

First to Respond, First to Win: Locking in Jobs Before Competitors Even Call Back

Win more jobs by replying in seconds with a 24/7 AI CSR.

Peak season can feel like controlled chaos—calls stack up, techs race from house to house, and every voicemail is potential revenue on hold. Yet the very crunch that strains your team also exposes the biggest growth opportunities. In the following Q&A, we tackle contractors’ real-world questions about adding AI-driven phones and messaging right when demand peaks, and show how smart automation can capture after-hours leads, relieve overworked staff, and turn frantic days into the most profitable weeks of the year..

Why has “speed to lead” become the single biggest competitive edge for HVACR contractors in 2025?

Today’s homeowner shops the way they stream movies—on-demand and impatient. Independent research shows 78 percent of customers hire the first company that replies. If your crew takes longer than five minutes to answer, your chances of winning that job plummet. Complicating matters, roughly 40 percent of new job opportunities now arrive after traditional business hours, when your office is dark. That’s a lot of revenue slipping through the cracks simply because no one picked up—or texted back—fast enough.

What does Podium do that helps contractors win that race to respond?

Podium is an all-in-one, AI-powered lead-management and communication platform already trusted by more than 11,000 HVAC and plumbing businesses. At its heart is an AI CSR—think of it as a tireless virtual CSR that greets web-chat visitors, texts back missed phone calls, and even answers the phone, all in real time. With both texting and phone call capabilities, AI provides leads with an instant, helpful answer at 11 p.m. on a Saturday. When the homeowner is ready to book, the AI CSR can schedule the service call directly into systems like ServiceTitan and Housecall Pro, so the job is locked in before your competitor ever sees the lead.

How is an AI CSR different from a traditional chatbot or IVR menu?

Traditional bots follow rigid scripts—great for “Press 1 for billing,” terrible for a stressed-out homeowner without AC in July. Podium’s AI CSR is trained on millions of service-industry conversations, so it sounds like your best rep: it asks follow-up questions, empathizes, and offers the next available appointment. Reed Borton, owner of Premier Heating & Air, sums it up: “*The AI Employee can take the conversation from beginning to end and actually book an appointment. It’s doing almost all of the work for us.*” Jeremy Altman at Pride Air adds, “*We had an upset customer after hours. By the end they were thanking ‘Larry’—our AI—and never knew it wasn’t human.*”

Jimmy Thompson

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podium.com/industry/hvac

FOLLOW UP: 78% of homeowners choose the contractor who replies first—see how a 24/7 AI CSR turns after-hours chats, missed calls, and web inquiries into booked jobs while your competitors are sleeping.

BUSINESS INSIGHTS: AI insights brought to you by Podium

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Does adopting AI mean letting staff go?

Not at all. Dealers who succeed treat AI as an efficiency multiplier, not a head-count reducer. The AI CSR handles the “always-on” grunt work—filtering spam, deflecting DIY tire-kickers, answering repetitive pricing questions—so your human team can focus on high-value tasks: complex diagnostics, empathetic follow-ups, and upselling service agreements. Kellie Waldron at All Seasons HVAC/R puts it plainly: “Before Podium, I’d be stuck doing admin work after hours and still answering calls. Now the phone stops ringing; ‘Max’ handles it. I can tackle tomorrow’s schedule and get home on time.”

What first steps should owners take to put AI to work without overwhelming the office?

Start with your pain point. If after-hours calls are slipping by, deploy the AI CSR on your website chat and enable missed-call texts. If you’re missing calls after-hours or during busy season, deploy the AI CSR to answer calls to schedule appointments. Any way you bring leads into your business, Podium can consolidate in a single dashboard, your team doesn’t juggle tabs or apps.

If calls are my lifeblood, how does upgrading the phone line turn ring-ins into confirmed appointments?

Podium’s built-in VoIP phone system knows who’s calling and pulls up the entire message thread in one dashboard. If you miss the call, Podium automatically sends a text that says, “Sorry we missed you—how can we help?” Data shows 58 percent of recipients reply to that text, instantly putting them back in your sales



funnel. And because 57 percent of consumers prefer texting once a call starts, you meet prospects on their terms while capturing written proof of every promise you make. The result: fewer phone-tag loops, faster dispatching, and a measurable uptick in closed tickets.

We’re already slammed—why would I add new software in the middle of peak season?

Peak season is exactly when every minute—and every missed call—costs the most. Rolling out an AI-driven phone and messaging platform during crunch time does two things no human crew can scale to match:

- 1. Instant Coverage When Demand Spikes –** After-hours and lunch-hour calls surge during heat waves or plumbing emergencies. AI CSRs reply in seconds 24/7, securing the job before a competitor can pick up. That captures revenue you’re otherwise too busy to chase.
- 2. Relief for Burnt-Out Staff –** Instead of adding overtime or hiring temporary help, you off-load the repetitive intake (“What’s your service call fee?”) to AI and let techs focus on diagnostics and repairs. Teams report lower hold times and happier CSRs—right when customer patience is thinnest.

In short, peak season magnifies both missed-lead losses and staff fatigue; implementing now plugs the biggest revenue leaks precisely when they’re widest.

The key mindset: AI isn’t here to replace the human touch; it preserves it by giving real people the time and breathing room to deliver five-star service. In an industry where trust is everything and margins are thin, being first, friendly, and always available is how you beat the competition—one speedy response at a time. ♦

Book more jobs *with less effort* with Podium’s AI CSR.

Podium is an AI-powered communication platform built to help you get more reviews, convert leads faster, and drive more revenue with the power of text and phones. With AI CSR and automation, Podium ensures you never miss a lead and win every job.


Podium helps dealers:


- Answer every call—even when you're in the field
- Book more jobs—before competitors get the chance
- Close up to 30% more sales—automatically
- Save time with our AI CSR, which never takes a day off





 **Richie Hoffman**
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 My AC is broken. When can you guys come by?

 So sorry to hear that! We have some availability this afternoon.


 Yes, this afternoon would be great! I’m free at 2pm.

 Great, our technician will see you at 2pm.




Text your new AI CSR.

Get a Custom Demo
Email Keith.Massey@podium.com



Call Completed

5:17 • Front Desk (757) 600-6753



5:17

Richie's AC isn't working and he wants someone to come take a look at it at 2pm tomorrow.

View call details

Hey Richie—just texting to confirm a tech is on their way to you and will arrive by 2pm.

Thanks! See you soon.