

FIELD SERVICE

Analysing the Latest Field Service Innovations:

Driving Forward Sustainability, Technology and Talent



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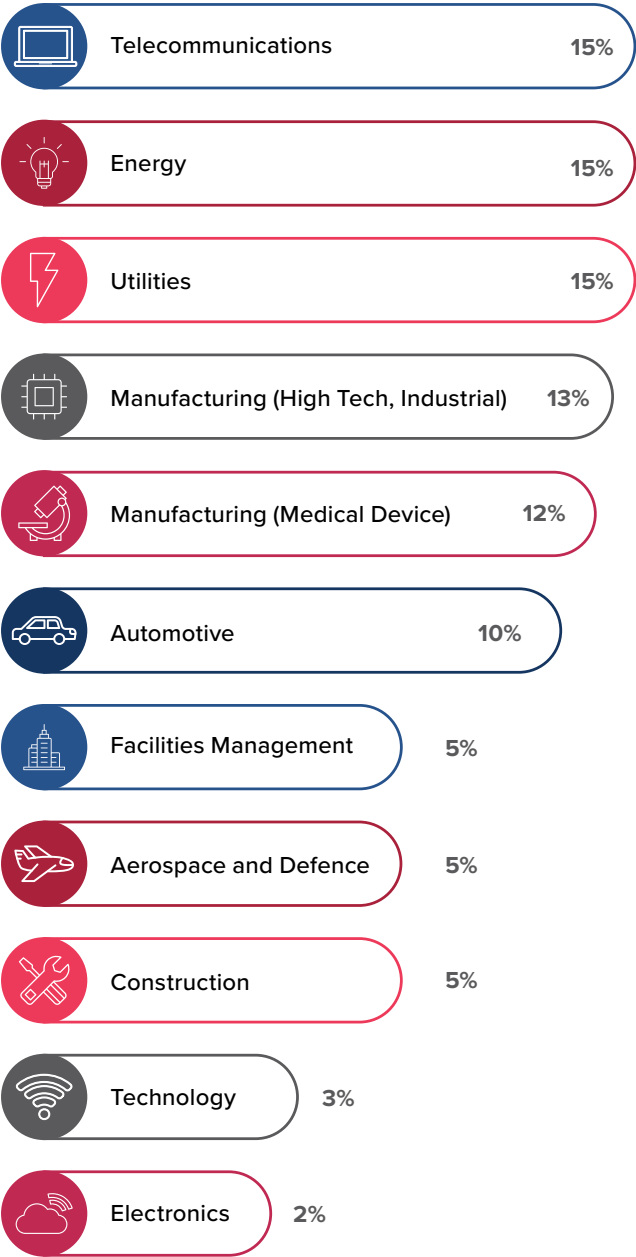
Methodology

In Q3 of 2023, WBR Insights surveyed 100 of the most senior figures in the field service industry. Heads of Field Service Delivery, Operations, Integration and beyond were asked about the biggest challenges they are currently facing and the solutions they are bringing to the table. Our survey asks the unanswered questions surrounding key industry discussions, sustainability, technology and the talent crisis.

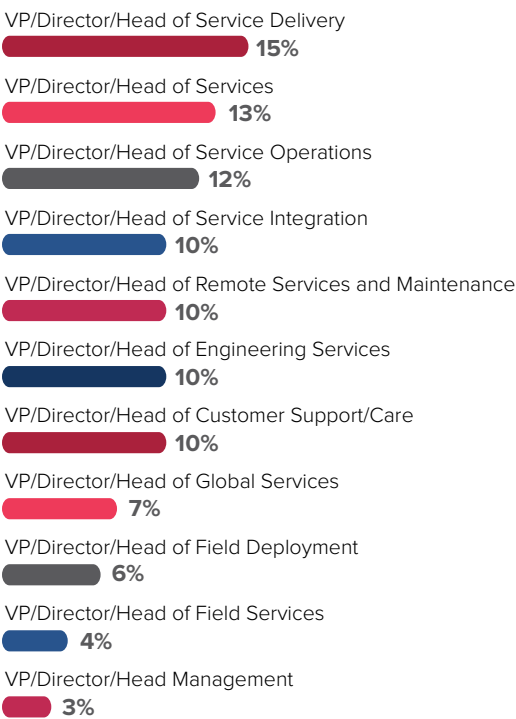
The survey was conducted by appointment over the phone and results were compiled and anonymised by WBR Insights. They are presented here with analysis and commentary from ByBox, IFS, ServiceMax and the extensive Field Service Community.

The WBR Insights topics detailed in this report will also be covered at our Field Service Europe event, download the agenda [here](#).

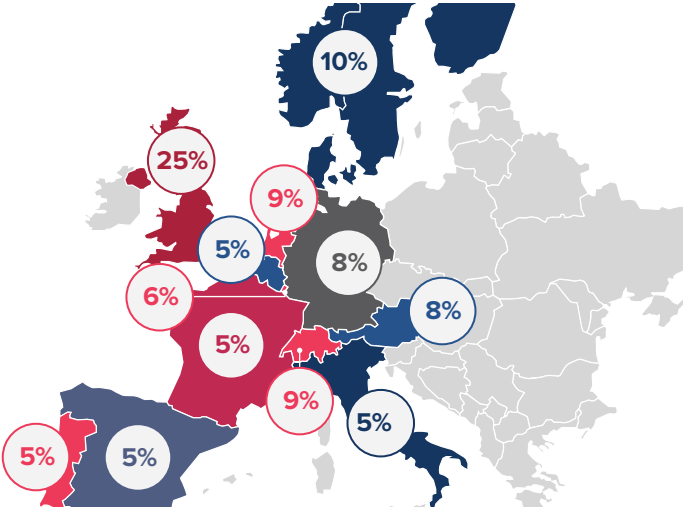
What type of organisation do you work for?



What is your job title?



Which country are you currently working in?



Key Findings

1

Well, What's Changed?

Leaders in field service are making sustainability goals an essential part of their business model. It is promising to see that 0% of our respondents say sustainability is not a priority. However, a majority of respondents (57%) find their sustainability plan is currently operational and implemented into parts of the business but not completely integrated. Change is on the horizon but there is still work to do.

2

The Writing is on the Wall

A whopping 68% of respondents see route optimisation to reduce miles, visits, and CO₂ emissions as their top priority for their sustainability programme. However, there is wider agreement on the second priority, with 75% striving to improve equality, diversity and inclusion for their people. Having a more diverse set of expertise will ultimately offer more ideas on how to best push sustainability goals forward.

3

All AI's on Technology

Interest in artificial intelligence (AI) and machine learning (ML) is higher than it has ever been and there is a strong consensus that automation will add value to field service. An overwhelming majority (96%) of respondents revealed their desire to implement AI/ML platforms in the not-so-distant future.

4

Trend Setters

Heads of service are already making progress when it comes to their talent efforts. Our survey points to further progress in the future, with a large number of respondents prioritising field service mobility and automation solutions. In the ever-evolving technological landscape, others are turning to augmented reality. The overall goal is to capture knowledge from the current ageing workforce.

5

Field Service Has Got Talent

The war for talent was being fought long before the Covid-19 pandemic. While heads of service are still facing challenges, our survey reveals there is light at the end of the tunnel. A massive 71% of respondents to our survey believe the severity of the talent crisis has either stayed the same or improved slightly.

Overcoming Barriers to Field Service Technology Adoption: Building a Compelling Business Case for Success



By James Lewis, SVP Service Management, IFS

In today's fast-paced business landscape, field service organisations are under mounting pressure to adopt advanced technologies. These innovations promise significant benefits, including enhanced competitiveness, improved customer service, and reduced operational costs. However, despite these advantages, many companies face obstacles when implementing field service technology. The two major roadblocks are budget constraints and a lack of stakeholder buy-in. To overcome these challenges and fully harness the potential of modern solutions, organisations must develop a compelling business case that showcases the value and return on investment (ROI) of adopting such technologies.

Barrier 1: Budget Constraints

A significant hurdle to adopting field service technology is the limitation of financial resources. Organisations often encounter budgetary constraints due to economic uncertainties, tight profit margins, and competing priorities. Investing in new technologies requires a substantial financial commitment, leading decision-makers to hesitate when faced with large costs and limited budgets.

To surmount this barrier, companies should adopt a forward-thinking approach towards technology adoption. Instead of viewing it as an expense, they should see it as an investment that offers substantial long-term benefits. Conducting a comprehensive cost-benefit analysis enables organisations to identify potential cost savings, increased efficiency, and revenue growth resulting from technology implementation. Articulating a clear financial roadmap that aligns the technology with strategic goals can sway stakeholders and justify the allocation of resources.

Barrier 2: Lack of Stakeholder Buy-In

Even with adequate financial resources, gaining support and buy-in from stakeholders presents a complex challenge. Stakeholders, ranging from top-level executives to field technicians, may resist change due to fear of disruption or uncertainty about the technology's effectiveness. This resistance often arises from a lack of awareness regarding the advantages technology can offer.

To address this barrier, organisations must proactively engage stakeholders throughout the decision-making process. Open and transparent communication channels are crucial to address concerns, dispel misconceptions, and demonstrate how the technology can streamline workflows, improve service delivery, and enhance overall business outcomes. It is integral to define measures of success that demonstrate the business value the introduction of the new technology

will bring and what it means to each stakeholder. Hosting workshops, conducting pilot projects, and involving key personnel in the technology selection process fosters a sense of ownership and involvement, encouraging wider acceptance and enthusiasm.

Building the Compelling Business Case

To successfully overcome budget constraints and stakeholder buy-in, organisations must craft a persuasive business case for field service technology adoption. The following steps can guide businesses in this process:

Identify Pain Points: Begin by identifying specific pain points and challenges faced by the organisation's field service operations. Determine how technology can address these issues and unlock hidden opportunities for improvement.

Quantify Benefits: Conduct a comprehensive cost-benefit analysis to quantify the potential benefits of technology adoption. Include both tangible and intangible gains, such as reduced operational costs, improved customer satisfaction, and increased employee productivity.

Demonstrate ROI: Present a clear roadmap detailing the anticipated return on investment over a specified period. Highlight the timeline for recouping the initial investment and showcase the long-term financial gains resulting from technology implementation.

Align with Strategic Goals: Ensure that the proposed technology aligns with the organisation's broader strategic goals and vision. Illustrate how technology adoption will contribute to the company's growth and competitiveness in the market.

Engage Stakeholders: Involve key stakeholders from different levels of the organisation throughout the planning and decision-making process. Address concerns and provide opportunities for feedback to build consensus and support.

Conclusion

The potential benefits of field service technology adoption, including increased competitiveness, improved customer service, and cost reduction, are undeniable. However, budget constraints and stakeholder buy-in pose significant challenges. By developing a compelling business case that highlights the value and ROI of adopting advanced technologies, organisations can break through these barriers and unleash the transformative power of innovation. Embracing technology and investing in field service solutions will not only propel businesses forward but also ensure a sustainable and successful future in the ever-evolving service industry.

Chapter One

Sustainability in Field Service: Balancing Sustainability with Business Performance



Sustainability remains at the forefront of everyone's minds - and the field service industry knows better than most that big changes are needed to drive environmental goals. When asked how they would describe their sustainability plan, more than half of our respondents (57%) revealed they are operational having implemented changes to some parts of their business. Notably, not one respondent said that they don't have a plan or are not prioritising sustainability.

As heads of service continue to develop their sustainability plans, many new opportunities are emerging to drive these goals forward in 2024. A significant 68% of respondents

How would you describe your sustainability plan?

Leading – best in class plan for field service

2%

Integrated – fully into how we do business

30%

Operational – being implemented in parts of the business

57%

Developing – actively working on it

11%

No Plan – not a priority

0%

"Field service is now a Boardroom agenda item given its contribution to sustainability – both operationally and financially. Almost two-thirds of respondents are implementing plans in parts of their business to drive sustainability forward. This result is incredibly encouraging but experience highlights that leadership and implementation are inextricably linked and there's more work to do if we're to achieve our goals."



Stuart Miller
Executive Chairman
ByBox

"I agree with the respondents here. We have really strong policies from the very top that ensures the day-to-day running of the business while also driving our sustainability goals forward at an operational level. It has to become part of your design and in the future, every field service organisation will reach the stage where they are fully integrated."



Frank Odogu
Director of Lifecycle Services
Atlas Converting Equipment LTD

shared that their top priority for the next 12-18 months is route optimisation to reduce miles and visits for less CO₂ emissions. Route optimisation will create a large impact but reducing the number of routes is the end goal for energy saving. Encouragingly, the next-highest priority in 78% of respondents' minds is striving for equality, diversity and inclusion.

Environmental change brings numerous challenges. A lack of clear data from suppliers and KPIs to help set baseline targets is proving to be a barrier for many. Having access to quality data is crucial but data alone will not help to achieve sustainability objectives if organisations are unable to extract the right wisdom.

"An asset-centric view of service can have a significant impact on the success of an organisation's sustainability initiative and plan.

Not only can it help eliminate unnecessary field service visits via better asset-centric insight, but it can also uncover better return, repair, refurbishment, and recycling opportunities that eliminate waste and streamline purchasing of new parts and equipment."



Sumair Dutta
Vice President, Product Marketing
ServiceMax, a PTC Technology

"Our organisation has been working hard to drive sustainability forward and will be implementing KPIs to measure our environmental impact from 2024 onwards. We have ambitious targets for sustainability and a large number of our TOMRA locations are already using solar energy.

Additionally, a majority of our field service engineers in Europe are using electric vehicles and we are ultimately trying to do a lot more remote work instead of just deploying on-site immediately."



Clinton van der Merwe
VP Head of Global Service
TOMRA Recycling

"At first glance, the results here make sense. We are still in the early stages of becoming truly sustainable. Companies are becoming more sustainable as governments deploy more requirements and customers demand more sustainable products and services. This is not fully the case yet so really field service is still at the beginning of their sustainability journey.

I think service companies are missing an important opportunity. Currently, the focus is mostly on improving sustainability of their internal operations, like reducing travel of engineers.

The big opportunity is launching new service offerings to help customers become more sustainable, like reducing CO₂ footprint or raw material consumption."

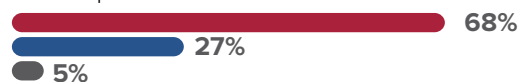


Jan Van Veen
Founder & Managing Director
MoreMomentum

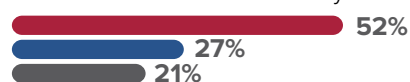
What are the top three priorities for your sustainability programme in the next 12 – 18 months?

● Top Priority ● 2nd Priority ● 3rd Priority

Route optimisation to reduce miles/visit and CO₂ emissions



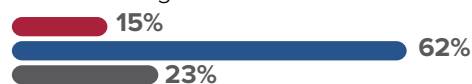
Switch to renewable electricity



Switch to low, ultra-low emission vehicles (EVs and PHEVs)



Better building insulation



Improve energy efficiency of, lighting, and office equipment



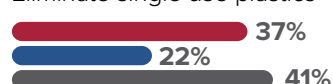
Improve operational effectiveness e.g. first-time fix rate / reduce return visits



Send less waste to landfill / Recycle / Repair



Eliminate single use plastics



Increase community engagement e.g. volunteer days, charity donations



Strive for equality, diversity, and inclusion for our people



"Encouragingly, some of the top priority areas focused on improving operational effectiveness. From improving first-time fix rates, reduced return visits, repair and recycling of returned parts, reducing waste and managing recycling from the field. There's a huge difference that field service teams can make across all of these areas."

"Field Service systems will play a key role in unlocking these efficiencies and already well proven the efficient route planning for engineers. The same level of visibility is now required for spare parts to improve the access and visibility of them in the field. 51% are planning to invest in improved inventory and parts management. This is in addition to sourcing renewable energy, more efficient equipment and lighting (e.g. LED bulbs) as well as a transition to electric vehicles."



Stuart Miller
Executive Chairman
ByBox

"The primary driver behind low first-time fix rates, leading to a substantial increase in additional travel, stems from lack of spare part availability. Organisations, therefore, must not solely focus on optimising routes to reduce travel and emissions but also explore ways to minimise unnecessary travel throughout their service delivery supply chain. With the advent of AI and ML-powered platforms, new possibilities have emerged.

These advanced technologies now enable the seamless tracking of engineers' van stock and facilitate intelligent job assignments based on real-time inventory data. Moreover, they can dynamically generate part pick-ups along the engineer's route or even schedule the engineer's visit only when the required part has been delivered to the customer site.

Implementing these solutions significantly curtails redundant or wasted travel, leading to a profound reduction in repeat journeys and, consequently, a substantial impact on CO₂ emissions."



Bob De Caux
VP Automation
IFS

"Focussing on sustainability, this result illustrates that the respondents have an internal focus on their environmental objectives and less on launching new advanced services that help their customers drive sustainability."



Jan Van Veen
Founder & Managing Director
MoreMomentum

What are the biggest challenges to achieving your sustainability objectives in the next 12 months? (Respondents were asked to select all that apply)

Getting clear sustainability data from suppliers (e.g. CO₂ emissions data)



Lack of data / KPIs on which to baseline, target and manage sustainability performance



The cost, risk, and timing of investing in more sustainable technology



Balancing financial performance and sustainability targets



Staying on top of business as usual challenges (e.g. inflation / interest rate / other pressures)



Access to funding / resources / expertise for sustainability initiatives



Internal consensus, support, and engagement of colleagues, including our leadership team



Lack of understanding about issues such as climate change and how we impact



Procurement process doesn't include sustainability criteria for supplier selection.



"Accessing the right data from which to build a solid baseline and/or measure progress heads the list of challenges. Increasingly mandated by reporting standards including GRI (Global Reporting Initiative) accurate data is key to completing materiality assessments. Data is increasingly required by customers as part of their sustainability reporting (e.g. Scope 3 CO₂ emissions) challenging not just the data collection but the production of customer-specific reports.

Additionally, when it comes to investment, There are clear signs that sustainability is increasingly important in the prioritisation of projects. For example, companies are focusing on "value-added services that support sustainability" at the expense of others that may not."



Stuart Miller
Executive Chairman
ByBox

"From my experience, this result aligns with where I think the industry is at the moment. If you want to understand sustainability, data is essential. The most pressing challenge is finding an appropriate reason for customers to give data to you. There needs to be something that you can help them with in order to justify giving data.

The challenge here will be developing a vision and value proposition that will help create partnerships with your customers, in which data indeed is shared."



Jan Van Veen
Founder & Managing Director
MoreMomentum

In your organisation, who is sponsoring and who is implementing supply chain sustainability change?

● Supply Chain Sustainability Sponsor

● Supply Chain Sustainability Implementor

CEO



Finance



Strategy / ESG



Procurement



Operations



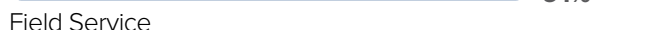
Supply Chain / Logistics



Field Service



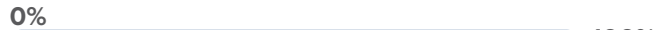
Transformation / PMO



0%



0%



"In the realm of supply chain sustainability, operations departments (including field service and supply chain) appear to be taking centre stage in driving transformative change within field service.

Their intricate understanding of logistical processes enables them to identify opportunities for efficiency gains, reduced waste, and environmentally conscious practices. By seamlessly integrating sustainability principles into day-to-day operations, these departments not only enhance environmental stewardship but also elevate overall service quality. Their pivotal role underscores the crucial link between operational excellence and a greener, more responsible supply chain future."



Stuart Miller
Executive Chairman
ByBox

"I am not surprised by this result. I would say for most organisations it is the operations team who are the key drivers in implementing supply chain change. However, it really does depend on the organisation, the size, etc."



Clinten van der Merwe
VP Head of Global Service
TOMRA Recycling

"I would agree with this result. For us, the main implementors of supply chain sustainability change sit with our operations team. However, operations for us include, for example, our engineering team. I think it depends on the business and what they define as operations.

On the other side, the main vision and sustainability sponsorship sits with our CEO. It is very much top-down and driven by the norms of what is required."



Frank Odogu
Director of Lifecycle Services
Atlas Converting Equipment LTD

Chapter Two

Transforming Field Service into a Value-Added Service Through Technology



Efficiency is essential for a field service that delivers excellence, while new technological innovations are ensuring the industry continues to develop and meet customers' expectations.

As a result, automation is on the rise and almost all of our respondents (99%) revealed they have already implemented scheduling and resource planning automation. Additionally, 96% are interested in implementing AI/ML in the future. These cutting-edge technologies are helping to drive forward a service paradigm of greater visibility, efficiency and profitability that will allow techs to do more in the field.

What technologies are you planning to invest in to provide or increase your value-added service for your customers?

- Already implemented
- Interested in implementing
- Not interested



Our research also uncovered a move towards investing in additional digital services, with 72% of respondents planning to implement in the next two years. Contrastingly, nearly every head of service we surveyed already has a reactive break/fix in place.

The service industry is being driven in exciting new directions while also innovating traditional methods. Innovation does not come without challenges, though, and to continue adding value to services, organisations need to be ready to tackle any barrier that comes their way. Our respondents were candid in revealing that they are working to overcome rising expenses, insufficient budgets and extensive approval timeframes.

"It comes as no surprise to me that AI and ML rank as the highest priorities for future implementation. However, what did strike me was the recorded number of actual implementations, standing at a mere 4%. Many of the other solutions such as chatbots and scheduling and resource planning automation all scored highly and they rely heavily on AI and ML.

The question is, therefore: Is there a misconception on what AI is and how it is being implemented within organisations? Leaders should be looking at AI as not just a new technology, but in how it adds value to their organisation and what outcomes it enables."



Bob De Caux
VP Automation
IFS

"Technology is the key to success in field service, particularly when it comes to leveraging data. We still have a lot of work to do in terms of the bigger picture and the long term. How can we get more value out of data, how can we benefit from AI and ML, and how can we embed data into our value offering for our customers?

Another point to mention is knowledge management for mobile workers. This will be so beneficial as we turn our attention to the ageing workforce. How can we extract the knowledge from seasoned experts and disseminate that knowledge to our younger workers."



Jan Van Veen
Founder & Managing Director
MoreMomentum

"Interestingly, where nearly all the technologies listed have been implemented to a large degree, AI & ML remain a strongly desirable yet little used tool within the field service space.

This is an excellent data point, giving an indication of where the industry looks to move next."



Josh Lloyd-Braiden
Conference Director
Field Service Connect

We asked our respondents what barriers or challenges they are currently facing in advancing their value-added service. Here is what they told us:



“I was amazed to see that ‘quality of solutions available’ was something that came up a number of times in the feedback. The technology industry is advancing at an exponential rate and innovating at a speed never experienced before, which is undoubtedly further elevating the standard of available offerings.

Organisations must seek solutions that do not just meet their current needs but also have the capacity to scale and evolve alongside their business. Choosing such forward-looking solutions will ensure they stay at the cutting edge of technology and position themselves for long-term success.”



James Lewis
SVP Service Management
IFS

“In terms of strategy for being more sustainable, I would advise finding the right service solutions that bridge current technological gaps. However, I do not believe that any service organisation or industry can be without automation for process improvements as we need those tools to help drive targets forward.”



Clinton van der Merwe
VP Head of Global Service
TOMRA Recycling

“I would say for those who mentioned budget, for us this is not sizeable enough to limit our advancement. I think the price has definitely gone up in some key areas. When it comes to supply and demand, as the prices rise you need to be able to adjust your budget to meet that. It comes back to finding the right technology for your organisation and understanding what you will use it for.”



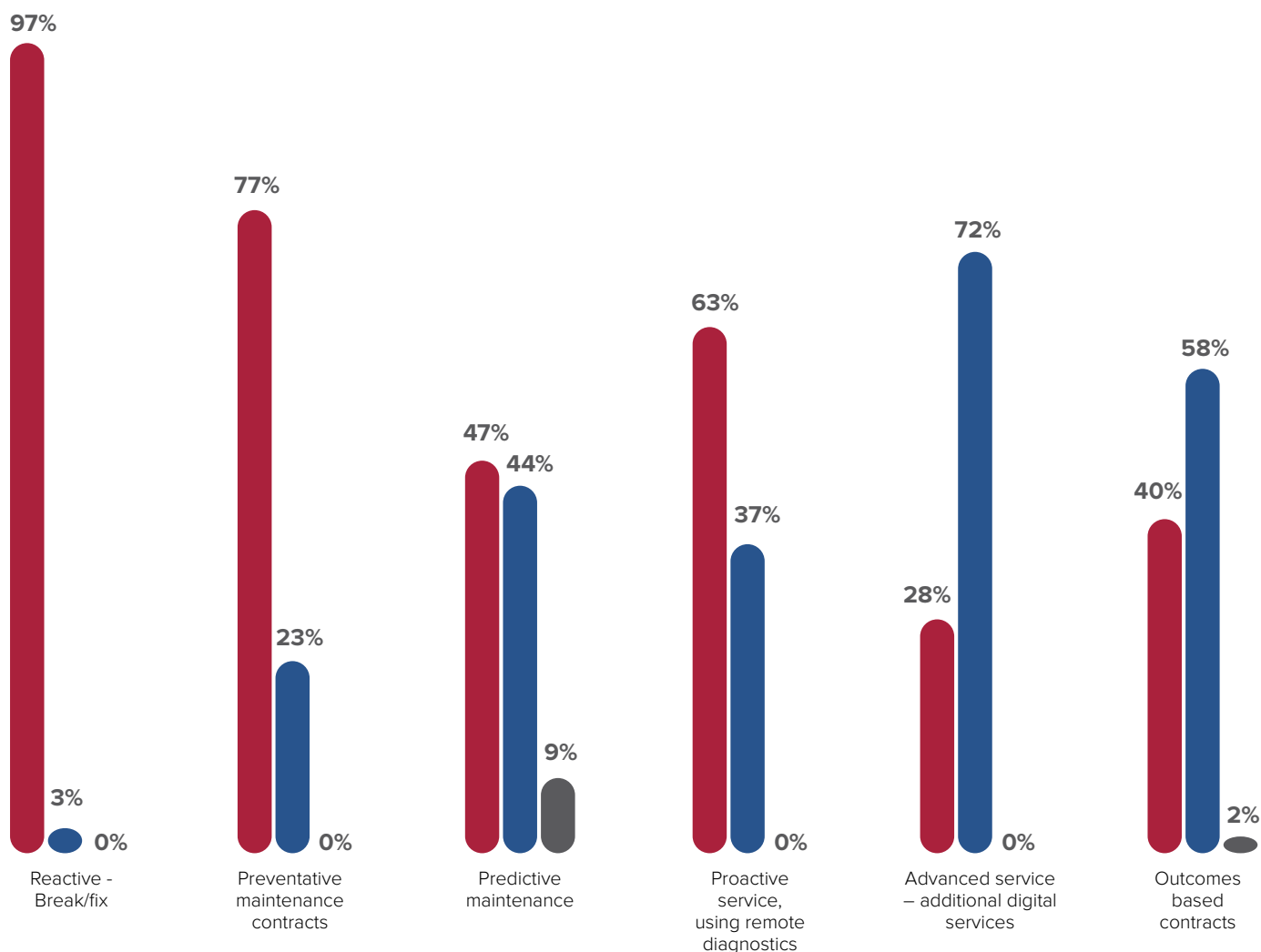
Frank Odogu
Director of Lifecycle Services
Atlas Converting Equipment LTD

How would you rate your organisation's progress with the following services?

● Already implemented

● Planning to implement in the next 2 years

● Not our goal to implement



"The push towards advanced services is a priority for many organisations, given the benefits it offers in terms of differentiation, customer loyalty and operational efficiency. It comes as no surprise that this tops their priority list for implementation in the coming two years.

However, as many organisations often face internal barriers to change, they need to ensure they have an all-encompassing change management strategy that puts the benefits—both long term and short term—at the forefront of communication with key stakeholders."



James Lewis
SVP Service Management
IFS

"I am quite surprised that such a large number of respondents are planning to implement advanced services and looking to additional digital services. I think this comes back to the fact that a lot of companies are looking at how they can structure these digital services into their offerings for customers to get greater value.

There are two things to consider. Firstly, there is a cost-benefit and ultimately, how you perform on your service levels to sell something tangible to your customers."



Clinton van der Merwe
VP Head of Global Service
TOMRA Recycling

"I am surprised by such a large number of respondents looking to implement "advance service - additional digital services" in the next two years. However, I am not in any way shocked by the large number already utilising "Reactive - Break/fix." I think in terms of next steps, "Predictive and preventative" are only likely to grow."



Frank Odugu
Director of Lifecycle Services
Atlas Converting Equipment LTD

Chapter Three

The War for Talent in the Age of Technology and Customer Centricity



In an ever-evolving landscape, the demand for talent has never been higher. The desire to gain and retain new talent comes down to adapting to Gen Z's changing priorities for the workplace.

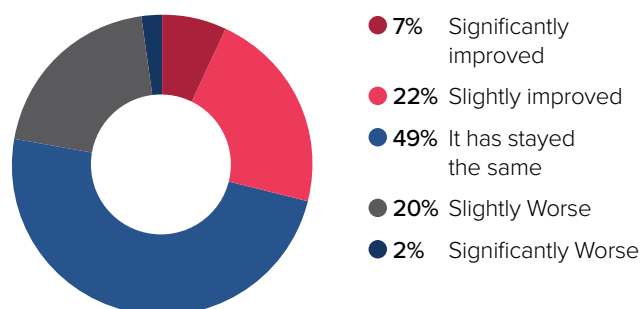
Interestingly, our research has revealed that almost half (49%) of heads of service believe the severity of the talent crisis has stayed the same. However, that is not to say all of our respondents are in agreement. In fact, 29% have seen improvement while 22% see the severity getting worse. To overcome the industry's shrinking talent pool, organisations will need to capitalise on employment trends and adapt to core values such as personal fulfilment and environmental impact.

Additionally, a key step forward for heads of service will be embracing technology for a generation of workers who are

keen to adopt new innovations as they emerge. When asked which key technology trends will have the greatest impact on talent efforts, our respondents believe automation solutions and AI-driven tools are the priority. These platforms will make it easier for less experienced workers to capitalise on knowledge and learn new skills quickly and effectively.

To keep up with these trends, heads of service will be making key business changes to their organisations in the next three to five years. More than half (57%) are aiming to deliver more standardised service offers and 52% are looking to become more proactive and planned in service delivery. The widening skills gap is undoubtedly a challenge. However, it is not barrier. Instead, it is an opportunity for innovation.

Over the past 12 months, how has the severity of the talent crisis changed for your organisation?



"I would have expected more respondents to reveal that the talent crisis is getting worse. There is an increasing discrepancy between what education delivers and what the market requires due to the ongoing digitalisation.

Another issue is how attractive service business of manufacturers is for young talents, compared to the sexy digital employers like Facebook or Google. How can manufacturers improve the employee value proposition?

Part of the competitive landscape is who can attract the right talent for their future workforce and how can you build a more fluid recruiting process. I would recommend looking to state-of-the-art marketing and sales methodology."



Jan Van Veen
Founder & Managing Director
MoreMomentum

"This is a very interesting question, and I would argue that the current talent crisis is improving slightly. This comes down to the market we are currently operating in and from a talent point of view, Covid-19 allowed field service to catch up and develop new talent streams while doing more remote work."



Clinton van der Merwe
VP Head of Global Service
TOMRA Recycling

"I am shocked by the number of respondents who have said that the severity has stayed the same for them. For us, the crisis is currently getting slightly worse. However, it is positive to see so many companies putting the effort in to growing their talent pool and capturing new talent with increased pay.

In a post Covid world, there have been positive steps forward and it is crucial to continue to innovate ways of capturing knowledge from an ageing workforce."



Frank Odogu
Director of Lifecycle Services
Atlas Converting Equipment LTD

"Interestingly, despite a great number of conversations around talent and the lack thereof in the field service space, most seem to suggest that the challenge has not worsened.

That being said, something one should keep in mind is that the real challenge may lie ahead with the ageing workforce. Some argue this is a 'ticking time bomb'. Replacing the talent one anticipates will be lost is, perhaps, the more serious talent problem."



Josh Lloyd-Braiden
Conference Director
Field Service Connect



We asked our respondents, regarding the previous question, to explain why the severity of the war for talent has changed in recent years. Here is what they told us:



“To truly address talent concerns, organizations need better insight into which areas of field service work are consuming nonproductive time. Often this non-productive time is attached to work documentation and summarisation.

Any investment that standardises or templatises data captured in the field or automates data entry in a standardised manner will continue to have a significant impact of resource utilisation and availability.”



Sumair Dutta
Vice President, Product Marketing
ServiceMax, a PTC Technology

What are the top three business changes that your organisation is making in the next three to five years to tackle the talent crisis?

Delivering more standardised service offerings



Becoming more proactive & planned in service delivery



Extending better content and support tools to field engineers



Building a new generation of products that are "designed for service" and require less service intervention.



Extending more training resources to customers for their first level support



Moving to a more remote-first service and triage model



Overhauling our learning and training programs for field engineers



Bringing more equipment back into a repair depot for service work



Offering more self-service options to customers



"Addressing talent needs in field service requires a mix of strategies that focus on the near-term knowledge and content needs of technicians while also uncovering broader product design and service portfolio changes that need to be made.

In the long run, organizations must be very focused on which field service visits are truly value-add and require their field technician resources as opposed to other visits that can be handled by other service models such or even eliminated via modular product design."



Sumair Dutta
Vice President, Product Marketing
ServiceMax, a PTC Technology

"This result does not surprise me and delivering standardised service offers is one of the areas where the benefits are undeniable in terms of lowering costs. Therefore, it goes hand in hand with field service and will work for a majority of organisations. This fits well with proactive and planned service delivery.

I also think it must be mentioned that although self-service options for customers is ranked at the bottom of this list, I do think this will only grow in the next few years."



Clinton van der Merwe
VP Head of Global Service
TOMRA Recycling

"I think that the top result makes sense to me. In field service, you need to be able to standardise offerings. It makes it easier and more efficient when training new talent and getting them up to speed. If you start looking at non-standard offerings, then you are segmenting talent."



Frank Odogu
Director of Lifecycle Services
Atlas Converting Equipment LTD

Which technology themes and trends will have the greatest impact on your talent efforts in the next three to five years?

Field service mobility and automation solutions



Augmented reality for field engineer support



AI-driven tools for summarising work and raising knowledge insights



Remote connectivity, monitoring, and diagnostics



Workforce planning and schedule optimisation solutions



Virtual reality for training and learning



Data analytics supported by AI and Machine Learning



Self-service portals or mobile applications



"I think these trends depend on the industry. Some industries will always be more fuel-based, less remote and more data driven. When thinking about field service, in particular, I think the big changes in terms of trends will be enabling customers to have more self-service and providing them with better tools and instructions.

I am surprised that self-service portals are not higher here as this has large opportunities for change. Similarly, remote diagnostics and AI will change job profiles and help us understand what kind of workforce is needed."



Jan Van Veen
Founder & Managing Director
MoreMomentum

"While there is great promise in AI for field service, most initiatives have been limited by the quality of data available. In fact, one of the bright spots in early AI endeavors has been to identify data gaps that need to be rectified.

With the growing reach of LLMs and ChatGPT-like tools, the near-term value of AI might be tied to helping technicians or other service agents quickly summarise and organise work debrief notes to provide standard data on cause and resolution that can be mined for further insight."



Sumair Dutta
Vice President, Product Marketing
ServiceMax, a PTC Technology

"It is clear from these results that AI and automation is appearing as the key tool for bridging the gap between an ageing workforce. It is interesting to see self-service portals as less of a priority for respondents here. This will only grow in importance and soon become the norm as a more realistic alternative to AI that can solve more issues before passing on to experienced field service engineers."



Clinton van der Merwe
VP Head of Global Service
TOMRA Recycling

"AI is always going to be a big topic and for field service, it will be incredibly helpful when retaining talent in terms of capturing knowledge. It is a tool that will help bring a lot more people into the industry and also act as a vehicle of development for the next generation."



Frank Odogu
Director of Lifecycle Services
Atlas Converting Equipment LTD

"Even more interesting is the lack of enthusiasm for self-service. There are several possible reasons for this, chief among them being that customers simply are not ready for it. Many may feel more reassured knowing that a qualified engineer has been dispatched to ensure the fault is fixed rather than risk it themselves. It may also impact the shift many field service organisations are trying to make in selling service as a value add - there is not as much value in a product where you have to do the work to fix it yourself.

There are also limits to what can really be fixed with self-service — is the cost of implementing self-service going to be covered by the time saved for field engineers?"



Josh Lloyd-Braiden
Conference Director
Field Service Connect

Conclusion

Our research points to positive change in the field service industry. Sustainability planning remains a top priority, with 57% of respondents at an operational level, indicating significant improvements across the board. Moreover, a promising 30% have sustainability completely integrated within their business.

Interestingly, our survey illustrates that CEOs and finance departments are sponsoring sustainable practices, while operations and field service are driving implementation. Our research suggests understanding sustainability roles will reduce business costs, improve reputations, and build more innovative strategies in the long term.

While heads of service are clearly making large changes for their sustainability goals, the same can be said for technological advances. An overwhelming 96% of

respondents are planning to implement AI/ML platforms and 99% are already implementing scheduling and resource planning automation. By doing so, respondents are aiming to revolutionise their efficiency, improve customer and employee satisfaction and continue to add value to their service offerings.

Much like technology, the expectations of the next generation of workers are constantly evolving. Heads of service are rethinking how they can appeal to a multigenerational workforce both now and in the future. For 49% of respondents, the severity of the talent crisis has stayed the same. Young people want to feel valued, they are more invested in sustainability and the future of the planet. As field service invests in automation tools, they will attract and retain the best talent for the future.

Key Suggestions

Think Smart

Pushing sustainability goals forward is crucial. But big change takes time and cannot be achieved overnight. Starting small, optimising routes and reducing fuel consumption are essential to this. One way to drive fewer miles is by using intelligent scheduling to find the most efficient and sustainable way.

Data is Key

The field service industry is witnessing a significant shift towards the adoption of AI technology to address customer-facing needs. However, while there is an aspiration to leverage AI from the get-go, heads of service struggle with the complexity and barely scratch the service of their capabilities. Respondents will need to gather more quality data to fully reap the benefits of these platforms.

Quality Time

The rising costs and inefficiencies in field service have seen a move from the traditional break-fix model towards more predictive forecasting, monitoring and maintenance to find and identify potential risks before they happen. Focussing on quality fixes will be crucial to improving customer satisfaction and avoid repeat incidents.

Career Goals

Amid the struggle to find and retain skilled talent, organisations are looking to adapt their service offerings as a way of exchanging knowledge more seamlessly. However, for this to be a success heads of services need to make sure they have an engaging culture, constant valuable communication and the tools to offer a career, not just a job.

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