partners and competitors	Product and Policy Q&A. Competitive Information. Partner Deal Registration Check. Training Content

Also in the pack: the full list of what each agent reads and where it stops, and the white paper “AI agents inside the sales team”, with sources.

Seven questions to ask before an agent drafts for a buyer or reads a deal record

01 Where does it run, and where is the model?

02 Does it keep each person’s permissions?

03 Which tools change a record, and does each wait for a person?

04 Can any agent send, call, book or quote without a person?

05 Where does its data about named people come from?

06 Does it score a salesperson or read anyone’s mood?

07 Can we stop one agent, one tool, or all of them, at once?

WHERE THE PLATFORM RUNS TODAY

In production at a top-tier bank in Asia, air-gapped, inside the bank’s own perimeter.

MODON built its AI Centre of Excellence on Katonic inside the Kingdom of Saudi Arabia.

ePLDT, the ICT arm of the Philippines’ largest telco, selected Katonic to power Pilipinas AI, a sovereign AI cloud hosted in the Philippines.

Where to start

One team, one process, invented data first. A product and policy Q&A agent can run on the first day: it touches no record.

KATONIC.AI/SOLUTIONS/SALES