

CASE STUDY

BRANDON'S HEATING & AIR

Brandon's Heating & Air: The 12-year Field Service Management Software Journey

Brandon Fentress, the owner of Brandon's Heating & Air, had been on a 12-year journey to find a field service management software that met his goal of professionally presenting clients' simple pricing prior to doing work. Although a straightforward goal on paper, it proved to be challenging because the industry lacked software that could provide the desired functionality while maintaining simplicity.

MULTIPLE ATTEMPTS ACROSS A DECADE

Brandon is no stranger to using field service management software to run his Topeka-based business; over the last 10 years he has spent around \$30K on different software, yet he continued to experience failure after failure when it came to obtaining his pricing goal. According to Brandon, most software was too complex and required significant time to fix a simple internal mistake, which ultimately was the final straw before switching to Sera.



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NOT ALL SOFTWARE IS THE SAME

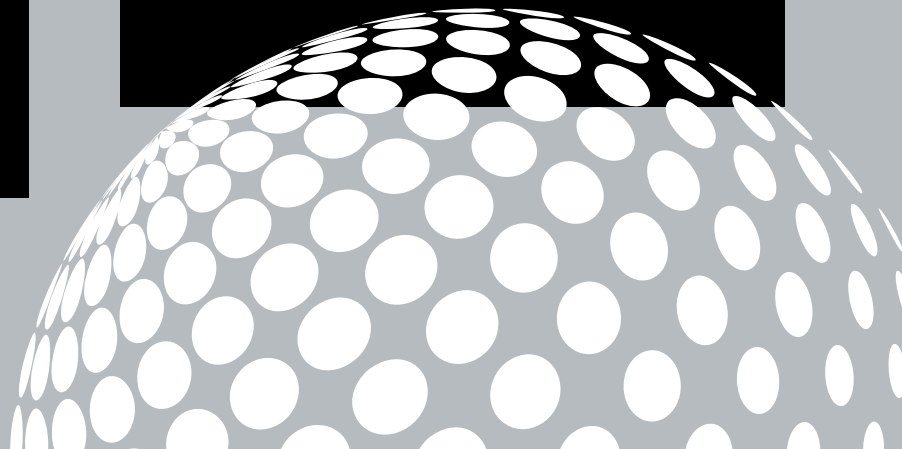
Brandon first learned of Sera Systems from a gentleman on his Facebook page who was bragging about how well his business was doing. Brandon sent him a private message and asked which software he was using, the gentleman said "Sera", to which Brandon responded, "Sera who?" After learning "Sera" was the name of the software he signed up for a demo.

With Brandon focusing on ensuring his techs present accurate pricing to clients, he appreciates the simplicity offered by Sera, which allows for quick pricing adjustments and an organized pricebook. In addition to the pricing functionality within Sera, Brandon also likes the dispatching capabilities, which allow for jobs to quickly be reserved, added, and scheduled along with how clients can log in and see their history.

LEARNING CURVE

When asked to rate the overall learning curve to implement the software on a scale of 1 to 5 (1 = difficult, 5 = easy), Brandon gave it a rating of 4.5. One of the key factors that contributed to a smooth experience was his relationship with his onboarding specialist, who never made him feel inferior or that any question was bad.

Being that Brandon has used a lot of software in the last decade, he has gone through a variety of onboarding processes. Therefore, when he shared he received more personalized attention during his Sera onboarding compared to his last seven or eight onboarding experiences further supports his rating of 4.5.



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PROOF THROUGH NUMBERS

When asked about the growth the company has experienced since implementing Sera, Brandon mentioned it is hard to judge since he was rapidly growing before adopting Sera. However, one notable advantage Brandon has observed was the ability to create processes while boosting his confidence in adding additional techs.

Currently, Brandon Heating & Air is a team of five full-time employees, which includes three full-time techs and two part-time techs during the busy season. Based on growth projections, the goal is to expand the team further by hiring three additional full-time techs by the end of 2024.

The company also provides a range of services including HVAC, Plumbing, and Electrical services. However, the primary reason for providing services across various trades is to weather the shoulder season. Looking ahead, Brandon is focused on solely providing heating and air services, which is his favorite of all the trades. He is confident that he can achieve this with the help of Sera software.

MEMBERSHIPS

In the past six months, Brandon's team has experienced an explosion of new membership sign-ups, surpassing 70+. As a result, Brandon is moving away from maintenance contracts and focusing on memberships. Before going all in on memberships, Brandon took the time to perfect their membership process which included spot-checking how current and new clients reacted across a 6-month period.

According to Brandon, taking time to ensure a solid process has contributed to the growth the team has experienced in their VIP membership program. Approximately 50-75% of clients sign-up for the program when they see firsthand the savings members receive vs. non-members.

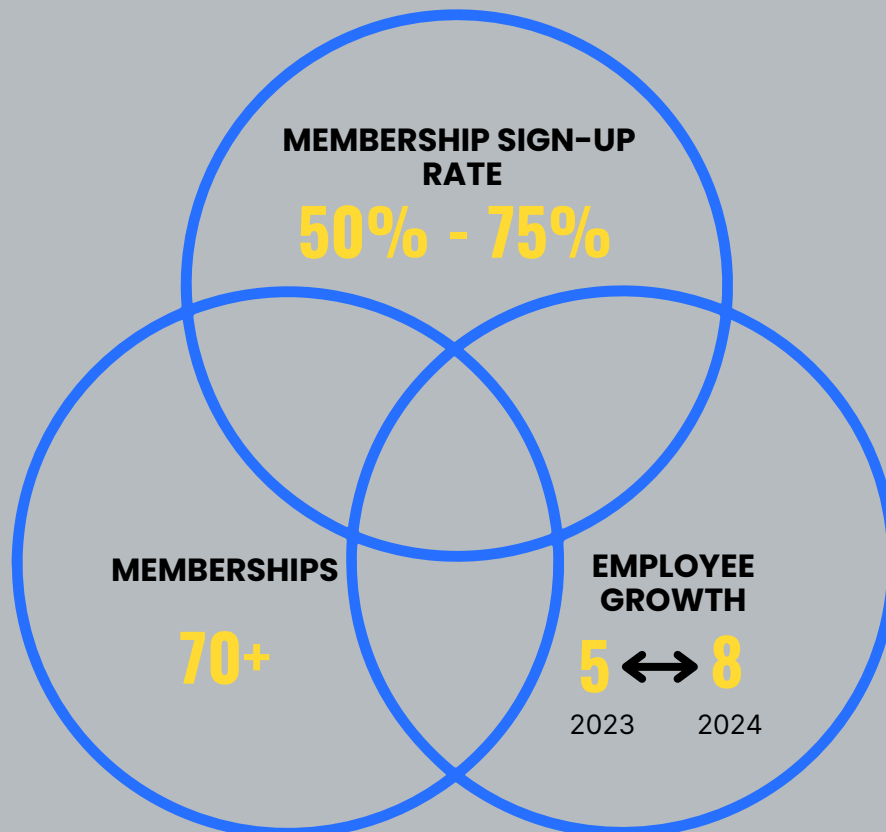
Because Brandon is a huge fan of simplicity, he used this approach when selecting the name of a program: VIP membership. The program is priced at \$75 and discounts are offered to seniors and veterans. A fun fact about the program, because of the simplicity of the name, techs can simply ask, do you want to be a VIP member when they present the program.

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FINAL THOUGHTS

After using a variety of field service management software during his 12-year journey, Brandon finally found his ideal software fit with Sera. He has also found the more he has adapted to how Sera is designed, the more efficiently his business runs. He recommends other contractors using Sera to look at which parts of their business they can best adapt.

When asked what's one piece of advice Brandon would give himself when just starting out, he said, ***"Enjoy the ride, most people fail till they are 40 years old. Fail and fail fast, you'll be successful. Don't quit failing and trying and you'll see the pot of gold at the end of the rainbow."***



Elevate the success of your HVAC business to new heights by diving deeper into what Sera has to offer with a 15-minute discovery call.



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