WeSuite
Growing Sales Strong

Security by APS



Location: Metairie, LA
Description: Delivers top-tier residential and commercial security solutions to customers throughout the Greater New Orleans area, North Shore, and Mississippi Gulf Coast.
Interviewee: Parker Smith, Chief Operating Officer

With QuoteAnywhere and Selena AI, Security by APS Builds a Foundation for Growth

Parker Smith, Chief Operating Officer at Security by APS, knows that flexibility is fundamental to security sales. And it's certainly true at APS. **"Many of our sales close on the spot. Those jobs are small and we do a lot of volume. But we also handle higher-end, larger commercial projects. Those systems take some time to design and involve a much more complex quoting process."**

APS needed a sales platform that could support both workflows while giving multiple team members the freedom to collaborate on projects and work from anywhere.

> ***"There are just so many benefits that outweigh what we were doing before. The reporting, being able to access it from anywhere, and now with Selena AI, the ability to take the information we're capturing and turn it into whatever the customer, salesperson, accounting team, or technician needs. That's where I see this going."***

- A flexible sales platform for on-the-spot and complex system sales
- Guardrails to reduce quoting omissions and protect margins
- Detailed, consistent scopes of work across the sales team
- Better visibility into leads, outstanding quotes, and follow-up activity

Leaning into QuoteAnywhere

Since going live with WeSuite in late 2024, the New Orleans-area integrator has steadily moved its sales operation onto QuoteAnywhere. Following the platform's major 2026 update, Smith estimates that his team now works in QuoteAnywhere about 99% of the time, making it the center of APS's sales process.

When Smith joined Security by APS in 2024, the company was just introducing WeSuite to **replace three disjointed software tools they were using; one as a CRM, another for residential sales, and a third for quoting commercial projects.** WeSuite was able to combine all of those functions within a unified platform: WeOpportunity for lead management, WeEstimate for detailed estimating and complex project design, and QuoteAnywhere for mobile quoting and simple sales.

Since then, QuoteAnywhere has evolved significantly. It now handles all the functionality of WeOpportunity, plus almost everything that WeEstimate can do. Smith says, **"Everything being in one spot made a huge difference. The consolidation sent usage by our sales team skyrocketing."**

Today, APS salespeople can manage the entire process – from lead to quote to close – within QuoteAnywhere. Smith and a few other in-house users only return to WeEstimate for a few specialized tasks. And those, too, will soon be managed through QuoteAnywhere.

The benefits of a single solution extend beyond making the sales process easier for reps. "It's helped with our marketing," Smith says. "It's helped with following up on leads they forget about – quotes sent out two weeks ago. The reporting side has definitely been beneficial."

Close Now or Later

About half of APS's sales close during the sales call. One veteran residential salesperson, in particular, tries to leave his appointments with a signature whenever possible.

QuoteAnywhere's presentation mode allows him to build and review the proposal with the customer while keeping internal pricing information concealed. If the customer asks for a discount, he can privately switch out of presentation mode, see his margins, and determine where he has wiggle room.

> *We've used DocuSign for years, but we much prefer using it built right into the QuoteAnywhere workflow. We've eliminated a lot of duplicate data entry. Now it's one and done*

"He knows what he's approved to offer," Smith explains. **"QuoteAnywhere creates a lot more autonomy for the sales guys in the field."**

That matters because requiring management approval in the middle of every sale can create problems. "If the salesperson is ready to close but a manager is unavailable to review the quote immediately, the company risks slowing down a customer who is ready to say yes," says Smith. "Instead, we rely on established margin guardrails programmed into QuoteAnywhere."

For larger commercial projects, salespeople build complicated, multi-system quotes after meeting with the customer. "We've ingrained in our salespeople that they should use the folder structure within QuoteAnywhere to organize their estimates," Smith says. "This can be done by system, floor, logical grouping, or whatever makes sense. They can also easily create multiple versions of a job portfolio to analyze costs and present different pricing options."

Whether a proposal is created in minutes or developed over time, QuoteAnywhere's DocuSign integration keeps the final step streamlined. Customers sign electronically on the spot or receive a proposal later, via email, for signature. "We've used DocuSign for years, but we much prefer using it built right into the QuoteAnywhere workflow. We've eliminated a lot of duplicate data entry. Now it's one and done," Smith stresses.

Remembering Every Detail

APS makes extensive use of QuoteAnywhere's associated-parts functionality to reduce omissions during quoting.

"If a salesperson adds a camera to the quote, we'll automatically add the SD card, NVR, hard drive, UPS, and everything else associated with it," Smith explains. "Then, if they don't need something, they can remove it. We'd rather take things away than try to build every system from scratch and risk forgetting something."

For experienced team members, this approach helps them quote more efficiently. For new hires, it lets them start working independently much faster. They don't have to remember every component that could be required when adding a device. Smith reports that his two most recent hires began conducting solo sales calls very soon after starting their new positions. "Initially, I would still review their quotes, but they picked up using QuoteAnywhere without any issues."

Bringing Selena AI into the Sales Process

APS is in the early stages of exploring how Selena AI can improve its sales processes, but Smith is impressed with what he's experienced so far. He has started by encouraging his team to use Selena to address a common pain point: writing scopes of work.

"I want our scopes of work to be fairly specific and don't want them to be structured differently by each salesperson," he emphasizes. **"When they're done right, they eliminate risk to our company by defining both what we're going to do and what we're NOT going to do. Selena helps organize the information for any project into a consistent, approved format that gives everyone a common starting point, and then they can customize it to reflect the specifics of the job."**

Smith currently uses Selena regularly on the jobs he quotes himself. He uses his voice, in a conversational tone, to describe in detail the system he's working on – including special installation requirements and disclaimers – and Selena turns that into a well-written, detailed scope of work. Then, he reads through it and makes any necessary revisions. "The more you use it, the closer it gets to generating exactly what you want," he says.

Continuing to Evolve

APS's use of QuoteAnywhere continues to evolve. What began as one component of a broader WeSuite workflow has become the hub for nearly the entire sales process, and Smith sees Selena AI as the next step in that progression. As new capabilities become available, APS plans to keep refining how its team captures information, builds proposals, manages opportunities, and shares information across the organization. He's particularly eager to begin using Selena Engineer, which automates device take-offs and provides Bill of Materials analysis.

For APS, **there's also value in not having to devote its own resources to developing, integrating, or maintaining AI tools.** With Selena AI built into QuoteAnywhere, Smith and his team can focus on selling security solutions rather than maintaining the technology that supports their sales process.

For Smith, that evolution is part of WeSuite's long-term value. His team isn't just using the platform more; it's using QuoteAnywhere and Selena AI to find new ways to make its sales process more consistent, efficient, and scalable. In other words, QuoteAnywhere and Selena will keep helping APS go further faster.

