Case Study

Brandon's Heating & Air

HVAC Business Ends Decade-Long Search for Simplicity
and Doubles in Size With Sera

The Challenge

Brandon Fentress, owner of Brandon's Heating & Air, is no stranger to using field service management (FSM) software to run his Topeka-based business. He's spent the last 10+ years looking for a way to show customers accurate pricing prior to starting a job.

Instead of a solution, what Brandon found was:

- Big tech players in the home service industry that couldn't facilitate simple pricing changes
- FSM solutions that required complex price book add-ons
- A hard time staying organized and growing his business

The Solution

Enter Sera. Brandon first learned about Sera's all-in-one FSM solution from a peer on Facebook. Almost immediately, Brandon knew he'd found what he needed for pricing and more.

> "I signed up for the demo and Sera was pretty much exactly what I'd been looking for for about twelve years."

How did he know Sera was the solution? Brandon specifically mentions simplicity — and in several areas:

- Sera's price book ensures Brandon's techs can present accurate pricing to customers; Brandon can easily update pricing and keep an organized pricebook
- The customer portal allows Brandon's customers to easily access their service history and invoices
- The dispatching module unlocked unexpected efficiencies for Brandon and team
- Memberships opened Brandon's eyes to new ways of doing business; he'll be able to simplify his business model and focus solely on HVAC because of the revenue he's making from memberships

> "I decided that once we switched to Sera, we were going to jump on the way the software was created instead of trying to reinvent the wheel. We retired service contracts and now our memberships are now exploding. That is probably going to be the most drastic change to my business. It's going to have the most positive impact."

The Results

Brandon says he was rapidly growing before adopting Sera, but he knows Sera has had a notable impact on his processes. If not for the simplicity of using Sera, Brandon says he'd never be able to recognize certain benefits:

- The growth Brandon's unlocked means they'll be able to hire three additional full-time techs by the end of 2024
- Brandon's office manager can quickly and easily add and schedule jobs then move on to bookkeeping; she also has bandwidth to help Brandon with even more tasks in Sera
- The more Brandon adapts to how Sera is built, the more smoothly he notices his business running

> "Sera has let me calm things down in such a simple way that I'm confident enough to add more techs. I would not have even considered adding another tech with any previous software. It was just too much of a mess in the office. We are running way more efficiently in the office and in the field now."

It's safe to say that Brandon found a simple solution for not just his pricing problem, but also for the chaos of service work.

Final Thoughts

While Brandon values the simplicity Sera offers, he doesn't want anyone to equate simple with unsophisticated.

> "Simple means the data is organized easily, I can use the system easily, I can update the prices easily. It doesn't mean the software is not advanced or robust.
> This is a powerful tool."

By The Numbers

70+
Memberships Added
In The First 6 Months

3
Projected Staff
Additions