Inspire AI Consulting

CASE STUDY · FIELD SERVICE & HOME SERVICES

We told a client they needed less AI than they thought.

Residential AV, lighting and shade integrator, about 10 people

A 10-person home AV and lighting integrator asked us where AI could help. The real problem was information. Their three most experienced people were hand-carrying it between systems, and it cost at least 1,284 hours a year. Our plan replaces nothing they own. One of the five quick wins was a software upgrade they already paid for.

1,284+
hours a year of documented, self-reported workload

$10,800 to $17,200
year-one value we said we'd defend

13
opportunities, each scored the same four ways

5
quick wins, none needing custom development

AT A GLANCE

Business	Residential AV, lighting and shade integrator: design, install and service
Size	About 10 people, about 100 homes under service
Who we talked to	The founder, the project manager, the designer
What we used	3 interviews, a written workflow survey, service ticket history back to 2013, a validation session with the owner
What they got	A written report, 13 scored opportunities, a 90-day roadmap

THE ASK

The owner wanted to know where AI could help. Most owners show up with a list of tools they've heard about. We skipped the list and started with how work actually moves through the business, from the first client conversation to the final invoice.

WHAT WE DID

We interviewed three people in three different seats: the founder, the project manager and the designer. Each one got a question set built for their role. We added a written workflow survey and a summary of service history going back to 2013. Then we sat down with the owner to test the draft. He added a finding we'd missed, and the data he sent afterward reshaped the roadmap.

WHAT WE FOUND

- **It's an information problem before it's an AI problem.** Information gets created once, in a call, a drawing or a tech's note. Then it gets re-typed and re-interpreted by hand across systems that don't talk to each other. The people doing that are the three most experienced people in the company. All three described the same problem without knowing what the others had said.
- **At least 1,284 hours a year.** That's self-reported time in three buckets: 832 hours of manual communication and follow-up, 260 hours of cross-system checking and rework, and 192 hours of the owner turning tech notes into invoices. At an assumed $50 blended rate, that's about $64,200. It's a floor. It leaves out costs we couldn't price, and it leaves out under-billed service time entirely because we couldn't prove it.

- **The business had changed shape.** In 2014, roughly three quarters of service tickets came from new clients. In 2025, 94% came from existing ones. This is now a service business running on about 100 homes, with an install arm attached. That pointed the roadmap at the installed base instead of new-project tooling.

WHAT WE RECOMMENDED

- **Thirteen opportunities, each scored the same four ways:** value, complexity, data readiness and scope risk. The scoring is in the report so the client can argue with it.
- **Five quick wins first, none needing custom development.** One was an upgrade to design software they already paid for. The current release does most of the drawing cleanup the designer was doing by hand, so we took a custom build off our own list.
- **One measured pilot:** turning service ticket notes into draft billing summaries. Read-only access, a person approves everything before it touches the books, and it runs side by side with the current process for two weeks so the savings get measured, not assumed.
- **Nothing replaced.** Every system they own stays. The fix is capturing information once, organizing it around the home and reusing it.
- **One named owner inside the company before anything starts.**

THE NUMBER WE'D STAND BEHIND

> We identified $64,200 a year. We told the owner we'd defend $10,800 to $17,200 of it in year one, which is 17% to 27%. The rest is real but not proven yet, and we'd rather under-promise it than inflate the headline.

WHAT HAPPENED NEXT

The owner called the findings accurate. He also decided to own the roadmap himself, which was a better answer than the one in our report. He'd already tried an AI-drafted billing summary, and as he tells it, the person who does their billing said it read well and didn't need much rewriting.

IF THIS SOUNDS LIKE YOUR BUSINESS

If your best people spend their week re-typing job notes, chasing messages and turning tech notes into invoices, you have the same problem. You probably don't need more software. You need the information captured once.

Book a 20-minute call

calendly.com/chriswollerman/new-meeting
chris@inspireaiconsulting.ai