

OBJECTIVE RESEARCH BRIEF

How Small and Mid-Size Service Companies Are Using AI Today

Real-world case studies from home services, remodeling, roofing, and dental practices - without major corporations

Executive summary

Small and mid-size service companies are using AI most effectively at the first point of customer contact: answering phones, qualifying leads, booking jobs, sending appointment confirmations, reviving old estimates, and handling routine customer questions. The strongest public examples show AI acting less like a futuristic technology project and more like always-on service capacity for lean teams.

Scope note: This brief intentionally excludes major consumer corporations. It focuses on independent, regional, small, and mid-market service operators where AI is being applied to practical workflows that translate directly to missed-call recovery, faster response, more bookings, and lower administrative burden.

Evidence snapshots

80% booking rate

Superior Plumbing reported that its AI voice agent averaged an 80% booking rate as a frontline call taker.

Source: ServiceTitan [1]

80-85% booking

Northwinds Services Group reported an 80-85% booking rate and shorter call times for its AI voice agent.

Source: ServiceTitan [2]

\$1.8M revenue

G.L. Hunt attributed \$1.8M in revenue to missed-call campaigns over 90 days.

Source: Hatch [4]

75 new patients

Serene Dental attributed 75 new patients booked in 2022 to an AI assistant for after-hours and missed-call engagement.

Source: Agentz [9]

Core pattern

For service companies, AI creates value when it prevents revenue leakage. The recurring pattern is simple: respond faster, collect enough information to qualify the request, book or route the job, and let human staff spend more time on the exceptions that require judgment.

Case studies: answering phones and booking jobs

1. Superior Plumbing - AI voice agent for residential plumbing calls

COMPANY TYPE

Atlanta-area residential plumbing company with roughly four decades of service history and a call-center culture built around answering quickly.

AI WORKFLOW

Superior deployed ServiceTitan's AI Voice Agent, named Piper, to answer, qualify, and book calls while giving human CSRs more time for customers who needed live help.

MEASURED IMPACT

ServiceTitan reports Piper averages an 80% booking rate as a frontline call taker with a 30% escalation rate. Superior also shifted from six full-time CSRs and one part-time CSR to three full-time CSRs through attrition while maintaining coverage.

BUSINESS TAKEAWAY

AI did not replace service judgment; it absorbed routine call handling and coverage gaps. The practical value was booked work, holiday coverage, and less need to overstaff for uneven call volume.

Sources: ServiceTitan Superior case study and field report [1] [3]

2. Northwinds Services Group - AI surge capacity for HVAC and plumbing

COMPANY TYPE

Rochester, New York service operator covering residential and commercial plumbing and HVAC; the company manages a large call-center operation across multiple brands.

AI WORKFLOW

Northwinds deployed ServiceTitan's AI Voice Agent, named Lucy, to handle high-volume heating calls, after-hours pressure, scheduling changes, and weather-driven surges.

MEASURED IMPACT

During a severe cold-snap week, Lucy handled roughly 7,000 calls. ServiceTitan reports an 80-85% booking rate, 4.5-minute average call time versus 8-10 minutes for humans, and zero handle time between calls.

BUSINESS TAKEAWAY

For seasonal service businesses, AI can be most valuable during the worst week of the year. It creates burst capacity without hiring for peak demand that may last only days.

Sources: ServiceTitan Northwinds case study and field report [2] [3]

3. Bill Joplin's Air Conditioning and Heating - AI booking with no human touch

COMPANY TYPE

McKinney, Texas HVAC contractor serving local homeowners; an example of a smaller regional contractor applying AI at the phone-answering layer.

AI WORKFLOW

The company used a ServiceTitan AI Voice Agent, named Karen, to answer air-conditioning calls and convert service demand into booked jobs.

MEASURED IMPACT

ServiceTitan reports Karen handled 1,361 calls since January; more than 90% ended in a booked job, and 72% were booked by Karen with zero human intervention.

BUSINESS TAKEAWAY

The most relevant lesson for smaller shops is that AI can be introduced as a narrow operational role: answer, qualify, and book. That reduces missed demand without forcing a companywide AI overhaul.

Source: ServiceTitan AI voice agent field report [3]

Case studies: missed calls, follow-up, and lead response

4. Shafer Services - replacing voicemail with qualified AI intake

COMPANY TYPE

Texas-based HVAC and plumbing provider, categorized by Hatch as mid-market, serving local families with heating, cooling, plumbing, and service work.

AI WORKFLOW

Shafer consolidated customer communication into Hatch and used Voice AI for after-hours and overflow calls, plus SMS/email campaigns for lead response, estimate follow-up, nurture, memberships, and customer care.

MEASURED IMPACT

Hatch reports 200-300 calls per month handled by Voice AI, 90+ appointments set per month by AI, and 80% more bookings after replacing standard voicemail with Voice AI.

BUSINESS TAKEAWAY

For service companies, voicemail is often a revenue leak. AI voice intake can collect urgency, caller details, preferred callback times, transcripts, and completed bookings before staff return to the office.

Source: Hatch Shafer Services case study [5]

5. G.L. Hunt Foundation Repair - missed-call recovery and lead follow-up

COMPANY TYPE

Family-owned Texas foundation repair and drainage company serving homeowners since 1987; Hatch categorizes the company as mid-market.

AI WORKFLOW

G.L. Hunt used Hatch to automate outreach across the customer journey: speed to lead, missed-call follow-up, recent estimate follow-up, aged-lead nurture, canceled appointments, and appointment confirmations.

MEASURED IMPACT

Hatch reports a 40% increase in booking rate over eight months. In 90 days, the missed-call campaign launched 5,711 times, booked 594 appointments, influenced 279 sales, and generated \$1.8M in revenue.

BUSINESS TAKEAWAY

The lesson is not simply to buy more leads. AI can help service companies recover value from demand they already paid to generate but failed to reach quickly enough.

Source: Hatch G.L. Hunt case study [4]

6. SwiftPro HVAC - AI outreach across Yelp and lead sources

COMPANY TYPE

Family-owned Northern Virginia service company offering HVAC, plumbing, and handyman solutions, with Hatch listing it as mid-market.

AI WORKFLOW

SwiftPro used Hatch AI agents for multi-channel outreach, including speed-to-lead campaigns, sales follow-up, aged lead follow-up, and appointment reminders across Yelp, Angi, Modernize, Google LSA, and other sources.

MEASURED IMPACT

Hatch reports SwiftPro doubled its Yelp response rate from 29% to about 60% in under two months. Two appointments were booked the first night the AI agent went live, and both reportedly sold the next morning.

BUSINESS TAKEAWAY

AI can improve the weak point between inquiry and conversation. The value here was not only faster response, but more effective messaging that got prospects to reply.

Source: Hatch SwiftPro HVAC case study [8]

Case studies: lean staffing and after-hours capture

7. Skyview - one call-center rep managing hundreds of leads

COMPANY TYPE

Southeast Michigan outdoor living contractor specializing in PVC decks, louvered pergolas, sunrooms, glass roofs, and motorized screens; Hatch lists it as mid-market.

AI WORKFLOW

Skyview used Hatch for speed-to-lead campaigns, appointment confirmations, no-show outreach, SMS/email AI agents, and Voice AI for business-hour overflow, after-hours calls, and weekends.

MEASURED IMPACT

Hatch reports missed calls dropped from 43 per week to 7 per week. In a 30-day snapshot, Skyview had 1,880 campaign launches, 592 AI SMS/email conversations, 165 Voice AI conversations, 100 Hatch-influenced appointments, and 40 Hatch-influenced sales.

BUSINESS TAKEAWAY

AI can let a growing service business stay lean. Instead of building a large call center, Skyview used AI to filter lower-value chatter and let its human rep focus on high-intent leads.

Source: Hatch Skyview case study [6]

8. Luxury Bath NJPA - AI for remodeling lead conversion and confirmations

COMPANY TYPE

Mid-market bathroom remodeling company serving New Jersey and Pennsylvania, specializing in bath and shower renovations.

AI WORKFLOW

Luxury Bath NJPA deployed Hatch across 12+ lead sources for speed to lead, SMS/email AI conversations, voice AI for inbound calls and confirmations, estimate follow-up, lead nurture, customer care, and recruiting.

MEASURED IMPACT

Hatch reports the overall set rate doubled from 25% to 52%, \$4M in revenue was attributed in seven months, and appointment-confirmation time decreased by 75%.

BUSINESS TAKEAWAY

For project-based service companies, AI supports the expensive pre-sale workflow: responding to aggregators fast, keeping prospects engaged, and confirming appointments so sales teams do not waste trips.

Source: Hatch Luxury Bath NJPA case study [7]

9. Serene Dental - after-hours AI assistant for a small dental practice

COMPANY TYPE

Fremont, California dental practice using an AI assistant to support patient communication during staffing shortages, lockdown restrictions, missed calls, and after-hours inquiries.

AI WORKFLOW

Serene Dental used Agentz to engage patients across website chat, SMS, Google/Facebook messaging, and missed-call reply, allowing patients to get immediate responses when staff were unavailable.

MEASURED IMPACT

Agentz reports 2021 monthly averages of 98 engagements, 44% after hours, 66% resulting in a lead, and 173 missed calls handled. In 2022, the practice booked 75 new patients, generating \$28,575 in initial revenue with potential LTV of \$449K.

BUSINESS TAKEAWAY

Small service practices can use AI to reduce front-desk pressure and capture after-hours demand. The key is immediate, useful response - not simply replacing people.

Sources: Agentz Serene Dental case study and article [9] [10]

SMB service AI use-case map

Use case	Business problem solved	Best public story
AI voice receptionist	Missed calls, after-hours gaps, weather surges, and weekend inquiries.	Superior Plumbing; Northwinds; Bill Joplin's
Overflow and after-hours booking	Voicemail does not qualify, set expectations, or book jobs.	Shafer Services; Northwinds
Missed-call recovery	Paid leads call once, hang up, and may choose a competitor.	G.L. Hunt; Skyview
Speed to lead	Lead aggregators and paid campaigns lose value when follow-up is slow.	Luxury Bath NJPA; SwiftPro
Appointment confirmations	Manual confirmations consume staff time and leave unconfirmed jobs at risk.	Luxury Bath NJPA; Skyview
Estimate rehash / nurture	Unsold estimates and aged leads go cold without systematic follow-up.	G.L. Hunt; Luxury Bath NJPA
Patient/customer self-service	Small practices cannot staff every channel 24/7.	Serene Dental

Practical lessons for small and mid-size service companies

Start with revenue leakage. Missed calls, slow lead follow-up, unconfirmed appointments, stale estimates, and after-hours inquiries are usually easier to monetize than broad internal AI experiments. Keep humans in the loop. The best examples route routine calls to AI and let staff handle exceptions. Measure simple operating outcomes. Track booking rate, abandoned calls, response time, booked appointments, revenue recovered, and staff time saved.

Selected sources

- [1] ServiceTitan, Superior Plumbing case study: AI Voice Agent used to streamline call-center coverage and booking.
- [2] ServiceTitan, Northwinds Services Group case study: AI Voice Agent for HVAC/plumbing call surges.
- [3] ServiceTitan, field report on Karen, Lucy, Piper, and Jenny AI Voice Agents, April 2026.
- [4] Hatch, G.L. Hunt Foundation Repair case study: missed-call follow-up, booking-rate lift, and revenue influence.
- [5] Hatch, Shafer Services case study: Voice AI replacing voicemail and setting appointments.
- [6] Hatch, Skyview case study: AI support for one call-center rep handling hundreds of weekly leads.
- [7] Hatch, Luxury Bath NJPA case study: AI-assisted lead response, booking, and appointment confirmations.
- [8] Hatch, SwiftPro HVAC case study: AI outreach increasing Yelp response rate and appointments.
- [9] Agentz, Serene Dental PDF case study: AI assistant engagement, missed-call handling, and new patient acquisition.
- [10] Agentz, Serene Dental article: staffing shortage, after-hours responses, and patient experience.

BOTTOM LINE

For smaller service companies, the best AI entry point is usually not a broad transformation initiative. It is a narrow workflow where missed speed, missed calls, or inconsistent follow-up already cost money.