

# Field service management buyer's guide for manufacturers



The roadmap to smarter service  
and support



# Field service management

## Accelerate service revenues with the right technology

### Defining service success in manufacturing

This buyer's guide will help you:

- **Identify the key capabilities** needed to deliver best in class service
- **Discover what sets Industrial AI apart** and how to evaluate its role and effectiveness in field service management
- **Understand which AI-driven functionalities are essential for future-proofing operations**
- **Navigate the complexities of implementing** a new field service management platform
- **Align your specific service needs and challenges** with the right solution

Field service management is a critical driver of growth and competitive advantage in manufacturing. Although rising competition and changing customer demands have made service operations more complex, Industrial AI is enabling manufacturers to optimize and scale service more efficiently than ever.

Leading manufacturers look to service and support to differentiate their business and increase profitability. But delivering service excellence and staying ahead requires a modern, intelligent field service management platform.

### How do you ensure lasting service success?

Manufacturers are moving beyond the traditional break-then-fix model toward outcome-based service, where **uptime guarantees and asset performance** take priority over just scheduling repairs. With 40% struggling to meet SLAs and 22% citing increased complexity in service operations, the ability to predict, prevent, and optimize service delivery is now a competitive necessity, driving new revenue streams, higher margins, and more sustainable operations.



This transformation from reactive to proactive service is powered by Industrial AI, Internet of Things (IoT), and machine learning, enabling manufacturers to:

- **Implement predictive maintenance by detecting potential failures before they happen and scheduling service proactively, reducing waste and extending asset lifecycles.**
- **Automate service decisions based on real-time asset performance data, ensuring more efficient resource allocation.**
- **Optimize technician dispatching and parts logistics to reduce costs, minimize service delays, and increase first-time-fix rates.**
- **Enable prescriptive analytics that not only forecast failures but also recommend the best corrective actions.**

This guide outlines the key capabilities, technology considerations, and implementation strategies needed to select a field service management solution that fits your business –whether you're replacing an outdated system or adopting it for the first time.



# Defining service excellence

## Key Criteria for Consideration

Before investing in a field service management solution, manufacturers must ensure it aligns with the complexity and scale of their operations. Many vendors provide one-size-fits-all software, forcing businesses to adapt their workflows to fit their rigid system rather than offering a solution tailored to their needs.

Manufacturers should evaluate how well a solution performs in real-world service operations, from its flexibility to adapt to changing needs to its ability to manage complex workflows. In field service, complexity comes from the need to coordinate multiple elements in real time, such as customer requirements, asset data, service tasks, technician skills, parts availability, warranties, and contractual obligations. The right platform should be able to manage this interconnected flow, supporting consistent execution and long-term business growth. Here's what to consider:

### 1. Don't settle for a basic list of features:

Choose a solution built for industrial service operations. Consider composable solutions, which offer modular, flexible components that allow you to adapt and expand capabilities as your service business evolves.

### 2. Ensure it adapts to your workforce structure:

The right platform should align with how your teams actually work, supporting flexible scheduling, multi-skilled teams, and real-world workforce dynamics.

### 3. Look beyond the demo – validate real-world functionality:

Flashy features don't guarantee operational success. Evaluate how well the system handles complex service workflows, scales across global operations, and meets industry-specific requirements before making a decision.

### 4. Confirm seamless integration and long-term flexibility:

Your field service management platform should integrate easily with your existing systems today while remaining adaptable for future needs. Evaluate its ability to support your long-term service strategy without requiring costly reconfiguration.

The right field service management solution for you should enhance operations, improve efficiency, and drive long-term business growth – without forcing you to change how you work.

# AI-Driven FSM: The True Value of Industrial AI in Service

Not all AI is designed to meet the demands of asset-centric field service. While generic tools may handle admin or personalize content, manufacturers need intelligence that strengthens real-time decisions, anticipates service needs, and supports faster, more efficient responses without adding complexity. That's the role of Industrial AI.

## What sets Industrial AI apart

Industrial AI for manufacturers is purpose-built for asset-intensive environments. Rather than being bolted on, it's embedded within service workflows, delivering intelligence at the point of decision - whether in scheduling, diagnostics, or parts planning. It's tailored to the realities of manufacturing field service, from asset diversity and workforce constraints to outcome-based contract requirements.

By connecting data across the full asset and service lifecycle, it helps teams make smarter decisions and continuously improve with timely, relevant insights. And with explainability built in, every recommendation is clear and traceable, so everyone can understand what to do, why it matters, and how to move forward with confidence.

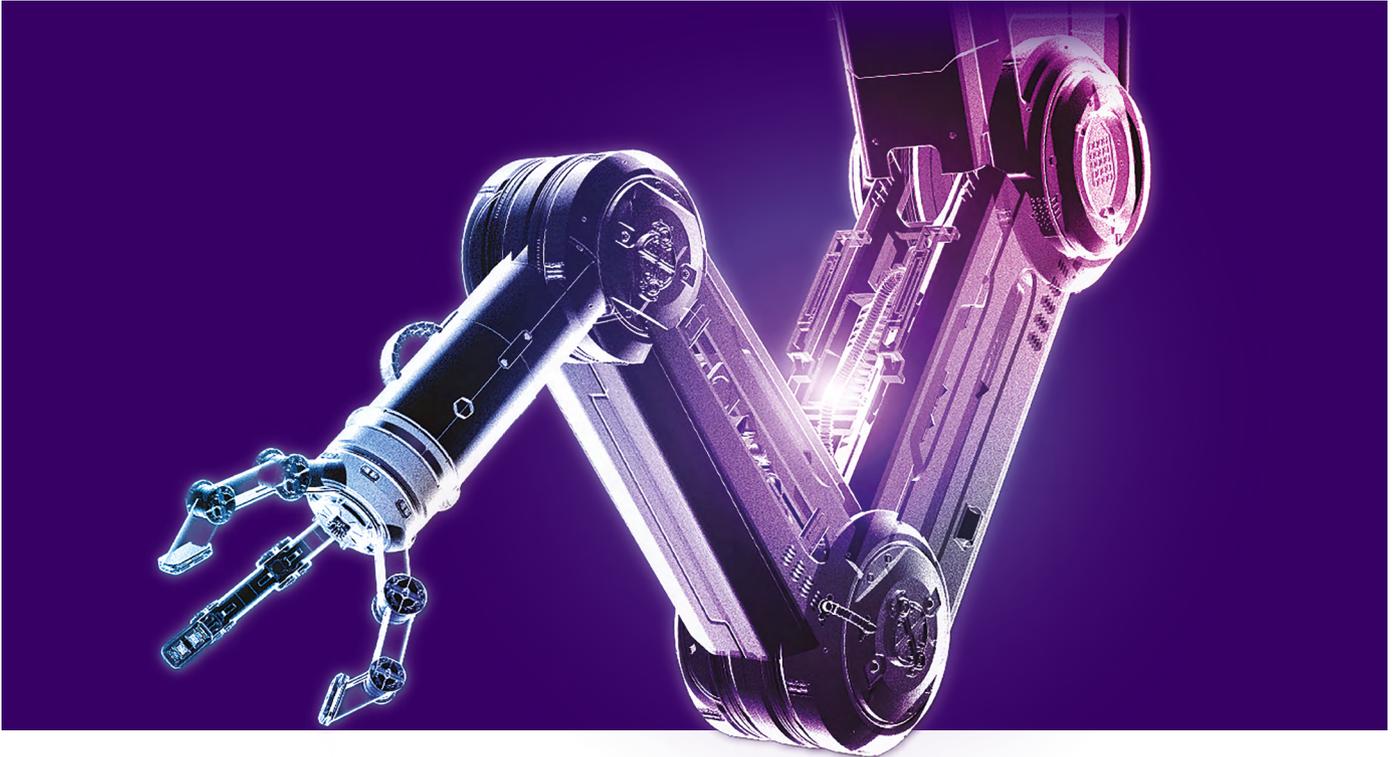
## The six areas where Industrial AI drives value in field service

With so much noise around AI, it can be hard to assess what actually drives value in field service for manufacturers. These six categories offer a practical way to evaluate where Industrial AI can have the most meaningful impact, based on real, operational needs.

### Get the right information, faster with contextual knowledge

Industrial AI delivers asset-specific guidance, like service manuals, parts data, and repair history, based on the exact issue and equipment. This ensures technicians can act quickly and consistently, even when experience levels vary, reducing resolution time and improving first-time fix rates. It also gives service managers and dispatchers faster access to the data they need to monitor performance and drive continuous improvement over time.





### **Spot issues before they escalate with anomaly detection**

By learning what “normal” looks like for each asset, Industrial AI can flag early signs of performance drift or irregular behavior. This enables proactive maintenance and minimizes unplanned downtime without overwhelming teams with false alarms. It also alerts dispatchers and service leaders to technician-related issues and SLA risks, so they can take corrective action before targets are missed and customer satisfaction is affected.

### **Transform complex scenarios into actionable next steps with recommendations**

Whether supporting an experienced technician or guiding a new hire, Industrial AI recommends the most effective next step based on context, past outcomes, and real-time data, helping teams act with confidence, even under pressure.

### **Eliminate time-consuming admin with content generation**

From service reports to compliance checklists, Industrial AI automates documentation based on technician input and asset data, reducing manual effort while ensuring records are complete, accurate, and ready to support SLAs, warranty claims, or audits.

### **Make scheduling smarter, not harder with AI schedule optimization**

Industrial AI continuously balances real-world constraints, like technician skills, job urgency, part availability, and SLAs, and adapts as new variables emerge, to keep service delivery efficient, responsive, and profitable, even as complexity increases. For example, for dispatchers, AI Copilots surface the best scheduling options, flag potential risks, and automate routine planning decisions, reducing manual effort while keeping operations on track.

### **Enable smarter, more confident planning with forecasting & simulation:**

Use historical trends to forecast service demand, workforce needs, and asset performance. Industrial AI enables teams to test “what-if” scenarios—like changing technician coverage, contract growth, or seasonal spikes—so you can plan ahead, not just react.

These six categories can help manufacturers assess and benchmark AI-powered FSM platforms against the real demands of field service at scale. They offer a clear framework for cutting through vendor hype and identifying where intelligence must deliver: across planning, execution, and on-the-ground decision-making.

# Evaluating field service management capabilities

Field service management solutions vary widely in their ability to deliver real-world results. To make an informed choice, manufacturers should evaluate platforms across three critical areas:

## Service Delivery Capabilities

Field service management software often starts with the basics—contract and SLA management, appointment scheduling, and service tracking. These functions replace manual processes and ensure service operations are structured and efficient.

However, leading manufacturers go beyond simple record-keeping. Modern service delivery platforms actively enhance execution with capabilities like AI-powered knowledge management, guided workflows, and on-the-job training tools. These technologies help technicians access real-time guidance, improve accuracy, and boost first-time fix rates—driving faster, smarter service without adding unnecessary complexity.

## Operational Capabilities

Operational capabilities refer to the movement of technicians, tools, and parts within a complex system. AI-powered optimization helps deploy technicians efficiently, while logistics and inventory management keep operations running smoothly.

Reverse logistics and real-time parts tracking help manufacturers minimize delays, reduce waste, and prevent stockouts. End-to-end visibility ensures that every aspect of service delivery is coordinated, enabling faster, more cost-effective operations.

## Customer Experience Capabilities

Customer experience goes beyond CRM systems or contact centers. Technician efficiency and the use of tools like zero-touch service and AI chatbots are key to delighting customers.

CX tools automate repetitive tasks, allowing self-service for routine issues and reducing the load on back-office staff. While CX systems streamline customer interactions, efficient service delivery is the real driver of satisfaction. Equipping technicians with the right tools ensures faster, proactive resolutions, creating a seamless experience from start to finish.

## Essential capabilities of modern field service management



Customer Engagement



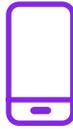
Planning & Scheduling Optimization



IoT



Reverse Logistics



Mobility



Service Pricing & Billing



Remote Assistance



Warranty & Contract Management



Service Parts Management



Depot Repair Management



Performance Management



Service Project Management

## Capabilities Explained

Let's dive deeper into each category and explore the tools that define them. We'll also highlight the features that set the best solutions apart. Does your business check all the boxes? If not, what's missing?

### Service Delivery

Capability	What it does	What defines best-in-class
Service ticket management	Catalogs all active and closed tickets across service operations	Unified across all service channels with automated ticketing and real-time performance dashboards.
Knowledge management	Delivers on-site information to service technicians to ensure an understanding of repair processes, customer requirements, and business functionality for better troubleshooting.	Enables shared view, AR-based guidance, and AI-powered contextual knowledge delivery. Uses IoT and appointment data to prepopulate relevant documentation automatically.
Mobile field service	Provides on-the-go access to field service management capabilities via mobile devices, rugged devices, or tablets.	Offers full mobile & desktop functionality, including AR-guided repairs, offline access, knowledge management, parts tracking, and customer updates.
Warranty management	Catalogs and maintains records of product warranties and expectations.	Automates renewal cadences and builds complex repair-or-replace recommendations based on service history, asset health and cost analysis.
SLA management	Incorporates and outlines various contract requirements in the system and uses them to inform and prioritize service delivery.	Automates SLA requirements into planning, scheduling, and routing. Supports dynamic SLA enforcement based on asset condition, technician skill, and real-time customer needs.
Asset management	Monitors the performance, health and output of serviceable assets in the field.	Uses Industrial AI & IoT to predict service interruptions and automate service scheduling before an asset failure occurs.
Repair management	Tracks and logs all on and off-site repairs, ensuring full visibility into service history.	Provides real-time tracking across all repair channels internally and through dealers and external partners.
Pricing and billing	Provides point-of-sale functionality, purchase order, and account management for field workers.	All systems should have the ability to process purchase orders and credit transactions, build tabulated account views, and automate payment follow-ups.
Performance management	Logs, analyzes, and presents technician and service team performance metrics.	Provides a consolidated, AI-powered performance dashboard combining service data, asset health insights and back-office intelligence with minimal customization.

## Optimization

Capability	What it does	What defines Best-in-class
Planning tools	Develops long-term headcount and capacity plans for back-office and field workers.	Utilizes AI-powered optimization for multi-horizon planning, extending from days to years. Enables businesses to project capacity, assess various scenarios, and make informed decisions in advance.
Simulations	Conducts "what if?" scenarios to assess impacts on headcount, profitability, and other metrics.	This capability itself is typically a hallmark of best-in-class planning and scheduling optimization.
Scheduling	Prioritizes customer appointments alongside service needs.	Features AI-driven scheduling optimization that automates scheduling while considering SLAs, regional factors, and other constraints.
Parts management	Manages inventory, locations, and stock levels tracking.	Tracks parts across warehouses, technician vehicles, depots, and other locations to ensure rapid turnaround. Integrates part allocation recommendations into the scheduling tool based on appointment data.
Reverse logistics	Oversees the tracking, management, and optimization of returns and repairs.	Provides multi-channel visibility across internal and external depots and warehouses. Evaluates repair efficacy for customers in real-time, aiding informed decision-making
Driver routing	Maximizes efficient appointment delivery by reviewing appointment locations.	Employs AI-powered tools to identify bottlenecks and inefficiencies in technician behaviors. Allows setting of business rules and prioritization of appointments to maximize performance.
Enterprise resource management	Manages internal business capabilities beyond direct service delivery.	Provides comprehensive lifecycle, performance, and investment planning across all business functions within a unified platform.

## Customer Experience

Capability	What it does	What defines Best-in-class
Omni-channel contact center	Provides multiple ways for customers to interact with the business post-sale.	Unified call logs and chat histories are automatically linked to customer profiles. Channels include phone, online, Multimedia Messaging Service (MMS), and app-based messaging, enhanced by AI.
Chatbots and virtual assistants	AI-driven tools for customer communications.	Automated escalation and sophisticated voice recognition capabilities, allowing for zero-touch appointment scheduling without human intervention.
Customer service CRM	Manages customer profiles and interactions at the firm, business unit, and individual level.	Automated functionalities for routine service bookings and marketing activities.
Unified desktop support	Consolidates back-office functionality into a single application.	End-to-end compatibility with all utilities in the service stack.
Customer self-service	Provides options for customers to resolve issues independently.	Multiple delivery channels, including phone, online, and mobile, enhanced through emerging technologies where appropriate. Built-in triggers to transfer to technicians for more complex service needs.
Remote assistance	Resolves service issues without dispatching a technician where possible.	AR-enabled shared views that go beyond telestration to actual collaboration. The best solutions are further enhanced by IoT functionality.

# New implementation

## Driven by outcomes or system consolidation

Deploying a new field service management platform is a business transformation, not just a technology shift. The right solution must align with real-world operations, seamlessly integrate into existing operations, improve efficiency and scale for future growth.

No two service implementations are the same—each organization has unique complexities, from customer lists and regional expectations to cultural and operational requirements. The implementation process will also vary based on an organization's starting point:

1. First-time adopters transitioning from manual processes or disconnected tools.
2. Established businesses modernizing outdated systems for improved scalability and automation.

While the specific approach will differ, success depends on minimizing disruptions, ensuring smooth adoption, and driving long-term value through a strategic, well-executed rollout. Regardless of starting point, every organization should focus on these critical areas:

### 1. Map Every Millimeter of Your Workflows

Before implementing software, document every aspect of your service operations, from technician workflows to back-office processes and customer interactions.

- **Involve frontline workers early** to ensure the system solves real pain points and gains user acceptance.
- **Identify inefficiencies** and ensure the platform doesn't add unnecessary complexity.
- **Run a pilot test before full deployment** – Start with a small group to validate functionality, refine workflows, and troubleshoot potential issues.
- **Plan an iterative rollout** with user feedback loops to refine the system post-implementation.

### 2. Manage Change Effectively

A new field service management system is only as successful as the people using it. With 40% of manufacturers struggling with change management and user technology adoption, ensuring employees are fully engaged and supported throughout the transition is essential. Without clear communication, training, and leadership buy-in, even the best software can fail to deliver results.

- **Set clear expectations** – Explain why the change is happening and how it benefits employees.
- **Provide hands-on training** – Ensure users feel confident navigating the new system.
- **Encourage adoption through leadership** – Managers and executives should model the use of the new platform.
- **Monitor engagement and address concerns** – Track usage, gather feedback, and refine workflows as needed.



### 3. Plan for System Consolidation & Data Migration

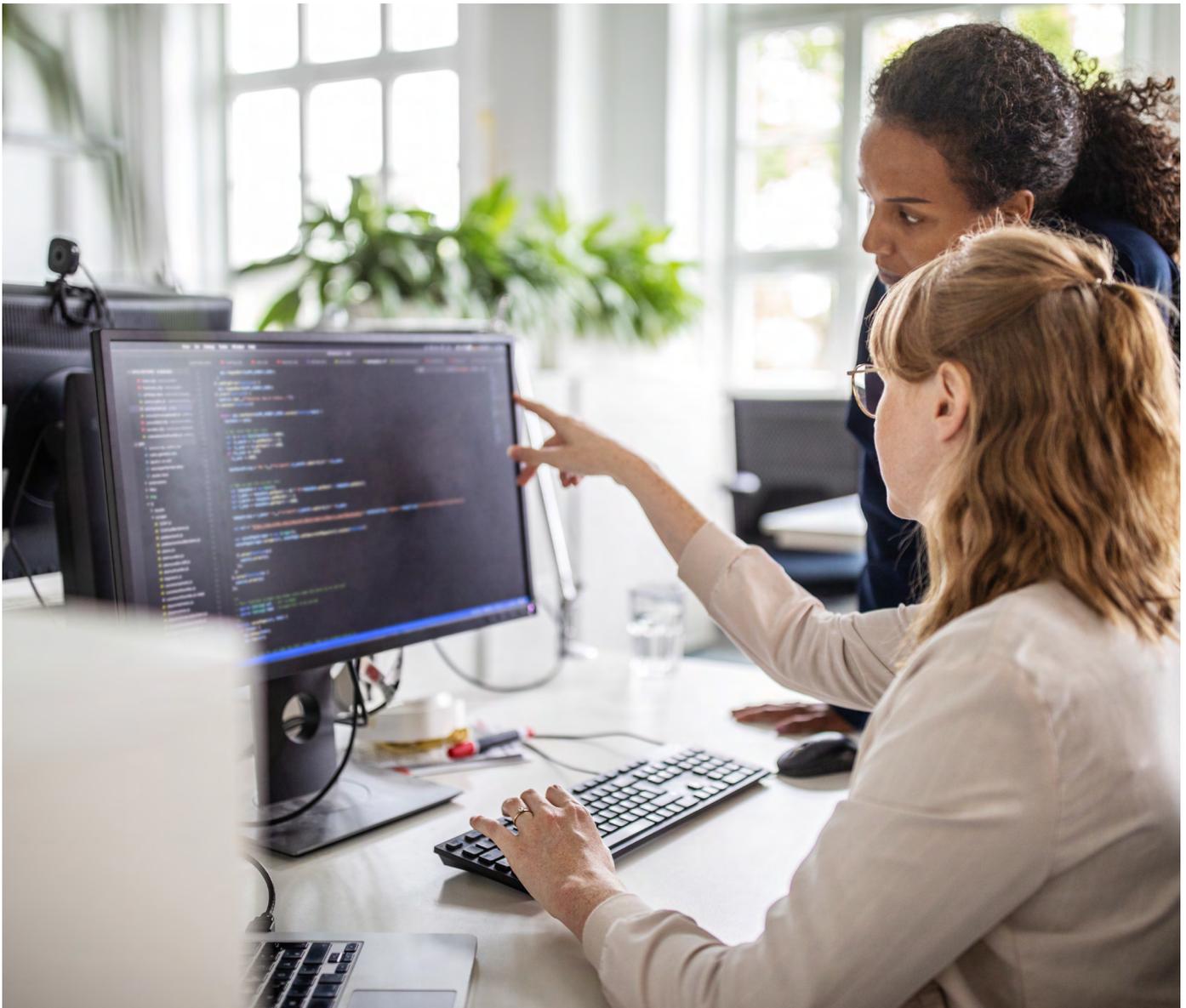
Many first-time implementations involve replacing manual processes or disconnected tools with a centralized platform. To avoid disruptions:

- **Audit existing tools** – Identify which systems should be replaced, integrated, or phased out.
- **Develop a migration plan** – Ensure customer records, service histories, and warranties are seamlessly transferred.
- **Minimize redundant costs** – Retiring outdated software reduces unnecessary spending and simplifies workflows.

### 4. Measure Success & Optimize Continuously

The real value of a field service management solution goes beyond deployment—ongoing monitoring and refinement ensure long-term impact.

- **Define and track key success metrics** – Identify and measure the most relevant metrics such as service efficiency, cost savings, workforce productivity, reduced emissions or lower energy consumption.
- **Monitor adoption rates** – Ensure employees are fully utilizing the system and minimizing inefficiencies.
- **Analyze real-time data** – Use insights to identify bottlenecks, optimize workflows, and improve sustainability practices (e.g., reducing technician travel or extending asset lifecycles).



# Implementation partnerships

## Smart collaboration with integrators ensures that you have a verifiable blueprint for success and independent validation

A structured transition plan is essential for a successful implementation. Poorly managed migrations can lead to data loss, downtime, and inefficiencies that disrupt service delivery.

Manually transferring system information into a new platform isn't viable for manufacturers. Fortunately, modern integration tools and migration strategies ensure a seamless transition without operational disruptions.

Ultimately, the goal is a fully connected system—one that eliminates redundancies, data silos, and inefficiencies. Achieving this requires the right expertise and technology to ensure smooth integration. Who can help with that?

### Consider Implementation Partnerships

Most software vendors recommend or provide implementation partners to handle system integration, data migration, and process alignment, helping to reduce technical and organizational strain.

While implementation partners manage much of the technical side of deployment, the final stage of success depends on internal adoption. Your teams must be fully engaged in the process, advocating for the new system, and ensuring it aligns with real-world service workflows.

### Look Ahead: Service Transformation is a Continuous Journey

Implementation is just the beginning. Technology, customer expectations, and service models are constantly evolving, and your field service management platform should evolve with them.

New advancements in AI, IoT, and automation continue to unlock greater efficiencies and enhanced customer experiences. A modern

field service management system isn't just a one-time investment—it's a foundation for ongoing innovation and optimization.

To maximize long-term ROI, manufacturers must take a proactive approach to their service technology. Regular platform updates, process refinements, and strategic integrations will ensure the system continues to drive efficiency, scalability, and competitive advantage.

# Upgrades and Replacements

## When it's time to say goodbye to your old service provider

For many manufacturers, the challenge isn't adopting field service management for the first time but replacing an outdated system with a more advanced solution. In fact, 29% of businesses cite outdated or insufficient service technologies as a key challenge, making modernization essential for long-term service success. Whether driven by scalability needs, efficiency improvements, or better integration with modern technologies, transitioning to a new platform requires careful planning to avoid disruptions.

### But why do companies decide to switch?

- **Limited capabilities** – The current system can no longer scale or support evolving service demands.
- **Forced upgrades** – The provider is requiring a migration to an inferior product due to an acquisition.
- **Integration failures** – The existing system no longer connects effectively with other business-critical technologies.

Sticking with an outdated platform creates inefficiencies, reduces service agility, and hinders innovation. When a field service management system becomes a barrier rather than an enabler, it's time for manufacturers to consider a strategic upgrade.

# In short

## Find a service platform that conforms to how you deliver service

### The Employees

Technology alone won't drive success. Your people will. Employee adoption is what determines ROI and buy-in needs to start early. Identify key advocates within the workforce early to drive engagement and ensure technicians and service teams are fully aligned with the new system. A well-executed rollout, supported by hands-on training and clear communication, positions employees to embrace automation, optimize workflows, and maximize the system's potential.

### The Customers

Customers don't care about the system itself but the value it delivers. A modern service platform allows manufacturers to move beyond reactive service to outcome-based models, offering uptime guarantees and performance-driven contracts.

The more trackability your system enables, the more opportunities you have to offer differentiated service experiences that drive customer loyalty and long-term revenue. A well-implemented service platform can become a competitive advantage that strengthens relationships and future-proofs your business.

### The Software

Integration is the backbone of a smooth transition. Your new platform must work seamlessly with the legacy systems you're keeping while aligning with the way you work—not forcing you to adapt your operations to rigid software constraints. Migrating historical documentation, parts inventories, contracts, and employee records shouldn't create unnecessary friction. The process can be streamlined with the right tools and support, whether that's internal expertise or external guidance. While integration may come with some challenges, a tailored, well-planned approach, built around how your business already operates, makes the process far more manageable and efficient.



## About IFS

IFS develops and delivers cloud enterprise software designed to help manufacturers optimize field service management, streamline operations, and drive long-term growth. Our AI-powered platform connects Field Service Management (FSM), Enterprise Asset Management (EAM), and Enterprise Resource Planning (ERP) to provide seamless integration, real-time insights, and automation that enhance efficiency and profitability.

Built for flexibility, IFS Cloud adapts to your business—whether modernizing outdated systems or implementing field service management for the first time. With its composable architecture and Industrial AI-driven capabilities, manufacturers can transition from reactive service to predictive, outcome-based models that improve uptime, reduce costs, and maximize customer satisfaction.

Recognized by Gartner as the only Customers' Choice for Field Service Management in 2024, IFS is trusted by leading businesses worldwide to deliver exceptional service when it matters most—at the Moment of Service™. With a global team of over 7,000 employees, we work alongside customers and expert partners to ensure a smooth transition, maximum operational impact, and long-term value.

Visit [ifs.com](https://ifs.com) to learn more.