

WEX® FSM drives 15–20% close rate boost for HVAC Business

The Customer

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 eliminated virtually 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



The 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, manage increased demand, and meet operational needs.
- **Outdated Processes:** The reliance on old systems and paper files made daily operations clunky and slowed response times.



WEX Solutions

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

- **Removal of Paperwork:** The office now operates digitally, saving the team valuable time and sparing them administrative headaches.
- **Streamlined Invoicing and Payments:** WEX FSM's mobile invoicing allows for immediate billing and faster payment collection and gives customers more ways 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.
- **Enhanced Scheduling and Dispatching:** Improved scheduling and dispatching reduce administrative workload and fuel costs.
- **Integrated Price Books:** WEX FSM's integrated price book allows Guidry's to build and manage service and equipment replacement packages directly within the software.
- **Mobile Accessibility:** The WEX FSM mobile app offers flexibility, enabling Guidry's team to generate and finalize job quotes from anywhere.
- **Exceptional Customer Support:** The WEX FSM Customer Care team is one of the top reasons Guidry's stays with WEX.

The biggest thing that I love and the one thing that's kept us with WEX for so long is the customer care team.

VAUGHAN GUIDRY
OWNER



The Results

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

15-20%

Boost in close rate

45%

of invoices paid immediately



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



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

Ready to ditch spreadsheets and start scaling your business?

> Schedule a demo to get started today.

