

How Tarrant Roofing Gives 130 Sales Reps Answers with Analytics AI

"I was able to do a week's worth of work in 35 mins."

—JEREMY SCHELHORN
VP OF RESIDENTIAL SALES, TARRANT

Key Impact

- 98% less time spent on recurring reports
- 130 reps with on-demand access to sales data
- 1,000+ monthly jobs with clear visibility to leadership

ABOUT TARRANT ROOFING

Tarrant Roofing has spent 32 years roofing homes and businesses in Texas, installing more than 50,000 roofs along the way. Today, its 200+ employees work out of Dallas, Fort Worth, and Austin, while its commercial division serves the lower 48 states. Jeremy Schelhorn, VP of Residential Sales, oversees more than 130 sales reps. Supporting a team that size means understanding how each person is performing and where they need help. From coaching new hires to keeping collections moving, leadership needs a clear view of the work so they can give the team practical guidance.

Challenge

Jeremy Schelhorn, VP of Residential Sales, had been looking for a better way to see what was happening across his division of over 130 reps. The solutions they'd previously tried were either too manual or simply failed to paint the full picture. Even after the team put hours into the report, it couldn't give every manager the view they needed. "Reporting has been the weakest point in every CRM that we've tried," he said. "You're trying to nail down one type of report that's going to make everyone happy, and it proves to be impossible."

Getting beyond those blinders meant spending hours pulling reports and manually analyzing data. By the time Jeremy worked through the data, he'd already spent hours gathering information that he still needed to translate into actionable training for the team. "We needed something that was going to really hone in on every aspect of our business," Jeremy said.

Solution

When Analytics AI became available in beta, Jeremy put it to work right away. On the first day, he asked for sales by rep, month, and region, along with average deal size. He



wanted to see whether it could handle the questions that his previous reporting tools had struggled to answer. "Within minutes, I had everything right back to me, and at that point, I kind of got giddy and said, 'Okay, we found a winner,'" Jeremy said. "I was able to do a week's worth of work in 35 minutes."

Jeremy rolled Analytics AI out to his entire sales team. Reps could type in their name, ask for their open AR accounts, and get a list with a link to each job. On weekly collections calls, each rep could pull up their open jobs,

how long they'd been open, and the balance owed. To help the team get comfortable using it, leadership even ran contests where reps raced to find answers with Analytics AI.

D'Sha Jones, Director of Marketing, also began using Analytics AI to prepare for company-wide meetings every Friday. She could ask follow-up questions and explore multiple layers of data without having to manually pull it or connect a third-party tool. "I can easily ask a question and boom, answer," she said. Because Analytics AI works with the data already in JobNimbus, the team could get answers where they were already managing their work.

Results

Questions that used to take days of searching spreadsheets and doing math by hand now take minutes to answer. For Jeremy, that means he can spend more time deciding to help his reps.

When he wanted to understand how his hires were performing, he gave Analytics AI a list of every rep he'd brought on. He asked it to compare jobs sold and total revenue, then used that information to build training around what each rep needed. He could move from a question about performance to a plan for supporting the people behind the numbers.

Collections tracking has also "dramatically improved," Jeremy said. Reps can see their own open balances whenever they need them and come to weekly calls with the information ready. Now, each rep has a clearer starting point for follow-up. Paired with Boards in



JobNimbus, Analytics AI helps each rep keep track of the 70–80 moving pieces they manage a month. Leadership has more flexibility too. Managers can ask for the view they want in the moment, then explore another question as it comes up. "Now with this tool [Analytics AI], it's possible," Jeremy said.

Across the company, Analytics AI is now where Tarrant Roofing goes for answers. The value extends beyond time saved on reports. Jeremy can see where a rep needs support and shape training around it. Reps can find the balances they need to follow up on. D'Sha can bring current information to the company's Friday meetings without hours of manual prep. Questions still come with running a team of this size, but Analytics AI makes them a manageable part of the day.

Put Your Data to Work

See how Analytics AI in JobNimbus can help you answer questions about your business and decide what to do next.

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