IDC MarketScape

IDC MarketScape: Worldwide Manufacturing Field Service Management Applications 2021–2022 Vendor Assessment

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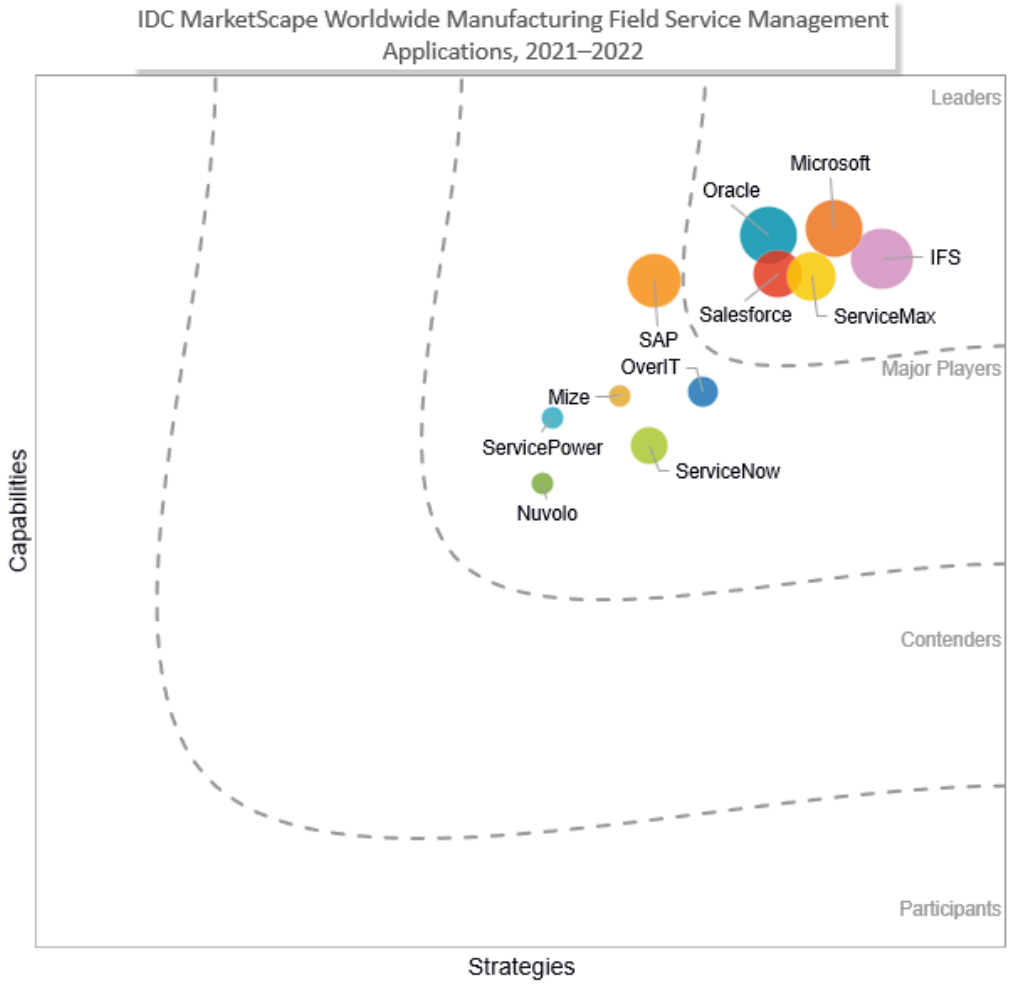
IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Manufacturing Field Service Management Applications Vendor Assessment



Source: IDC, 2021

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Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IDC OPINION

In 2021, and beyond, manufacturers and service organizations have made, and will continue to make, a concerted effort to prioritize service experiences for customers, operators, and consumers. Expectations for valuable interactions, consistent quality engagements, and personalized experiences demand that manufacturers and service organizations rethink what good field service looks like. Heroes on the day or one-off superstars in field service, though still the norm, are no longer acceptable as customers demand visibility into resolution and consistency of service interaction regardless of whether an in-house field engineer, third-party technician, or self-service experience is being delivered. Field service teams are now expected to be in the right place, with the right part and the right skills, at the right time to go beyond closure of a work order to deliver an engaged experience with customers or operators. Digital capabilities and innovation accelerators such as augmented reality (AR)/mixed reality, the Internet of Things (IoT), and artificial intelligence (AI) are helping manufacturers and service organizations transform field support to be more proactive, predictive, and remote. The past 12–15 months have highlighted how manufacturers and service organizations need to incorporate contactless and remote service experiences to ensure, regardless of physical distancing limitation, resolution and value could still be delivered. Across manufacturing value chains in discrete, process, high-tech, and CPG environments, the field operation has become a differentiator and not just an aftersales-required activity. Not all field service operations are managed as profit centers, but through digital transformation, more manufacturers are looking to enhance the user experience through more efficient field service execution.

This study assesses the capability and business strategies of many notable technology vendors in field service management (FSM). Key findings of this field service management vendor assessment include:

- Field service management in manufacturing is defined by IDC Manufacturing Insights as the set of activities or processes to manage the field service operation including work order management, scheduling and route optimization, fleet management, contractor management, workforce management, warranty service, service contracts, install base management, dispatch management, augmented/mixed reality, crew/worker geolocation, and wearable support, among other capabilities.
- All 11 vendors included in this IDC MarketScape support a broad set of capabilities across the entire field service management marketplace, and each provides different approaches to FSM, vertical industries in manufacturing, and integrations into a broader set of service processes.
- The "short list" as provided by this IDC MarketScape highlights the unique capabilities and future strategies of each vendor that aid technology buyers and field service leaders to effectively and efficiently digitally transform their FSM operations.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The field service market has a number of technology vendors supporting a variety of capabilities to the manufacturing and service industry. The vendor inclusion criteria for this study were chosen to accurately reflect the technology providers that are most representative of any given field service management functional buyer's selection list providing one input of a manufacturer's decision-making

process to shorten the vendor evaluation process. The intent of this IDC MarketScape is to focus on those notable vendors that meet the criteria outlined and focus on broad FSM capabilities.

For the purpose of this study, we have focused on those vendors that we deem to be notable because of the following characteristics:

- Vendors must have at least 40 field service management customers.
- Vendors must have customers in at least five manufacturing subvertical industry segments and in at least two geographic regions.
- Vendors must have had a field service management application in the marketplace for at least 8 years.
- Vendor has referenceable manufacturing clients (at least two that will speak to IDC Manufacturing Insights) that are using all functionality as defined above.
- Vendors must have capabilities to support end-to-end field service management activities and processes.
- Vendors must have a demonstrable track record of innovation within their field service management application.
- The vendor commits to making the required resources available to meet the research timeline.

Each of the 11 vendors included in this study meets the aforementioned requirements. There are vendors that provide products for a subset of field service management processes or support adjacent processes that are notable but not included because they do not meet the "end-to-end requirement" in the manufacturing industry. This may change in the future, and future publications of this study will have additional inclusions.

ADVICE FOR TECHNOLOGY BUYERS

Field service has taken on a new role within many businesses as a result of the global pandemic. Where field teams could be deployed simply to diagnose an issue with the hope to eventually achieve resolution, physical presence on a customer site was no longer a given. This shift in access has forced the field service operation to be less manual, more remote, more dynamic, and more tapped into individual customer requirements. Digital transformation in the field historically revolved primarily around a better route or schedule to close more work orders in a given day. In today's environment, service leaders and IT buyers need to look to digital transformation for the field service operations to deliver digital and remote experiences, resolution regardless of access to equipment, and on-demand insights to ensure any technician or field engineer can be an expert to solve the problem in limited time on that first visit. Broadly, across a variety of manufacturing value chains, the following advice is provided to service and IT leaders to meet the challenges of today within field service management:

- **Take an enterprise view of field service digital investments whereby service data can inform a broader set of outcomes and data-driven decisions.** One-off or siloed digital investments fail to address the needs of a connected enterprise and experience. More so than ever, data must be made accessible, consumable, and actionable for a wider range of functions across the organization. Field service interactions open a window into performance and the experiences of the asset, the customer, and products that are invaluable to the rest of the organization, but often remain within the service operation. Field service data needs to be integrated with other enterprise applications like ERP, enterprise asset management, CRM, and SCM to ensure

asset, customer, and product service insights can create a closed loop of innovation. A couple of key questions to ask when considering a technology partner in field service:

  - Is the value from this investment isolated, or would multiple functions benefit from the technology and the data created?
  - Can this technology, application, or platform integrate easily with already-made investments, legacy technology, or homegrown systems out of the box?

- **Establish frontline buy-in for increased automation in field service to focus the team on more value-add activities.** Technology decisions that are made primarily by leadership or IT with limited input by the frontline users is doomed to be an impediment to transformation. Frontline service workers will be skeptical and worse yet reluctant to adopt new technologies if they perceive it to be just another application or tool they need to navigate to get their job done.
- **Prioritize near-term improvements within a strategic vision of long-term, iterative digital transformation.** Digital initiatives that take years are becoming less desirable as organizations recognize the need for speedy returns and value attainment. Despite the need to have a fast time to value for investments, digital transformation is a journey of steps that organizations need to prepare for and not a quick fix. A couple of key questions to ask when considering digital investments for the organization:
  - Is this investment a building block or a standalone use case solution?
  - Does our strategic vision solve real-world, near-term problems as well as address future needs?
- **Strengthen industry-specific ecosystem partner relationships to enable scalable innovations and accelerated business model transformation.** As more service applications fit within a broader enterprise transformation, the need to incorporate partners will continue to grow. But these partners need to have a service mindset with the ability to support the specific needs of a given industry. The needs of discrete manufacturers are different from process industries, for example, and the ecosystems to support them need to be tailored for their respective use cases. A couple of key questions to ask when considering partnerships in service life-cycle management:
  - Has the technology partner, consultant, or systems integrator helped companies in your respective industry or size of field service operation?
  - Has the vendor shown a track record of driving innovation and business model change even in environments where the manufacturer is risk averse or lacks a culture of rapid change?
- **Educate business functions, partners, suppliers, and customers on the importance and impact of quality field service experiences.** The field service experience is becoming a differentiator for manufacturers delivering value to the customer experience and necessary insights to improve product quality, relevance, and sales. However, when field service interactions and service experiences are siloed, service will remain an activity that has to be done as opposed to one that is critical to the success of the organization. Increased collaboration through remote digital tools like augmented reality driven by the pandemic has opened a window into the value of field service.
- **Avoid turning broken manual processes into broken digital processes.** Digitization is not inherently good or a panacea for improvement. Digital transformation must be the result of business transformation and improvement to truly provide the benefits desired. A couple of key questions to consider when evaluating the field service operation and its maturity:
  - What metrics are being measured to evaluate quality service and outcomes?

    - Have manual processes delivered the right outcomes or resolution?
- **Ensure service and resolution can be delivered consistently and with quality whether in person or remote.** Digital technologies need to support remote expertise, peer-to-peer collaboration, and self-service, which aid in the delivery of resolution the first time. A couple of key questions to consider:
    - Do you have standard best practices and a way to capture knowledge?
    - Have you established a collaborative culture whereby customers and the service team partner to achieve resolution?

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

IFS

IFS is positioned in the Leaders category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

IFS has served the service industry for over 38 years. IFS has established an ecosystem of partners to support its service management capabilities with strategic partnerships with companies such as Accenture, BearingPoint, Capgemini, Infosys, TCS, and Wipro. The company has partnered with more local and niche companies like Euclides, Gogh, Jolt Consulting, Leadent, and ProV, among others. Over the past three years, IFS has expanded its offerings in manufacturing-focused industries and adjacent markets through acquisitions of Astea, Clevest, Customerville, mplsystems, and WorkWave.

IFS supports the field service market with its Service Management product offering on the IFS Cloud platform. IFS has customers in a variety of subindustries within manufacturing such as medical devices; farm, construction, and industrial machinery/equipment; aerospace and defense; high-tech; and consumer products, along with service providers. IFS has a long-standing offering to support end-to-end field service management, which includes workforce management, work order management, scheduling and dynamic route optimization, warranty management, service contracts, forward and reverse logistics, install base management, contractor management, dispatch management, and service demand forecasting, among other capabilities. The field service product offering is modular and also has a prepackaged industry-specific version to meet the needs of clients.

Quick facts about IFS are as follows:

- **Employees:** Approximately 4,500 overall; 1,400 supporting service products
- **Globalization:** Supports clients in 95 countries and available in 15 languages
- **Selling partners added in past two years:** More than 20
- **Delivery models supported:** On premises, hosted private cloud, hosted public cloud, hybrid

Strengths

IFS has built an end-to-end offering that goes beyond the needs of the field service team to support the broader service life cycle, which includes service parts and warranty management. This integrated perspective for the entire service chain has also fostered a culture of innovation that benefits the entire

offering and is not just an incremental enhancement strategy. IFS' aggressive acquisition strategy also highlights its focus on delivering value across the service life cycle in many industries and for companies with all sizes of field service teams. In addition, customer interviews highlighted that IFS has enabled industry-specific domain expertise, which established a trusted partnership with clients and allowed customers to leverage shared industry best practices shortening time to value of the offering.

Challenges

IFS' primary challenge is growing its client base beyond its strongest market penetration of North America and Europe. This is a challenge faced by a number of vendors in the space, but as global markets continue to mature with regard to field service management technology, IFS will need to accelerate its presence in these markets. The depth of IFS' partner ecosystem has the ability to aid in this growth and must be a core part of the growth strategy. A track record of organic, inorganic, and ecosystem deepness will only be a benefit to IFS addressing this industrywide challenge.

Consider IFS When

Manufacturers and service organizations should consider IFS if they are looking for a partner with deep industry and service-specific domain expertise to aid in the rapid digital transformation of the field service and maintenance operation. IFS has aided clients across industries and company size to innovate within field service and meet the needs of an end customer that demands more than just SLA attainment but value from quality service experiences.

Microsoft

Microsoft is positioned in the Leaders category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

Microsoft (Nasdaq: MSFT) is a publicly held global vendor of end-to-end field service management capabilities headquartered in Redmond, Washington. Microsoft has served the service market for over 20 years. Microsoft has strategic partnerships with Accenture/Avanade, Alithya, DXC Technologies, EY, Hitachi Solutions, Infosys, Orbis, RSM, and Velrada. Microsoft offers two products to directly support FSM: Microsoft Dynamics 365 Field Service and Microsoft Dynamics 365 Remote Assist. Microsoft supports customers in multiple manufacturing industries such as farm, construction, and industrial machinery/equipment; aerospace and defense; high-tech; consumer products; process manufacturing; and service-only businesses.

Microsoft's end-to-end field service management includes workforce management, work order management, scheduling optimization, dynamic route optimization, augmented/mixed reality, warranty management, service contracts, install base management, contractor management, business intelligence, artificial intelligence, dispatch management, customer portal, capacity planning, and service demand forecasting, among other capabilities. The field service product is modular and can support revenue-based pricing models with clients. Microsoft can offer prepackaged industry-specific versions of the FSM application to meet the specific needs of clients.

Quick facts about Microsoft are as follows:

- **Employees:** Approximately 168,000 overall
- **Globalization:** Supports clients in more than 240 countries and available in 45 languages
- **Selling partners added in past two years:** More than 20

- **Delivery models supported:** On premises, hosted public cloud, hybrid

Strengths

Microsoft has recently announced an industry cloud strategy that includes manufacturing, healthcare, financial services, nonprofit, and retail clouds. This strategy coincides with Microsoft's capability around industry consultants for FSM and established industry best practices that are offered to clients, along with the prepackaged industry version of the app. Manufacturers expect their technology partners will go beyond just a rudimentary understanding of their respective needs to provide applications that can meet the individual demands of the industry with limited need for customization. Microsoft's ability to integrate IoT data with its field service and mixed reality offerings highlights the shift occurring in the market where manufacturers and service organizations need on-demand insights to better predict and resolve issues. The ability to deliver specific capabilities to support the market is critical to rapid adoption and ROI. Customer references also noted that Microsoft's integration with other enterprise applications and technical capabilities of the application helped speed deployment and achieve value quickly.

Challenges

Microsoft's primary challenge with regard to field service management is with regard to industry-specific innovations. Microsoft has established a culture of innovation around many of its products and highlights service-specific offerings, which demonstrate the future of field service collaboration and execution. However, manufacturers and some service organizations lag behind those in other industries, and companies like Microsoft will need to provide both transformative offerings and incremental innovations that closely align with the risk aversion of the specific subvertical industry. The past 15–18 months have shown that manufacturers are willing to rapidly innovate, but the digital journey still needs to be paced.

Consider Microsoft When

Manufacturers and service organizations should consider Microsoft when they are looking for an integrated field service product offering that can seamlessly integrate IoT data, remote collaboration, AI, and AR/mixed reality capabilities to enable more predictive and proactive service outcomes. The ability to collaborate in real time and have on-demand insights is transforming the way field service and support can be conducted. Microsoft is helping manufacturers that are on this journey around servitization and the convergence of AI, IoT, and AR in the field.

Mize

Mize is positioned in the Major Players category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

Mize is a privately held technology vendor headquartered in Tampa, Florida. Mize provides a wide breadth of field service capabilities and has served the service market for almost 10 years. Mize recently announced it would be merging with Syncron, a Sweden-headquartered service management platform with a focus on service parts management and outcomes-based service. This merger was made official in August 2021. Mize has strategic partnership relationships with Cognizant, Tech Mahindra, and Wipro. Mize has approximately 75 service customers, with the majority in North America, Europe, and Asia/Pacific.

Mize's Field Service Management Solution includes workforce management, work order management, warranty management, service contracts, install base management, contractor management, and

customer portal, parts, material, and returns management, among other capabilities. Mize has customers within manufacturing subverticals such as farm, construction, and industrial machinery; high-tech; consumer products; and service-only organizations. The field service product is modular and can support revenue-based pricing models with clients. Mize can offer industry-specific versions of the FSM application via customizations to meet the specific needs of clients.

Quick facts about Mize are as follows:

- **Employees:** Approximately 160
- **Globalization:** Supports clients in more than 100 countries and available in 19 languages
- **Selling partners added in past two years:** Approximately five
- **Delivery models supported:** Hosted public cloud

Strengths

Mize has established a set of offerings that include field service but also incorporate capabilities to support warranty and service contract management, depot repair, and service knowledge. These additional support core areas and adjacent processes to field service help manufacturers and service organizations deliver an integrated service experience for end customers and consumers. Mize has helped clients digitally transform service beyond a point offering to ensure data can flow across processes to enable a better view of the service experience. Customer references noted that Mize is a supportive and approachable partner that can provide configurable solutions to meet specific client needs. Mize's flexibility in support, pricing, and configurability aligns the goals of the customer with a digital journey to achieve quality end-to-end service experiences.

Challenges

Mize's primary challenge is in the broad field service capabilities in relation to other vendor offerings that have been in market longer. Mize has a strong offering in markets such as consumer electronics and farm equipment but hasn't established itself within industries such as aerospace and defense and process manufacturing. The field service offering can support these industries, but Mize hasn't prioritized these markets as a focus area. As these industries mature and look to digitally transform the field service and maintenance operation, vendors like Mize will be poised to extend into these broader markets. Mize, even prior to the merger with Syncron, had introduced targets to expand into newer global markets and subindustries within manufacturing.

Consider Mize When

Manufacturers and service organizations should consider Mize when they are looking for an agile technology partner with an established modular approach to the end-to-end service life cycle. Service has evolved to include more than just scheduling, dispatch, and routing of technicians to close an individual work order. Manufacturers and service organizations are looking to integrate data across the service life cycle and create valuable customer experiences that demand a technology infrastructure that is connected and not a siloed point solution.

Nuvolo

Nuvolo is positioned in the Major Players category in the 2021-2022 IDC MarketScape for worldwide manufacturing field service management applications.

Nuvolo is a privately held field service management technology vendor headquartered in Paramus, New Jersey. Nuvolo has served the service market for 8 years and has more than 150 customers within service life-cycle management, primarily in North America. Nuvolo has strategic partnership relationships with companies such as Accenture, Carahsoft, Column Technologies, Contender Solutions, Creative Systems and Consulting LLC, Crossfuze, Deloitte Inc., Devoteam Technology Consulting A/S, Engage ESM Ltd., Fujitsu Sweden AB, Fujitsu Technology Solutions (Holding) BV, and ITSM Group, among others. Nuvolo is built on ServiceNow's Now Platform.

Nuvolo supports the field service market through its Nuvolo Connected Workplace product offering with capabilities to enable mobile workforce management, mobile work order management, scheduling optimization, service contract management, install base management, contractor management portal, and customer portal, among other capabilities. Nuvolo has customers across a variety of manufacturing subindustries including farm, construction, and industrial machinery; high-tech; consumer products; and service-only companies.

Quick facts about Nuvolo are as follows:

- **Employees:** Approximately 407 overall
- **Globalization:** Supports clients in 26 countries and available in 23 languages
- **Selling partners added in past two years:** More than 20
- **Delivery models supported:** Hosted public cloud

Strengths

Nuvolo's key strengths include its customer service offering, flexibility in billing, evaluation versions, education of best practices, and digital maturity assessments. The company plans to aggressively invest in service capabilities in the coming 12-24 months. Nuvolo understands that manufacturers are primed to move from legacy and homegrown field service management applications to look for a thread of digital tools that are integrated and built upon one another. The ability to establish a digital road map and assess a client's digital maturity will ensure clients can maximize their investments and thrive in a digital age.

Challenges

Nuvolo is relatively new to the standalone field service marketplace. The company's primary challenge is not having the deep FSM domain expertise and set of capabilities today to support the full suite of needs in field service. That said, Nuvolo clearly has a road map to achieve a robust set of capabilities in the coming years and plans to expand the markets it serves into life sciences and into newer global markets such as EMEA and APAC. It will be critical for Nuvolo to leverage its background in maintenance, operational technology (OT), projects, and ERP to establish a connected technology stack for manufacturers in complex manufacturing industries.

Consider Nuvolo When

Manufacturers and service organizations should consider Nuvolo when they are looking for a technology partner that integrates with a workplace offering incorporating needs around maintenance, space management, OT, financial and procurement systems, and ERP. These functions and processes are becoming more intertwined, and applications will need to be able to integrate, aggregate, and make sense of disparate data sets. Nuvolo is investing in FSM-specific functionality, and manufacturers are becoming more willing to partner with technology firms to fine-tune applications within an ecosystem strategy.

Oracle

Oracle is positioned in the Leaders category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

Oracle (NYSE: ORCL) is a publicly traded technology vendor headquartered in Austin, Texas. Oracle has provided end-to-end field service management capabilities to the service market for over 25 years across the globe, with field service clients in North America, EMEA, Asia/Pacific, and Latin America. Oracle supports customers in farm, construction, and industrial machinery/equipment; high-tech; consumer goods; process manufacturing; and service-only companies. Oracle, within service, has strategic partnerships with Accenture, Deloitte, Infosys, KPMG, Capgemini, and TCS as well as specialized partners such as ApexIT, Amberleaf, AST, eVerge, Helix, and Inspirage.

Oracle Field Service is an end-to-end field service management offering that includes workforce management, work order management, scheduling optimization, dynamic route optimization, augmented/mixed reality, warranty management, service contracts, install base management, contractor management, business intelligence, predictive analytics, artificial intelligence, dispatch management, customer portal, capacity planning, crew/worker geolocation, and service demand forecasting, among other capabilities. The field service product is modular and can support individual client needs regarding billing. Oracle offers prepackaged industry-specific versions of the FSM application to meet the respective needs of clients in different industries.

Quick facts about Oracle are as follows:

- **Employees:** Approximately 135,000 overall
- **Globalization:** Supports clients in more than 55 countries and available in 23 languages
- **Selling partners added in past two years:** From 5 to 10
- **Delivery models supported:** Hosted public cloud, hosted private cloud

Strengths

Oracle has a long history of supporting the field service market in complex, asset, and appointment-centric environments. Oracle offers a wide variety of portfolio benefits, including customer service delivery, customer service offering, functionality, range of services, delivery, and innovation. With established capabilities across the breadth of processes in field service, deep domain expertise in field service needs, and an R&D strategy in place specific for field service, Oracle has delivered value to customers throughout their digital journey. Oracle has been able to innovate both with customers and ahead of their needs. Driving innovation with field service in complex manufacturing industries isn't easy, but more manufacturers are looking for partners that can bring industry best practices along with out-of-the-box thinking to drive digital excellence.

Challenges

The primary challenge for Oracle is pricing and deployment model flexibility. Oracle Field Service is primarily a hosted public cloud offering. Though Oracle can support other instances and deployment requests via its Cloud@Customer offering, which allows customers to privately host their instance in the cloud. Customers looking for an on-premises deployment can choose this offering designed to specifically address their needs. Oracle, like other technology vendors in the FSM space, has moved to primarily support the cloud as this has provided the best environment for rapid enhancements to the solution and a culture of continual improvement of the offering. That being said, Oracle will need to

address concerns from some manufacturers in industries that are still resistant to the cloud as this may thwart some penetration in those markets.

Consider Oracle When

Manufacturers and service organizations should consider Oracle when they are looking to partner with a global technology firm with the breadth of offering that integrates service data with broader enterprise applications. A connected enterprise approach to technology strategies is becoming table stakes for many CIOs and global organizations whereby they demand working with partners that at a minimum have an established ecosystem to meet digital transformation goals and aspirations. Agile innovation is now a critical success driver for manufacturers, and technology vendors have to meet this moment of rapid disruption.

OverIT

OverIT is positioned in the Major Players category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

OverIT is a privately held field service management technology vendor headquartered in Fiume Veneto, Italy. OverIT has served the field service market for over 20 years and has more than 200 customers primarily in EMEA, with some clients in Latin America, Asia/Pacific, and North America. OverIT has strategic partnerships with Accenture, CBTechnologies, CGI, Engineering Group, Everis, Gogh Solutions, Implemented Systems, Inetum, Newtoms, and NTT DATA.

OverIT supports the field service market with two products: Geocall and SPACE1, an AR- and AI-product. OverIT supports clients across manufacturing and service industries with prepackaged industry offerings for farm, construction, and industrial equipment; high-tech; consumer products; aerospace and defense; process manufacturing; and service-only organizations. Geocall and SPACE1 provide a wide breadth of field service functionality including mobile workforce management, mobile work order management, scheduling optimization, dynamic route optimization, service contract management, install base management, contractor management, augmented/mixed reality, customer portal, predictive analytics and business intelligence, artificial intelligence and machine learning, and crew/worker geolocation, among other capabilities. OverIT can offer revenue-based pricing and the product is modular, with Essential, Advanced, Expert, and Elite editions.

Quick facts about OverIT are as follows:

- **Employees:** Approximately 515, all dedicated to service products
- **Globalization:** Supports clients in more than 40 countries and available in 8 languages
- **Selling partners added in past two years:** From 11 to 20 strategic partnerships
- **Delivery models supported:** On premises, hosted private cloud, hosted public cloud, hybrid

Strengths

OverIT has established strong customer relationships and built a culture of innovation that is able to aid manufacturers in their digital journey in field service. With aggressive investments in R&D and service capabilities, OverIT has been able to enhance its range of services while also incorporating innovative technology capabilities such as augmented/mixed reality, artificial intelligence, and IoT into its field service application. OverIT has leveraged field service domain expertise to expand the industries it can support with prepackaged offerings and best practice digital road maps. Manufacturers and service organizations are becoming more accustomed to innovative technologies

as part of the aftermath of the crisis of the past 15 months. Applications that can seamlessly weave innovative technology capabilities into core functionality will be welcomed by the manufacturing industry, which historically has not been a first mover.

Challenges

OverIT's primary challenge is its relative infancy in markets outside of Europe. The FSM market has a number of players already entrenched in North America and Asia/Pacific. OverIT will need to rapidly increase its ecosystem selling partners and industry flagship clients in broader markets to grow. Manufacturers expect to see a track record of success in their subvertical industry, size profile, and region before they are willing to make large investments. The test for OverIT will be whether or not it can highlight its rapid ROI and enhance its breadth of offerings, making decisions easier for new global markets.

Consider OverIT When

Manufacturers and service organizations should consider OverIT when they are looking to partner with a technology provider with aspirations for rapid innovation and growth. OverIT has been keen to embed innovative capabilities into its FSM offering to provide fast time to value for clients. The company understands that field service excellence in the future will depend on on-demand insights and collaborative experiences. A physical presence in the field is no longer a given, and manufacturers will need to ensure field service technicians can solve issues regardless of physical proximity to the asset.

Salesforce

Salesforce is positioned in the Leaders category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

Salesforce (NYSE: CRM) is a publicly held global service management vendor headquartered in San Francisco, California. Salesforce has delivered service products for over 10 years. Salesforce has customers across a variety of manufacturing industries such as healthcare, high-tech, energy and utilities, industrial equipment, and service-only firms. Over the past three years, Salesforce has acquired Acumen Solutions, ClickSoftware, MapAnything, Mulesoft, Slack, Tableau, and Vlocity, which have enhanced the capabilities and services for the field service product. Salesforce, specific to field service, also has strategic partnerships with Accenture, Asperii, Capgemini, Coastal Cloud, Cognizant, Deloitte, Diabsolut, Eagle Creek, Gears CRM, Infosys, Magnet 360, NeuraFlash, Nubik, Polsource, Slalom, TCS, Tech Mahindra, Traction on Demand, Wes Monroe, and Wipro, among others.

Salesforce Field Service offers an end-to-end field service management offering. The application includes capabilities such as workforce management, work order management, scheduling optimization, dynamic route optimization, service contracts tracking, install base management, contractor management, business intelligence, predictive analytics, artificial intelligence, customer portal, capacity planning, crew/worker geolocation, and service demand forecasting, among other capabilities. Salesforce Field Service's mobile application is offline first and extensible. The field service product is also modular and can support individual client needs regarding billing. Salesforce offers industry-specific versions of the FSM application through customizations to meet the respective needs of clients in different industries. Salesforce Field Service can offer flexible pricing such as revenue-, risk/profit sharing-, or outcome-based pricing models.

Quick facts about Salesforce are as follows:

- **Employees:** More than 70,000 overall
- **Globalization:** Supports clients in approximately 60 countries and available in 28 languages
- **Selling partners added in past two years:** More than 20 strategic partnerships
- **Delivery models supported:** Hosted public cloud

Strengths

Salesforce, through organic growth and acquisitions, has provided a wide breadth of capabilities to support the field service market. As the company introduces industry clouds, the field service offering is able to meet the specific needs of a variety of markets and complex environments. Based on IDC's criteria, Salesforce has been able to provide a number of client benefits such as delivery, functionality, innovation, customer service offering, portfolio depth, and pricing flexibility. Also, Salesforce customer interviews highlighted the partner ecosystem, which accelerates innovation and ensures value can be achieved quickly.

Challenges

The primary challenge for Salesforce regarding the field service market is in growth across industries, markets, and deployment types. Salesforce being primarily a cloud-only platform has constrained opportunities as not all manufacturing companies plan to adopt cloud technologies in the near future. Some manufacturers and service organizations still have concerns about cloud applications around IT governance, security, and difficulty in centrally managing IT systems and IoT services and integrating cloud services. As Salesforce builds industry-specific offerings in manufacturing, the company will have to address these concerns.

Consider Salesforce When

Manufacturers and service organizations should consider Salesforce when they are looking to partner with an innovative technology partner that can help transform the field service business into a customer-focused operation. Salesforce looks to go beyond individual functional processes within field service to connect the enterprise and ensure silos of data are made accessible and actionable. Manufacturers are in the midst of a transformation whereby field service is no longer an aftermarket reaction to a failure but a key driver for differentiation, revenue, and value. Ecosystems that enable the field service operation to innovate at speed and scale will be imperative.

SAP

SAP is positioned in the Major Players category in the 2021-2022 IDC MarketScape for worldwide manufacturing field service management applications. SAP has strategic relationships with partners such as Accenture, Atos, Capgemini, Cognizant, Deloitte, DXC Technology, EY, HCL, IBM, PwC, Tata Consultancy Services, and Wipro to further extend its capabilities in digital transformation and the service life cycle.

SAP (NYSE: SAP) is a publicly traded global technology vendor headquartered in Walldorf, Germany. SAP has supported the field service market for over 40 years. Over the past three years, specific to the field service capabilities SAP has acquired Coresystems. SAP also has strategic partnership relationships with Accenture, Atos, Capgemini, Cognizant, Deloitte, DXC Technology, EY, HCL, IBM, Infosys, LTI, NTT DATA, PwC, TCS, T-Systems, and Wipro.

SAP Field Service Management supports the end-to-end field service process including mobile workforce management, mobile work order management, scheduling optimization, install base management, contractor management, augmented reality, business intelligence, artificial intelligence, predictive maintenance, and customer portals, among other capabilities. SAP supports a number of industries within manufacturing including farm, construction, and industrial machinery; aerospace and defense; automotive; high-tech; energy and utilities; and service-only organizations. The product is modular and is primarily deployed in the cloud.

Quick facts about SAP are as follows:

- **Employees:** Approximately 102,400 overall
- **Globalization:** Supports clients in 100 countries and available in 30 languages
- **Selling partners added in past two years:** More than 20
- **Delivery models supported:** Hosted public cloud

Strengths

SAP has been a long-standing vendor serving the field service market with domain expertise in asset-centric and complex manufacturing environments. SAP has been able to incorporate innovative technology capabilities such as artificial intelligence and IoT into field service processes to enable manufacturers to transform business models, enhance the customer experience, and more efficiently resolve issues. SAP's asset management portfolio establishes a level of visibility across the asset and service life cycle, which improves productivity, contains the costs of maintenance, and heightens the service experience. Manufacturers and service providers understand that data volume isn't really the issue; however, they must turn data points into actionable insights to improve a variety of processes and customer touch points.

Challenges

The primary challenge for SAP resides in offering flexibility. SAP's adherence to a cloud-only offering has benefits regarding innovation, agility, and openness. However, there are many industries and companies within manufacturing that are still reluctant to go all in on the cloud. Manufacturers and service organizations are also looking for shared risk pricing options, which a cloud model can address. But determining a cloud-only approach will impact SAP's goals to expand and grow across markets. The cloud-only challenge is felt by other vendors in the FSM space, many of which are cloud-only since inception. SAP will need to provide a compelling digital story to combat any reluctance from manufacturers that are planning to avoid this cloud-only market and are investing in digital tools to transform field service processes.

Consider SAP When

Manufacturers and service organizations should consider SAP when they are looking to partner with a vendor that can support business model transformation in service while improving processes associated with field service execution. SAP has invested heavily in innovative technologies to aid clients into more efficient service processes while also allowing for dynamic business outcomes. Manufacturers clearly understand the need to enhance service outcomes and will need to work with partners that can enable agility, innovation, and experiences, not just products.

ServiceMax

ServiceMax is positioned in the Leaders category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

ServiceMax is a global provider of field service applications headquartered in Pleasanton, California. ServiceMax announced in July 2021 its intention to become a publicly traded company listed on the Nasdaq stock exchange under the symbol "SMAX." ServiceMax has delivered technology products for the field service market for 14 years and has over 350 customers globally, primarily in North America, Europe, and Asia/Pacific. ServiceMax has strategic partnerships with Accenture, Cognizant, Deloitte, and Salesforce.

ServiceMax supports the field service market with its ServiceMax Core and Asset360 for Salesforce offerings. Both offerings have a breadth of capabilities to support the end-to-end field service process. The ServiceMax Core application was the product evaluated for this study, and it includes mobile workforce management, mobile work order management, scheduling optimization, dynamic route optimization, service contracts, install base management, contractor management, customer portal, predictive analytics and business intelligence, service demand forecasting, and crew/worker geolocation, among other capabilities. ServiceMax supports customers in a variety of industries including farm, construction, and industrial equipment; aerospace and defense; high-tech; consumer products; process manufacturing; oil and gas; energy; utilities; renewable energy; and service-only companies. ServiceMax Core is a modular application and can support industry-specific needs through best practice templates and process recommendations through professional services and consultative partners.

Quick facts about ServiceMax are as follows:

- **Employees:** Approximately 530 overall, all dedicated to service products
- **Globalization:** Supports clients in more than 100 countries and available in 13 languages
- **Selling partners added in past two years:** More than 20 strategic partners
- **Delivery models supported:** Hosted public cloud

Strengths

ServiceMax has been dedicated to the field service market for more than a decade prioritizing this aspect of the service life cycle through organic growth and acquisitions. Based on IDC's criteria, the ServiceMax Core product provides a number of benefits for clients including functionality, R&D-focused enhancements, innovations, portfolio depth, range of services, and customer service offering. The ServiceMax product is built to manage complex asset-centric environments and has helped manufacturers enhance the field service experience for clients. ServiceMax continues to innovate the offering to ensure engagement and customer-first enhancements while also extending its partner ecosystem to deliver industry-specific value.

Challenges

The primary challenge for ServiceMax is with regard to its growth into new markets and service offerings. ServiceMax has established its offering in its core industry verticals and global markets, but to grow at the pace it envisions, ServiceMax will need to continue to build specific functionality into adjacent markets to manufacturing. Also to grow, ServiceMax will need to continue to address the needs of lightweight field service operations downmarket. ServiceMax thrives in the complex field

service market, but manufacturers with less mature field service instances are also looking to partner around digital tools.

Consider ServiceMax When

Manufacturers and service organizations should consider ServiceMax when they are looking to transform field service into a key differentiator for their business in order to drive revenue, enhance the customer experience, and deliver better outcomes. Complex field service environments demand robust offerings that can meet the needs of dynamic data flows, coordinated crews, and real-time on-demand insights from the field to the support team. The role of field service applications has transcended a scheduling or dispatch tool to require a depth of capabilities that can empower predictive, prescriptive, and proactive service outcomes.

ServiceNow

ServiceNow is positioned in the Major Players category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

ServiceNow (NYSE: NOW) is a publicly traded technology vendor headquartered in Santa Clara, California. ServiceNow has served the service market for 17 years and has over 6,900 customers overall, primarily in North America and Europe with some in Asia/Pacific, Latin America, and Africa. ServiceNow has strategic partnerships with Accenture, Cognizant, Deloitte, DXC Technology, EY, IBM, and KPMG. Over the past three years, ServiceNow has made acquisitions to augment capabilities in service product offering with Appsee, Attivio, Element AI, 4Facility, Intellibot, Loom Systems, Passage AI, and Sweagle.

ServiceNow Field Service Management is an end-to-end field service management platform that includes capabilities in mobile workforce management, mobile work order management, scheduling optimization, dynamic route optimization, service contract management, install base management, contractor management, customer portal, predictive analytics and business intelligence, and artificial intelligence, among other capabilities. ServiceNow FSM is modular and is primarily deployed in the hosted cloud.

Quick facts about ServiceNow are as follows:

- **Employees:** Over 15,000 overall
- **Globalization:** Supports clients in more than 25 countries and available in more than 20 languages
- **Selling partners added in past two years:** More than 20
- **Delivery models supported:** Hosted public cloud, hybrid

Strengths

ServiceNow has supported the service market for some time and recently has ramped up its investment and focus on field service. ServiceNow has embedded innovative enhancements in its offering to meet the needs of the market and to aid in manufacturers' digital transformation efforts. All ServiceNow products are written on the Now Platform using a single code base and data model. The single-platform approach to connect ecosystem partners to a common innovation architecture enables ServiceNow customers to transform at a swift pace and scale. Manufacturers, historically, are reluctant to be the test case for digital innovation, but in this current environment of rapid change, there is excitement about making leaps into the future of technological advancement.

Challenges

The primary challenge for ServiceNow specific to its field service management product is industry-specific capabilities and offerings. ServiceNow has established a depth of functionality to meet the needs of the broader market for field service. However, more and more manufacturers are looking for subvertical industry capabilities and domain expertise. These manufacturers demand configurability of a solution that can address specific needs and impact respective KPIs that drive their business goals. ServiceNow's aggressive acquisition strategy and organic investments must address this aspect of the product offering. Recognizing this, ServiceNow recently combined the Industry Workflows business unit under the Customer Workflows business unit to enhance alignment and rapidly develop industry-specific solutions, including manufacturing.

Consider ServiceNow When

Manufacturers and service organizations should consider ServiceNow when they are looking to partner with an innovative platform for service that can incorporate data from across the enterprise. Ecosystems and platforms are becoming a vital part of the IT landscape for organizations as they look to leverage technology in a fragmented environment. Manufacturers also understand the need to innovate at scale and will do so through building strong ecosystem technology partners.

ServicePower

ServicePower is positioned in the Major Players category in the 2021–2022 IDC MarketScape for worldwide manufacturing field service management applications.

ServicePower is a privately held global field service management technology vendor headquartered in McLean, Virginia. ServicePower has supported the field service market for 24 years and has over 260 clients globally, primarily in North America and Europe. ServicePower has strategic partnership relationships with Cognizant, Deloitte, and PwC.

ServicePower's field service management product is an end-to-end offering that includes capabilities in mobile workforce management, mobile work order management, scheduling optimization, dynamic route optimization, service contract management, install base management, fleet management, contractor management, augmented reality, customer portal, warranty claims, predictive analytics, artificial intelligence, service demand forecasting, and crew/worker geolocation, among other capabilities. ServicePower supports manufacturing clients in major appliances, consumer electronics, construction and industrial machinery, and high-tech industries. ServicePower's FSM product is modular and has prepackaged industry-specific product offerings.

Quick facts about ServicePower are as follows:

- **Employees:** Approximately 116, all dedicated to field service products
- **Globalization:** Supports clients in 27 countries and available in 12 languages
- **Selling partners added in past two years:** From 5 to 10 strategic partners
- **Delivery models supported:** On premises, hosted public cloud, hybrid

Strengths

ServicePower has supported the field service market for over two decades and has built an end-to-end offering that meets the needs of manufacturers and service organizations. ServicePower offers a wide range of services to support the field service market and has driven high levels of customer

satisfaction through its offering. Customer references highlighted the product's breadth of capabilities and the domain expertise in the market as being benefits of the product.

Challenges

The primary challenge for ServicePower with regard to its field service product is with its resources allocated to innovate and enhance the product for the future. Despite increasing its R&D investments in 2021 to 35% of revenue, ServicePower will need to further increase its investments and R&D resources to match the momentum being driven by other market players. Manufacturers historically are slow to adopt innovative technologies or change business models. However, this is changing in this market as disruptions are forcing manufacturers to accelerate digital initiatives and invest in innovations to transform the business.

Consider ServicePower When

Manufacturers and service organizations should consider ServicePower when they are looking to partner with a technology provider/ long-standing FSM vendor with the depth of functionality to support their current needs. ServicePower has industry-specific product offerings to support complex field service operations. Manufacturers and service organizations have targeted the field service operation to digitally transform and ensure that quality experiences can be delivered during each interaction.

VENDORS TO WATCH

There are many other field service management application vendors that have not been included in this IDC MarketScape because they did not meet the industry, customer, breadth of capabilities, or other inclusion criteria. This section briefly explains IDC's key observations for some other field service management application vendors that were not formally evaluated:

- **CSG Field Service Management.** CSG International (Nasdaq: CSGS) founded in 1994 and headquartered in Greenwood Village, Colorado, offers customer engagement services in field service primarily in the cable and telecommunications industry.
- **FieldAware.** FieldAware founded in 2011 and headquartered in Plano, Texas, offers field service capabilities primarily in facilities management, oil and gas, and building and construction services.
- **Infor.** Infor, an ERP technology vendor, founded in 2002 and headquartered in New York, New York, offers field service functionality primarily through its service and sales offering.
- **Key2Act.** Key2Act founded in 1995 and headquartered in New Berlin, Wisconsin, offers field service management capabilities primarily in mechanical services, facilities management, energy, and building services.
- **Oneserve.** Oneserve founded in 2010 and headquartered in Exeter, England, the United Kingdom, offers field service management capabilities primarily in building maintenance, utilities, telecommunications, and HVAC, with some manufacturing clients in the United Kingdom.
- **Pegasystems.** Pegasystems (Nasdaq: PEGA) founded in 1983 and headquartered in Cambridge, Massachusetts, offers field service management capabilities through its Pega Customer Service platform.
- **Praxedo.** Praxedo founded in 2005 and headquartered in Montreal, Canada, offers field service capabilities primarily in telecommunications, utilities, security, facilities management, and home services, with some manufacturing clients.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the estimated market share of each individual vendor within the specific market segment being assessed.

Each of the 11 vendors evaluated in this IDC MarketScape have the capabilities to support a broad range of functionalities and services to automate end-to-end field service processes within manufacturing and service industries. Across value chains such as discrete, process, high-tech, and CPG, these vendors support manufacturers whether they own the service experience and deliver service through dealer, distributor, third-party, or partner models. All vendors in this IDC MarketScape ended up in the Leaders or Major Players categories as a result of delivering the breadth and depth of offering to support the complex needs of field service and the innovations necessary to aid companies in digital transformation.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC Manufacturing Insights defines field service management as a set of activities and processes to manage the field service operation including work order management, scheduling and route optimization, fleet management, contractor management, workforce management, warranty service, service contracts, install base management, dispatch management, augmented/mixed reality, crew/worker geolocation, and wearable support, among other capabilities. The applications and platforms that automate the aforementioned processes should be commercially viable as a stand-alone offering with the ability to integrate into a broader IT infrastructure of enterprise applications. The intend of this IDC MarketScape is to primarily focus on those notable vendors with end-to-end FSM functionality that can support the unique requirements of the manufacturing and adjacent industries.

Included in this IDC MarketScape are providers with offerings for manufacturing, which includes product-centric and asset-centric organizations across four distinct value chains:

- **Asset-oriented value chain (AOVC):** Industries include chemicals, metals, and paper and pulp.
- **Brand-oriented value chain (BOVC):** Industries include consumer packaged goods, food and beverage, and fashion.
- **Engineering-oriented value chain (EOVC):** Industries include automotive, aerospace and defense, and farm, construction, and industrial machinery.
- **Technology-oriented value chain (TOVC):** Industries include electronics, semiconductors, high-tech, and medical devices.

Strategies and Capabilities Criteria

Tables 1 and 2 provide key strategy and capability measures, respectively, for the success of selecting a field service management application or platform within the manufacturing and service industry vertical.

TABLE 1

Key Strategy Measures for Success: Worldwide Manufacturing Field Service Management Applications

Strategies Criteria	Definition	Weight (%)
Growth	Firms poised for growth provide relevant services and offerings that address specific needs around digital transformation for field service management, particularly for overall FSM revenue growth and anticipated short-term and long-term growth.	35.0
Functionality or offering strategy	Future plans for offering functionality are well aligned with current and future customer needs and with priority customer segments. Vendor is able to meet and exceed its strategic objectives with regard to field service management.	14.0
Innovation	The firm's capabilities and offerings have unique characteristics that generate market value. Innovation is driven through company culture and innovative technologies such as artificial intelligence, machine learning, and augmented reality capabilities. The firm also leads innovation strategies for its clients.	8.0
Financial/funding	Firms financial or funding-related resources and performance include profitability, length of profitability, and company's annual revenue from manufacturing and manufacturing revenue specifically from field service management engagements.	17.0
R&D pace/productivity	The company's innovation model maximizes its potential to generate market value. The vendor has demonstrated its understanding that to increase the capabilities of its offering, it will need to utilize its internal development resources both in spend and in a team specific to field service management innovation. Vendor has a clear strategy for R&D investments in the next three to five years.	14.0
Delivery	The company has typical client ROI.	4.0
Other	The company has C-suite accountability and highest-level service sponsor.	8.0
Total		100.0

Source: IDC, 2021

TABLE 2

Key Capability Measures for Success: Worldwide Manufacturing Field Service Management Applications

Capabilities Criteria	Definition	Weight (%)
Range of services	The vendor's current offerings, architectures, features, functions, methodologies, and best practices match directly to current customer needs and with current vendor skills to deliver maximum customer benefit. The offerings address functionality and range of services.	29.0
Customer satisfaction	The vendor has demonstrated a level of customer satisfaction in the form of industry expertise, FSM expertise, marketing message, account management, project management, integration with enterprise systems, technical skills, and overall value.	27.0
Customer service delivery	The vendor offers support, provides features, and has implemented processes that ensure consistent and high-quality customer service worldwide, in each region. Customer service delivery also includes subvertical industries served, number of clients per subvertical industry, number of dedicated manufacturing FTEs, and number of additional non-manufacturing FTEs dedicated to projects, language support, worldwide reach, and direct industry FSM consultants.	23.0
Customer service offering	The vendor offers evaluation versions, industry best practices, non-related industry best practices, digital transformation road mapping, digital maturity assessments, and innovation exploration and implementation.	14.0
Pricing model or structure of product/offering	The pricing model is currently aligned with customers' preferences for payment (e.g., risk-, profit-, outcomes-based pricing models).	3.0
Portfolio benefits	The company has worldwide FSM software-focused employees.	3.0
Functionality or offering	The company has customization capability.	1.0
Total		100.0

Source: IDC, 2021

LEARN MORE

Related Research

- *IDC MaturityScape: Field Service Management in Manufacturing 1.0* (IDC #US44957320, September 2021)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2021: Engineering-Oriented Value Chains in the Manufacturing Industry* (IDC #US47994120, August 2021)
- *Product and Service Innovation Survey Report* (IDC #US46592621, July 2021)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2021: Brand-Oriented Value Chains in the Manufacturing Industry* (IDC #US47991020, June 2021)

- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2021: Technology-Oriented Value Chains in the Manufacturing Industry* (IDC #US47960221, June 2021)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2021: Asset-Oriented Value Chains in the Manufacturing Industry* (IDC #US47884121, June 2021)
- *Can a Hybrid Field Service Workforce Deliver Consistent Quality Experiences?* (IDC #US46593621, June 2021)
- *Five Mobile Workforce Trends for Field Service and Enterprise Asset Management* (IDC #US47638821, May 2021)
- *IDC TechScape: Worldwide Service Life-Cycle Management and Servitization Optimization in Manufacturing, 2020* (IDC #US44624120, November 2020)

Synopsis

This IDC study uses the IDC MarketScape model to provide an assessment of vendors participating in field service management specific to service life-cycle management in the manufacturing and service industries.

"Digital transformation within manufacturing and service industries is entering its next phase whereby cool technology is making way for tech that drives action and innovation," says Aly Pinder, program director, Service Innovation and Connected Products Strategies, IDC Manufacturing Insights. "The field service operation is primed to benefit as automated decision making enhances the service experience, profitability, and efficiency."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 1,100 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For 50 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company.

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