



Case Study

Lavender AC & Heating

HVAC Business Finds a Fix for Broken Data, Boosts Growth by 100% With Sera

The Challenge

Lavender AC & Heating in Mesquite, Texas has two techs, including owner David Lavender, and an install crew in the field. David's wife Jennifer runs things in the office. With such a small team in the field, things have to go smoothly for Lavender to deliver reliable service to customers. Once Lavender reached \$500,000 in revenue, things weren't running smoothly at all. David needed to fix something fast.

A few factors added up to chaos and stalled Lavender's growth:

- Although the company was using field service management (FSM) software, David and Jennifer couldn't track what they needed to
- Lavender's data was unreliable, so their software wasn't really working for them
- Bad data also meant missed maintenance appointments

"In service companies, you live and die by maintenance contracts. If you miss a visit, you get a bad review. You start losing money that way. So we needed to make a change."



Case Study

Lavender AC & Heating

The Solution

Change came in the form of Sera. David had heard about it in a Facebook group and was intrigued by moving to an all-in-one solution — something his previous FSM software definitely wasn't. David was clear about what he wanted in a new FSM solution — and what Sera delivered.

The essential features David says won him over included:

- **Accuracy:** Being able to trust the data that is in the system can be the difference between winning a job and losing it, or missing service appointments. David and team also love knowing their pricing is accurate and being able to quickly and easily update it when it isn't.
- **Customer Service:** David chose Sera over other FSM providers because he appreciates Sera's quick response times and the relationship he established with his onboarding specialist at Sera. He also likes how accessible Sera's leadership team is.
- **Efficiency:** It was all about giving the team their time (and lives!) back. The ability to automate routine tasks means David's wife Jennifer can actually focus on the business or leave the office when she needs to. Tracking tech arrival time and efficiency is also one of David's favorite features.

"Everything with my old FSM software was a workaround, workaround, workaround. You've got to have five apps just to run their app to make it efficient. I'm not doing that. With Sera, I can do everything in one app."

The Results

The Lavender AC team was able to dive in and use Sera to understand their business better. In fact, they used both the job time efficiency and pricing features to unlock incredible growth:

- Lavender transitioned to Sera in April 2022
- From January to April of 2022, Lavender had around \$100,000 in revenue
- From April to December of 2022, after moving to Sera, Lavender hit **\$1 million** in revenue
- Lavender made more money with fewer opportunities — **875 calls vs. 1,000** in the previous year



Case Study

Lavender AC & Heating

“Sera is a game changer. It opened up our eyes to various gaps that we found in our business. It helped us grow our business... by learning our numbers, learning certain KPIs that we needed to find. The price book is amazing. Once it’s set up, it makes the job easier. It makes your office staff’s life easier.”

Final Thoughts

David’s biggest takeaway after switching to Sera is that it helps him “close the gaps” in his business.

“When I used to do it by pencil and paper, I wasn’t profitable. I wasn’t anywhere near successful. And then when I finally got FSM software, I started to see a little bit of profit, but I knew there was something missing. The minute I switched to Sera, that’s when we found the missing piece. Now we’re able to see the things that we need to adjust. When you close those gaps, make those adjustments to pricing or efficiency, it can make a \$200-300,000 difference. That’s when it takes you from a \$500-\$600,000 company to over a million.”

By The Numbers

100%

Revenue Growth

275%

Membership Growth