

CASE STUDY | CUSTOMER ENGAGEMENT + AI

How AI Increased Call Capacity by 43%

From AI-assisted call overflow to a fully integrated AI customer service workflow

+43%

MORE CALLS HANDLED

with the same CSR team

THE CLIENT

HelloBooked

High-volume customer engagement and call answering for the home services market. Thousands of inbound calls handled every day on behalf of client businesses.

ABOUT HELLOBOOKED

High-volume customer engagement for the home services industry

HelloBooked is a high-volume customer engagement and call answering company that operates as an extension of the front office for a growing portfolio of service businesses, primarily in home services. Every day the team handles thousands of inbound customer calls on behalf of its clients, making sure customers are answered, service opportunities are captured, and every interaction moves quickly toward the right outcome.

Thousands

Calls handled every day

Many clients

A scalable extension of client teams

Home services

Primary market focus

More than an answering service

For many home services businesses, HelloBooked is the first point of contact between the business and its customers. In most cases callers do not realize they are speaking with HelloBooked at all. They believe they are calling the business directly.

That responsibility means CSRs do far more than take messages. They greet callers with client-specific scripts, follow each client's call-handling instructions, identify the reason for the call, gather customer and service-location details, book or change appointments, route calls, escalate urgent situations, and capture everything needed for proper follow-up. Every client has different expectations, and the goal is always the same.

Built for the reality of home services

Call demand in home services rarely arrives evenly. Busy seasons, weather events, marketing activity, urgent service needs, after-hours demand and ordinary daily peaks all create sudden surges. In that environment a missed or delayed call means a frustrated customer and, often, a lost job. HelloBooked has to deliver scale and consistency at the same time: answer more calls when demand spikes, without loosening the experience across dozens of different client workflows.

THE STANDARD

Every caller should feel as though they reached the business directly, and get the same professional, caring and knowledgeable service they would expect from the client's own team.

THE CHALLENGE

How do you answer more calls without adding headcount at the same rate?

As call volume grew, HelloBooked ran into a challenge common to every scaling service organization. The traditional model answers rising volume by adding Customer Service Representatives, and that model carries real cost:

- Higher labour costs that scale directly with volume
- Difficulty staffing peak call periods
- After-hours coverage requirements
- Longer hold times during call surges
- Ongoing recruiting and training load
- Inconsistent execution of customer service procedures
- Lost opportunities when customers cannot reach someone quickly

WHY AI MATTERED HERE

At HelloBooked's scale, small improvements on each call create significant gains across the whole operation.

That made it an ideal environment for practical AI. Not AI for novelty, and not AI to replace people, but AI built to create capacity, standardize repetitive work, and let CSRs spend their time where human judgment and empathy matter most.

HelloBooked partnered with Advance2000 to build an AI strategy that would add capacity while protecting one non-negotiable business objective: the customer would always keep the ability to speak with a human. AI handles the routine work. A live CSR stays available whenever the caller wants one.

A two-phase initiative

PHASE 1

Assist the CSR: overflow, intake and information gathering

PHASE 2

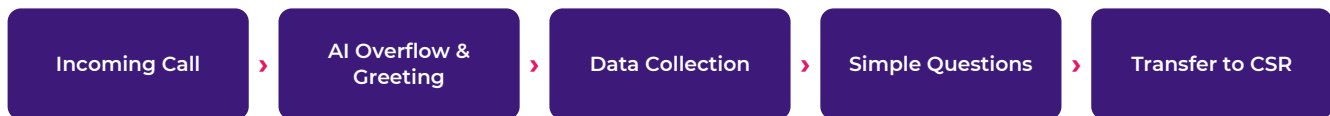
Perform the workflow: booking, scheduling, changes and cancellations

PHASE 1 | AI-ASSISTED CALL HANDLING

Assist the CSR. Increase capacity.

The first phase used AI to strip routine work out of the front end of every call. Rather than having a CSR start each interaction from scratch, Advance2000 placed AI at the beginning of the call flow. The CSR then received a caller whose identity, location and reason for calling were already established.

PHASE 1 CALL FLOW



What the AI handled

- Answer overflow calls
- Greet the caller
- Determine the reason for the call
- Collect customer information
- Collect property and service-location details
- Identify basic service needs
- Answer simple questions
- Hand the caller and the captured detail to a live CSR

43% more calls handled

Same number of CSRs. No proportional increase in staffing.

This changed the economics of the operation. Instead of staffing directly to peak call volume, AI provided an additional layer of capacity that absorbed the surges. The CSR team could concentrate on the interactions where human communication, judgment and empathy created the most value.

Before adding AI, our team spent a lot of time collecting the same basic information on every call. Now the AI handles that first step, so our CSRs can focus on customers who need more personalized assistance. We are able to handle 43% more calls with the same team, while still giving every caller the choice to speak with a real person.

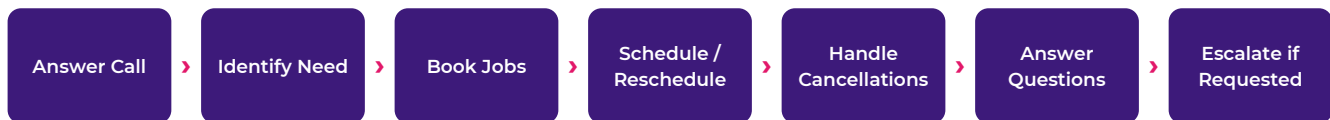
HelloBooked

PHASE 2 | FROM AI ASSISTANT TO AI CSR

Perform the full customer service workflow

With Phase 1 proven, HelloBooked and Advance2000 expanded the initiative. The question changed from “what information can AI collect before transferring the call?” to “how much of the complete customer service workflow can AI perform?” The answer was most of it, with escalation to a live CSR available at any point.

PHASE 2 CUSTOMER JOURNEY



What the AI now manages

Answering the call

Answers professionally and identifies why the customer is calling.

Customer information

Collects and validates everything required to process the request.

Appointment booking

Identifies available appointments and books jobs directly into the client's scheduling workflow.

Cancellations

Cancels appointments while capturing the right information and updating the workflow.

Routine questions

Answers common questions immediately without pulling in a CSR.

Understanding intent

Determines whether the caller needs service, wants to change an appointment, has a question, or needs another action.

Service qualification

Gathers detail on the problem and follows the client's approved call-handling and booking rules.

Scheduling and rescheduling

Helps customers select appropriate times and moves existing appointments within the client's rules.

Routing and escalation

Transfers or escalates calls that need special attention according to predetermined business rules.

Data capture

Records interaction detail consistently for downstream operations, reporting and follow-up.

THE PHASE 2 OBJECTIVE

Move AI from an overflow and information-gathering tool to an intelligent customer service agent able to perform many of the operational functions traditionally handled by a CSR.

THE HUMAN + AI EXPERIENCE

AI when it makes sense. People when they matter.

The most important element of the HelloBooked strategy is that customers are never forced to interact with AI. At any point where the experience needs a person, or where the caller simply prefers one, the customer can ask for a live HelloBooked CSR.

Handoffs are warm. The AI privately briefs the CSR with the caller's name, address and issue before connecting them, so the customer never repeats themselves. Failure paths are covered too: if a caller hangs up at any stage, a lost-call record is created automatically so no lead disappears. The AI always introduces itself, so the experience stays transparent.

AI PROVIDES

- ✓ Immediate response
- ✓ Scalability
- ✓ Consistent process
- ✓ Routine task automation
- ✓ Call quality monitoring
- ✓ CSR training opportunities

LIVE CSR PROVIDES

- ✓ Empathy
- ✓ Complex problem solving
- ✓ Human judgment
- ✓ Relationship building and personal assistance

CALLER CHOICE**Caller choice stays part of the experience.**

A customer can opt out of AI and speak to a live CSR whenever they choose.

The business impact

The result is an operation that scales without labour costs rising in proportion to transaction volume.

1**Greater scalability**

More calls, no proportional headcount growth

2**Faster response**

Less delay, better customer access

3**CSR productivity**

Staff focused on high-value interactions

4**Consistent execution**

Approved workflows followed every time

5**More revenue**

More inbound calls become booked jobs

THE SHIFT

From staffing for volume to scaling with intelligence

TRADITIONAL MODEL

More customers, more calls, more employees, higher costs.

Staff directly to peak demand and carry the cost of that peak all year.

AI-ENABLED MODEL

More customers, AI absorbs the routine work, CSRs handle higher-value interactions, the business scales.

Use AI as scalable capacity while preserving human service.

That is the difference between deploying an AI chatbot and redesigning a business process around artificial intelligence.

WHY HUBTGI AND ADVANCE2000 CANADA

Business transformation, not just an AI installation

AI can lift productivity, speed up decisions and unlock knowledge across a business. HelloBooked proved it: better call handling and materially more capacity from the same team. Without the right strategy, though, AI exposes sensitive data, creates new security risk, and becomes one more disconnected tool sitting on a pile of unstructured content.

That is why hubTGI and Advance2000 Canada start with an AI Readiness Assessment. The assessment takes a holistic look at where AI can create real value, which processes can be improved, what data is needed, what risks have to be addressed, and how to implement AI in a secure, practical and measurable way.

For HelloBooked, the assessment centred on:

- How calls flow through the organization
- What information CSRs collect
- Which tasks are repetitive
- Which decisions can be automated
- Which systems need to communicate
- What booking rules must be followed
- When human intervention is appropriate
- How AI and CSRs should work together

THE REAL QUESTION

What could AI do for your business?

The HelloBooked question was never “can AI replace an employee?” The better question, and the one that produced the result, was: what would happen if every employee could accomplish significantly more?

Most organizations have hundreds of repetitive activities hidden inside everyday workflows: answering calls, entering information, scheduling appointments, following up with customers, processing requests, updating systems, routing work and answering the same questions over and over. hubTGI and Advance2000 Canada help you find those opportunities, prioritize them by business impact, and build an AI roadmap around how your operation actually runs.

Book an AI Readiness Assessment with hubTGI

Find out where AI can create measurable value in your business, and what it will take to get there securely.

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Delivered in partnership with Advance2000 Canada. HelloBooked results as reported by the client.