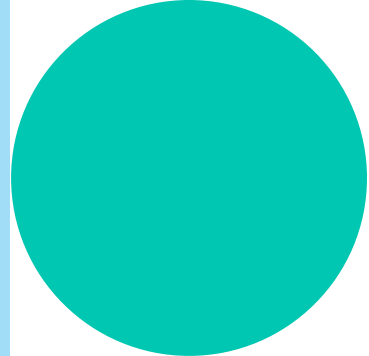




Case Study

WEX FSM drives 15-20% close rate boost for HVAC business

A success for Guidry's Air Conditioning & Refrigeration Service





Overview

Guidry's Air Conditioning & Refrigeration Service is a thriving Louisiana-based HVAC business that needed a technological leap to match its growth ambitions. They first partnered with WEX Field Service Management (FSM) in 2015 to streamline payments.

Recognizing WEX FSM's potential, they fully upgraded to the Enterprise software in January 2021 to overhaul their entire operation, seeking greater efficiency and a critical improvement in work-life balance. Since fully adopting the platform, Guidry's has:

Accelerated growth: The company's net profit now exceeds its past annual revenue.

Achieved efficiency: They have virtually eliminated all paper invoices.

Scaled operations: They recently moved into a new, larger facility to support future expansion.



"We use WEX today because of the support that we as contractors get on our end. I've never used any other type of platform that gives us the service that y'all do."

Vaughan Guidry, Owner

Challenges

Work-life balance: Vaughan Guidry worked long hours, including weekends and evenings, balancing multiple roles, which affected personal time.

Operational inefficiency: Pre-existing systems were manual and time-consuming, causing delays in invoicing and customer payments.

Growth constraints: Limited technological capabilities made it difficult to scale efficiently and keep up with increased demand and operational needs.

Outdated processes: The reliance on old systems and paper files made daily operations clunky and slowed response times.



The solution: WEX Field Service Management (FSM)

WEX FSM provided a **single, unified platform** to address Guidry's operational and growth challenges.



Removal of paperwork: The software has led to the almost complete removal of all paper invoices and work orders. The office now operates digitally, saving the team valuable time and sparing them administrative headaches.



Streamlined invoicing & payments: WEX FSM's mobile invoicing allows for immediate billing and faster payment collection. Customers benefit from multiple ways of paying (eCheck, credit card) and the ability to pay on their own time.



Real-time proposal creation: WEX FSM's proposal tools streamline quote generation, enabling immediate, accurate proposals to be sent to customers in real time. This eliminates the long delay of the old server-based system.

"The immediate impact for us was the proposals and closing these sales jobs right away versus the process that we were doing prior!"

Vaughan Guidry, Owner



The solution: WEX Field Service Management (FSM)



Enhanced scheduling and dispatch: Improved scheduling and dispatch capabilities reduce administrative workload and fuel costs, allowing technicians to start their day directly from home.



Integrated pricebook: WEX FSM's integrated price book allowed Guidry's to build and manage service and equipment replacement packages directly within the software. This streamlined the quoting process, enabling quick and accurate pricing.



Mobile accessibility: The mobile capabilities of WEX FSM offer exceptional flexibility, enabling Guidry's team to generate and finalize job quotes from anywhere — whether during commutes or on-site. This eliminates manual paperwork and accelerates sales closures.



Exceptional customer support: Guidry's credits the WEX FSM Customer Care team as the top reason they remain with the platform, noting the immediate, accessible support.



"The biggest thing that I love and the one thing that's kept us with WEX for so long is the customer care team. The service that we've gotten since the beginning has been number one for me. And that's why we're still here."

Vaughan Guidry, Owner

Results

WEX FSM has transformed Guidry's operations, creating a more efficient, profitable, and technologically advanced business.



15-20% boost in close rate due to the efficiency of WEX FSM's proposal tools.



45% of invoices are paid immediately when the office sends them out.



Virtual elimination of physical paperwork has reduced the need for extended hours in the office.



Vaughan has been able to work fewer hours while still driving his business forward, allowing him to spend more quality time with his family.



“Financially, we’ve come a long way... Now, our net profit exceeds what we were doing in revenue back then!”

Vaughan Guidry, Owner



Drive more sales for your service business

WEX FSM provides the integrated tools, from mobile proposals and payments to powerful dispatching, to make your operations more profitable. Don't wait to streamline your business.

[Request a free, personalized demo](#) today to see how WEX FSM can help you.