

CUSTOMER SPOTLIGHT

*A concierge that
finishes the work —
not a switchboard.*

SMHC

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Karmaflow

30 DAYS · LIVE IN PRODUCTION · ONTARIO

THE SETUP

Most firms route the call. *SMHC finishes it.*

Simcoe Muskoka Home Comfort is an HVAC service company across Orillia, Barrie, Bracebridge, Huntsville, and the Muskoka cottage country in central Ontario. Heating in the winter, cooling in the summer, on-call when something stops working. The work itself is straightforward. The first contact is where it gets hard.

HVAC intake is real work, not a phone tree. A homeowner with no heat needs their equipment identified, their address confirmed, the right diagnostic fee quoted, a job created, and a technician dispatched — at first contact, not after three transfers and a callback. Most chains hand this to a call center that takes a message, or an IVR that routes by menu. Neither finishes anything. The customer still has to wait for a human to actually do the work.

SMHC deployed something different: a Virtual Service Advisor that behaves less like a switchboard and more like a senior service coordinator. One agent, one identity, working across web chat, voice, SMS, and email — reasoning through the request, completing the billable work, and dispatching as needed, all on the first contact. It works at 4 AM on a Saturday the same way it works at 2 PM on a Tuesday.

86%

CALLS COMPLETED AT FIRST CONTACT

4

CHANNELS, ONE CONTINUOUS CONVERSATION

24/7

COVERAGE INCLUDING WEEKENDS

What follows is thirty days in production. Every conversation audited on more than twenty dimensions before it closes.

WHAT GOT BUILT

A senior coordinator, *not a phone tree.*

SMHC's Virtual Service Advisor reasons through a request the way an experienced service coordinator would — identify the caller, understand the problem, complete the work, dispatch if needed. It does this across every channel, and it can carry a single conversation from one channel to another without losing the thread. Underneath, a second layer audits every conversation the moment it ends.

LAYER 01 · THE ADVISOR

Reasoning, not routing

Identifies the caller, pulls their record, checks for open jobs, runs the intake protocol — equipment, fuel type, ownership, symptoms, address — quotes the territory-specific diagnostic fee, creates the job, posts a structured intake note, and dispatches to the on-call technician. It completes the billable work on first contact instead of taking a message. Judgment, not a decision tree.

LAYER 02 · OMNI-PRESENCE

One conversation, any channel

Web chat, voice, SMS, email — one identity sharing one memory. A customer can begin on web chat and, if they prefer, continue the same conversation by SMS without repeating themselves. The advisor knows what was said on the previous channel and picks up exactly where it left off. The conversation follows the customer; the customer never has to follow the channel.

LAYER 03 · THE REVIEWER

Real-time audit on every conversation

When a conversation closes, a review agent scores it across more than twenty dimensions: intake protocol compliance, safety triage, fee quoting, value anchoring, escalation handling, missed-opportunity detection, memory personalization, voice quality. Every conversation gets a structured audit record — not a sample, not a spot-check. Every one.

WHAT CHANGED

Eighty-six percent *finished on the first contact.*

The number that matters in HVAC service isn't how fast a call is answered — it's how often the customer's need is actually completed before they hang up. A job created, an estimate prepared, an appointment changed, a technician dispatched. Not a message taken. Done.

86%

OF CALLS COMPLETED AT FIRST CONTACT

Jobs and estimates created, appointments updated, dispatched as needed

4

CHANNELS, ONE CONTINUOUS CONVERSATION

89%

BRAND PERCEPTION "HELPFUL PROFESSIONAL"

24/7

COVERAGE INCLUDING WEEKENDS

Measured across 30 days of production conversations, test and internal traffic excluded.

A SATURDAY MORNING IN BRACEBRIDGE · ANONYMIZED

CALLER Service call.

ADVISOR I'm sorry to hear you're needing a repair. To get started, I'll just need to pull up your file. What's the best phone number for you?

[advisor finds caller in CRM — two properties on file]

ADVISOR Thanks. I see two properties for you: one in Huntsville and one in Bracebridge. Which one am I sending the technician to?

CALLER This one's in Bracebridge.

[fee quoted, AC confirmed cooling-only, job #26074 created, on-duty Front Office paged]

ADVISOR You're all set. Service request 26074 has been created for your AC in Bracebridge. Our dispatcher will call you shortly to coordinate a time.

FINISHED AT FIRST CONTACT · 2 MINUTES 16 SECONDS

WHAT IT LOOKS LIKE IN PRACTICE

Three calls. *Three things humans usually don't get right.*

The numbers describe the system; the conversations describe the work. Three moments from the thirty-day window, anonymized.

4:00 AM
SATURDAY
ORILLIA
4:05 TO JOB
CREATED

The 4 AM furnace

A homeowner in Orillia calls before sunrise on a Saturday. Furnace is out. The advisor runs the full safety triage — no gas smell, gas is already off — confirms natural gas vented through floor vents, quotes the Orillia diagnostic fee of \$139, creates job invoice #26114, and confirms a dispatcher will call back. Mid-call the advisor slipped and called it "a weekday morning." The caller corrected it — and the advisor caught itself in the same breath: *"You're absolutely right, I'm sorry about that. Since it's the weekend..."*

10:14 AM
WEEKDAY
ORILLIA
1:58 END TO
END

The cancellation

A long-time customer calls to cancel tomorrow's AC diagnostic appointment. The advisor finds the existing job, confirms the address, asks if she wants to reschedule or just clear it, then cancels job #26056 and emails dispatch. Whole call: two minutes. Most call centers spend longer than that on hold music.

EVENING
WEB → SMS
ORILLIA
ONE
CONVERSATION

When the channel changes, the conversation doesn't

A customer starts a web chat in the evening about a furnace that's short-cycling, partway through giving the advisor their equipment details. They need to step away from the computer. The advisor offers to continue by text: *"No problem — I can pick this up by text so you're not tied to the screen. What's the best number?"* The conversation moves to SMS mid-thread, the advisor already knowing the make, the symptom, and the address. The customer never repeats themselves. The booking is finished from their phone, walking around the house.

WHAT'S UNDERNEATH

The work, the audit, *and the conversation about both.*

SMHC's leadership doesn't have to listen to recordings to know what's happening. Every conversation closes with a structured audit — intake compliance, fee anchoring, safety triage, missed opportunities, brand perception, tone. The same system that completes the work watches the work. When a fee is quoted weakly, when an upsell is missed, when an intake skips a step — there's a tag for it, and a path to fix it.

That's the difference between deploying an AI agent and operating one. Most chains will deploy something this year. The ones that pull ahead will be the ones who can see what their agent actually did, on every call, in production.

A switchboard hands the customer off. A concierge finishes what they called about — and remembers them the next time they reach out, on any channel.

— KARMAFLOW PLATFORM OBSERVATION, 30 DAYS AT SMHC

ABOUT SMHC

Simcoe Muskoka Home Comfort is an HVAC service company serving Orillia, Barrie, Bracebridge, Huntsville, and the Muskoka region. Heating, cooling, installation, and 24/7 service.

ABOUT KARMAFLOW

The AI agent platform underneath. Businesses use Karmaflow to deploy and operate agents across voice, SMS, email, and chat — with built-in real-time audit, recovery, and observability.

See it for yourself.

karmaflow.ai