

Agilon

The Operating System for SMEs

Project Planning Document — February 2026

Vision

Agilon is the Operating System for Small and Medium Enterprises, built to serve 36 million SMEs in the US — including 31 million non-employee firms (sole proprietors, freelancers, single-member LLCs).



Core Flow



1. Login

User authenticates into the Agilon platform.

2. Onboarding

Two sets of information are collected from the user:

Basic Info: Industry, Company size, State
Style: Templates, Logo, Color

3. Provisioning

Happens automatically after account creation.
Two resources are created in parallel on Aedify.ai:

A. Dedicated Agilon

Bot

- Agilon logs into Aedify and assigns a dedicated bot to the customer
- OpenClaw-like bot based on Nanobot (small open-source model)
- This bot is the core of the client's experience

B. Client Cloud Storage

- Dedicated cloud storage for the client's data
- Separate from bot's own database (LightSQL)
 - Client data in cloud storage; bot state in LightSQL

4. Deployment

| Channel | Access Method |
|------------|--------------------|
| Web App | Direct browser URL |
| Mobile App | QR Code |

Skills — Back-Office Modules (Phase 1)

Skills are modular back-office capabilities that clients choose and activate. Each skill adds a specific business function to their Agilon Bot.

| Skill | Description |
|-------------------|---|
| Accounting | Bookkeeping, invoicing, financial reporting |
| HR | Employee management, payroll, benefits |
| Tax | Tax preparation, filing, compliance |
| Scheduling | Appointments, calendar, resource booking |
| VDR | Virtual Data Room — secure document sharing |
| IT | IT support, device management, helpdesk |
| Legal | Contract management, compliance, legal docs |

Concept: Clients pick skills !' bot is equipped with capabilities !' personalized back-office OS.

Skills — Front-Office Modules (Future)

Industry-specific front-office modules will be added gradually to serve different SME verticals:

| Vertical | Examples |
|------------------------|--|
| Healthcare | Patient scheduling, records, billing |
| Repair Services | Job tracking, estimates, parts inventory |
| Ride / Delivery | Route management, earnings tracking |
| Freelancers | Ad creation, content generation, client management |

Roadmap: Back-office skills first (universal) !' Front-office skills per vertical (industry-specific).

Custom Workflows

Clients can create their own workflows — a key differentiator. Each step can be handled by:

| Executor Type | Description |
|---------------|--|
| AI Agent | Automated — handled by the Agilon Bot / AI |
| Human | Manual — assigned to a real person |
| Hybrid | AI does the work, human reviews/approves |

Example: Invoice Processing



Clients design processes that match how their business works — mixing automation with human judgment.

Infrastructure

Cloud Provider: Aedify.ai — providing full-stack cloud infrastructure.

| Resource | Purpose |
|-----------|-------------------------------|
| CPU | General compute |
| GPU | AI/ML workloads |
| Storage | Cloud storage for client data |
| Bandwidth | Network and CDN |