

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).

36M

Total SMEs (TAM)

31M

Non-Employee Firms

~5M

Employer SMEs

Core Flow

Login

!

Onboarding

!

Provisioning

!

Deployment

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