

ServiceTitan[®]
PANTHEON

Pantheon 2025 Investor Session

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Welcome!

Jason Rechel
VP, Investor Relations



ServiceTitan 101

Customers at work!

Please respect the integrity of this event





Pillars of Durable, Profitable Growth

Massive, Durable Market

\$650B¹ of Served Addressable GTV Today

Platform Leadership

The Operating System for the Trades

Expanding Moat

Defensible Product, Scale and Ecosystem Advantages

Multiple Growth Vectors

Clear Customer ROI

Efficient Operating Model

Built to Deliver 25% Incremental Margins



Four FY26 Priorities

Enterprise

Expand Enterprise Capabilities

Pro Products

Broaden Pro Adoption

Commercial

Accelerate Progress

Roofing

Expand in Roofing and Exterior Trades

Agenda



Enterprise Strength

Ross Biestman, CRO

Pro Product Vision

Vincent Payen, SVP Product

Commercial Strategy

Alex Kablanian, SVP & GM Commercial & Construction

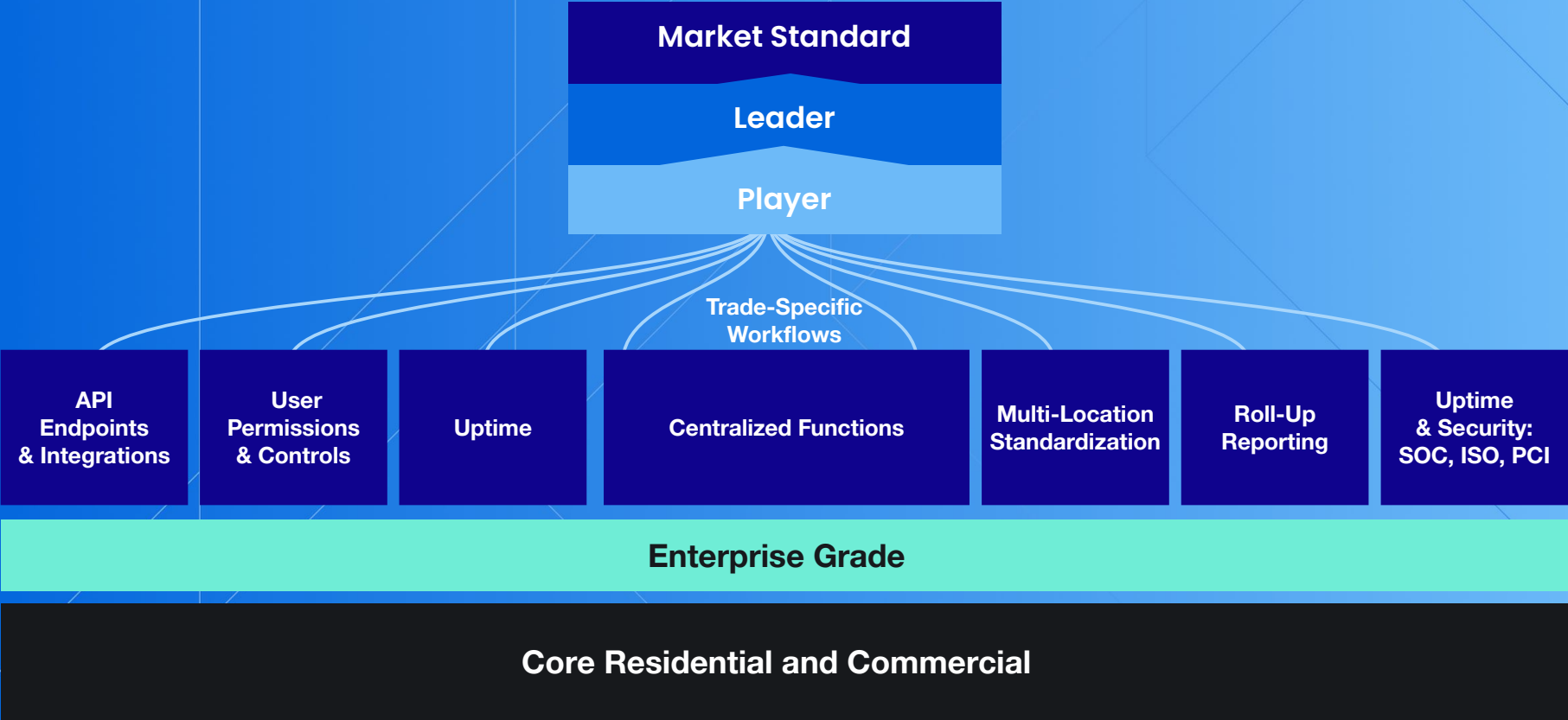
Winning in Exteriors

Chris Petros, COO

Enterprise

Ross Biestman
Chief Revenue Officer

ServiceTitan Was Built For Scale



The Trades are Professionalizing and Consolidating

**Accelerate
Organic Growth**

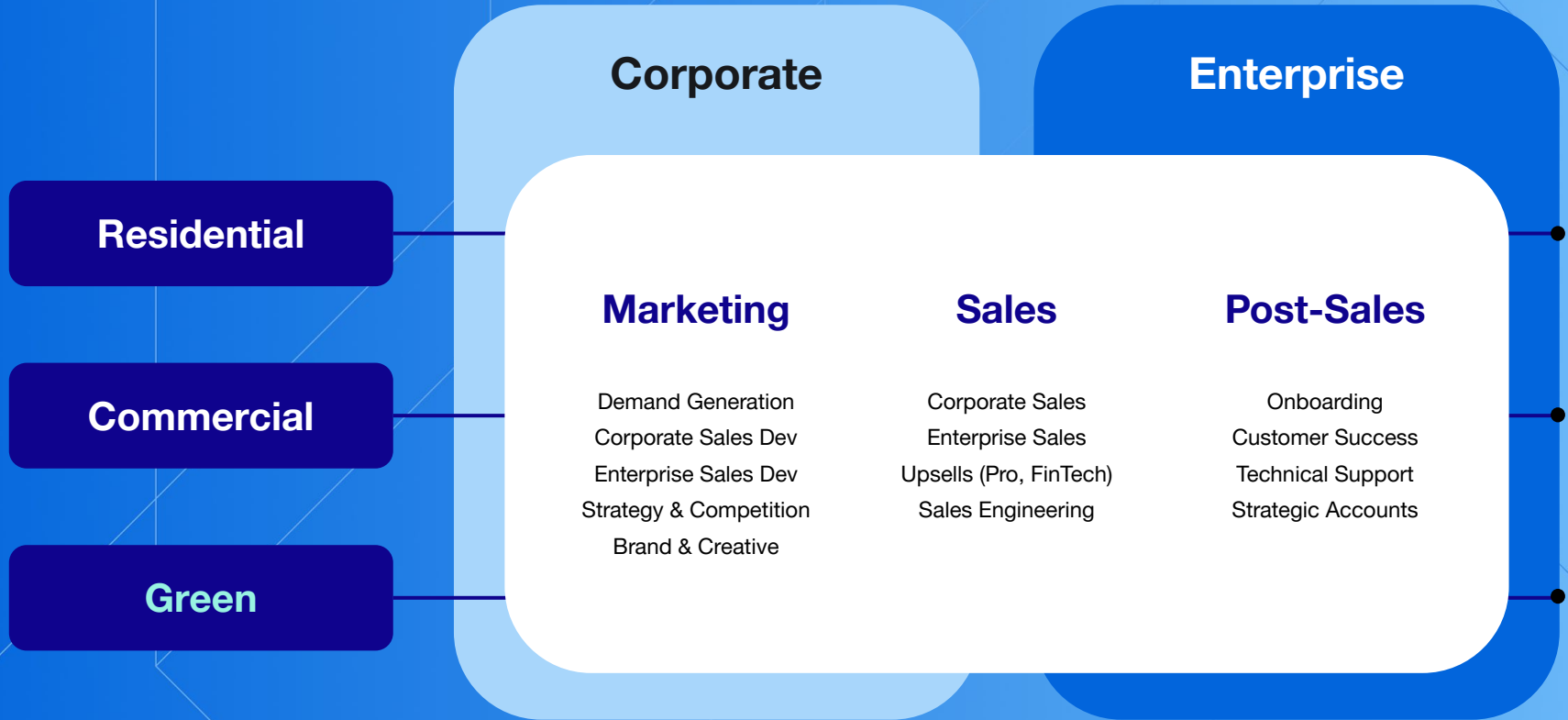


**Consolidate
Share**

Large Enterprise Accelerates Our Entire Model



Organized to Capture The Opportunity



Partners Extend our Reach & Deepen Our Moat

Go-to-Market Activities

sage Intacct

SCORPION

INOVIA

MCAA

NETSUITE

NEXSTAR
network

FERGUSON



Co-Marketing



Training



Events & Thought Leadership



Co-Branded Packages

Impact

Partners drive customer acquisition opportunities to ServiceTitan.

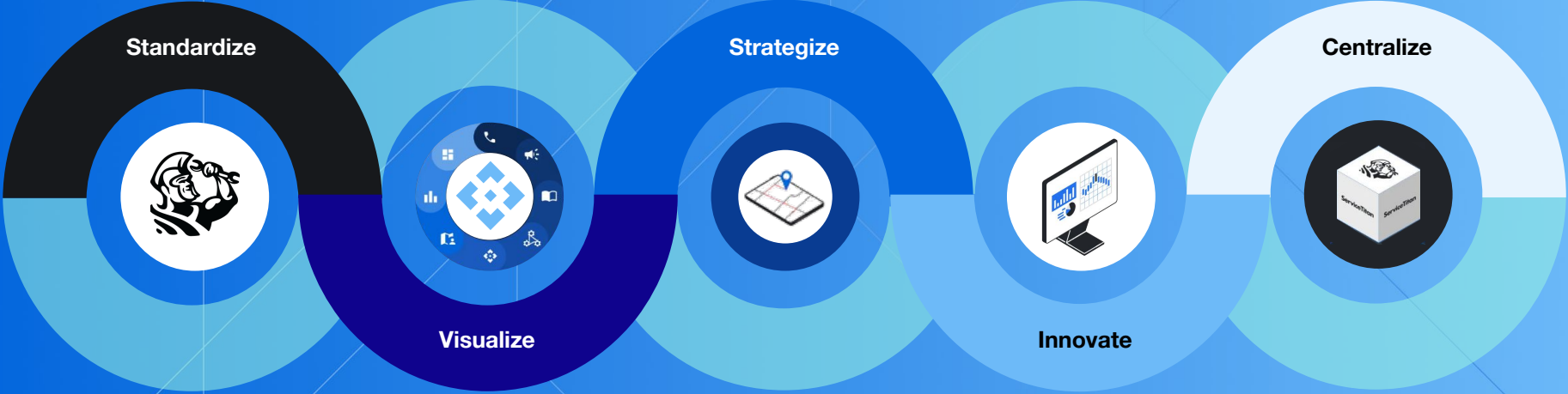
Warm Referrals

Customer Lead Lists



Good Fit Referrals

The PE Playbook Further Extends This Playbook



—• Sponsor Backed Customers Are Elite Operators

PE-backed customers use the platform

>25%

Higher TAD Score

and adopt Pro Products

>50%

Greater average Pro Product attach rate

which together result in faster revenue growth...

>500bps

Faster GTV Growth Rate

...and higher ServiceTitan NPS scores

>2x

Higher ServiceTitan NPS

As compared to non-sponsor backed customers

Enterprise New Product Velocity This Week



Enterprise Leading the Way



Atlas

Automating the Trades

Pro Portfolio Updates

Standardizing Our Largest Customers

Commercial CRM + Construction

Paving the Way to Market Standard

Pro Products

Vincent Payen
SVP & GM, Pro Product



**Automatically
adjusts pricing**

**Books through
Voice Agent**

**Automates in
the field**



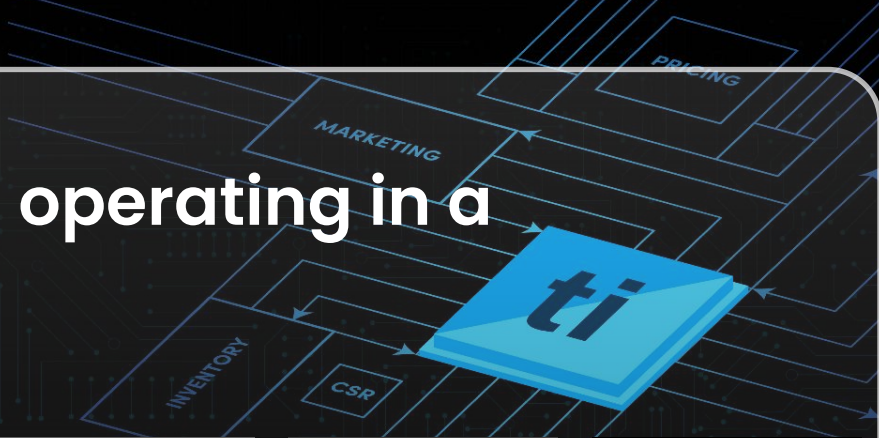
**Detects the
board is empty**

**Initiates automated
campaigns**

**or books through
SMS Agent**

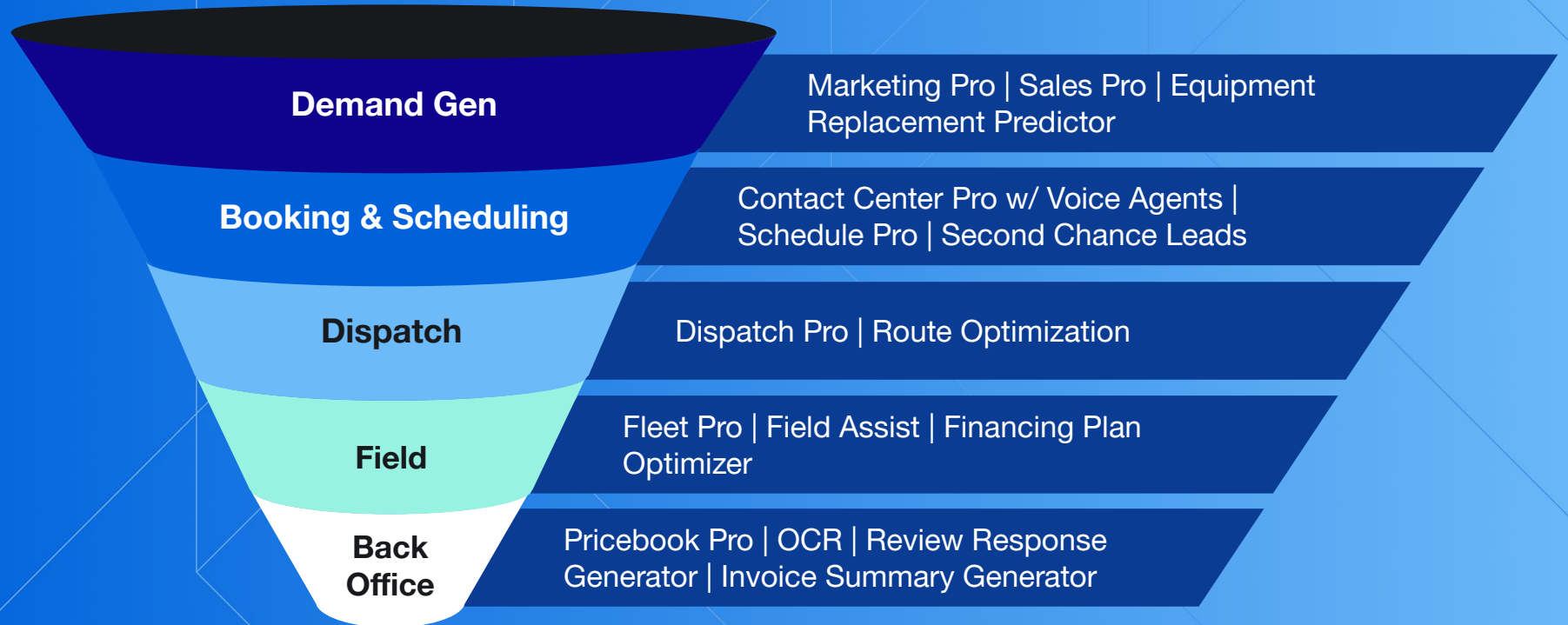
IMMENSE OPPORTUNITY

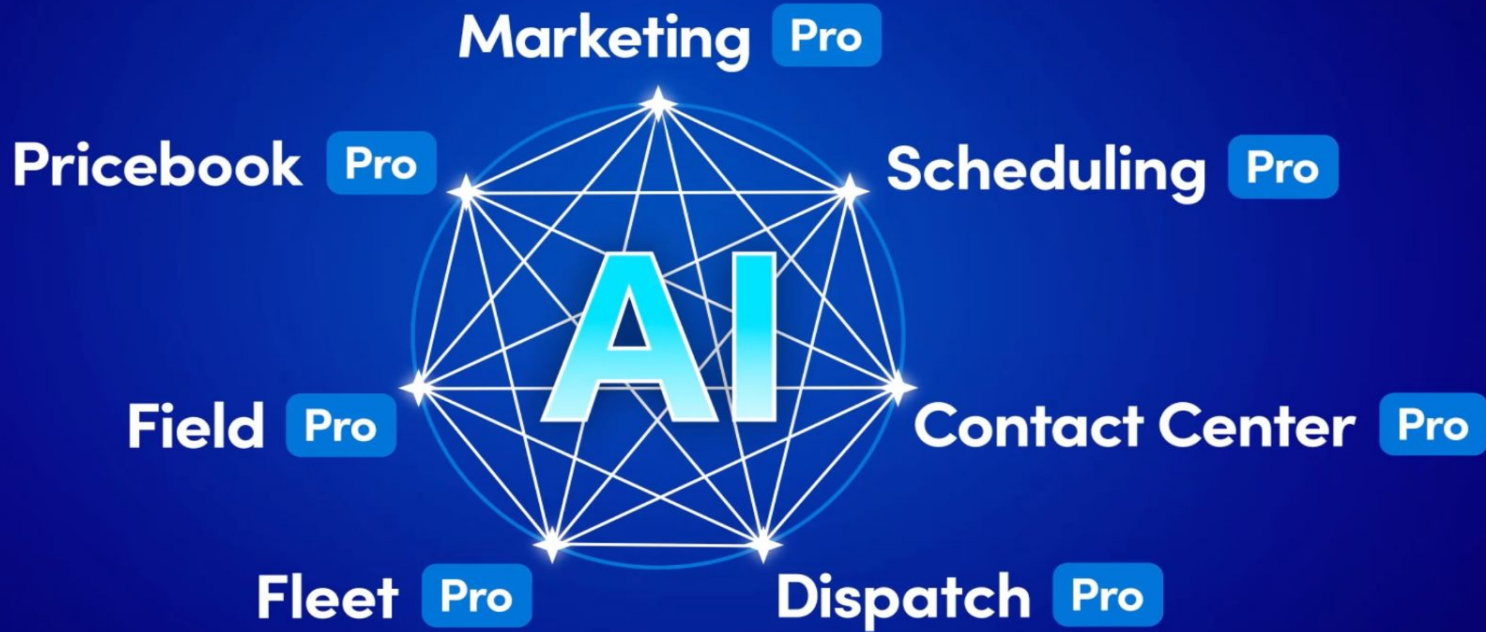
Trades businesses are still operating in a highly manual way



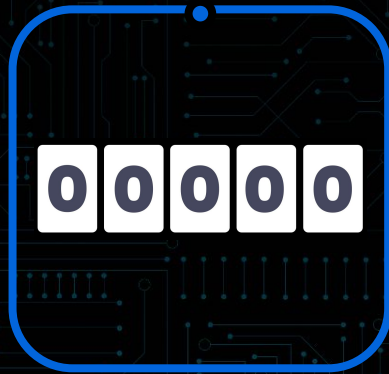
Prospecting	Demand Generation	Booking & Scheduling	Dispatching	Field	Back Office
Cold Calling	“Manual” Digital Marketing	Phone Calls	Manual Job Assignments	Manual Follow-Ups	Inventory Management
Door-to-Door	Traditional Marketing	Contact Forms	Location-Based Scheduling	Ride-Alongs	Procurement & Billing
Networking Events	Event-Based Marketing	Emails	Inefficient Processes	Inaccurate Pricing	Financial Tracking
					Hiring

Pro Products Have Historically Delivered Functional Automation with AI infusion





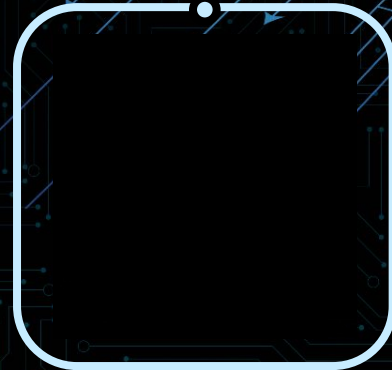
3 Pillars of Our AI Right to Win



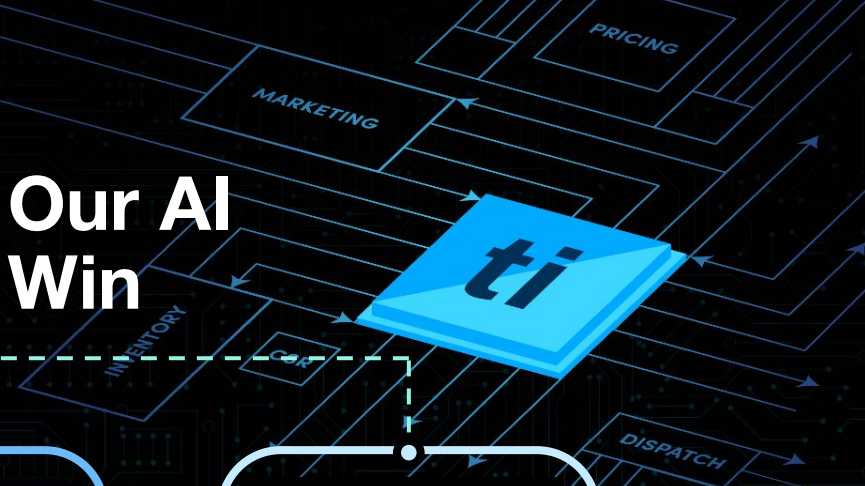
Proprietary Data



Closed Loop

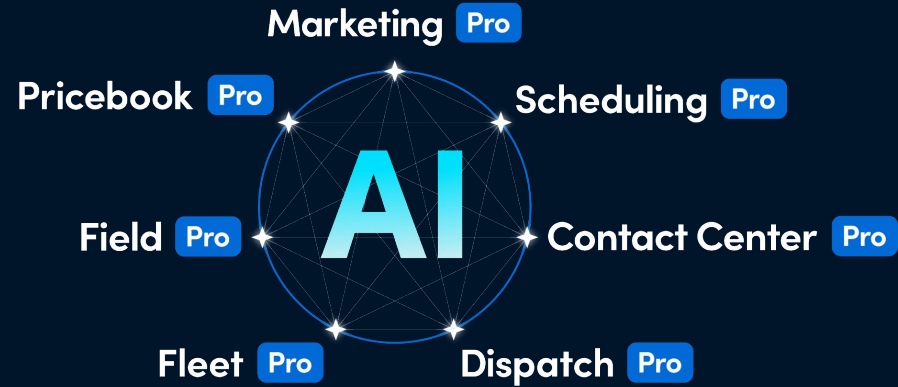


System of Action



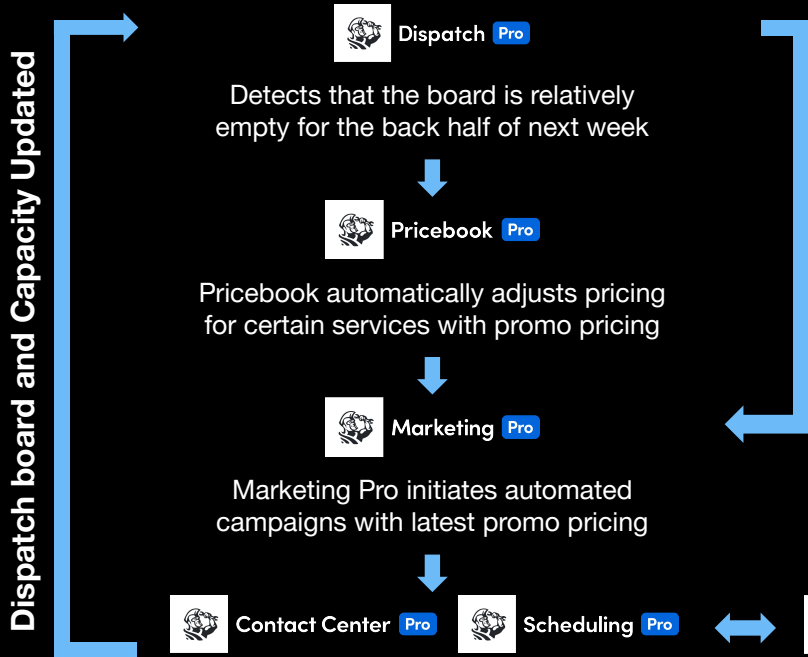
Digital Workers

- Comprehension & Conversation
- Context & Memory
- Reasoning
- Actioning



AI Ecosystem Will Unlock

Capacity Triggered Marketing



Dispatch Pro
Detects that the board is relatively empty for the back half of next week



Pricebook Pro
Pricebook automatically adjusts pricing for certain services with promo pricing



Marketing Pro
Marketing Pro initiates automated campaigns with latest promo pricing

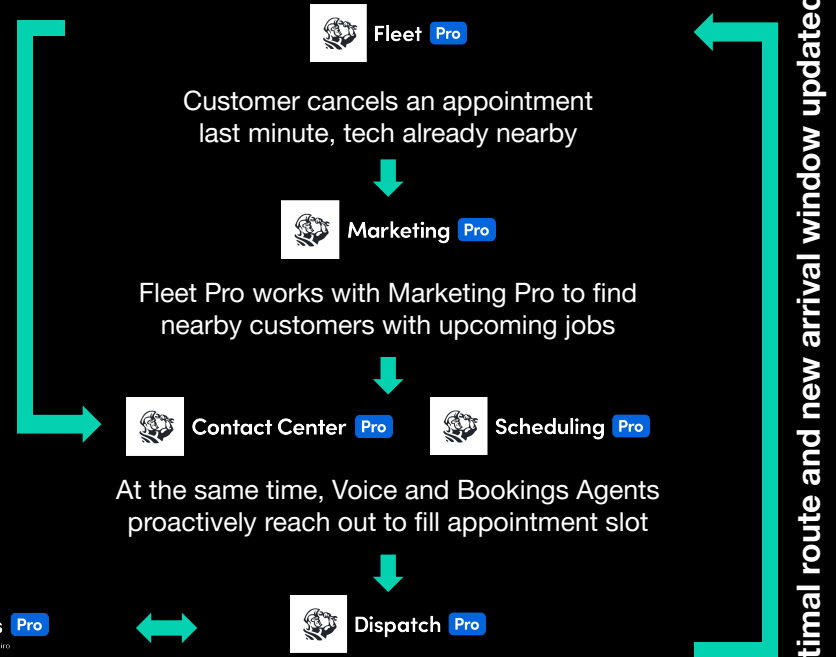


Contact Center Pro
Scheduling Pro
Seamless booking through Voice Agent or SMS Agent



Sales Pro
Automate job prep, equipment diagnostics and sales coaching in the field

Location Triggered Marketing



Fleet Pro
Customer cancels an appointment last minute, tech already nearby



Marketing Pro
Fleet Pro works with Marketing Pro to find nearby customers with upcoming jobs



Contact Center Pro
Scheduling Pro
At the same time, Voice and Bookings Agents proactively reach out to fill appointment slot



Dispatch Pro
Dispatch Pro re-assigns nearby technician to new appointment

—• New at Pantheon: Pro Takeaways

Existing Products

AI Automated Ads Management

Agentic Marketing, Scheduling & Dispatch

Manager & CSR AI in Contact Center Pro

Hardwareless Fleet with Ford

Sales Pro Agentic mining & Opportunity rehash automation

New Products

Field Assist: AI Diagnosis & troubleshooting (part of Field Pro)

Virtual CSRs in Contact Center Pro and now outside

New AI Workflows

Multi-channel marketing campaigns with location and capacity triggers

Interactive Marketing SMS with agentic booking

Automated Agentic SMS for dropped booking attempts

Automated opportunity re-contact from Sales pro

And Many more...

New Packages

Maximize Program Pilot

- Full Pro Access
- Automation implementation assistance
- Easier & faster buying experience

Field Pro

- Combining all Field Products in one easy package (Sales & Diagnosis)

Commercial Strategy

Alex Kablanian

SVP & GM, Commercial & Construction

What is Commercial



Residential
(single family homes)



Commercial
(basically everything else)

What is Construction



Residential *(single family homes)*

Example Residential Construction Work:
Installing brand new HVAC system, ductwork, piping, and controls as part of a production home build out



Commercial *(basically everything else)*

Example Commercial Construction Work 1: Retrofitting an entire floor of an office building with new electrical wiring as part of a tenant improvement plan

Example Commercial Construction Work 2: Installing full piping & plumbing for entire newly built restaurant or hospital



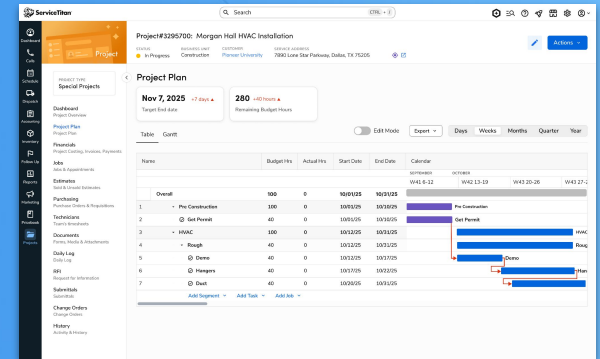
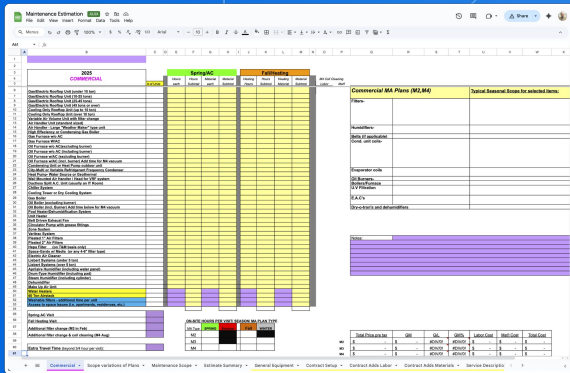
Our Focus:
Powering Profitable Growth for
"Specialty" or "Sub" Contractors

Complexity: The Primary Difference from Residential Service & Replace

Complex Agreements

Complex Equipment

Complex Projects



(View from my hotel room at Pantheon)

—• Our Path Towards Market Standard

Non-Participant

Don't Actively Target

Player

Leverage robust platform capabilities and high customer ROI to compete

Close specific product gaps

Leader

Critical capabilities are developed

Emerging product leadership

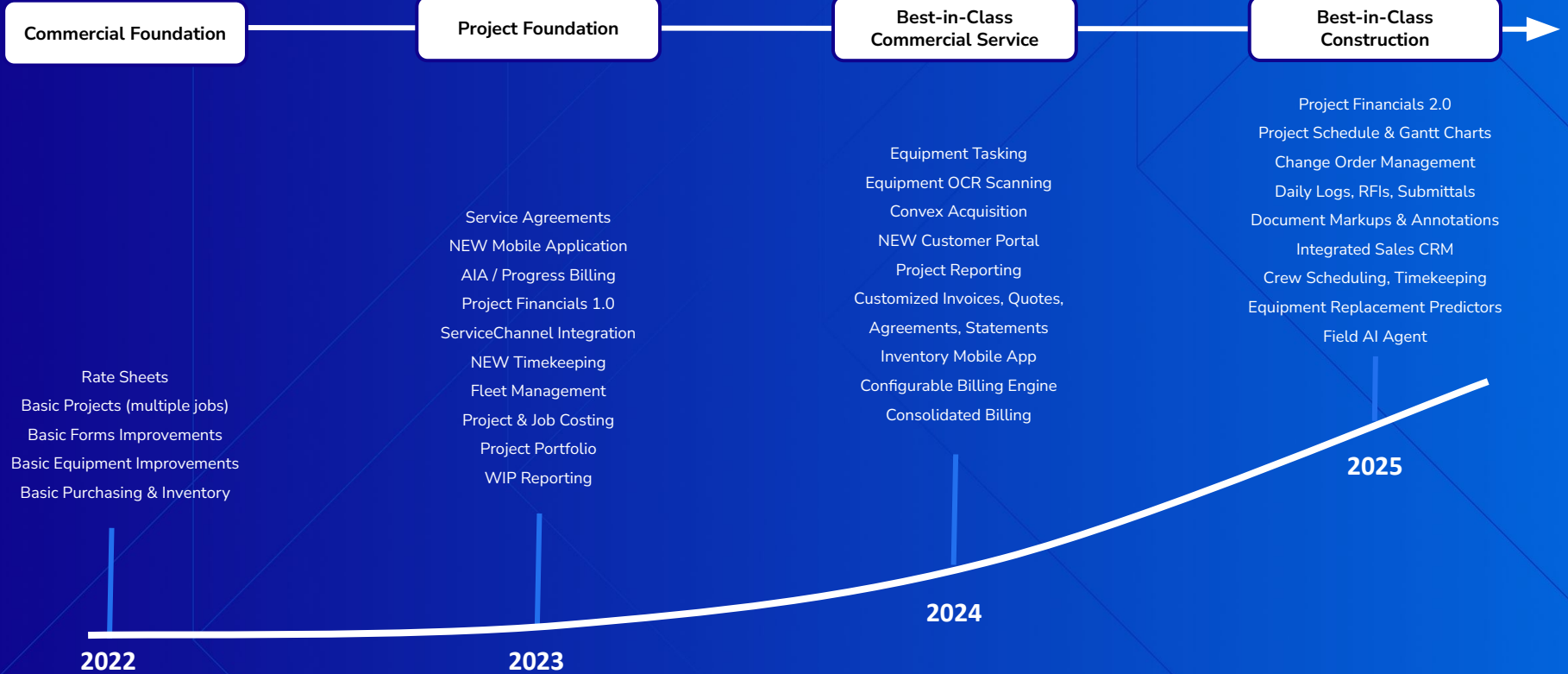
Player of scale

We're here

Market Standard

Proven track record

We've Delivered a lot of Customer Value in a Short Time



Our Customers Realize Significant ROI

15%

Average revenue
Increase in year 2*

**Win New
Business**

8%

More projects
delivered on time¹

**Increase
Productivity**

12+

Days faster
to collect payment¹

**Optimize
Cash Flow**

2%

Annual percentage
point increase in
net profit margins¹

**Grow Your
Bottom Line**

Based on data from commercial customers on ServiceTitan for two or more years. Results are not guaranteed and may vary.

*Comparing Year 1 vs Year 2 on ServiceTitan.

¹ Comparing data from 2023 compared to 2024.



Full Retrofit /
Change Out



Initial Build Out of a
New Structure

OUR THESIS:
Drive Value
throughout the
Entire Lifecycle
of a Property

Generating Pull
Through Work



Conversion to a
Service Agreement



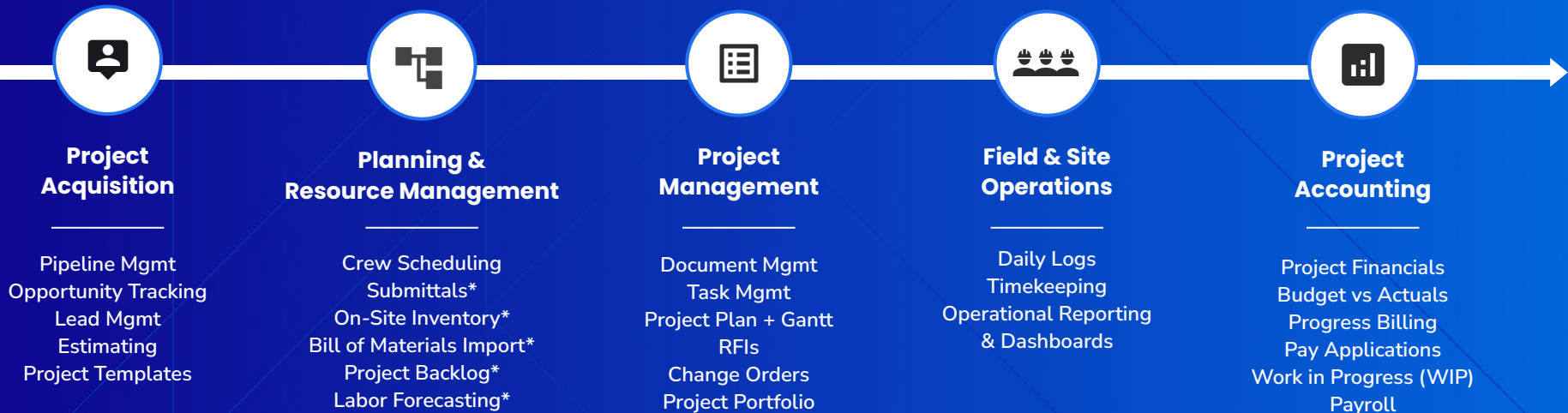
Ongoing Service
& Maintenance

But Two Things Were Missing:

1. Robust Construction Workflow
2. CRM



End-to-End Construction Management



*Targeted to be available in 2025

End-to-End Connected Platform for Commercial Contractors



Core ServiceTitan ROI



We Listen to Our Customers





Eliminating Friction

~\$100B¹

Commercial Construction

~\$260B¹

Commercial Service & Replace

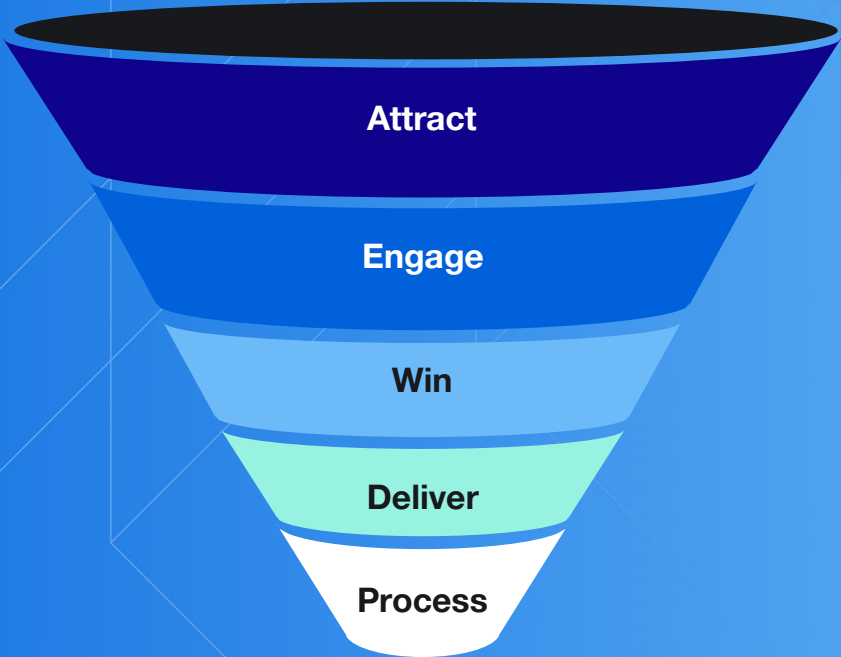
Path to Market Standard

Commercial CRM and Construction Capabilities have ServiceTitan on the path to Market Standard

Winning in Exteriors

Chris Petros
Chief Operating Officer

Residential Value Proposition



~20% Trade-Specific

~80% Common Workflow Across Trades

—• The Four Clusters of Residential Trades

Mechanical Systems

Plumbing

HVAC

Electrical

Garage Door

Chimney

Exteriors

Roofing

Gutters

Siding

Windows

Doors

Interiors

Home Remodeling

Restoration

Flooring

Property Care

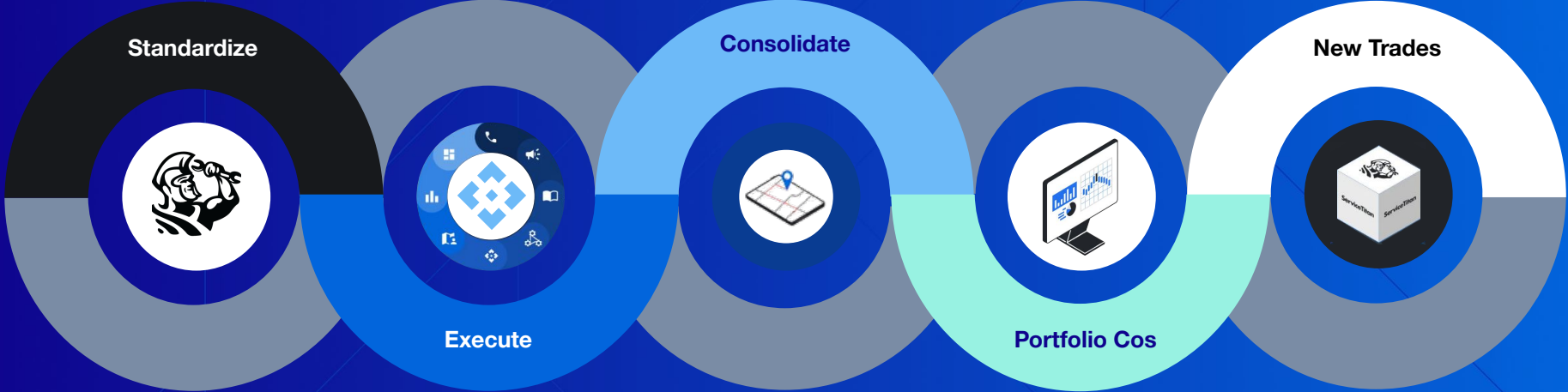
Landscaping / Arbor

Pest Control

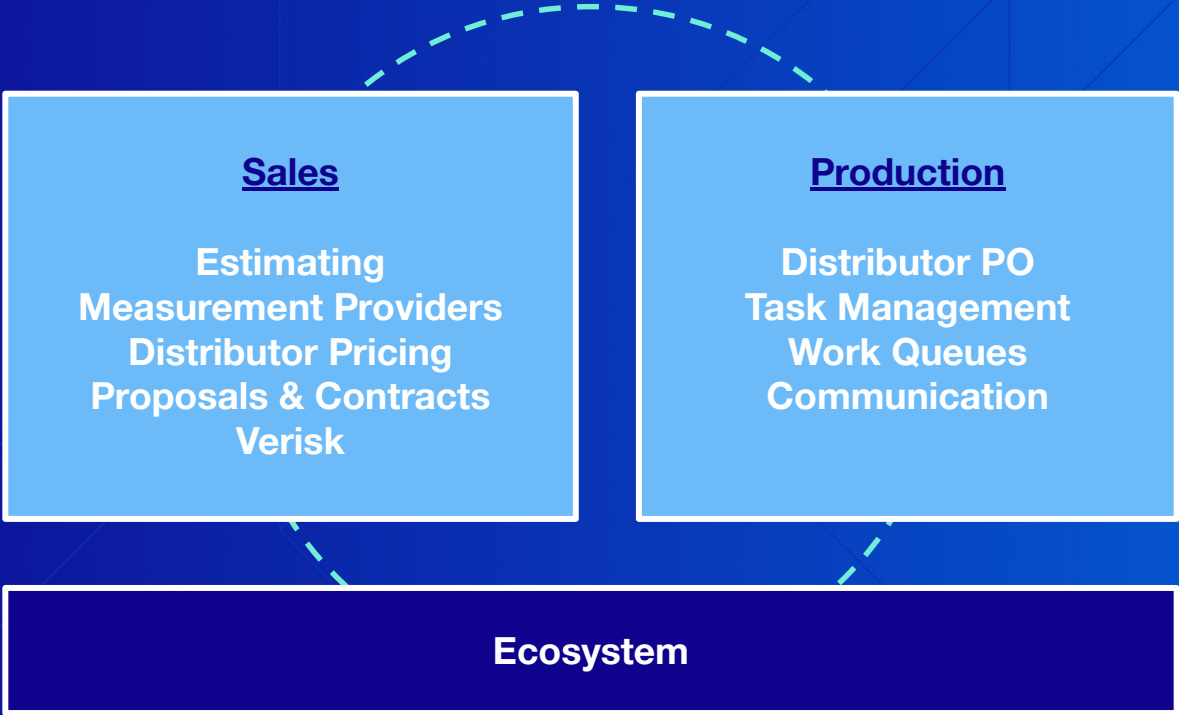
Pool and Spa

Lawn Care

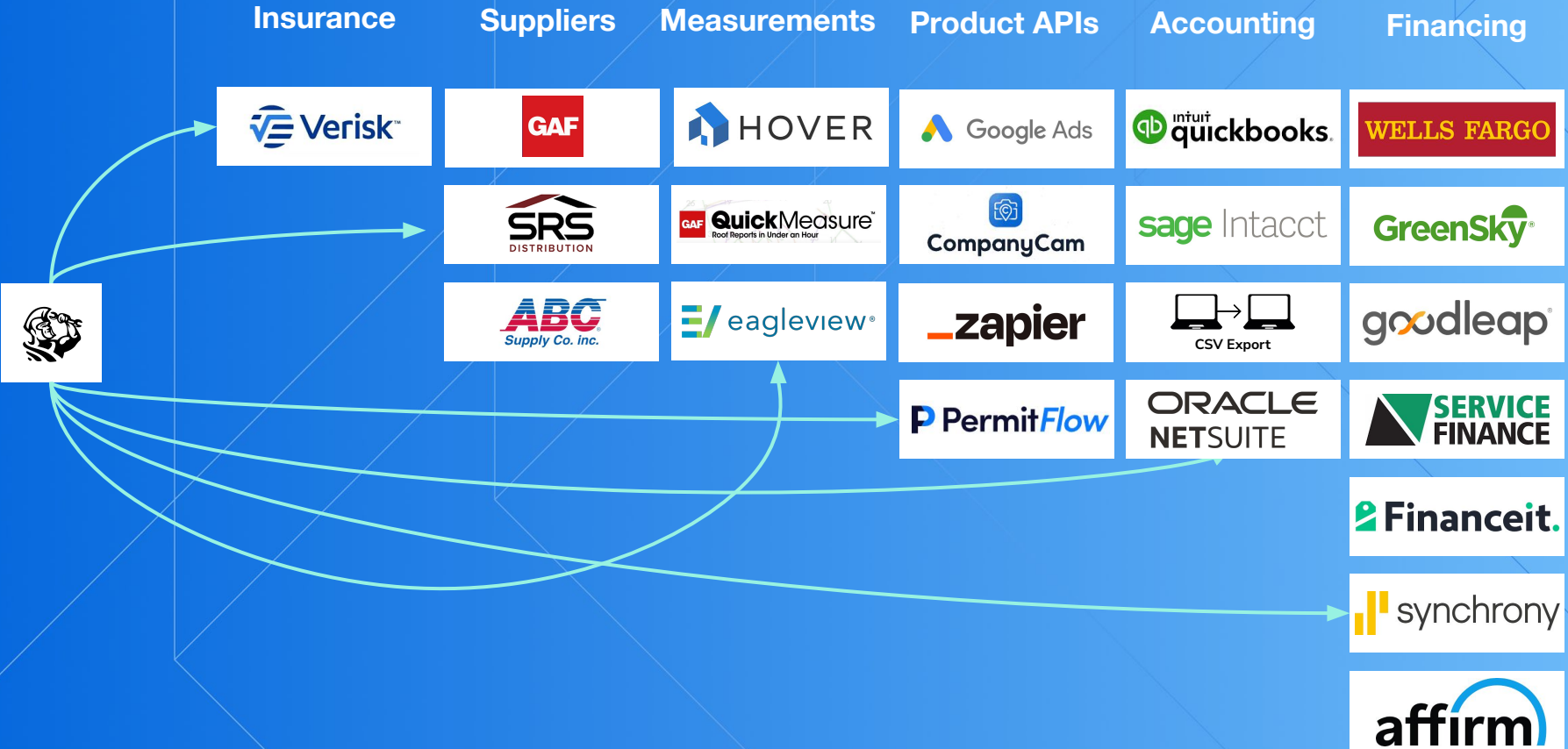
Consolidation Accelerates Our New Trade Playbook



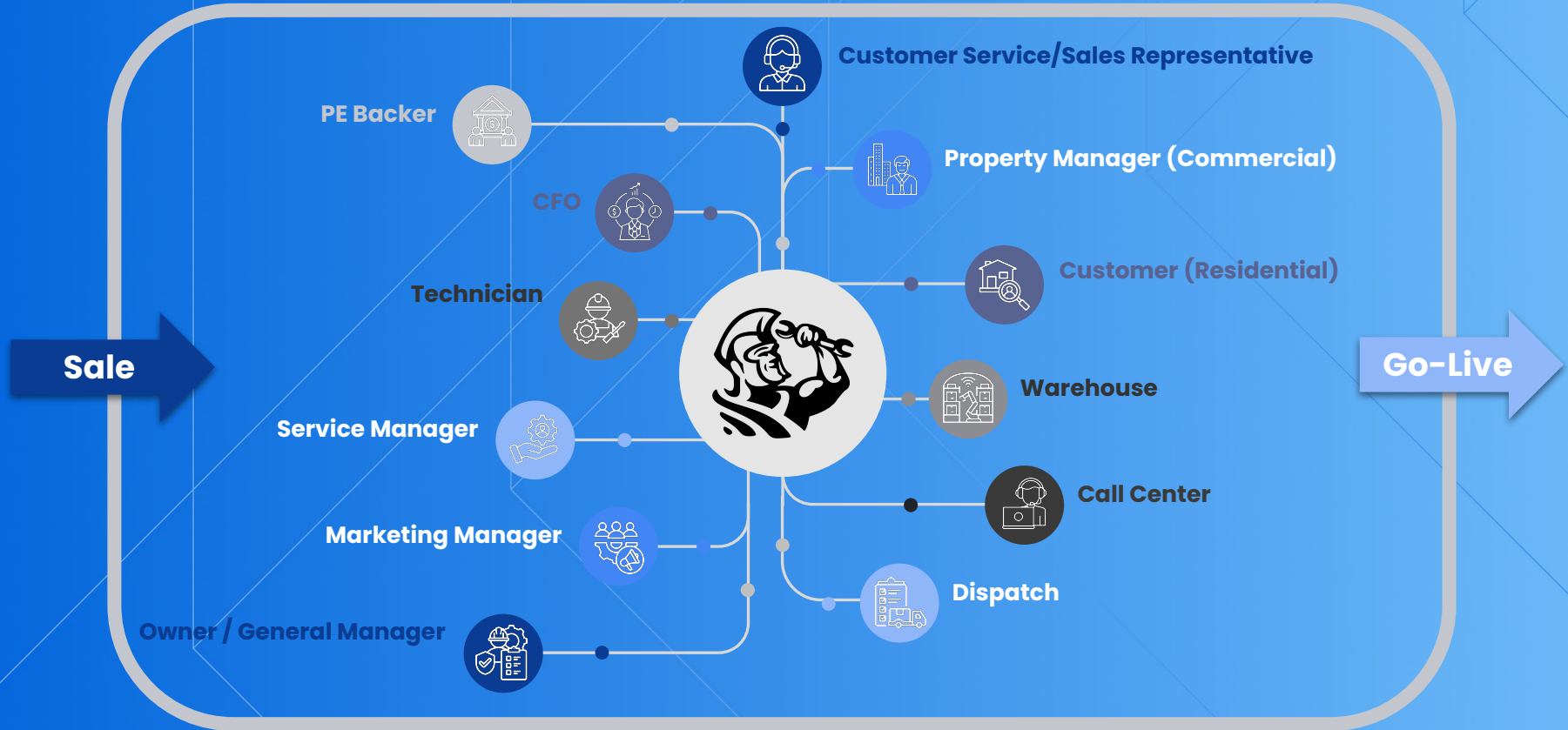
Key Roofing Investments



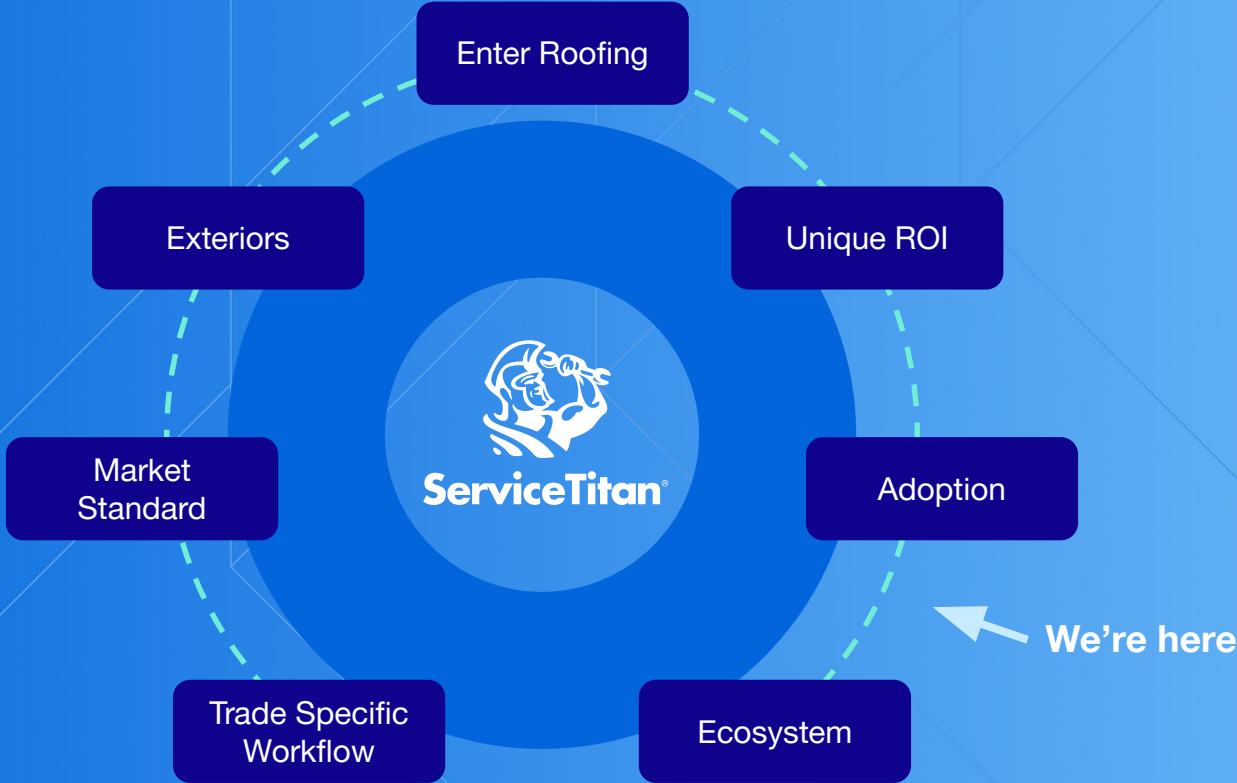
One. Robust. Ecosystem.



Wall to Wall Meets Trade Specific Workflow



Path to Market Standard



Conclusions

Jason Rechel
VP, Investor Relations

—• Key Highlights: New at Pantheon

Enterprise

Benchmark+

GL Accounts and
Inventory Sync

Centralized Feature
Configurations

Adaptive Capacity

Pro Products

Existing Product
Updates

New Products

Virtual Agents for All

Packaging Changes

Commercial

Commercial CRM

All commercial service
AND construction
capabilities

One platform

Roofing

New Partnerships

Real Time
Communication

Smart Tasks

Work Queues

Atlas: AI Champion of the Trades

Customers at work!

Please respect the integrity of this event



Afternoon Keynotes



Residential / Pro Updates

Main Stage

Commercial & Construction Updates

Main Stage

Future of AI in the Trades

Vahe Kuzoyan



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