Project AI Assessment

Example industry - Roofing software solutions

BAIN & COMPANY ◓

Summary

- **Future roofing software solutions will be AI-enabled**, and while the degree of AI application will vary, it will have a profound impact on roofing workflows and functionalities across modules; the **nature of differentiation is going to shift**
  - Today, roofing platforms stand out based on purpose-built workflows, ease of use, and ecosystem integrations
  - In the future, new differentiating factors will emerge, and the leaders will be those that embed agentic AI, natural language interfaces, and context-aware intelligence to further reduce administrative burdens, streamline operations, enhance decision-making, and increase profitability

- AI will make developers more productive, which **will make it easier for competing solutions to enter the market** and incorporate roofing workflows and functionality
  - AI-native competitors will be able to match Target's functionalities and integrate AI features into a full production app within 9–15 months, or less with increased resourcing and AI-first techniques. These timelines will continue to shrink as AI further boosts developer productivity
  - Peers may begin to bridge the gap between their advanced GenAI capabilities and roofing domain knowledge
  - Target's defensibility—being purpose-built for roofing, offering strong ecosystem integrations, and having locked-in data—will slow down competitors but not fully protect against new entrants

- This changing **landscape presents both threats and opportunities for Target**, and the outcome will depend on execution
  - Opportunity for Target to incorporate AI and create distance from adjacent competitors like peers. Target can tap into expanding services TAM and monetize AI by saving users time when interacting with the platform and reducing admin overhead
  - There is also a threat to Target if it fails to execute its AI vision—risking loss of relevance or increased competition from companies that integrate AI from the ground up and invest in tailoring solutions using roofing domain expertise.

- AI has potential to ease switching barriers, but **adoption will be company-led, not customer driven**, particularly in the near-term
  - Roofers are historically "low-tech" and not actively demanding AI, but they will adopt solutions that reduce manual work, speed up claims, and improve ROI
  - Successful adoption will depend on Target clearly demonstrating time savings and offering seamless onboarding—it will not be immediately demanded by customers

AI Assessment | We deploy a common framework to assess how AI will impact specific targets

AI EXPOSURE POTENTIAL

LOW → HIGH

| AUGMENTATION | TRANSFORMATION | REVOLUTION |

(A) Augmentation Opportunity

Possibility for productivity gains (potentially large scale) but **limited material impact on core drivers of competitiveness**; no imminent threat from AI

(B) Transformation Opportunity

Some **positive changes to the product landscape and cost base or competitive landscapes** resulting in product, bottom-line and/or differentiation improvements

(C) Transformation Risk

Some **changes to product- and competitive- landscapes;** potential for market share / leadership changes
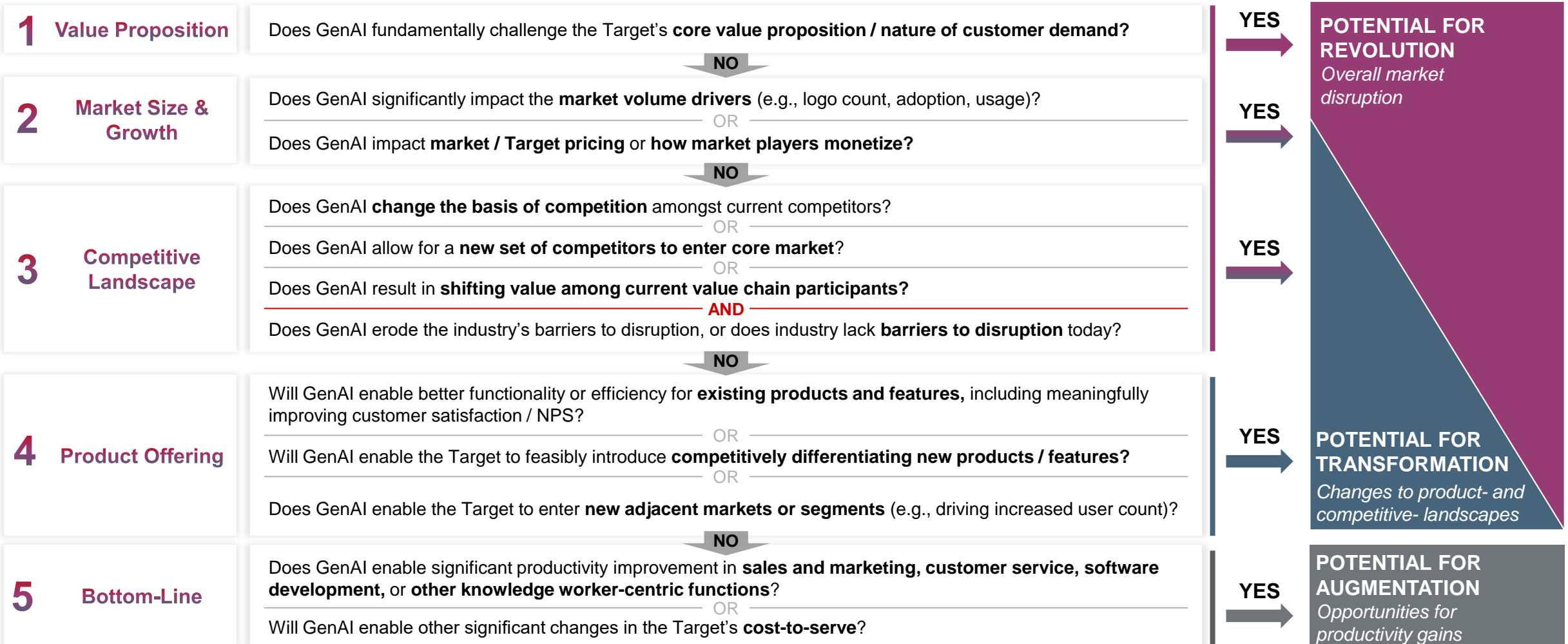
(D) Revolution Opportunity

Market or product may fundamentally evolve, or value chain may shift; incumbents have opportunity to gain share through AI driven advances

(E) Revolution Risk

Market or product may fundamentally evolve, or value chain may shift, with PortCos that have lower barriers to entry at risk for disruption

Disruption Diagnostic | We use a short diagnostic during project scoping to understand expected disruption and required diligence approach
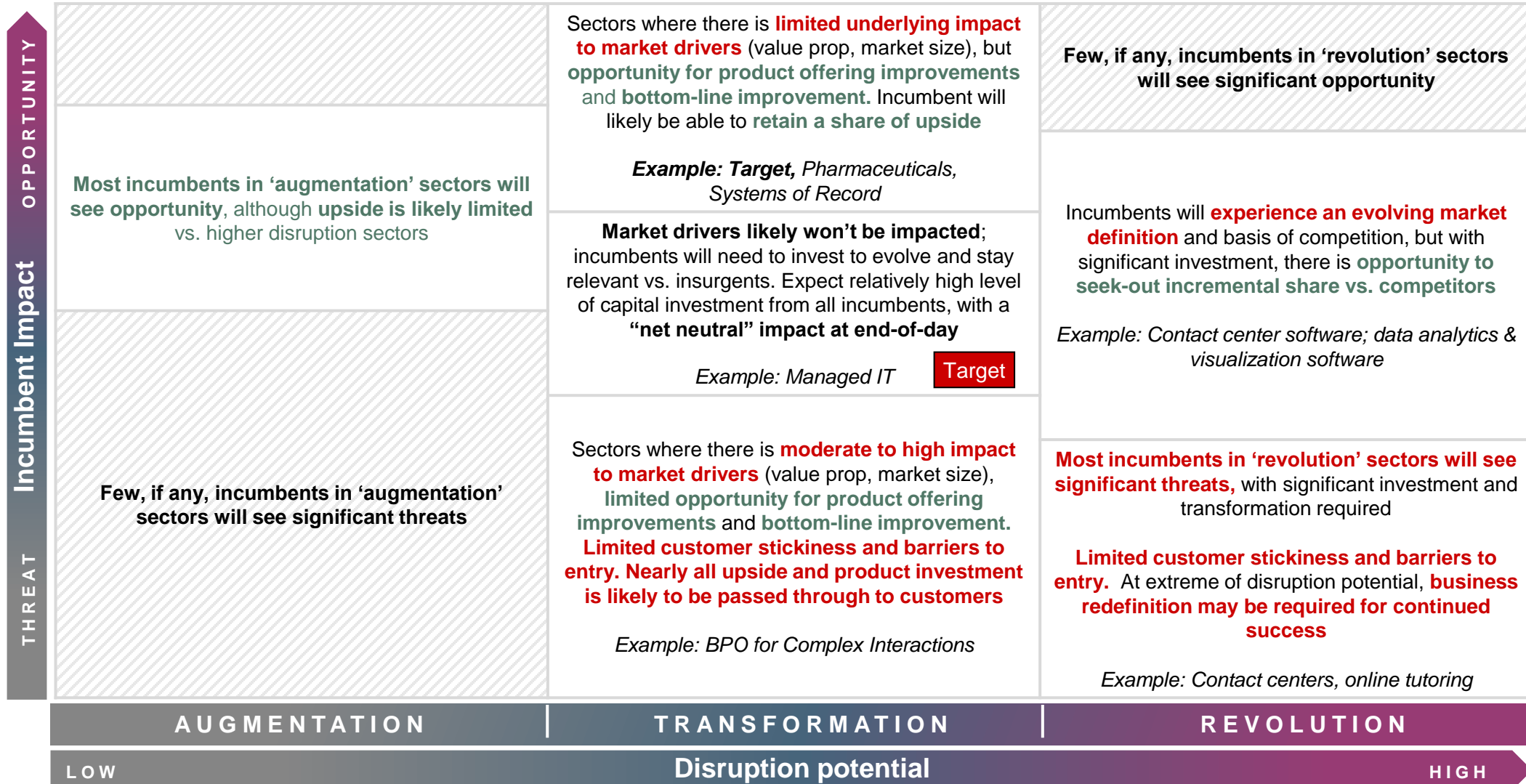
Over the next ~5 years, do we believe GenAI will impact the Market or Target's…

1 Value Proposition

Does GenAI fundamentally challenge the Target's **core value proposition / nature of customer demand?**

YES →

2 Market Size & Growth

NO ↓

Does GenAI significantly impact the **market volume drivers** (e.g., logo count, adoption, usage)?

OR

Does GenAI impact **market / Target pricing** or **how market players monetize?**

YES →

3 Competitive Landscape

NO ↓

Does GenAI **change the basis of competition** amongst current competitors?

OR

Does GenAI allow for a **new set of competitors to enter core market**?

OR

Does GenAI result in **shifting value among current value chain participants?**

AND

Does GenAI erode the industry's barriers to disruption, or does industry lack **barriers to disruption** today?

YES →

POTENTIAL FOR REVOLUTION
Overall market disruption

4 Product Offering

NO ↓

Will GenAI enable better functionality or efficiency for **existing products and features,** including meaningfully improving customer satisfaction / NPS?

OR

Will GenAI enable the Target to feasibly introduce **competitively differentiating new products / features?**

OR

Does GenAI enable the Target to enter **new adjacent markets or segments** (e.g., driving increased user count)?

YES →

POTENTIAL FOR TRANSFORMATION
Changes to product- and competitive- landscapes

5 Bottom-Line

NO ↓

Does GenAI enable significant productivity improvement in **sales and marketing, customer service, software development,** or **other knowledge worker-centric functions**?

OR

Will GenAI enable other significant changes in the Target's **cost-to-serve?**

YES →

POTENTIAL FOR AUGMENTATION
Opportunities for productivity gains

Disruption Diagnostic | Disruption can be either an opportunity or threat to incumbents; Target is likely to be more opportunity-exposed vs. threats

/ ILLUSTRATIVE

OPPORTUNITY / **Incumbent Impact** / **THREAT**

Most incumbents in 'augmentation' sectors will see opportunity, although **upside is likely limited** vs. higher disruption sectors

Sectors where there is **limited underlying impact to market drivers** (value prop, market size), but **opportunity for product offering improvements** and **bottom-line improvement.** Incumbent will likely be able to **retain a share of upside**

Example: Target, *Pharmaceuticals, Systems of Record*

Market drivers likely won't be impacted; incumbents will need to invest to evolve and stay relevant vs. insurgents. Expect relatively high level of capital investment from all incumbents, with a **"net neutral" impact at end-of-day**

Example: Managed IT | **Target**

Few, if any, incumbents in 'augmentation' sectors will see significant threats

Sectors where there is **moderate to high impact to market drivers** (value prop, market size), **limited opportunity for product offering improvements** and **bottom-line improvement. Limited customer stickiness and barriers to entry. Nearly all upside and product investment is likely to be passed through to customers**

Example: BPO for Complex Interactions

Few, if any, incumbents in 'revolution' sectors will see significant opportunity

Incumbents will **experience an evolving market definition** and basis of competition, but with significant investment, there is **opportunity to seek-out incremental share vs. competitors**

Example: Contact center software; data analytics & visualization software

Most incumbents in 'revolution' sectors will see significant threats, with significant investment and transformation required

Limited customer stickiness and barriers to entry. At extreme of disruption potential, **business redefinition may be required for continued success**

Example: Contact centers, online tutoring

AUGMENTATION | **TRANSFORMATION** | **REVOLUTION**

Disruption potential

LOW — HIGH

Disruption Diagnostic | Target is likely to face Transformational impact from AI, driven by competitive and product impacts

Impact	Low	Low-medium	Medium	Medium-high	High

Disruption diagnostic: "Does GenAI…" / **Rating & Rationale**

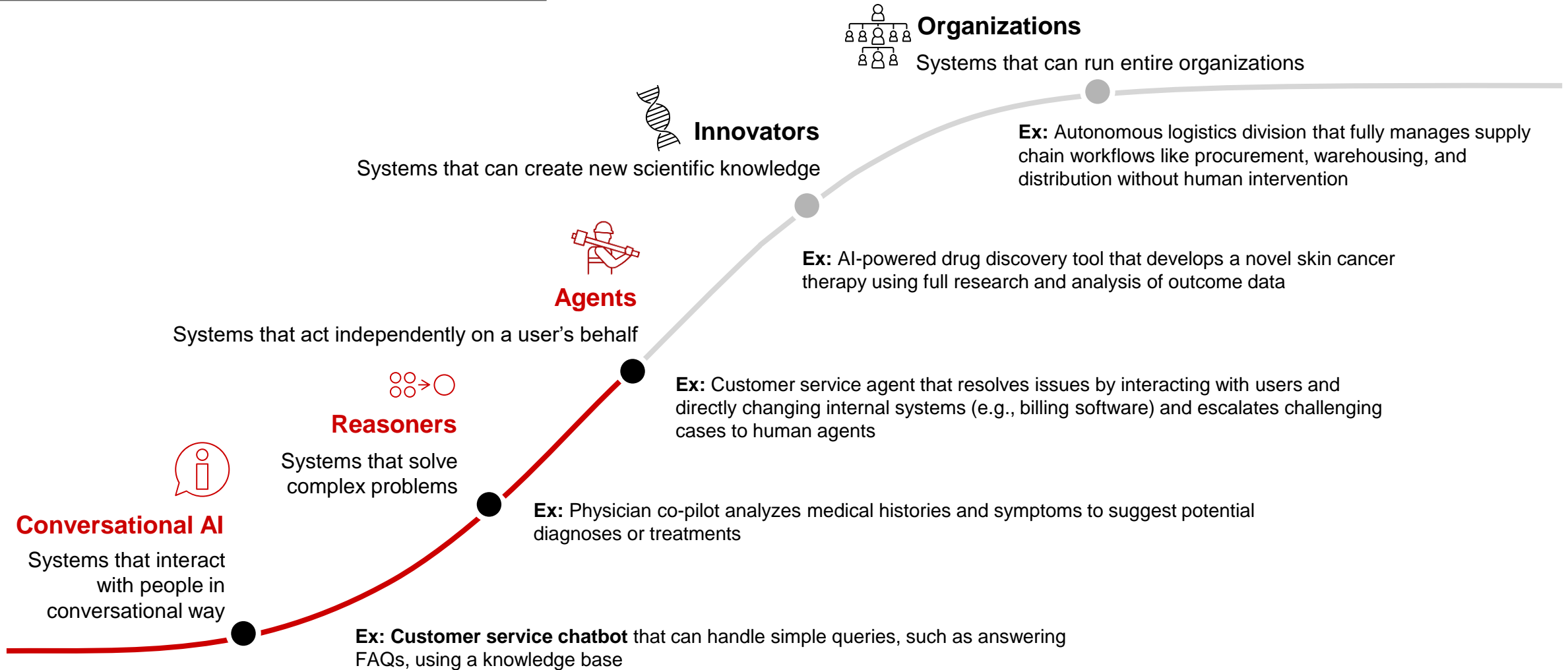|		Disruption diagnostic	Impact	Rating & Rationale
1	**Value Proposition**	Fundamentally challenge the Target's **core value prop / nature of customer demand?**		• Cloud-based business management software for the Roofing industry will continue to be demanded by customers, but the nature of customer demand will start to shift; customers will demand AI-enabled and Agentic AI-equipped software solutions that are deeply integrated into their workflows
2	**Market Size & Growth**	Impact the **market volume drivers** (e.g., logo count, adoption, usage)?		• Adoption and usage likely to experience tailwinds as AI-enabled solutions are easier to engage with and start to land at customers initially averse to using software solutions
		Impact **market pricing** or **how market players monetize?**		• Pricing to be impacted as players monetize value add driven by AI and Agentic capabilities
3	**Competitive Landscape**	**Change the basis of competition** amongst current competitors?		• AI roadmap and capabilities will be a leading KPC, and competitors leading on AI will have an edge
		Allow for a **new set of competitors to enter core market**?		• Lightweight, AI-native Roofing business management solutions will emerge; potential for generalized CRMs and other business platform software solutions to extend into specific markets
		Result in **shifting value among current value chain participants?**		• Foundational model providers and Agentic AI solutions to extract some market rents
		Erode the industry's barriers to disruption, or does industry lack **barriers to disruption** today?		• Market has limited barriers, with industry-specific solutions deeply integrated with other applications and data sets presenting some barriers to switching
4	**Product Offering**	Enable better functionality or efficiency for **existing products and features,** incl. meaningfully improving customer satisfaction / NPS?		• AI-enabled features (e.g., NL interfaces, AI-driven image analysis, AI-powered estimation and quoting, Agentic project management, customer service automation) to be some mix of highly differentiating and table stakes
		Enable Target to feasibly introduce **competitively differentiating new products / features?**		• Target could offer AI-enabled Agents that would enable it to capture some of the services TAM
		Enable Target to enter **new adjacent markets or segments** (e.g., driving increased user count)?		• Target could offer lightweight, modular solutions that could help drive up adoption and usage at smaller customers
5	**Productivity**	Enable significant productivity improvement in **sales and marketing, customer service, software development,** or other **knowledge worker-centric functions**?		• Target has a relatively small team (158 FTEs on LinkedIn), so the firm lacks the scale to drive meaningful productivity gains in specific functions (e.g., sales, customer services, software dev); that said, opportunity exists to slow HC growth
		Enable other significant changes in the Target's **cost-to-serve?**		• Cost-to-serve to be impacted as token costs will be a net new cost in delivering Target's solutions
		Overall disruption level		**Transformation**

Macro Considerations | Gen AI will play out against a backdrop of diverse factors; possible to have high confidence in some elements, but net result is uncertain

Key factors influencing impact of Gen AI (*not exhaustive*)

What <u>will</u> stay the same	**Core jobs-to-be-done –** Capturing leads, producing estimates, scheduling crews, managing jobs, and invoicing remain the backbone of any roofing CRM
	Domain expertise wins – Roofing / insurance claim workflows, supplier catalogs, and measurements stay highly specialized; products built "for everyone" still struggle here
	Integration expectations – Suppliers, and finance/marketing stacks remain must-have connectors
	Relationship-driven sales channel – Roofing contractors adopt software largely through referrals, distributors, buying groups, and associations
	Change-averse user base – Many contractors are still "low-tech"; any new tool must show clear ROI and minimal training time
What <u>will</u> change	**AI-enabled workflows –** Agentic AI, natural-language UIs, and context-aware suggestions will be embedded throughout all workflows, with less human input
	Faster product cycles & copy-cats – AI boosts developer velocity; new entrants can replicate core functionality in months, not years, eroding feature-based moats
	Commoditization of basic features – Contact management, estimating, and photo capture become table stakes; differentiation shifts to intelligence, integrations, and UI
	Data-driven decision support – Real-time profit analytics, predictive maintenance, and benchmark comparisons will be expected rather than "nice to have"
	Rising user expectations – Voice input, chat-first interfaces, and instant insights will feel normal—even to previously "low-tech" users—because every tool will offer them
	Competitive field widens – Horizontal giants (peers) will bolt on roofing domain logic, while vertical upstarts launch AI-native stacks
	Lower switching costs – Automated data migration and AI-assisted onboarding trim pain of switching, forcing vendors to compete on continuous value, not just sunk cost
	Mobile, field-first usage – Crews and sales reps will rely on phones/tablets on-site; offline capability will matter but most interfaces should happen away from desktop
What <u>might</u> change *(unlikely in near-term)*	**Pricing models –** Shift from per-seat to usage-based or outcome-based (e.g., % of claim paid) is possible but not certain
	Data-ownership norms – Customers and suppliers may push for revenue-share or co-ownership of the data that trains agents
	Supplier power balance – Distributors might open real-time APIs to every CRM—or they might double-down on pay-to-play data deals
	Competitive landscape – Horizontal "Copilot" suites could replicate core workflows or offer agents that utilize software platforms
	Talent mix – Admin roles may shift from data entry to AI-validation and exception handling, but humans remain in the loop

AI is advancing exponentially, and we must contemplate how it will impact Target throughout the upcoming hold period
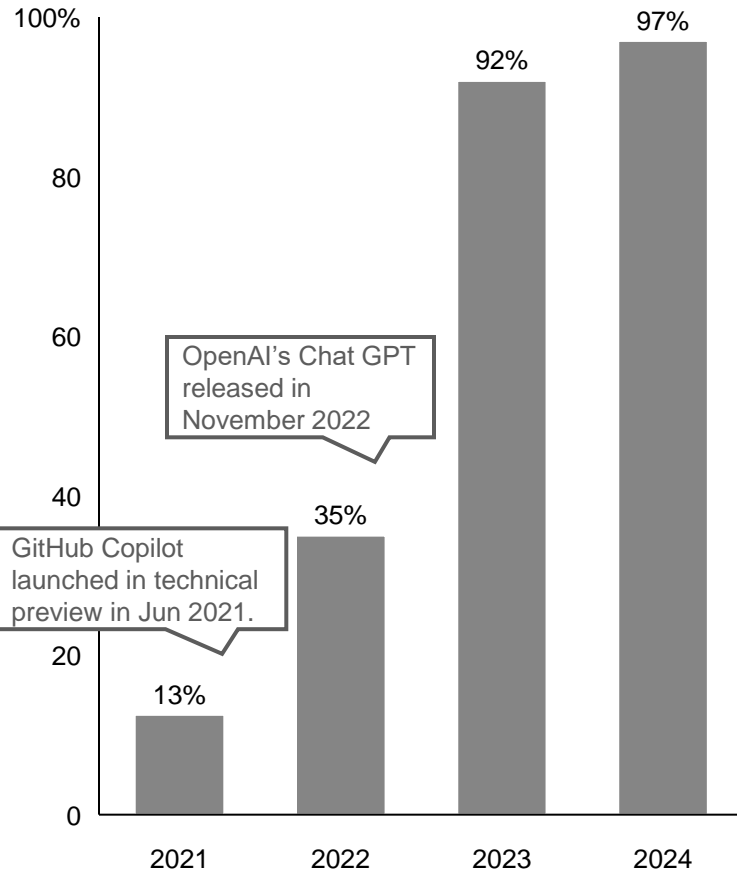
IMPACT OF AI ON SOFTWARE

Organizations
Systems that can run entire organizations

Ex: Autonomous logistics division that fully manages supply chain workflows like procurement, warehousing, and distribution without human intervention

Innovators
Systems that can create new scientific knowledge

Ex: AI-powered drug discovery tool that develops a novel skin cancer therapy using full research and analysis of outcome data

Agents
Systems that act independently on a user's behalf

Ex: Customer service agent that resolves issues by interacting with users and directly changing internal systems (e.g., billing software) and escalates challenging cases to human agents

Reasoners
Systems that solve complex problems

Ex: Physician co-pilot analyzes medical histories and symptoms to suggest potential diagnoses or treatments

Conversational AI
Systems that interact with people in conversational way

Ex: Customer service chatbot that can handle simple queries, such as answering FAQs, using a knowledge base

Source Bain analysis

According to AI leaders, AI say it will soon supercharge, and even in places replace, much of what developers do today

AI adoption among developers is reaching saturation

Adoption of AI Coding Tools Among US Developers

- OpenAI's Chat GPT released in November 2022
- GitHub Copilot launched in technical preview in Jun 2021.

Year	Adoption
2021	13%
2022	35%
2023	92%
2024	97%

Source: Lit search; GitHub; Wired

Leaders signal a shift: AI is rewriting the developer workflow

*"AI is **compressing three decades** of software development change **into just three years**." ~ Jan 2025*

Satya Nadella, Microsoft CEO

*"**95% of code is going to be AI-generated** within the **next 5 years**. Very little is going to be line by line, human-written code.." ~ Apr 2025*

Kevin Scott, AI platform 1 CTO

*"**Building GPT-4** took **hundreds of people**, almost all of AI platform 1's effort. Now, thanks to advances from **GPT-4.5**, we could **rebuild it** with just **five to ten engineers**." ~ Apr 2025*

Sam Altman, AI platform 1 CEO

*"Probably in 2025, we are going to have an **AI** that **can effectively be a sort of mid-level engineer** that you have at your company that can write code." ~ Jan 2025*

Mark Zuckerberg, Meta CEO

*"**All code will be AI generated**. I assume that on this optimisation path we're on, where agents are gonna get better and better.. it would be **a waste of time to learn how to code**." ~ Mar 2025*

Amjad Masad, Replit CEO

*"I think this is the year that **AI becomes better than humans at competitive coding** forever. This is the year that AI gets better than humans at programming forever." ~ Mar 2025*

Kevin Weil, AI platform 1 CPO

New capabilities will be needed to build and deploy Agentic AI, and doing so is not trivial, particularly for platforms with minimal AI talent and capabilities

AI solution layer

User interaction

Interaction Modalities (e.g., text, voice, vision, etc.) and interfaces	**Prompt Engineering** to enhance off-the-shelf performance of LLM

Model orchestration

Model selection & routing to decide which model to use for each task

AI tooling layer

Data-driven model development	*Agent platform*	*Deployment & monitoring*	*Continuous improvement*
Model training / fine-tuning	**Foundation model** used to power agentic thinking	**CI/CD for AI** for automated deployment	**App testing** (test cases)	**Feedback-based retraining** to refine model using signals
Data annotation / **Context & memory mgmt.**	**Agent Orchestration & Management** across agents	**Observability** to track model performance		**Explainability & Auditability** to analyze and interpret model

Data foundation layer

Data acquisition & access	*Data curation & quality*	*Data storage & discovery*	*Data serving*
Data acquisition to identify needed data and ensure access	**Data cleaning & normalization** to remove duplicates, outliers, and errors	**Enterprise Storage** to manage data and content storage	**Real-Time Access** to enable APIs to support live model inference
Pipeline for ingesting data from structured/unstructured data sources	**Data definitions & metadata** to establish definitions & domain vocab	**Discovery & cataloging** to enable querying data / enhance accessibility	**Batch Access** to support offline analytics & batch training for models

Infrastructure & integration layer

Cloud infrastructure & compute			*Enterprise integration*		*Security & access control*	
LLM infrastructure	**Flexible environment** (DevOps, microservices, containerization)	**Speed/procedures** to stand up environment (infra as code)	**API-Driven and event-based architecture** to integrate with SaaS	**Connectors to 3rd-party systems** outside RP platform	**Access controls to** ensure security of app (e.g., data, endpoints)	**Data encryption & compliance** to adhere to security regulations

AI is accelerating software development, cutting build time, and increasing velocity; this has real implication on solutions like Target that could face AI-native competitors

/ PRELIMINARY

Development phase	Planning & Design		Build & Integrate			Launch & Oprate			Total
	Requirement Analysis	Design & Prototyping	Frontend Development	Backend Development	Integration	Testing & QA	Deployment	Maintenance & Updates	
Description	Define features, business rules, constraints	UI/UX wireframes and user journeys	Web/mobile UI with React/Vue etc.	APIs, logic, database integration	Sync FE/BE, auth, middleware	Manual + automated testing	CI/CD setup and go-live	Ongoing features, bugfixes	
Timeline & Resourcing (no AI today)	**4-6 weeks**	**8 weeks**	**10 weeks**	**13 weeks**	**5 weeks**	**8 weeks**	**3 weeks**	Continuous	**~12-15 months ~8-10 people**
Timeline & Resourcing (with AI today)	**4 weeks** +AI auto-generated summaries	**4 weeks** +AI generated design draft	**6-7 weeks** +GitHub Copilot-style coding	**9 week** +Partial codegen assist	**4 weeks** +Boilerplate scaffolds	**5 weeks** +AI test scripts, partial self-fixing suggestions	**1-2 weeks** +Scripted pipelines	Lighter load +AI bug triage	**~8-9 months ~5-7 people**
Timeline & Resourcing (with AI in 2-3 years)	**2-4 weeks** +Conversational AI agent synthesis	**2 weeks** +Prompt-to-prototype	**3 weeks** +Design-to-code	**3-4 weeks** +Standardized backend API templates	**2-4 weeks** +Auto integration	**2 weeks** +Self-written tests and auto-fixes	**1 week** +GitOps bots & fully automate CI/CD	Minimal +Self-healing code	**~4-5 months ~3-5 people**

AI accelerated delivery ~4x faster with less resourcing

Source: Lit search, Bain expertise

There are certain characteristics that can help determine the degree of impact / level of insulation from GenAI for any software category

Lower impact: Characteristics that help drive insulation from significant GenAI driven changes

- **Serving high complexity use cases:** Software handling complex, unstructured workflows is harder to automate and insulated from AI-driven changes

- **Mission critical with low failure tolerance:** Deeply embedded in enterprise infrastructure, these systems require transparency, accountability, and reliability, that AI cannot currently provide

- **Strong network effects:** Categories that benefit from multiple organizations and users utilizing the same product / platform have a moat against AI-driven shifts

- **Standards are set outside the Enterprise, not inside:** Workflows and "best practices" that are defined by external expertise, regulation, or risk management will continue to require external input

- **Data or regulatory moats exist:** Required access to privileged third-party data or industry-specific regulatory approvals creates high barriers that many AI models can't easily cross

High impact: Characteristics that leave the door open for significant GenAI driven changes

- **Labor intensive or rule-based workflows:** Software that currently relies on human input for repetitive tasks can be transformed by AI-driven automation

- **Data rich but insight poor:** Software that collects large amounts of data but still requires human analysis could be altered by AI that extracts insight and recommends action without human intervention

- **Customization as a selling point:** Premium pricing tied to manual, high-touch customization will struggle as AI scales personalization at lower cost

- **Fragmented implementations:** Solutions comprised of multiple disconnected / standalone tools stitched together could be replaced by AI-native platforms offering more streamlined functionality and user experience

- **Expert driven but not proprietary:** AI can mimic human expertise without a deep data or regulatory moat (e.g., contract review), reshaping software that depends on human judgement

Software category GenAI impact: examples	No impact				Higher impact
	NA – all software categories will be impacted to some extent	ERP / OCFO	Financial services	Professional services	CRM	Marketing / creative
		Cybersecurity	Govt. Services	Business intelligence	EdTech / Learning mgmt.	Coding / DevOps
		Database and storage	Healthcare / med. records	Productivity tools	Compliance	Call center SW

AI is not an existential threat for software broadly, but it is for specific categories of solutions that lack protections

GenAI presents new opportunities at both category and company levels; companies must ensure they are ready for AI transformations

Positioning in the face of GenAI can be measured across two dimensions:
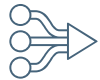
Category GenAI impact

Likelihood that GenAI will significantly reshape business models, workflows, or competitive dynamics within a category, either positively or negatively

Company GenAI transformation readiness

A company's ability and willingness to invest, adapt, and innovate to ensure it continues to thrive in the face of an evolving GenAI landscape

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Category: GenAI impact (vertical axis: HIGH / LOW)

Where investment goes to die!

Burning Platform (Dead Tech Walking)

Operating in a category ripe for AI driven changes but without the investment or agility to respond – without urgent action, these firms risk becoming obsolete as disruptors take over

This is where the bold win big or lose it all …

AI Mavericks (The AI Vanguard)

Mavericks are already moving fast, embedding AI into products, processes, and strategy to stay ahead. Big bets mean big risks, though – pick the wrong path or fail to execute, and cash will burn with little left to show for it

Safe but stagnant – if you stay here too long you will miss out

Steady State (Dinosaur Mode)

Safe for now, these companies face little pressure to act however too much reluctance to explore GenAI could leave them vulnerable to slow erosion in the future, especially if the category evolves

Staying ahead while playing it safe – lower risk, but don't expect fireworks

AI Opportunists (Sharpening the Blade)

Opportunists do not face immediate changes to how they do business, but they are set up to invest, adapt, and innovate while others stand still

LOW ——————————————— HIGH

Company: GenAI transformation readiness

Source: Bain expertise

Each individual application software category and company will face one of four potential scenarios

1
Incumbent SaaS re-invent to be AI-native and leverage scale advantages

AI is placed at core of value proposition, not just an add-on

Incumbents infuse products from **UX/UI to underlying tech stack** to be AI-native

Are **able to leverage incumbency benefits** (e.g., distribution, integrations, regulatory barriers)

2
AI-native SaaS displace incumbents who are stuck with legacy tech debt & product design

Incumbents treat AI as an add-on to the existing product stack

AI-native SaaS co. **reimagine how work gets done**

Limited barriers to entry, but **limited upside to users developing a solution themselves** (e.g., due to cost, design, maintenance requirements)

3
A proliferation of **fit for purpose applications built on top of "low-code** / no-code" platforms

Growing demand for **tailored AI solution specific to business needs**

Low-code / no-code platforms deliver balance between abstraction and ease of development & deployment (including maintenance)

May see a **range of 3rd party apps and DIY** built on such platforms

4
Enterprises build their own full-stack applications on top of foundation models (API or self-hosted)

Full Enterprise **control & customization is considered mission-critical** for this use case

ROI on use case means enterprises are **prepared to commit resources** to design, build & maintain application

Source: Bain expertise

Competitive environment | It is likely to shift, and include new-to-world, AI-native competition as well as emboldened adjacent competitors that outexecute on AI

COMPETITIVE ENVIRONMENT

SPECIALIZED   AI-NATIVE   AGENTIC AI

EXISTING COMPETITORS	NEAR-IN COMPETITORS	AI-NATIVE PLATFORMS	MODULAR APPLICATIONS	AGENTIC AI SOLUTIONS

Modules later expanded into light-weight CRMs

Automation platforms are offering Agentic AI capabilities

Target and competitors will be placed here basis their positioning

These companies are not formidable competitors today, but highlight direction of travel

These are examples of companies deploying these approaches outside of roofing

Source: Lit. search

Deep dive | Each archetype brings unique GenAI strengths, but future winners will be those who combine deep roofing context with autonomous execution

Archetype	Current GenAI offering	Ability to leverage GenAI to take Target's share	Feasibility and likelihood
Existing competitors	• **Limited:** Chatbot that can schedule appointments, interface with customers, and transfer customer calls to human employees (mostly done via integrations)	• **Integrate with external GenAI tools** to automate workflow tasks and deliver personalized client interactions to boost operational efficiency and enhances customer experience • **Enable AI use cases** (e.g., document production, analysis, agentic workflows)	• **High feasibility / High likelihood** • Platforms already integrate with third-party software across entire workflow; integrating GenAI is a logical next step
Near-in competitors	• **Moderate:** Offer GenAI tools for sales and customer communications, but field ops, production, and roofing-specific workflows remain lightly supported	• **Strong GenAI foundations** and integration ecosystems position this segment well to deliver future differentiators like agentic AI, cross-system intelligence, and conversational field interfaces, but roofing-specific workflow depth is lacking	• **High feasibility / High likelihood** • With present infrastructure, capabilities, and potential investment, success only depends on willingness to focus and specialize on roofing market
AI-native platforms	• **Moderate**: Purpose-built platforms with GenAI for Sales/CRM and Business Ops; more roofing-specific than incumbents but still maturing in field ops and production depth (space is very early)	• **Built from the ground up around GenAI**, these players can rapidly embed agentic workflows, automate end-to-end tasks, and personalize the roofing experience by extending GenAI use cases to cover complete end-to-end process • Pose threat if acquired by direct/ near competitors	• **Moderate feasibility / High likelihood** • Platforms are built for roofing with AI at the core, making rapid adoption and market capture achievable with funding for developing advanced functionality
Modular apps	• **Moderate**: Modular AI-native application addresses a specific task (e.g., estimate builder, proposal generator)	• AI-native applications can **start as niche applications**, focused on a singular use case and then slowly expand to other modules; **to scale, these AI applications start building platforms (e.g., CRMs)**	• **Moderate feasibility and likelihood** • Can be fine tuned to field-heavy roofing workflows and offer value in chat/voice-first interface, but are still focused on building end-to-end roofing functionality
Agentic AI solutions	• **Advanced**: AI agents perform autonomous tasks across apps, summarize conversations, generate content, and act as intelligent copilots	• Agentic AI layers can **abstract away complex UIs and workflows**, enabling roofing companies to operate through **conversational agents**, potentially transforming them into "AI-native" databases with minimal human intervention.	• **Moderate feasibility and likelihood** • Technically feasible, but adoption depends on agent reliability, domain context, and whether vertical integration outweighs efficiency and other benefits

Source: Lit search, Bain expertise

Competitors | While select competitors like Peer 1 have announced AI features, most of the direct competitor set is lagging on AI

Fully implemented GenAI capability

Predictive analytics/ AI capability (or 3rd party GenAI features)

GenAI capability currently in development

Both Target and Peer 3 also offer 3rd party integrations for workflow automation

/ P R E L I M I N A R Y

			Target	Peer 3	Peer 5	Peer 8	Peer 1	Peer 7
Sales / CRM	Lead Generation	Capture, organize, assign, and prioritize leads using AI	Lead intelligence scoring, 3rd party integration	**AI Answering Service**, 3rd party integration	N/A	N/A	TI Chat Assistant, Audience Assistant, Ads Optimizer, Email Content Generation	AI Receptionist, ABC Copilot, conversational AI assistant, 3rd party integration
	Estimations and quotation	Create accurate estimates with templates, measurements, and pricing adjustments	3rd party integration	3rd party integration	3rd party integration	3rd party integration	Job Value Predictor, 3rd party integration	N/A
	Proposal Management	Generate and track proposals with templates, signatures, and reminders	N/A	N/A	N/A	N/A	Automated Proposal Templates	N/A
Production	Crew & Job Scheduling	Manage job schedules with crew assignments, calendar tools, and notifications	N/A	N/A	N/A	N/A	Dispatch Pro (Smart Dispatching and Schedule Assistant)	N/A
	Materials Management	Order and track materials with real-time pricing and supplier integration	N/A	N/A	N/A	N/A	Automated Inventory Planning	N/A
	Process Management	Track job progress, tasks, and updates with linked orders and logs	N/A	N/A	N/A	N/A	N/A	N/A
Field App	Mobile Job Access	Manage and update job info on the go with filters and file access	N/A	N/A	N/A	N/A	N/A	Conversational AI assistant
	Photo & Document Capture	Upload and organize job files by insurer or homeowner	3rd party integration	3rd party integration	3rd party integration	3rd party integration	3rd party integration	3rd party integration
	On-Site Communication	Communicate updates, log notes, and get alerts for job changes	N/A	N/A	N/A	N/A	N/A	
	Real-Time Status Updates	Update job status and submit documentation directly from the field	N/A	N/A	N/A	N/A	GPS enabled timesheets	Conversational AI assistant

Note: Peer 4 have not announced any AI capabilities;
Source: Company websites, Lit. Search

Competitor detail | Peer 1 uses GenAI in lead generation, quoting and invoicing to cut manual work and accelerate revenue capture

/ **PRELIMINARY**

Peer 1 Company overview

Description	Cloud-based software built for residential and commercial field service businesses like HVAC, plumbing, electrical, and other home service contractors.
Revenue	xx
Employees	xx
Location	xx
Key offerings	• **All-in-One Field Service Platform:** Scheduling, dispatching, CRM, and invoicing • **Technician Mobile App:** Job details, pricing, payments, and forms in the field • **Smart Scheduling:** GPS tracking and drag-and-drop job assignments • **Proposals & Invoicing:** Digital approvals, Text-to-Pay, and automated billing • **Customer Experience Tools:** Live technician tracking, client portal, and SMS • **Service Agreements:** Recurring revenue with automated renewals • **Reporting & Job Costing:** Real-time margins, KPIs, and team insights • **Inventory & Purchasing:** Vendor integration and materials tracking • **Accounting & Marketing Integrations:** other software integrations

Key GenAI functionalities and products

Module	Feature		Description / Impact
Sales / CRM: Lead Generation	TI Chat Assistant	✓	• **Engages with website visitors or app users** through natural, conversational interfaces, collecting essential lead details, answering questions, and **qualifying customers for services before routing them to live agents** – Helps **reduce missed opportunities**, **speed up lead intake**, and maintain a consistent customer experience
	Audience Assistant	✓	• Assists marketers in **building hyper-targeted audience lists** through a conversational interface, streamlining the process of audience segmentation – **Saves time** and enhances the **effectiveness of marketing campaigns**
Sales / CRM: Estimations and quotation	Job Value Predictor	✓	• Estimates the **potential revenue** of each incoming job using AI. Helps businesses assign high-value jobs to the best-suited technicians, **optimize dispatching, and maximize revenue** by prioritizing the most profitable opportunities. – Helps companies **boost revenue** and **efficiency** by automatically assigning the most valuable jobs to the best-suited technicians.
Sales / CRM: Proposal Management	Automated Proposal Templates	✓	• Leverages GenAI to **build tiered (Good/Better/Best) proposals** based on job history, pricing, and customer data, reducing the need for manual setup – **Speeds up proposal creation**, **ensures consistency** across teams, and improves customer decision-making by offering clear service options
Finance: Invoicing	Invoice Summary & Email Generator	✓	• Uses GenAI to **create invoice summaries** and **payment request emails** based on job, customer, and payment data to support internal billing processes – Reduce manual entry, **prevent billing errors**, and send **consistent payment requests**, helping to improve billing efficiency and on-time payments
Business Management: Reporting & Analytics	TI Assist	✓	• Provides **real-time AI suggestions** within workflows to help teams make faster, smarter decisions - like **flagging job risks**, **recommending actions**, or highlighting opportunities. – Improves **operational efficiency**, **reduces errors**, and helps teams **act faster -** leading to better performance, higher revenue, and improved customer satisfaction.

Source: Lit. search; Market participant interviews

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	① Target leads market with differentiated GenAI innovation	② Target drives strong AI innovation, outcomes in-line w/ competition	③ Competitive GenAI innovation drives pricing pressure	④ New offerings challenge modest Target's innovation	⑤ Target fails to innovate, is surpassed by competition
Description	*Target is **market leader with differentiated AI** functionality, delivering better superior AI functionality and fully monetizing features*	*Target's offering incorporates **strong GenAI-functionality** with meaningful improvement of outcomes, although **limited in differentiation** from competition*	*Target develops **moderate GenAI innovation and product feature functionality**; however**, competitive offerings match Target's offerings** and expanding the competitive set to adjacent players*	***New offerings**, potentially including lightweight AI-native solutions, provide similar outcomes to Target; **Target's innovation lags**; Target loses share and faces more price pressure, particularly on the lower end of the market*	*Target **fails to produce any material AI products or features**; competitor innovation and/or new lightweight offerings result in declining share and added pricing pressure*
Competitive innovation	Trails Target	On par with Target	On par with Target	Outpaces Target	Outpaces Target
Target's share	Increases	Steady	Steady-to-Declining	Declines	Declines
Target's pricing	Increases	Slight increase	Steady-to-Declining	Steady	Declines
Net revenue impact	Material increase	Slight increase	Steady-to-Declining	Modest decline	Material decline

Source: Bain expertise

Range of outcomes | Most likely scenarios would result in neutral to modestly positive margin impact

	① Target leads market with differentiated GenAI innovation	② Target drives strong AI innovation, outcomes in-line w/ competition	③ Competitive AI innovation drives pricing pressure	④ New offerings challenge modest Target's innovation	⑤ Target fails to innovate, is surpassed by competition
Net revenue impact	Material increase	Slight increase	Steady	Modest decline	Material decline
Likelihood of outcome	**Lower**	**Moderate**	**Higher** *Most likely scenario with a PE firm's support*	**Moderate** *Most likely scenario on current glidepath*	**Lower**
Why this could happen	• Target has advantages in building AI solutions, including workflow expertise, data assets, expertise • Competitors fail to match Target's initiatives and performance • Target's market is relatively small, reducing attractiveness for potential entrants	• Target still has time to innovate on AI and stay ahead of competition, plus advantages such as workflow expertise, integrations, data assets • New competitors / offerings limited by niche market and difficulty of switching customers	• Target will benefit from increased AI investment and focus under new ownership • Current and adjacent competitors are already making investments in AI-powered solutions	• Target's modest GenAI investments and supporting talent to-date could result in less innovation • Current and adjacent competitors are already making investments in AI-powered products; key features are easily replicated	• Target does not generate any meaningful AI products or features • AI solutions are advancing rapidly; realization of agentic AI-native offerings as well as those from larger platforms expand into roofing • Refactoring Target's solution for AI is too cumbersome
Why it might not happen	• Requires meaningful inflection in AI capabilities and product feature functionality from today • Many current and adjacent competitors already building innovative AI offerings with potential to compete	• Offerings from existing / new competitors outpace Target, can be easily adapted for roofing • Requires Target to invest in AI above current levels to stay ahead • Customer adopt AI-driven modules for select modules	• Target has incumbent advantages (e.g., brand, integrations, workflows, data, expertise) that will allow it to stay ahead of competition • Offerings from existing / new competitors outpace Target, can be easily adapted for roofing	• Even with GenAI modest investments, Target has several advantages (e.g., workflow expertise, platform, switching difficulty) as current market leader • Adjacent / new competitors have had limited motivation to enter given small market	• AI is clearly a priority for Target, and it will be able to incorporate AI functionality into varying solutions

Source: Bain expertise

Drivers | The nature of differentiation will shift from UI, roofing-specific workflows to agentic AI, natural language, reasoning, and context memory capabilities

Drivers of differentiation today
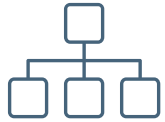
Purpose-built roofing workflows
Software solutions stand out by being tailored specifically for roofing, especially insurance-heavy and residential workflows

Ease of use and intuitive interface
Software that's easy to use for both office and field staff consistently outperforms clunkier and more complex systems

Integrations with tools in roofing ecosystem
High-value integrations are a major differentiator – particularly material supplier, measurement, and accounting integrations

Out-of-the-box functionality vs customizability
Roofing software platforms differentiate on configurability – some cater to smaller teams needing fast, out-of-the-box workflows, while others focus on customizability and scalability for large operators

Future drivers of differentiation
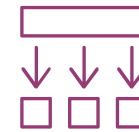
Agentic AI and autonomous workflows
Next-gen platforms will differentiate by embedding process-aware AI agents that proactively complete tasks, harnessing memory and prior interactions to remove repetitive process steps

Natural language interfaces for field ops
Mobile and desktop interfaces that allow people to use text or voice to query, update, and manage jobs conversationally
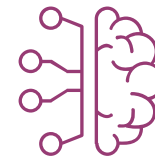
Critical reasoning and analytical capabilities
Next-gen platforms will deliver business intelligence by analyzing visual inputs, job and historical data to generate accurate estimates, scoring job profitability, and eventually making strategic decisions

Context memory and cross-system intelligence
Leading platforms will remember prior jobs, customer preferences, and team behavior, using that memory to remove friction, preempt repetitive steps, and seamlessly coordinate with external APIs

Source: Bain expertise

Switching barriers | AI will ease switching barriers, especially if competitors use it to recreate workflows and assist with data migration and team onboarding

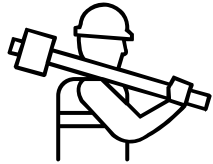| Stickiness driver	Significance	AI impact	Rationale
Deep integration with daily operations and workflows, disruption is seen as risky	(high)	(high)	• AI agents **can be trained to recreate familiar workflows**, pre-fill data, and mirror standard operation procedure to reduce disruption and maintain productivity from Day 1
Data migration is complex and time-consuming (leads, job history, documents and photos are not easily portable)	(high)	(high)	• AI **can assist with data capture, auto-map fields, clean unstructured data**, and intelligently categorize historical documents and photos, turning an 8-week data migration into a 2-3 week one
Too cumbersome to train the team to use a new software platform	(high)	(high)	• Conversational AI is intuitive to use and requires minimal to no training. **AI agents can turn voice inputs into actions**, act as tutors and copilots to onboard field and office users via guided steps
Regulatory data-retention requirements for warranty docs, photos and customer PII	(medium)	(high)	• As mentioned earlier, **AI can assist with data migration**, ensuring that all relevant data are retained
Loss of bespoke reports & dashboards built over years	(medium)	(high)	• AI report wizard can recreate legacy dashboards, ingesting existing KPIs, SQL queries and XLS exports, then rebuilding custom views via natural-language
Custom integrations with other software solutions	(medium)	(neutral)	• **Third-party AI providers can become valuable new integrations**; Within existing integrations, AI can detect systems in use and provide configuration templates
Lack of available alternatives and time to evaluate them	(low)	(low)	• **AI can enable time-constrained operators to assess switching ROI** through workflow simulations and compelling business case examples; alternatives will increase in number
Vendor lock-in and termination fees	(low)	(low)	• AI has limited direct influence but **can increase confidence in ROI** (e.g., time saved and redirected to driving new sales) to offset perceived lock-in pain

Note: Significance is measured by share of respondents and interviewees who indicated each driver as a key reason of switching difficulty
Source: Target customer survey (N=91), Market participant interviews

Adoption barriers | Users are accustomed to low-tech, simple tools; they are skeptical of AI's ability to deliver value and are sensitive to the cost of add-ons

Barriers to AI adoption	Commentary
Roofing's physical, hands-on character and old-school culture	"*Scheduling labor still happens through calls and texts—Target's subcontractor portal adds cost, and frankly, our crews don't need it.*" "*PlanHub and its integration with PlanSwift is **trying to integrate AI. But we're a little old school** … **we're not so much into** [that].*" – *Customer #4* "***AI can't get on a roof and tell me what's wrong with it. AI can't jump on the roof and start installing**.*" "*No, **I don't [need AI],** not for my stallers or for my sales team. Really **all they're doing is taking pictures**.*" – *Customer #6* "*If I can't train a rep on the CRM in three hours, **I don't want it. It's need to be quick, easy, simple.**" "*We're **simple guys**. Hammer and nails. **If I get the opportunity to do something simple, I'll do it**.*" – *Customer #2* "***Some reps never use the mobile app**—they just go home and upload later; **adoption depends entirely on how tech-savvy** your team is.*" – *Customer #3*
Customers are skeptical of AI added value	"*It's still something that was being done before. **AI can tell me how many squares, but so can Hover** … **I haven't thought of a need that I don't have already that something would solve.**" "*I just **don't see a use case scenario for AI** that much in my business … maybe leads, maybe email … I haven't thought of a need that something would solve for.*" "*I think in my call center, you know, lead generation, stuff like that. Maybe … but **nobody's shown me anything spectacular**." – *Customer #6*
Price sensitivity among smaller customers	"***I wanted a custom KPI report** on repairs and close rates—they said 'sure,' **but it'd be $80/month. I'll figure it out in Excel**, thanks... Target **doesn't integrate well unless you pay extra**, and it's **not worth the hassle**.*" – *Customer #3* "*Smarter Docs is one of the problems that Target has... it is a pay per use feature... That **per use fee is quite honestly too high**... it's caused our company to very, very seriously evaluate whether or not we wanted to continue our relationship with Target..*" – *Customer #4*
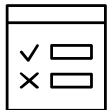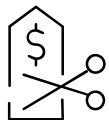
Source: Market participant interviews

Competitive positioning | Large platforms such as Peer 1 and Peer 2 have an edge over companies like Target and Peer 3 given existing capabilities

Positioning: Very weak | Weak | Neutral | Strong | Very strong

Factor	Description	Target	Peer 3	Peer 1	Peer 2
Data Quality, Quantity & Accessibility	Access to a large volume of clean, unique, and well-governed data—in real time	Standardized and domain-specific data but limited ML utilization	Domain-specific data but with custom fields and limited ML utilization	Large footprint across field service verticals (HVAC, plumbing, and roofing)	Enterprise-wide data standardization but not specific to roofing market
Product Innovation Track Record	Repeated success in launching and refining data-driven features	Limited innovation	Some innovation (Customized automations and mobile app upgrade)	Consistent updates and enhancement of Titan Intelligence suite	Pioneer in AI/ML; strong history of AI copilots and predictive analytics
Monetization Potential	Effective packaging, pricing, and go-to-market strategies for product capabilities	High synergy with add-on business model	Flat-rate pricing model currently limits monetization	Revenue-based pricing model allows to tie monetization to customer success	Highly flexible pricing models; consultative sales approach supports AI bundling
Brand Reputation & Trust	Perceived leadership position in the roofing software marketplace	Recognized as top brand and market leader in roofing	Recognized as top brand and market leader in roofing	Emerging software provider in roofing but growing rapidly	Globally known as a CRM leader, with significant presence in roofing
Ecosystem & Partnerships	Strategic alliances and integrations with complementary platforms for roofing	Integrated with key tools (ABC, SPS, Beacon, EagleView, CompanyCam, Quickbooks)	Integrated with key tools (ABC, SPS, Beacon, EagleView, CompanyCam, Quickbooks)	Growing roofing-specific 3rd-party ecosystem (EagleView, CompanyCam, Quickbooks)	Large 3rd-party ecosystem but limited roofing-specific integrations
Technical Talent	A dedicated cross-functional team with AI/ML expertise, supported by leadership	High share of software engineering talent but limited AI/ML expertise	High share of software engineering talent but limited AI/ML expertise	Track record of AI deployment and strong CTO leadership	Enterprise-grade AI/ML teams
Technical Infrastructure & Scalability	Robust cloud-based architecture, MLOps pipelines, and well-documented APIs	*N/A – no evidence found, requires further validation*	*N/A – no evidence found, requires further validation*	Strong commitment to scalability and modern infrastructure	Scalable cloud architecture, well-documented APIs, and MLOps pipelines
IP and Defensibility	Patented algorithms, proprietary data, and exclusive partnerships	*N/A – no evidence found, requires further validation*	*N/A – no evidence found, requires further validation*	Holds 15 active patents, incl. job value prediction and crew dispatch optimization	4K+ active patents on digitization, AI and database tech; strategic partnerships
Execution & Scalability Roadmap	Proven processes for rapid AI prototyping and deployment	Perceived as slow-moving and reactive	Ships frequent updates, especially in UI, workflows, and integrations	Track record of frequently enhancing AI features	Demonstrated success across industries, including roofing

Source: Market participant interviews, Lit. Search

KPCs | AI has the potential to increase the value that Target's customers get from the solution, and could enable them to increase revenues and profitability

AI Impact	Low	Low-medium	Medium	Medium-high	High

More important ↑	KPC	AI impact	Implication for Target
	Roofing-specific functionality	Streamline roofing workflow by auto-filling forms, accelerating measurements, adapting estimate templates, driving customer & insurer interactions, and propose labor & materials	**Faster lead capture, estimation, and scheduling** through GenAI, improving efficiency and reducing manual effort on administrative tasks
	Breadth of functionality	AI agents can traverse across sales, production, and finance workflows, triggering actions, validating entries, and flagging process gaps in real time	**Enables full-suite stickiness** by connecting modules and driving deeper adoption, especially for add-on features like payments, SmartDocs, and Reports+
	Product performance	Proactively detect platform issues, help technical staff with maintenance and debugging, as well as handle performance-related support tickets	**Reduced downtime and increased system reliability** via AI-driven monitoring and proactive issue detection
	Ease of use / user interface	Enable NLP-powered search and intuitive navigation, while conversational tools help streamline field, admin and customer interactions with the platform, reducing clicks, increasing speed, and easing adoption, especially for new or less tech-savvy users	Conversational AI has **potential to completely transform how users interact with platform, reducing friction for less tech-savvy users**, handling customer interactions, speeding up onboarding of new talent and subcontractors
	Configurability / customization	Personalize workflows based on usage data, recommending field mappings, margins, or sales templates per user or team	**Enables "smart defaults/templates" at scale**, enhancing template versatility without requiring additional resources to develop and configure
	Ease of implementation	Accelerate onboarding by guiding users through setup with a chat/voice assistant, auto-mapping integrations (e.g., CRM, accounting), recommending field defaults, and suggesting optimal workflows	**Reduced onboarding friction**, **lower time investment** for contractors, and position as a faster, more intuitive choice - especially for **multi-location** or franchise buyers
	Return on investment	Proactively drive sales pipeline by automating time-intensive tasks (e.g., data-entry, scheduling, and communication); Surface upsell opportunities to increase profitability	Allows Target's customers **to maximize job profitability and ROI by reducing administrative overhead** and freeing up time to build up and drive sales pipeline
	Integration capabilities	Automate data mapping, support integration process and issue resolution, identify conflicting data fields and data quality issues to minimize errors and setup time	**Broader ecosystem of integrations and more accurate data flow** between Target and third-party software providers
	Support / customer service	AI-powered chatbots and virtual assistants can offer 24/7 support for troubleshooting, triggering contextual support flows, and even drafting responses to customer queries	Autonomous lead management, **faster issue resolution** and continuous support availability can help **improve overall customer experience**
	Multi-location reporting	Aggregate and analyze data from multiple locations to forecast cross-location performance, surfacing outliers and optimization opportunities via smart dashboards	**Better visibility** across different locations, **helping multi-location businesses** optimize operations and resource allocation

Note: KPC importance is measured by share of respondents and interviewees who indicated each KPC as a primary criteria when selecting roofing vendors
Source: Target customer survey (N=91), Market participant interviews

Highest value but increasing **GenAI** complexity

	Predictive analytics/ ML *(Traditional AI benefit)*	Search & summarize information	Content creation & personalization	Process unstructured data & detect anomalies	Engage software, data, and knowledge via natural language	Engage with co-pilot for guidance & support	AI agents conduct select workflows	Enhanced decision support & analysis
Generative AI benefit								
Description	• Leverage historical data and algorithms to forecast future outcomes and make data-driven decisions without explicit programming	• Retrieve and synthesize information from existing documents & databases	• Generate first drafts, fill out forms, and translate docs. / comms. for global stakeholders	• Reconcile and clean unstructured data (e.g., transforming tables in PDFs to Excel); identify changes in sentiment and detect data anomalies	• Remove user burden to interact with software, data, and internal knowledge with natural language interface that enables users to quickly make queries over chat	• Virtual assistant that supports employees in day-to-day communication and analysis while providing real-time guidance and coaching	• AI Agents complete specific tasks, with human supervision and support; eventually, AI Agents take on more responsibility	• Gen AI can enable development of deep & meaningful insights to become a strong thought "partner"
Potential AI features/ modules	• Fine-tune lead scoring in the field • Flag margin leaks and job risks • Forecast permit timelines and payment cycles	• Voice search for jobs or status • Summarize job notes and customer history • Retrieve aerial measurement history to assist in new quoting	• Auto-fill estimate/ proposal templates • Draft follow-ups, customer replies • Pre-fill proposals with job & CRM data	• Extract data from photos, scans or notes • Flag anomalies in pricing, quantity or scope • Compare contract vs. delivery photos	• Voice or chat-based job creation and updates • NLP filters for schedules or find jobs (e.g., 'show all delayed installs this week')	• Suggestion of missing items during estimations • Real-time guidance during form filling or template creation	• AI Agent to notify crews, confirm deliveries or follow up on tasks • Agent processes voice input to draft updates, send messages or trigger workflows	• AI-driven analysis and reporting • Agentic AI capabilities embedded • Decision making engine / eventually "runs" business

Source: Bain expertise

Functionality Analysis | In order to understand GenAI impact on Target's functionality, we broke out the key functionality customers utilize the platform for

*Note: **Bolded** features are most important*

Sales / CRM			Production			Field App			
Lead Generation	**Estimations and quotation**	**Proposal Management**	**Crew & Job Scheduling**	**Materials Management**	**Process Management**	**Mobile Job Access**	**Photo & Document Capture**	**On-Site Communication**	**Real-Time Status Updates**
Capture and import leads from multiple sources (incl. API)	**Build estimates using pricing templates**	**Generate proposals** using templates	Assign crews and labor to jobs	Order materials from **integrated suppliers**	Link orders to jobs and schedule tasks	View assigned jobs and job files on the go	**Upload documents and photos**	Send job updates and messages to crews	**Update project progress from field**
Organize leads by priority, status, and tags	Import aerial measurements for accuracy	Include documents and digital signatures	Drag-and-drop scheduling on production calendar	**Access real-time product pricing and catalogs**	Track job progress and key milestones	Search and filter jobs by type or urgency	Attach files directly to job records	**Log calls and notes into job records**	Confirm delivery or inspection completion
Assign leads and track owner activity	Apply discounts, margins, and taxes	Set signature expiration and reminders	Schedule inspections and deliveries	Submit and track orders from within platform	**Log communications** and actions in job history	Access documents, contracts, and estimates	Organize documents by insurer / homeowner	Trigger alerts for task completions or issues	Capture digital signatures on-site
Score leads using AI to prioritize follow-up	**Tie job to insurer and claim number**	Track proposal views and signature status	Resolve conflicts and notify crews	Compare availability and delivery options	Use live feeds to monitor status updates	Mark tasks and milestones as complete		Receive schedule changes and notifications	Submit post-job documentation immediately

Finance				Business Management			
Invoicing	**Payment Processing**	**Accounts Receivable**	**Customer financing**	**Reporting & Analytics**	**Internal Operations**	**User & Permission Management**	**Third-Party Integrations**
Create invoices from job milestones or data	**Enable payment via customer portal**	Monitor outstanding balances and A/R aging	Offer loan options through AccuFi or GreenSky	**Access pre-built and custom dashboards**	Manage templates and standard forms	Create user roles and access levels	Connect with Sales/ CRMs, accounting, and supply tools
Send invoices via email or portal	Reconcile payments to jobs automatically	View payment status and due dates	Prequalify clients through online forms	**Track KPIs across sales, production, and finance**	Automate workflows and **communication**	Control visibility of financial or job data	Use AppConnections to link external systems
Track amount invoiced vs. job value	Track transaction status and disputes	Sync A/R with accounting platforms	Track offer acceptance and funding	Export visual reports for review	Assign internal tasks and deadlines	Track user activity and job ownership	
Send bill to insurer, if relevant		Manage partial and full payments	Manage financing documents and terms	Filter insights by date, team, or region	Contacts management	Support multi-location access controls	

Applicability of future / improved GenAI for Target   ● Low   ● Moderate   ● High

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Sales/ CRM | Impact of AI on the process step

Lead generation	Estimations and quotations	Proposal management

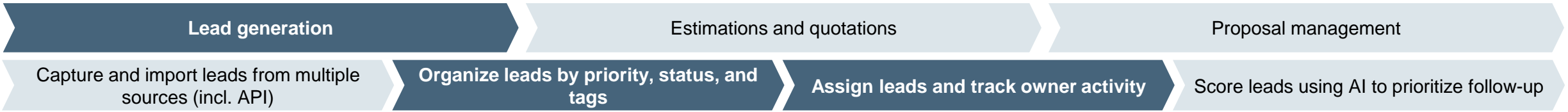| Capture and import leads from multiple sources (incl. API)	Organize leads by priority, status, and tags	Assign leads and track owner activity	Score leads using AI to prioritize follow-up

Workflow

Platform screenshots

Outside-in assessment

- Filling out a form is **manual**

- Customers indicate **limited use of API Integration** (currently partnering with multiple third-party lead generation/ management tools)
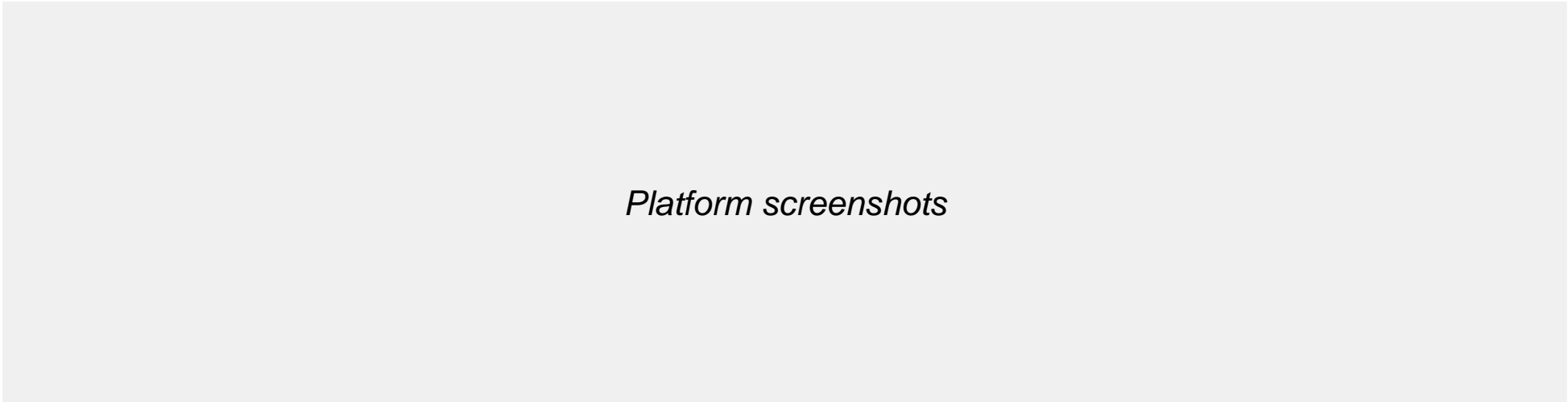
AI potential

- Opportunity to **allow for voice input** or **photo-to-text option** (e.g., take a pic of notes and fill out a form)

- Potential to **enable Agentic APIs** in the future

Source: Product demos, Market participant interviews, Bain expertise

Sales/ CRM | Impact of AI on the process step

Lead generation	Estimations and quotations	Proposal management

Capture and import leads from multiple sources (incl. API)	**Organize leads by priority, status, and tags**	**Assign leads and track owner activity**	Score leads using AI to prioritize follow-up

Workflow

Platform screenshots

Outside-in assessment

- Organizing/ tagging/ prioritizing leads is **a manual process**

AI potential

- **Potential for Agentic AI** to prioritize leads, tapping into series of bots to make recommendations (with human oversight) for (1) **reviewing pipeline**, (2) **prioritizing next best action**, and (3) **enabling outreach** via email/ phone

Source: Product demos, Market participant interviews, Bain expertise

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Sales/ CRM | Impact of AI on the process step

| Lead generation | Estimations and quotations | Proposal management |

| Capture and import leads from multiple sources (incl. API) | Organize leads by priority, status, and tags | Assign leads and track owner activity | Score leads using AI to prioritize follow-up |

Workflow

Platform screenshots

Outside-in assessment

- **Predictive analytics generated Lead Rank is less useful** – customers do not find it helpful for lead prioritization

AI potential

- Good to **fine tune lead rank algorithm** in the future **with ML and customer-specific results**; opportunity to use activity on platform and outcomes to produce monthly report that **highlights what they can do differently / better**

Source: Product demos, Market participant interviews, Bain expertise