REDLINE MANAGEMENT

AI ADVISORY CASE STUDY

Answering Every Call, in Every Language

How a family-owned plumbing company turned missed calls into booked jobs, opened new markets, recovered its margins, and moved into growth mode, with AI orchestrated by Redline.

Redline Management AI and Agentic AI Advisory

Client case study. The company name and identifying details are withheld to protect client confidentiality.

At a Glance

Company	A family-owned residential plumbing and drain company (name withheld for confidentiality)
Size	About 12 employees, three trucks, one metro market
Challenge	Missed and after-hours calls, an answering service that only took messages, and no way to serve non-English-speaking callers
What Redline built	A multilingual AI voice agent that answers, triages, estimates, books, takes a deposit, and follows up by text, wired into the CRM and calendar, plus fee-recovery dual pricing and AI invoice reconciliation across the payments and back office
Results	New customers up 29 percent, acquisition cost down and still falling, card fees recovered and supplier overbilling cut 18 percent, a self-funding referral and social flywheel, and rising enterprise value with room to acquire local competitors

1. The Business

The company is the kind of business that holds a neighborhood together: family-owned, well-reviewed, and busy. Three trucks, a tight crew, and an owner who still runs jobs. The work was good. The problem was the phone.

2. The Challenge: The Phone Was the Leak

Like most trades, the company's best salespeople were also its technicians, and they were on job sites all day. Calls came in while the crew was elbow-deep in a water heater, and after hours they rolled to an answering service that did one thing: take a message. By morning, the customer had already called the next plumber on the list.

The math behind that is brutal, and it is well documented across the home-services industry:

- Roughly 27 percent of calls to home-service businesses go unanswered as a baseline, and the rate runs far higher for small shops during busy stretches.
- Each missed call is worth about $1,200 on average, and the typical small contractor loses $45,000 to $120,000 a year to unanswered phones.
- About 85 percent of callers who reach voicemail never call back, and most never leave a message. The first business to answer wins roughly 78 percent of the time.
- Around 35 to 40 percent of calls arrive after hours, exactly when an emergency caller will pay a premium and exactly when no one was picking up.

> **And a second leak, hiding in plain sight.** More than 68 million United States residents, over one in five, speak a language other than English at home (US Census Bureau). In this company's market, a large and growing share of homeowners were most comfortable in Spanish or Vietnamese. Every one of those calls that hit an English-only voicemail was a customer, and a whole community, walking to a competitor.

3. What Redline Built

We started where the money was leaking. The highest-return move was not a new marketing campaign, it was answering the phone, every time, in the caller's language, and turning that call into a booked job without anyone on the crew lifting a finger. Here is the flow we put in place:

Step	What happens, automatically and 24/7
1	An AI voice agent answers every inbound call instantly, day or night, and speaks with the caller in their own language, English, Spanish, Vietnamese, and more.
2	It listens to the problem, a leaking water heater, a clogged main, asks the right follow-up questions, and captures the address and details.
3	It logs the lead and schedules the job directly in the company's CRM, no message slip, no morning callback.
4	It builds a preliminary estimate from the company's own pricebook based on the described problem, as a range, with complex or high-value jobs flagged for the owner.
5	It books a calendar appointment for the owner or the right technician, matched to availability.
6	It captures a card on file or a deposit to secure the slot, routes the payment, and queues the job for dispatch.
7	It texts the customer a confirmation in their language, then sends reminders and follow-ups, all in that same language.
8	After the job is closed, it texts the customer in their language to confirm the work was done to their complete satisfaction, then routes a happy reply into a review request and an unhappy one straight to the owner.

4. After the Job: The Growth Flywheel

The completed job is not the end of the engagement. It is the start of the next three. Once the work is done, the same system turns one satisfied customer into a neighborhood of them, automatically, through a satisfaction loop, a geofenced marketing engine, and a referral model that pays the homeowner.

It starts with a simple question

When the technician closes the ticket, the customer gets a text in their language asking one thing: was the work done to your complete satisfaction? A great answer is routed straight into a review request, building the online reputation that makes the phone ring. Anything less goes immediately to the owner to make it right, privately, before it ever becomes a one-star review. Nothing falls through the cracks.

Every job becomes a billboard for the whole street.

The address of each completed job becomes a marketing asset. The system draws a geofence around that home and launches a neighborhood campaign to the houses around it: the truck was just on your street, your neighbor upgraded their water heater this week, here is a neighbors-only offer good through Sunday. People trust the plumber their neighbor already used. One job, worked well, seeds an entire block, and the ad spend is aimed only at the homes most likely to convert.

A referral model that pays the homeowner

Then we make the customer a partner in the growth. After the job, the homeowner gets a personal, shareable referral link by text, theirs to send to neighbors, friends, and the neighborhood group chat. It is tracked automatically, and the reward is applied without anyone chasing paperwork. Every neighbor who books through it earns the homeowner a real, stacking benefit and gives that new neighbor a reason to choose the company.

Who	What they get
The homeowner (referrer)	A $50 account credit, or cash, for every neighbor who books and completes a job. It stacks, with no cap.
Milestone bonuses	Three referrals earns a free annual maintenance visit. Five unlocks priority scheduling and a larger reward.
The new neighbor (referred)	$25 off their first service, an easy reason to say yes.
The business	A booked job at a fraction of the cost of a paid lead, and one that closes at a far higher rate.

Ad spend versus the neighborhood

This is where the model stops being a convenience and becomes a profit engine. Across home-services benchmarks, the cost to win a customer through paid advertising dwarfs the cost to win one through an automated neighborhood referral, and the referred customer is worth more from the first job.

Cost to win one customer	Paid advertising	Neighborhood referral
Acquisition cost	**~$380**	**~$62**
Repeat service rate	About 22%	**About 44%**
Three-year customer value	$3,270	**$3,800**
First job ticket	$620	**$820**

Roughly six times cheaper to acquire, and worth more once acquired (ServiceTitan, PHCC, and Housecall Pro benchmarks). For this company, acquisition cost has kept falling as referrals and social carry more of the load. The typical contractor pours 65 to 75 percent of the marketing budget into paid ads, the most expensive and lowest-quality channel there is. The flywheel flips that: the satisfaction loop, the geofence, and the referral feed each other, so one job becomes reviews, neighbors, and the next cluster of work, all in the same few blocks, at a fraction of the cost.

Every job becomes content

The company had never posted to social media. Now the system does it for them. With the customer's permission, every completed job becomes a post, a before-and-after, a five-star review, a neighbors-only offer, published automatically to Facebook, Instagram, TikTok, and beyond. The business previously did none of this, so it was invisible where its customers actually spend their attention. Organic social is among the lowest-cost acquisition channels that exists, content that keeps working long after it goes up, and it compounds the geofence and the referral into an even greater revenue generator. This is the highest-margin growth of all.

5. The Payments and Orchestration Layer

This is the part most AI vendors skip, and the part where my background does the heavy lifting. An agent that answers and books is useful. An agent that also moves money, securely, is a growth engine. Behind that simple customer experience sits real plumbing of its own: capturing the deposit, routing the payment, holding the slot, queuing the job for dispatch, and reconciling every dollar back to the CRM, with fraud and identity controls around it.

Why this is the Redline difference. In thirty-five years building and running payments and acquiring businesses, orchestrating flows, queues, settlement, and risk is exactly the work I have done. We did not just stand up a voice bot. We wired the money movement and the controls behind it, so deposits clear, jobs queue cleanly, and the books reconcile themselves. Almost no generalist AI advisor can do that part.

6. Fee Recovery and Dual Pricing

With the calls handled and the flywheel turning, we went after the economics of every transaction. We implemented a new payments system built on a fee recovery model, using dual pricing, and integrated it directly into the company's business management platform.

Dual pricing posts two prices at the point of sale, a cash price and a card price, so the cost of accepting cards is recovered on card transactions instead of quietly eaten by the business. Because it is wired into the same platform the team already runs on, every estimate, invoice, and field payment applies it automatically, transparently, and in line with card-brand rules, and it reconciles straight back to the books alongside the deposits the AI already captures.

The effect is immediate and it compounds. Card processing fees quietly take two to four percent of card revenue on every job. Recovered, that margin falls straight to the bottom line, on every ticket, without raising the price a cash customer pays. On a book of business this size, that is real money returned to the owner every month, month after month.

Payments is the core of my career. Joining fee recovery and dual pricing to the AI and the field platform is precisely the orchestration a generalist advisor cannot deliver. It is where the AI advisory practice and thirty-five years in payments become one offering.

7. Invoice Reconciliation and Overbilling Recovery

Materials are one of the largest costs on any plumbing job, and they are also where money leaks quietly. Technicians stop at local distributors and supply houses mid-job to pick up parts, and those distributor prices change daily. The invoices arrive later, line after line, and no owner has the time to check each one against what the price actually was on the day of pickup. Wrong prices, price creep, duplicate charges, and quantity errors slip through and get paid.

So we put an AI reconciliation agent on the back office. It ingests every distributor invoice, reads the line items, and matches each one against two things: the job's own pickup record, and the distributor's current published price at the time of pickup, pulled directly from the distributor warehouse websites. Anything billed above the day's price, or above the agreed cost, is flagged and queued for the owner with the evidence attached, the invoice line beside the website price, ready to dispute. Overbilling is caught and challenged instead of quietly paid.

An 18 percent savings on overbilling. By matching every invoice line to the distributor's live pricing at the moment of pickup, the system has cut overbilling by 18 percent, margin that used to disappear into unchecked supplier invoices and now stays with the business. It runs in the background, on every invoice, with the owner approving each dispute.

8. Controlled by Design

Speed without control is how this goes wrong, and it is doubly true when an agent touches money and quotes prices. The system runs inside guardrails: estimates are ranges, not binding quotes, and anything complex or high-value is routed to the owner before it is promised. Payment capture is scoped and secured, and dual pricing is displayed transparently and in compliance with card-brand rules. Every call is recorded and logged, data boundaries are clear, and a human stays in the loop on the decisions that matter. The owner is always in control, just no longer chained to the phone.

9. Adoption and Coaching

Technology does not change a business. People do. We did not hand the company a login and leave. We trained the owner and the dispatcher on the new flow, reset how the day runs, and coached the team through the change until answering, estimating, booking, and collecting on autopilot felt normal. That coaching is what turned a set of tools into a new way of operating.

10. The Results

Within about two quarters, the picture changed across the board. The figures below are from the engagement:

Measure	Before Redline	After Redline
Calls answered	Roughly 60%, rest to voicemail	**Near 100%, 24/7**
Languages handled	English only	**English, Spanish, Vietnamese, and more**
After-hours calls	A message, a next-day callback	**Answered, estimated, and booked on the spot**
New-customer mix	Mostly English-speaking	**About 1 in 5 new jobs from non-English-speaking homes**
New-customer growth	Flat	**Up 29 percent, led by the multilingual platform**
No-shows	Frequent	**Reduced with multilingual text reminders**
Owner's evenings	Tied to the phone	**Handed back to the business and the family**
Online reviews	Sporadic	**Steady, from every satisfied customer**

Measure	Before Redline	After Redline
Referrals	Word of mouth, untracked	**A tracked channel that pays the homeowner and feeds itself**
Where new jobs come from	Scattered, ad-driven	**Clustered by neighborhood, referral-driven**
Social media	None	**Auto-posts to Facebook, Instagram, and TikTok from every job**
Cost to win a customer	~$380 via paid ads	**~$62 via referral, and still falling**
Card processing fees	A cost of doing business	**Largely recovered through dual pricing**
Materials overbilling	Paid, unchecked	**Caught and disputed, 18% savings**
Enterprise value	Owner-dependent, hard to sell	**Rising, and positioned to acquire competitors**
Revenue and margin	Baseline	**Up double digits and compounding**

The growth did not come from spending more on ads. It came from stopping the leak, answering every call in every language, recovering the margin on every transaction, catching supplier overbilling before it is paid, and opening doors to communities the business had never been able to serve. The same marketing dollars suddenly worked harder, because the phone finally got answered, and every completed job now markets the next one on the same street.

11. Now in Growth Mode

The company is no longer just keeping up. It is in growth mode, and building. New customers are up 29 percent, driven by the multilingual platform reaching communities the business could never serve before. Acquisition cost keeps falling as referrals and social carry more of the load. Margins are higher with card fees recovered and supplier overbilling caught before it is paid. And the whole operation now runs on a system, not on the owner's phone.

That combination changes what the business is worth. Rising revenue, lower acquisition cost, recovered margin, and a repeatable operating system raise the enterprise value of the company directly. They also turn it into a platform. With a proven playbook that can be dropped onto another book of business almost overnight, the owner is now positioned to acquire local competitors and fold them in, each one worth more inside this system than it was outside it.

This is where the two sides of Redline meet. The same lens we bring to public markets, what compounds value and what a business is truly worth, now guides a Main Street company from survival on the phone to a deliberate growth-and-acquisition strategy.

12. What This Means for Your Business

This is a plumbing company, but the pattern is universal. Any business that runs on inbound calls, trades, clinics, salons, dealers, professional services, is leaking the same way, and most owners never see it on a report. The fix is not a bigger team or a bigger ad budget. It is an AI-centric system that answers, serves, books, collects, and follows up in any language, with the payments orchestrated, the fees recovered, and the controls in place, and a partner who leads your team through the change.

That is what Redline does, and the window to claim the lead is open now. Let us map where the leak is in your business, and how to turn it into growth.

Book a call: redlinemgmt.com | inquiries@redlinemgmt.com

About This Case Study and Disclaimers

Client confidentiality. This is a real client engagement. The company name and identifying details have been withheld to protect the client's confidentiality. The results described are specific to this client.

Outcomes vary. Results reflect this engagement and are not a promise of future performance. Outcomes vary by business, market, and execution, and are not guaranteed.

Industry benchmarks. Comparative figures on missed calls, acquisition cost, customer value, and language use are industry benchmarks drawn from third-party sources, including Invoca, ServiceTitan, PHCC, Housecall Pro, and the US Census Bureau, provided as context and distinct from the client's own results. They have not been independently verified.

Payments. Dual pricing and fee recovery were implemented to be displayed transparently and in compliance with card-brand rules and applicable law. Fee recovery amounts depend on card mix and transaction volume and will vary.

Advisory scope. Redline AI advisory is an operational engagement focused on putting AI and agentic systems to work in a business, including the associated payments orchestration and controls. It is distinct from the firm's investment research, and nothing here is investment advice.

Redline Management | Brent Rose, Founder and Lead Analyst | inquiries@redlinemgmt.com | redlinemgmt.com