KINDO.

Vertical automation tools do one job. Workflows are becoming prompts. Controls are what survive.

Tines, Blink Ops, and Torq are good at security automation, and that is all they do. Our view: **as frontier models grow more capable, single-purpose workflow tools are the first layer they absorb.** The durable buy is the platform and its controls, not the workflow library.

THE PATTERN

YESTERDAY

Workflow libraries were the moat

10,000 prebuilt templates, 500 security agents, story libraries. The pitch was: we already built your playbooks.

TODAY

Frontier models write the playbooks

A capable model generates the workflow from a plain-language description. The template moat evaporates a little more with every model release.

WHAT SURVIVES

The control plane

DLP on model traffic, per-resource authorization, compliance-grade audit, in-boundary models. Trust and governance don't commoditize; they are what auditors and CISOs require.

A STACK OF VERTICALS VS ONE PLATFORM

Buying point solutions

- **SOC:** Tines / Torq, $52–450k/yr each [est., Vendr]
- **IT & business integration:** Workato, ~$197k/yr enterprise avg [est.]
- **Employee copilots:** Copilot Studio, credit-metered by interaction
- Three-plus contracts, three renewal cycles, three security reviews
- Three separate agent control planes to govern, none complete: DLP and per-resource authorization missing from all of them

Stacked spend, fragmented governance, and every layer exposed to the model curve.

One general-use platform

- **Same harness, every team:** SOC, IT, DevOps, and business workflows on one platform
- **One control plane:** DLP, authorization, audit, and model governance applied uniformly to every agent
- **One procurement, one audit surface,** one place to answer “what did the agents do?”
- **Model-curve aligned:** as models improve, your agents improve; the controls stay

$250k/yr list for SaaS, bring your own inference.

The honest part: these tools are genuinely good at their verticals today, and a pure-SOC buyer comparing feature checklists this quarter may not feel the difference. The question is whether single-purpose workflow software is the right three-year bet while model capability compounds quarterly.

THE BOTTOM LINE

Buy controls, not workflows. Workflows are becoming prompts; the control plane is what your auditors, regulators, and CISO require, and it is what survives the model curve. Kindo is one general-use agent platform for every team, at **$250k/yr list, bring your own inference**, instead of a stack of vertical contracts that each do one job.

Sources & estimates: contract data from Vendr marketplace (Tines n=62 median $52,228; Torq median $179,135; Workato ~$197k enterprise average), marked [est.]; template/agent-library counts from vendor sites (Blink Ops); the model-absorption thesis is Kindo's market view, not a third-party finding. Kindo SaaS at $250k/yr MSRP; negotiated pricing may differ. Companion documents: the four-gaps capability one-sheet and the DIY TCO analysis.