



The State of Field Service

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Evolution of Field Service Technology

Services shape our world — from the electricity that lights our homes to the networks that keep us connected. For the organizations providing these services, some of the most important work happens in the field — in neighborhoods, across open spaces, and along millions of last miles.

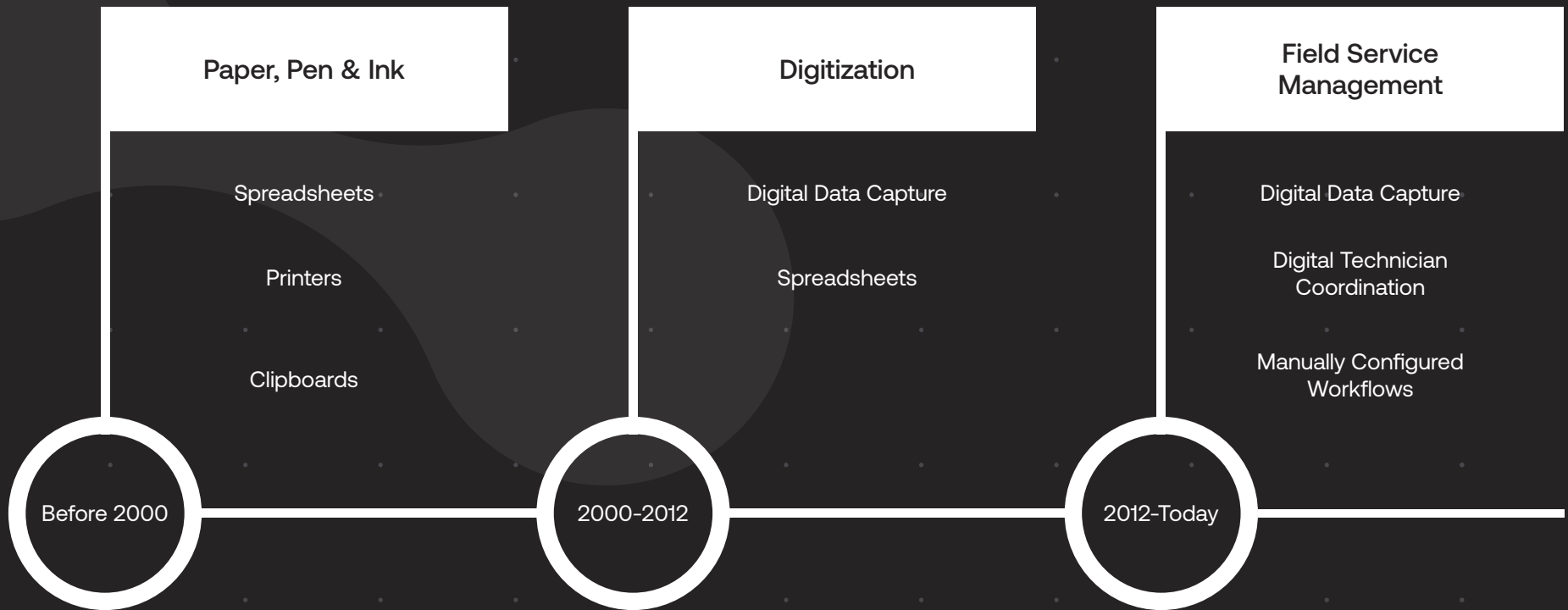
Field service keeps us in the daily rhythm of our lives. But behind each service call and site visit is a complex ecosystem of people, processes, and technology. There are work orders to create, technicians to dispatch, and equipment to maintain, repair, and eventually replace.

If you look at the evolution of field service, the last 20 years have been marked by periods of rapid growth and innovation.

Gone are the whiteboard schedules and paper forms that defined traditional field service. In their place, business leaders are leaning on digitized solutions that help them drive productivity and be mobile-first.

There are two primary drivers behind this transformation. First, the rise of IoT devices has created a massive influx of data. In fact, a recent Gartner report says, there will be more than 25 billion IoT devices online by 2021.

At the same time, customer expectations around the speed and quality of service are rising. The on-demand architecture popularized by streaming platforms and ride-sharing services is putting pressure on field service organizations to work smarter and faster.



Sizing the Market Opportunity

Like any industry, opportunity is driving much of the innovation we see in field service today.

The global field service management market is expected to grow from \$2.8 billion in 2019 to \$5.9 billion by 2024, at a CAGR of 16.2%. However, a recent study by TSIA found that 76% of field service organizations today are struggling to achieve revenue growth, with increased competition driving down revenue.

As the volume of work increases and price pressures mount, field service organizations will continue to invest in solutions that help them drive productivity, leverage their existing workforce, and deliver better customer experiences.



76% of field service organizations are struggling to achieve revenue growth.

Field Service Today

At the heart of every successful field operation is a system of people, resources, and information. On a given day, field service organizations rely on one or more tools to help them:

- Increase visibility into the field
- Identify field service needs, through remote monitoring or on-site inspections
- Create and assign work orders
- Schedule and dispatch field teams
- Manage spare parts and inventory
- Coordinate contractors and other external agencies
- Collect field data, including project updates and task completion
- Provide ad hoc support to field technicians
- Re-assign technicians based on changes in the field

For most field service organizations, it is a major logistical challenge to manage the small army of technicians, back-office coordinators, and contractors that support these tasks. And with the rise of IoT devices, field service leaders are being asked to analyze - and act on - more data than ever.

In many ways, data is changing the calculus of field service as corrective actions give way to predictive measures. Instead of relying on annualized site visits to identify service needs, organizations are using IoT devices to monitor equipment in real time.

Major Pain Points

In an increasingly commoditized industry, winners and losers are often separated by the thinnest of margins — customer experience. Unfortunately, legacy tools and siloed data can make it difficult for service leaders to deliver seamless customer experiences.

Even with modern tools, field service organizations still struggle to overcome the limitations of many field service management solutions, including:



58% of field service professionals report their top pressure is competition in product and service.

1

Static data recording:

Data streaming in from different systems gets siloed. Activities are simply recorded as data and not analyzed, preventing field service organizations from taking action.

2

High volume of manual work:

Even with basic automation, most actions today still require human intervention. The net result of all these manual processes is overworked teams and inaccurate reporting.

3

Built on non-native platforms:

Most field service solutions today are designed to accommodate field service, instead of being purpose-built to solve its unique challenges. These platforms are difficult to modify and already out-of-date.

The Hidden Cost of Contractors

Field service organizations today are growing increasingly reliant on contractors, especially in remote or hard-to-reach areas. By 2020, more than 40% of field service work will be performed by technicians who are not direct employees of the organization.

Although contractors can help organizations stay ahead of the rising volume of work, they also carry a number of hidden costs — from large, upfront investments in training to a heavier workload for the back-office coordinators tasked with managing multiple contractors on a single project.

Figuring out how to fully utilize contractors and ensure a consistent level of service is imperative for field service organizations.

Leveraging Your Digital Transformation

Digitization has enabled field teams to forego the classic clipboard ensemble in favor of mobile devices. Unfortunately, many of these new tools do little more than slap paper forms and PDFs onto devices ill-suited to accommodate these forms. The resulting combination leaves workers with lengthy close-out packages on clunky GUIs, wasting time and lowering user adoption and satisfaction.

In the worst cases, poorly executed digitization leaves everyone with more work done less efficiently.

Where are we headed?

The digital revolution is already here. Most field service organizations have abandoned pen-and-paper solutions in favor of digital tools that help them work smarter, faster, and more efficiently. These tools are more than just digital systems of record; by 2020, over 75% of field service organizations will deploy mobile apps that go beyond simple data collection and add capabilities that help technicians succeed.

The next step is automation. AI and automation will fundamentally change the way organizations approach field service. By automating routine tasks, technicians and back-office coordinators will be able to focus on mission-critical work. With real-time data and predictive insights, field teams will be able to avoid unplanned breakdowns and deliver more consistent customer experiences.

One area of concern? The field service market is already falling behind. By 2022, only 30% of field service providers

will be ready to deploy AI-based decision support on their systems, despite robust capabilities being available by then.

For service leaders, the pressure is on to update their fundamental infrastructure and make sure they fully leverage the capabilities of AI and automation. Today's systems can benefit from automation, and tomorrow's won't function without it.



By 2022, 30% of field service providers will be ready to deploy AI-based decision support in their field service platforms.



An End-To-End Solution for Field Service Automation

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