

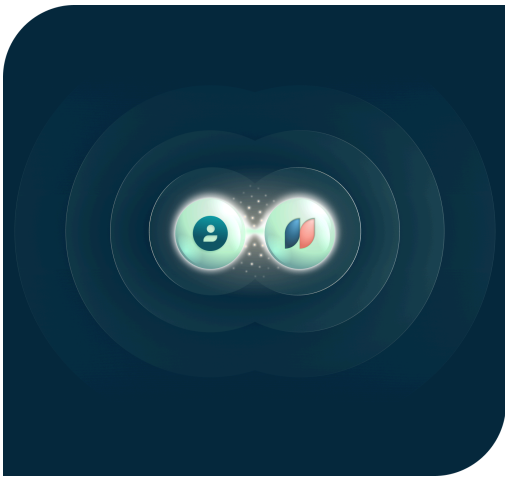


How We Build With You

You bring the expertise.
We build the application.

EXECUTIVE SUMMARY

As opposed to other offerings in the market, Kana is not a blank canvas on top of an agentic framework where you are left to build agentic applications for yourself. We treat **our Build-With approach** as a specific commitment to our customers, not a general capability. Understanding what it requires and what it returns is the best starting point for any organization who is considering working with us.



Our approach, “Build With,” means that we scope and design our applications with you to fit your business processes, existing tech stack and requirements. Kana then builds the solutions for you.

When you work with Kana, in the initial design phase you’ll get access to a solutions consultant who understands what it takes to finalize use case design, has seen best practices across deployments, and can run the process to ensure value capture and time to value.

Kana's delivery model is built around our team of Forward Deployed Engineers (FDE): senior technical specialists embedded in the customer's environment for the duration of onboarding and initial deployment. Your job is to be the domain expert — to articulate how the funnel actually works, what the audiences mean, what good looks like, and where the current stack falls short. Our FDE team’s job is to carry the engineering burden and bring your agentic applications to life.

That sounds straightforward. In practice, it requires intentional access and a small number of people on the customer side who are willing to be genuinely available during the build phase.

WHAT WE ASK FROM OUR CUSTOMERS

- **Data access.**

We'll need to read connections to the systems of record that govern your brand's customer data: the CRM, the data warehouse or lakehouse, the CDP if one exists, the email and channel platforms, and any first-party behavioral data. Without this access, the knowledge graph cannot be seeded and the agents cannot be grounded in reality. This is the single most common source of delay in onboarding.

- **Workflow documentation.**

A clear account of how marketing actually operates today: e.g. how audiences are defined, how campaigns are briefed and approved, how leads move through the funnel, how retention decisions get made. Formal documentation is useful; but keep in mind that candid conversation with the people who do the work is often even more useful.

- **Historical reporting.**

It greatly assists us to have verified baseline performance numbers and, if relevant, amount of impact driven by prior improvement measures (e.g., in the case of a customer engagement use case, how much uplift has prior A/B testing driven?)

- **Success criteria.**

Because Kana agentic marketing applications are designed to be outcome driven, we'll need specific, measurable definitions of what good looks like for each workflow being built. The more precise you can be here (pipeline conversion rate targets, churn reduction thresholds, contact sourcing volume expectations) the faster Kana can tune the agents to continuously optimize and maximize for those impacts and outcomes.

- **Governance requirements.**

We'll want to know what data privacy, security, and compliance constraints the application must operate within. These are addressed in the chassis by default, but customer-specific requirements defined by regulated industries, or regional data residency, internal AI policy, etc. need to be specified early.

- **An executive sponsor, a data subject matter expert, and a marketing subject matter expert.**

One person with the authority to make decisions and clear internal blockers. One person to help get us access to the data that Kana will access. At least one person with the operational knowledge to represent the marketing team faithfully in the build process. All need to be genuinely engaged in order for everything to process on time and without major hiccups.

TIMELINES

With full technical access in place from day one (data connections live, workflow documentation prepared, working lead engaged) a first Kana application is typically in production within 6 to 10 weeks. The range reflects the complexity of the first workflow being built, and the density of the data environment being connected, not the pace of Kana's engineering.

Each stage ships, runs in production, and generates real operational data before the next stage begins. This is intentional. The knowledge graph that grounds the system gets more accurate with every live stage, which means later-stage agents are better-tuned than early-stage agents would have been if everything had been built simultaneously.



The most reliable predictor of a fast deployment is not technical sophistication on the customer side. It is data and human expertise access.

Organizations that arrive with warehouse connections credentialed, API keys in hand, and a data team prepared to answer schema questions consistently reach production faster than those that do not. Kana's FDEs can work with nearly any data architecture, but they cannot work with data they cannot access.

WHAT YOU GET FROM OUR BUILD-WITH MODEL

- **A deployed, running application.**

Not a prototype, not a pilot environment, not a sandbox. A production-grade agentic marketing application tuned to your brand's workflows, connected to your brand's data, and operating against your brand's success criteria.

- **A knowledge graph that is already yours.**

From the first deployment, the system begins accumulating a structured representation of how your organization works — entities, relationships, decisions, exceptions that no other vendor has access to and that becomes more valuable with every interaction.

- **A team that knows how to govern it.**

Kana's onboarding includes working with your marketing team on the policy and instrumentation layer so that the people who own the outcomes are genuinely in control of the system producing them.

- **Kana as the ongoing maintenance owner.**

Model updates, platform changes, regulatory shifts, and architectural evolution are Kana's to absorb. We'll need you to communicate when your business changes, and the application will adapt from there.



**Welcome to Your Agentic
Marketing Era!**

Where should we begin?