PENTARIA

PENTARIA DEPLOYMENT GUIDES · GUIDE 0

Start Here: Overview, Roles & Support Levels

Audience: Everyone · Last verified October 21, 2026

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1. Welcome

Pentaria agents help product management and product marketing teams produce rigorous, evidence-based work — market definitions, market landscape reports, Ideal Customer Profiles, competitive research, battle cards and more — inside the AI system your company already uses.

This series of guides explains how to deploy, govern and get lasting value from Pentaria agents across your organization. It is written for three groups of people: the IT administrators who set up and secure your AI system, the content owners who are accountable for your official product and market deliverables, and everyone who uses the agents day to day.

This guide gives you the big picture. Read it first, then go to the guides for your role (see Section 7).

2. What Pentaria agents are

Everyone

A Pentaria agent is a packaged set of expert instructions, methods and templates that runs **inside your AI system**. It is not a separate application, website or login.

Anthropic defines agents as systems where the model dynamically directs its own process and tool use. Pentaria's agents do that: they branch on responses, decide when to run independent research, and adapt outputs to what they find. Agents will also pause for human feedback at critical checkpoints or when they hit

blockers.

Technically, each agent is a **skill**: a folder containing a `SKILL.md` instruction file and any supporting files. Skills are an open, Markdown-based format. Claude supports skills today, and Google Gemini, ChatGPT and Microsoft 365 Copilot are each adopting skills. Pentaria builds every agent as a skill so the same agent can run on each platform as support becomes available.

What this means for you

- **Your AI platform does the work.** Agents run under your company's agreement with your AI provider (for example, Anthropic for Claude), using your plan's models, security settings and data controls.
- **Your content stays in your AI system.** Pentaria agents send nothing to Pentaria. Pentaria does not receive, access or process the prompts, uploads, conversations or deliverables in your AI system (see the Pentaria Privacy Policy, Section 1.4).
- **Agents are delivered as files.** Your organization receives the agent files and installs them in your AI system. Your agreement permits your organization to modify, configure and adapt Pentaria agents for its internal use, with no need to ask Pentaria first. But a modified agent is a **Modified Material**: it still belongs to Pentaria, it no longer receives Pentaria updates or support, and it must be deleted if your subscription ends. Guide 7 explains your customization options, including ones that keep full support.
- **You own your Outputs. Outputs** are the content your AI system generates when you use Pentaria agents (Market and Product Definitions, ICPs, battle cards and the like), plus any Pentaria template you complete with your own information, such as your Company Context File. Outputs belong to your organization permanently, including after your subscription ends. Where an Output contains Pentaria structure, such as a template's headings, you have a permanent license to keep using it as part of that Output. Pentaria owns the **Materials**: the agents, the methods built into them and the blank templates. Agents and tools your team builds without copying or adapting Pentaria Materials are **Customer-Developed Tools** and also belong to your organization, including tools that use your Outputs as inputs. *(Details: your agreement with Pentaria (Master Services Agreement §9.4–9.8, or Terms of Service §8.4–8.8).)*
- **Asking an agent to show its instructions.** If anyone asks a Pentaria agent to display, restate or summarize its own instructions, the result is not an Output. It remains Pentaria's Materials and Confidential Information: keep it inside your organization, and delete it if your subscription ends. Any tool built by copying or adapting it is a Modified Material (see Guide 2, Section 9). *(MSA §8.1, §9.6; ToS §8.6, §9)*

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3. How Pentaria agents work together

`Everyone`

Pentaria agents are designed as **workflows**: the deliverable one agent produces becomes the required input for the next. This is deliberate. Each step builds on evidence established by the step before, so the final outputs — your ICP, your battle cards — rest on a documented chain of research rather than on assumptions.

Current agent catalog

Catalog current as of October 21, 2026. The always-current list is on the Pentaria portal: agentexplorer.pentaria.com/domains.

Product Vision Crafting workflow

ORDER	AGENT	PRODUCES	REQUIRES AS INPUT
1	Market and Product Definition	Market and Product Definition document — market boundary, segments and needs, and the problems the product solves	A public product URL, or answers to a short guided set of questions
2	Market Landscape and Trends	Market Landscape & Trends report — demand shifts, buyer roles, macro forces	Market and Product Definition document
3	Ideal Customer Profile	9-section ICP plus a query-ready account-attribute framework for CRM and marketing-ops use	Market Landscape & Trends report (required); win/loss data (optional)

Competitive Research workflow

ORDER	AGENT	PRODUCES	REQUIRES AS INPUT
1	Competitive Research for Customer Problems	Problem-led competitive research report, with machine-readable problem records and a companion CSV	Research materials you provide; optional deep web research
2	Competitive Problem Identifier	Traced, unranked register of customer problems and the opportunities they support, plus a record of what was set aside	Competitive research report
3	Competitor Battle Card	Single-competitor battle card for sales	Competitive Research for Customer Problems report; optional win/loss data
4	Battle Card Comparison	Head-to-head analysis of two battle cards	Two battle cards
5	Competitive Research Assembler	Final Competitive Research Report combining all of the above	The workflow's documents (Word format)

Supporting agent

AGENT	PRODUCES	USED BY
Pentaria Knowledge Builder (coming soon)	A Pentaria Knowledge bundle: Markdown copies of your approved deliverables, your Canonical Index and your Company Context File, packaged for your administrator to publish	Content Owners (Guide 4)

Why inputs matter

Because each agent builds on earlier deliverables, **the quality and currency of those inputs determine the quality of everything downstream.** If someone feeds the Market Landscape and Trends agent an outdated Market and Product Definition, every later deliverable inherits the error. The **Market and Product Definition** is

the most heavily referenced deliverable in the suite, so treat it with particular care.

Guides 4 and 5 explain how to make sure every user, every time, works from your current approved deliverables.

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4. Platform support

Everyone

AI PLATFORM	PENTARIA SUPPORT STATUS	MINIMUM PLAN FOR COMPANY-WIDE DEPLOYMENT	DETAILS
Claude (Anthropic)	Available now	Team (Enterprise recommended)	Guide 1, Section 2
ChatGPT (OpenAI)	Coming soon	Published at release	Guide 1, Section 3
Gemini (Google)	Coming soon	Published at release	Guide 1, Section 3
Microsoft 365 Copilot	Coming soon	Published at release	Guide 1, Section 3

Support levels

Pentaria uses three support levels for every platform-and-plan combination:

LEVEL	WHAT IT MEANS
Supported	Pentaria tests every agent release on this configuration and provides full support.
Limited	Agents should work, but for individual use only. Central deployment, shared company knowledge and governance features are not available. Best-effort support.
Not supported	Agents are not tested on this configuration and Pentaria cannot provide support.

Guide 1 lists the support level for each plan.

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5. Roles and responsibilities

Everyone

A successful Pentaria deployment needs a few clearly named people. In a small team one person may hold several roles; in a large organization each role may be a group.

ROLE	WHO TYPICALLY HOLDS IT	RESPONSIBLE FOR	PRIMARY GUIDES
IT Admin	AI platform owner, IT or security team	Plan and platform setup, security settings, installing and updating agents for the organization, adding and removing users' Pentaria portal accounts, publishing each new Pentaria Knowledge bundle to all users	1, 2, 3, 4, 8

ROLE	WHO TYPICALLY HOLDS IT	RESPONSIBLE FOR	PRIMARY GUIDES
Content Owner	PM or PMM leader accountable for a deliverable (e.g. the PMM lead owns personas)	Approving official deliverables, keeping them current, retiring superseded versions, maintaining the Company Context File, and building the Pentaria Knowledge bundle after each approval	4, 5, 7, 9
Pentaria Champion	An experienced user on the product or marketing team	Rollout and adoption, first-line questions, collecting feedback and customization requests	9, 10
User	Product managers, product marketers and anyone using the agents	Using agents with current approved inputs, checking agent versions, following your company's governance rules	3 (user sections), 4–7

Who is responsible for what

Pentaria agents run inside a platform you license from a third party, so responsibility is shared:

AREA	YOUR AI PROVIDER	PENTARIA	YOUR ORGANIZATION
Hosting, models, uptime, platform security			
Platform data use, retention and privacy terms			Choose the plan and settings
Agent methods, instructions and release quality			
Release notes and version information			
Installing and updating agents		Provides releases	
Who has access to the AI system and to agents			
What data users put into the AI system			
Approving, storing and governing deliverables		Provides guidance	

Guide 2 covers this model in detail.

6. Five principles for a healthy deployment

Everyone

Every guide in this series applies these five principles.

1. **One official copy of every deliverable.** Each ICP, persona, Market and Product Definition and similar deliverable has one approved, official version, kept in one system of record. Everything else is a draft or an archive. *(Guide 5)*
2. **Approve, then publish.** A deliverable becomes official only when its Content Owner approves it. The Content Owner then builds an updated Pentaria Knowledge bundle, and your IT Admin publishes it so every user's agents have the approved version. *(Guides 4 and 5)*

3. **Agents read approved inputs, not whatever is closest to hand.** Avoid feeding agents files from downloads folders, email attachments or old chats. *(Guide 4)*
4. **Keep agents on the current release.** New releases bring improved methods and fixes. *(Guide 3)*
5. **Customize through the supported paths first.** You're permitted to edit Pentaria agents, but an edited agent becomes a Modified Material: it no longer receives updates or support, remains Pentaria's, and must be deleted if your subscription ends. The Company Context File, Customer-Developed Tools and Pentaria Customization Services let you tailor your setup while keeping full support. *(Guide 7)*

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7. Which guides to read

GUIDE	TITLE	IT ADMIN	CONTENT OWNER	USER
0	Start Here: Overview, Roles & Support Levels	●	●	●
1	Platform Setup & Plan Requirements	●		
2	Security, Privacy & Who's Responsible for What	●	○	
3	Agent Lifecycle: Install, Update, Verify, Roll Back, Remove, Staff Changes & End of Subscription	●		○
4	Keeping Your AI Current: Pentaria Knowledge & the Canonical Index	●	●	○
5	Deliverable Storage & Governance	○	●	○
6	Integrations: Notion, Confluence, Aha!, Jira, Productboard (coming soon)	○	○	●
7	Customizing & Extending (coming soon)	●	●	○
8	Switching or Running Multiple AI Platforms (coming soon)	●	○	
9	Rollout & Adoption Playbook (coming soon)	○	●	
10	Troubleshooting, FAQ & Support (coming soon)	●	●	●

● essential ○ relevant sections only

Handbooks (PDF): The *Administrator Handbook* collects Guides 0–3 and 8 plus the **`IT Admin`** sections of Guides 4–7. The *User Handbook* collects Guides 0 and 4–7 plus the **`Everyone`** sections of Guide 3.

7.1 What each guide covers

Guide 0 — Start Here: Overview, Roles & Support Levels
What Pentaria agents are and how they work together, the current agent catalog, which AI platforms are supported, the roles in a deployment, five principles for a healthy deployment, how to check your agent's version, and a glossary of terms, including the terms used in your agreement with Pentaria.

Guide 1 — Platform Setup & Plan Requirements
Which Claude plan to choose and when Enterprise is worth it, how data use differs by plan, the admin settings Pentaria agents need, the download formats, how to plan a pilot and rollout, which models to use, and a setup

checklist. ChatGPT, Gemini and Microsoft 365 Copilot will be added as each version is released.

Guide 2 — Security, Privacy & Who's Responsible for What
Who is responsible for what between your AI provider, Pentaria and your organization; how data flows (Pentaria agents send nothing to Pentaria); recommended security settings; what information to give agents; risks from documents you upload; reviewing agent output; protecting Pentaria Materials; and how to report a security concern.

Guide 3 — Agent Lifecycle
How to install agents for your organization or for yourself, deploy them only to the people who need them, check you're on the current version, update and roll back, remove agents, handle people joining and leaving, and what to keep and delete when a subscription ends.

Guide 4 — Keeping Your AI Current: Pentaria Knowledge & the Canonical Index
Why AI memory isn't enough, and how your organization keeps every user's agents working from the latest approved deliverables: the Pentaria Knowledge bundle, the Canonical Index and the Company Context File, who builds and publishes the bundle, and what users experience.

Guide 5 — Deliverable Storage & Governance
How to keep one official version of every deliverable: choosing a system of record, the status block (Draft, Approved, Superseded), the approval checklist, retiring deliverables, preventing duplicate versions and updating downstream deliverables when an upstream one changes.

Guide 6 — Integrations: Notion, Confluence, Aha!, Jira, Productboard *(coming soon)*
How to send agent deliverables to the tools your teams already use, the formats each tool can import, and how to use information from those tools as inputs to agents.

Guide 7 — Customizing & Extending *(coming soon)*
Your options for tailoring Pentaria agents: the Company Context File, Pentaria Customization Services, what happens when you modify an agent yourself (Modified Materials), and how to build your own agents and tools alongside Pentaria's (Customer-Developed Tools).

Guide 8 — Switching or Running Multiple AI Platforms *(coming soon)*
What carries over when you move from one AI platform to another, what doesn't, how to plan the move, and how to run Pentaria agents on more than one platform at once.

Guide 9 — Rollout & Adoption Playbook *(coming soon)*
How to introduce Pentaria agents across your teams: piloting, champions, training and a phased rollout tailored to your AI vanguard, AI explorers and AI curious.

Guide 10 — Troubleshooting, FAQ & Support *(coming soon)*
Answers to common questions, fixes for common problems and how to get help from Pentaria.

8. Checking that your agent is the latest version

Everyone

Every Pentaria agent introduces itself when it starts. The introduction states the agent's **version number** and includes a link to the Pentaria portal (agentexplorer.pentaria.com) with that version built in. Click the link and the portal tells you whether your agent is the most recent release. You don't need to look up or compare version numbers yourself.

- If your agent is current, carry on.
- If an update is available, tell your IT Admin (company-wide installations) or follow Guide 3 to update it yourself (individual installations). Pentaria also emails administrators and Content Owners when a new release is available, and administrators can opt other users in to these notifications.

You need to be **signed in to the Pentaria portal** to use the link. Every user in a subscribing organization has a portal account. If you can't sign in, contact your IT Admin.

If your organization's subscription ends, Pentaria deactivates your organization's portal accounts and version checks stop working. Under your agreement with Pentaria, your organization must then delete all copies of Pentaria agents from its AI systems. Guide 3 covers how.

Privacy note. When you use the version-check link, the Pentaria portal records the date and time, the agent version, your IP address and your portal user account. Pentaria uses this to deliver updates and improve its library, as described in the Pentaria Privacy Policy. The link does not send any content from your AI system.

9. Getting help

- **Help center:** pentaria.com/support
- **Pentaria portal:** agentexplorer.pentaria.com
- **Agent catalog:** agentexplorer.pentaria.com/domains
- **Release notes:** pentaria.com/releasenotes
- **Support:** support@pentaria.com
- **Customization Services:** contact your Pentaria account manager — see Guide 7.

10. Glossary

TERM	MEANING
Agent	A Pentaria skill that carries out a specific piece of product or marketing work, such as producing an ICP.
Materials	Pentaria's library of AI skills, agents, plugins, software, prompt templates, playbooks and related tools that you download from the Pentaria portal. Pentaria owns the Materials; your organization is licensed to use, modify, configure and adapt them for internal use during its subscription. (MSA §2.4, §4.1; ToS §1, §8.1)
Outputs	Content your AI system generates when your organization uses the Materials, plus templates your organization completes with its own information. Your organization owns its Outputs permanently. Content that simply restates an agent's own instructions (for example, asking the AI to display them) isn't an Output; it remains Materials. (MSA §9.5–9.7; ToS §8.5–8.7)
Modified Materials	Any modification, adaptation, configuration or derivative of the Materials, by whoever made it, including any skill, agent or template that copies or adapts Pentaria's instructions, prompts or templates. Modified Materials are part of the Materials: Pentaria owns them (your organization keeps its own business information inserted into them), they can't be shared outside your organization, they aren't updated or supported by Pentaria, and they must be deleted when your subscription ends. (MSA §4.2(c), §7.4, §9.4; ToS §7(c), §8.4, §14.4)
Customer-Developed Tools	Skills, agents, templates or similar tools your organization builds without copying or adapting the instructions, prompts, templates or other content of the Materials, including tools that use your Outputs as inputs. Using general product management or marketing practices doesn't by itself make a tool a Modified Material. Your organization owns its Customer-Developed Tools, including after its subscription ends. (MSA §9.8; ToS §8.8)
Skill	The open, Markdown-based packaging format (a folder with a SKILL.md file) used by Pentaria agents.
Plugin	On Claude, a bundle of skills (and optionally connectors) that an administrator can distribute and manage as one item.
Workflow	An ordered sequence of agents in which each agent's deliverable is the next agent's input.
Deliverable	A document produced by an agent, such as a Market and Product Definition, ICP or battle card.
Official (canonical) deliverable	The single approved version of a deliverable that everyone in the company should use.
System of record	The place your company keeps the editable, official originals of deliverables — for example Google Drive, SharePoint, Notion or Confluence.
Canonical Index	A single document listing each official deliverable with its version, owner, approval date and location in your system of record. A copy is included in every Pentaria Knowledge bundle.
Pentaria Knowledge	A read-only skill containing Markdown copies of your approved deliverables, your Canonical Index and your Company Context File. Built by a Content Owner after each approval and published by your IT Admin as a required skill for all users.
Pentaria Knowledge Builder	The Pentaria agent Content Owners use to build a Pentaria Knowledge bundle.
Company Context File	A short Markdown file your company writes from a Pentaria template, with stable facts and preferences — product names, glossary, brand voice, templates — that every agent reads. Included in every Pentaria Knowledge bundle.
Status block	A short header at the top of each deliverable stating its version, status (Draft, Approved or Superseded), owner, approval date and location. Agents mark every new output Draft; the Content Owner changes it to Approved.

TERM	MEANING
Markdown (.md) version	A plain-text copy of a deliverable that saves alongside the original in your system of record. Agents read Markdown more reliably than Word or PDF.
Content Owner	The person accountable for approving and maintaining a specific official deliverable.
Supported / Limited / Not supported	Pentaria's support levels for each platform and plan (Section 4).