IDC MarketScape: Worldwide Manufacturing Field Service Management Applications 2019–2020 Vendor Assessment
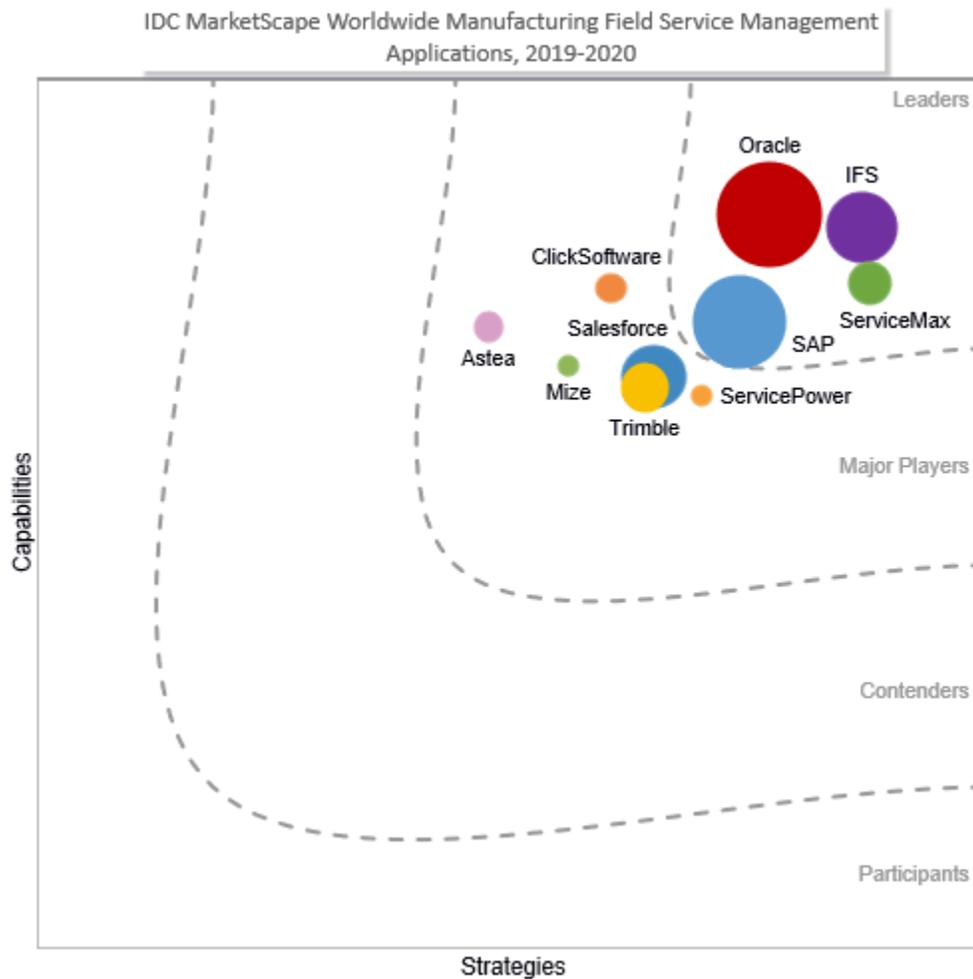
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IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Manufacturing Field Service Management Applications Vendor Assessment

Source: IDC, 2019

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

IDC OPINION

Rising customer expectations demand that manufacturers explore each touch point within the customer journey to enhance the value being delivered and remove any friction within the services being delivered. IT buyers and service leaders can no longer assume that customers will continue to buy more products and services regardless of the quality being delivered. Furthermore, field service cannot be supported with antiquated systems and manual processes that force technicians or field engineers to be superhuman three to four times a day, 365 days a year. In a demanding and competitive landscape for a finite set of customers and a shrinking set of service workers, IT buyers and service leaders must ensure they provide the field with the tools to excel, intelligently make real-time decisions, and have the ability to deliver valuable outcomes to customers during each interaction. This requirement for real-time insights is only exacerbated by the desire for manufacturers to deliver service less reactively and with more predictability as customers demand resolution before a failure occurs or at least the least amount of downtime possible. IDC Manufacturing Insights' *Product and Service Innovation Survey,* 2019 highlighted that only 16.7% of manufacturers stated they are delivering field service within a break/fix model, a decline of nearly 10% from 2017.

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

- Field service management in manufacturing – defined by IDC Manufacturing Insights as the process and set of activities necessary to resolve equipment, product, or customer issues in the field including work order management, scheduling optimization, route optimization, fleet management, workforce management, and contractor management – is one of the critical set of activities that provide an opportunity to improve revenue streams, contain costs, improve efficiency, and boost worker productivity.

- While all 10 vendors included in this IDC MarketScape support a broad range of capabilities within the end-to-end field service management market, they offer varying approaches to FSM, its subcategories, and within a variety of subvertical manufacturing industries.

- The "short list" as provided by this IDC MarketScape highlights the unique capabilities and future strategies of each vendor that enable tech buyers to more efficiently identify a good fit for their digital transformation (DX) needs. As manufactures and service organizations embark on their DX journey, selecting the right partner in the short and long term will be critical for success and growth.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

There are a number of vendors offering field service management capabilities to the manufacturing market. The vendor inclusion criteria for this study was chosen to accurately depict the vendors that are most representative of any given field service management functional buyer's selection list serving as one input into a manufacturer's decision-making process to shorten the vendor evaluation process. The intent with this IDC MarketScape is to focus on those notable vendors that meet the criteria 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 50 field service management customers.
- Vendors must have customers in at least three manufacturing subvertical industry segments.
- Vendors must have had a field service management application in the marketplace for at least five years.
- 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.

Each of the 10 vendors included in this study meets the aforementioned requirements. There are vendors that provide products for a subset of field service management or support adjacent processes that are notable but not included because they do not meet the "end to end" requirement. This may change in the future, and future publications of this study will have additional inclusions.

ADVICE FOR TECHNOLOGY BUYERS

There is a critical shift occurring for manufacturers in today's experience economy driving investment in tools, applications, and platforms to support a new approach to service execution and customer value creation. Historically, investments to support "after sales" service processes focused on internal operational capabilities and not aspects of service enhance customer value. Field service management and the tools to support it are becoming a crucial opportunity to impact customer service and value creation. Manufacturers are beginning to recognize they must, in parallel, improve efficiency and drive innovation to add value to the customer experience and drive new revenue streams. For manufacturers looking for a field service management application or platform, IDC offers the following guidance:

- **Assess your organization's service maturity and current technology capabilities.** Buying technology for technology's sake will be waste of finite resources and may sour the service team on future investments. Certain technologies are better suited to help grow from paper-based processes to a digital world within the finite world of the service function, while others are best suited to enable more advanced capabilities and digital transformation across an entire organization.
- **Establish internal buy-in from the front line and the users of the technology before, during, and throughout the deployment of the solution.** Technicians and field engineers have a primary goal of solving customer issues. They need tools that support their specific environment and can support the demands of their daily tasks. Providing them with a tool, an application, or a platform that hinders their day will not be adopted. Getting them bought in early and throughout the investment and deployment process is critical to success.
- **Understand where FSM solution fits into a broader IT infrastructure and DX journey road map.** An FSM application or platform is just one piece of the data puzzle for an organization, and thus must be tightly integrated to provide the highest return of shared value and knowledge.
- **Ensure vendors have a strategic vision, which aligns with your DX goals and future growth initiatives.** As noted previously, customer expectations can change quite rapidly, and competition is also demanding that manufacturers prepare for disruption. Working with

partners that can aid in nimbleness and support rapid business model transformation will be critical.

- **Make certain that the solution partners you choose fulfill both your current field service needs and extended support areas.** Often, IT buyers and service leaders make decisions based on a current need with limited focus on the other areas of need, which will become apparent in the future. Today's problem is just that, IT buyers and the service leadership must keep an eye to the next challenge and ensure a partner can support both today and tomorrow's field service needs.

- **Evaluate industry focus and depth of domain knowledge.** Requirements and needs can be vastly different based on the subvertical and thus in evaluating vendor partners, IT buyers should ensure alignment and domain expertise are present. Some activities and capabilities will cut across industries, but it is incumbent on IT buyers and service leaders to ensure their tools can support their specific needs.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape for worldwide field service management applications. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description in the sections that follow provides a summary of each vendor's strengths and challenges.

Astea

Astea is positioned in the Major Players category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

Astea International Inc. (USOTC: ATEA) is a global vendor of end-to-end service management capabilities based in Horsham, Pennsylvania, the United States. Astea has reached a definitive agreement to be acquired by IFS, pending shareholder approval. Astea, founded in 1979, has been delivering products to support service management for 40 years, with approximately 190 employees globally. This focus on the service market is highlighted by Astea over 650 customers across primarily in North America and Europe, with a minority in Asia/Pacific and rest of the world. Astea has strategic alliances and partnerships with Amazon Web Services (AWS), Jolt Consulting Group, Microsoft Azure, PricewaterhouseCoopers (PwC), RTM Consulting, Software AG, Wipro, and YASH Technologies.

Astea is a well-known technology vendor in the field service management market, serving a variety of manufacturing subverticals such as construction equipment, consumer products, industrial equipment, high tech, and medical devices. Astea has a two-tier product strategy to support both enterprise organizations and the SMB market with its Astea Alliance Enterprise platform and FieldCentrix, respectively. Both products support a wide range of capabilities including scheduling optimization, mobility, workforce management, dispatch, knowledge management, business intelligence (BI), customer self-service, project management, depot repair, service parts and logistics, contract and warranty management, contact center, third-party and vendor management, and sales and customer management. Applications are modular across a common platform with native apps with a shared code base across mobile provider platforms. Astea Alliance Enterprise and Astea FieldCentrix can be deployed on-premise or in the cloud, public, or private.

Strengths

A proven provider of end-to-end functionality in field service management, Astea delivers a set of products to solve today's challenges for its clients providing flexibility, visibility, and actionable intelligence to support efficient resolution and support. Astea's focus on service drives all of the company's decisions and approach to the market. This singular focus provides end users with the confidence that the platform will be purpose built and deliver to the specific needs of the service worker and field technician. The platform also allows for rapid configurability and integrations with low- or no-code development.

The platform extends beyond the field to support the contact center, the sales operation, project management, customer engagement, and the service depot. The ability to connect field data with the rest of the organization enables manufacturers to support a 360-degree view of the customer, more effectively sell new products and services, and make intelligent decisions throughout complex projects.

Challenges

The primary challenge for Astea resides with its ability to support a global customer base with the amount of resources currently in place. As manufacturers continue along a digital transformation journey, the need for agility will become even more critical to success. Partners in turn will need to have the teams, expertise, and bandwidth to deliver innovation at the speed of evolving customer needs, which can connect to a wide array of enterprise applications. Astea is a relatively small organization and must work harder to ensure prospects trust its ability to deliver solutions, which can scale with manufacturer's desired growth goals and provide a clear future road map for innovations.

Consider Astea When

Manufacturers within the industries of construction, consumer goods, industrial equipment, high tech, and medical equipment should consider Astea if they are looking for a highly customizable end-to-end service platform that can create a 360-degree view of the customer and enable sales activities. Astea is focused on the service management industry and delivers end-to-end field service management capabilities within a single platform.

ClickSoftware

ClickSoftware, a Salesforce company, is positioned in the Major Players category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

ClickSoftware is a global vendor of field service management capabilities based in Burlington, Massachusetts, the United States. ClickSoftware was acquired by Salesforce on October 1, 2019. ClickSoftware, founded in 1996, has been delivering field service and service management products since its founding with approximately 700 employees globally primarily based in the United States and Israel. The company has over 400 service customers globally, primarily in North America and Europe, with a minority in Asia/Pacific and Latin America. ClickSoftware has built strategic partnerships and alliances with over 50 companies such as Accenture, Atos, Capgemini, Diabsolut, EOH, HCL, IBM, IDEO, Peacock, Tata Consultancy Services, and Tech Mahindra.

ClickSoftware is a well-established technology vendor in the field service management market serving a number of manufacturing subvertical industries such as capital equipment, construction, high tech, industrial equipment, medical devices, and mining equipment, along with other industry verticals like facilities management, healthcare, telecommunications, and utilities. ClickSoftware's product go to market caters to both the enterprise and the SMB manufacturer with the company's Click Field Service

Edge. The product and platform allow for a zero-touch planning, scheduling, and dispatching functionality with the use of artificial intelligence (AI) and machine learning to continuously learn and improve service optimization. The platform focuses on four key areas – scheduling and optimization, service chain optimization (end-to-end field service workflow of territory planning, predictive traffic, service parts management, and outcome-based service), predictive field service, and contractor management or crowd service of field service engineers. The platform can be deployed modularly with additional capabilities to support mobility, customer engagement, capacity planning, and demand forecasting. Click Field Service Edge can be deployed on-premise or in the public cloud.

Strengths

A well-established product and team focused on field service management has enabled the ClickSoftware team to deliver value not only to customers across some key manufacturing industries but also to some industries outside of manufacturing. One area that provides value to customers is the ClickSoftware approach to "value discovery" process, whereby the company's domain experts work closely with the customer's project team to identify the scope of the issue and use case, building a strategic plan to deliver both tactical gains and digital transformation.

The platform supports end-to-end functionality with enhanced capabilities in artificial intelligence to support predictive scheduling and plan the necessary resources for future service demand. The platform allows for customers to migrate from a reactive service execution model to a more predictive model without giving up the ability to support as-needed reactive work orders.

Challenges

The acquisition of ClickSoftware by Salesforce in the short term may not have a major impact on current customers. But as the product becomes a part of the Salesforce Service Cloud, enhancements and support will be determined by the overall Service Cloud strategy. ClickSoftware's legacy of field service management focus will thus be incorporated into a broader customer service strategy. Not necessarily a problem, but IT buyers will need to be mindful as they make longer-term decisions for their digital transformation journey.

Consider ClickSoftware When

Manufacturers should consider ClickSoftware if they are looking for a platform with a field service focus, which will continue to only be more tightly wound into the fabric of the Salesforce Service Cloud with the ability to connect field execution data with CRM capabilities and tools. This is also contingent on Salesforce continuing to deliver and support the product into the future as it may not be a standalone product in the future. Field service will continue to demand an integrated model in which data accessibility across functions will be critical to enable revenue opportunities, efficiencies, and shared intelligence.

IFS

IFS is positioned in the Leaders category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

IFS is a privately held global vendor of end-to-end service management capabilities headquartered in Linkoping, Sweden. IFS, founded in 1983, has been delivering products and services to the service market for over 30 years with approximately 3,600 employees globally, approximately 1,170 employees dedicated to service. IFS also has products to support enterprise asset management (EAM) and enterprise resource planning (ERP) needs. Its focus on the service market, however, is

highlighted by IFS' over 780 service customers globally with a concentration in Europe and North America. IFS has over 350 strategic alliances and partnerships with companies such as Accenture, Capgemini, DXC Technology, Eqeep, Gogh, Infosys, Jolt Consulting Group, Microsoft, Noventum, ProV, PTC, Tata Consultancy Services, and Tech Mahindra.

IFS is rapidly growing its business in the field service management market serving a number of subverticals within the manufacturing industry such as aerospace and defense, asset intensive industries, high tech, capital equipment, construction, consumer packaged goods (CPG), and industrial equipment. IFS currently has a three-offering strategy to the service market with its IFS Field Service Management, IFS Enterprise Service Management (ESM), and WorkWave Service (WWS) products. All three products provide support for end-to-end field service management capabilities including customer engagement, mobility, planning and scheduling optimization, warranty and contract management, IoT connected service, reverse logistics, depot repair management, knowledge management, customer/dealer portals, service parts management, and service projects. The FSM product is positioned for tier 1 manufacturers, ESM to support midmarket organizations needing an integrated ERP and FSM solution, and WWS for the SMB market. All three products can be deployed on-premise or in the cloud, private, or public with a modular approach, allowing customers to include features such as planning and scheduling optimization, advanced resource planner, or a what-if scenario offering after deployment of the platform.

Strengths

A proven provider of end-to-end functionality in service life-cycle management, IFS enables a broad set of capabilities that support field execution and other aspects of the business that impact customer value. IFS also enables field service within highly complex work environments, which demand an integrated flow of intelligence to support dynamic and autonomous decision making. The product supports a connected view of field service, which depends on real-time data and intelligence from assets and products to predictively support resolution.

The platform empowers teams beyond the field service organization to make intelligent decisions around the customer, the product, and the asset from the back office to the front line. Also, supporting multiple deployment models, IFS can deliver solutions for a variety of environments within the manufacturing landscape.

Challenges

The primary challenge for IFS resides in whether it will lead its customer's digital journey and provide a platform of choice for its customers to lead their own direction and initiatives. IFS has innovative tools within the product such as artificial intelligence and augmented service support but aren't the focus of the solution. As manufacturers continue to explore service innovation, they will demand that partners push them forward into the future, illuminating the promise of the possible. IFS has a variety of capabilities within the product and a vision around the future and must lead its customers and prospects toward that vision.

Consider IFS When

Manufacturers across a variety of industry subverticals should consider IFS if they are looking for a platform that can support complex field service deployments in asset-centric, product-centric, or customer-centric environments. IFS is determined to provide its customers with the solution and the deployment that fits their business, and maturity being a critical partner on a digital journey of transformation.

Mize

Mize is positioned in the Major Players category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

Mize is a privately held global vendor of field service management capabilities headquartered in Tampa, Florida, the United States. Mize, founded in 2012, has been delivering products for service life-cycle management for seven years with approximately 120 employees, all dedicated to service. Mize has approximately 50 customers primarily in North America, with a minority in Europe and Asia/Pacific. Mize has strategic partnerships with Amazon Web Services, HP, IBM, and Tech Mahindra.

Mize is a growing service management vendor with products that support multiple manufacturing subvertical industries such as automotive, commercial equipment, high tech, industrial equipment, and medical equipment. Mize goes to market within field service with its CX Platform and Smart Blox product, which has capabilities to support mobile workforce management, work order management, warranty and service contract management, installed base management, knowledge management, customer portals, and parts management. The product is modular and can be deployed in the cloud, private, public, or on-premise.

Strengths

Mize is relatively new to the market, but its team has been within the service management space for some time now, and the team has built from the ground up a product that is constructed to support end-to-end service management in a proactive model. The product was created with usability, configurability, and integration embedded in its design, which gives manufacturers an easy template to get started along their digital journey in field service.

The Mize CX Platform and Smart Blox product puts revenue creation at the heart of the solution, which enables manufacturers and their stakeholders (e.g., channel partners, service provider network) to execute on goals around profitability that is a key driver in today's experience economy. The ability to not only deliver customers with value but also create experiences they are willing to pay for is critical for the future of manufacturers in field service management.

Challenges

The primary challenge for Mize resides in its size and relative new entrance into the global FSM market. Many of the other players have been in the market for decades if not longer and have built hundreds of referenceable customers to tout their products and services. Within the manufacturing industry, organizations demand that you derisk their technology investments, and a track record is a major step to lowering the risk of partnering. Being a small company, Mize will need to build its partner ecosystem out and focus on key subvertical markets that have already shown promise.

Consider Mize When

Manufacturers within industries such as high tech, industrial equipment, heavy equipment, and medical equipment should consider Mize when they are looking for a configurable and modular product that can support end-to-end service management capabilities as they take an initial leap into digital transformation. Rapid deployments that can tackle transformation in a modular way will enable manufacturers of varying maturity to begin their digital journey.

Oracle

Oracle is positioned in the Leaders category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

Oracle (NYSE: ORCL) is a global technology provider of end-to-end service management capabilities headquartered in Redwood Shores, California, the United States. Oracle, founded in 1977, has delivered products for the service life-cycle management market for over 15 years, with approximately 137,000 employees globally across all of the products. Oracle, as publicly held company, does not share its number of service-specific customers, but it supports customers across 55 countries primarily in Latin America, North America, and Europe, with a minority in Asia/Pacific and rest of the world. Oracle has over 100 partnerships and strategic alliances with companies such as Accenture, eVerge, Helix, Tata Consultancy Services, Tecnocom, and Wipro.

Oracle is a well-known technology vendor in the field service management market servicing a number of manufacturing subverticals like chemicals, commercial equipment, consumer packaged goods, high tech, industrial equipment, and mining equipment. Oracle supports the field service management through its Field Service Cloud product, which provides a wide range of capabilities to support routing and scheduling optimization, mobility, third-party workers, customer communication, collaboration, work order management, demand forecasting, capacity planning, and artificial intelligence. Applications within the product are offered as features, and customers can configure functionality for specific users. Oracle Field Service Cloud is a multitenant SaaS product.

Strengths

A proven technology provider in the field service market industry, Oracle delivers a wide variety of capabilities to support the changing role of the field technician within the manufacturing industry. Oracle provides applications to support the current needs of the field service organization but also has incorporated modern, innovative tools, which will ensure the future of the field workforce will have the real-time insights they need to deliver predictive service experiences and resolution.

The product is highly configurable and can ensure that data from the field is integrated with back-office enterprise applications for a more complete view of the product, the asset, the worker, and the customer. The future of field service work demands on-demand intelligence, which delivers the right answer every time to enable value-added experiences for customers.

Challenges

The primary challenge for Oracle is delivering against its own track record of products and support. Oracle must continue to be agile in order to deliver at the speed with which manufacturers are moving with regard to service transformation. Also, Oracle must continue to build out its vertical industry solutions for the complex manufacturing market as this market is exploring digital transformation within field service as it becomes more critical for its success.

Consider Oracle When

Manufacturers should consider Oracle Field Service Cloud if they are looking for an end-to-end solution that easily integrates with other enterprise applications but also can stand on its own. The field service product has grown out of investment, both organic and by acquisition, and must continue to build on the innovations demanded by the market. Oracle has shown focus on the field service management market and delivers products to support the varied nature of work to resolve issues and deliver customer value.

Salesforce

Salesforce is positioned in the Major Players category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

Salesforce (NYSE: CRM) is a global technology provider of field service management capabilities headquartered in San Francisco, California, the United States. Salesforce, founded in 1999, has delivered service life-cycle management capabilities since 2009, launching its Field Service Lightning platform in 2016 with approximately 36,000 employees globally for all its products. Salesforce has over 150,000 customers globally across all of its products. Salesforce provides its field service management product in approximately 60 countries globally with strategic alliances and partnerships beyond its AppExchange enterprise app store with companies such as Accenture, Asperii, Capgemini, Deloitte, GearsCRM, Huron Systems, IBM-Bluewolf, Magnet360, PwC, Slalom Consulting, Traction on Demand, and West Monroe Partners.

Salesforce is establishing itself in the field service market, and its acquisition of ClickSoftware on October 1, 2019, highlights this point. Salesforce supports a variety of manufacturing industries such as commercial equipment, construction, consumer packaged goods, high tech, industrial equipment, and medical devices. Salesforce has 100% hosted public cloud model for its Field Service Lightning product. The product delivers capabilities to support work order management, resource and time management, scheduling and optimization, dispatch management, business intelligence, contracts and entitlements, inventory management, customer experience and portals, mobility, and contractor experience. The Field Service Lightning product is built on the Salesforce Customer 360 platform enabling integration with other applications across the business supporting a 360-degree view of the customer and service experience and the asset.

Strengths

Salesforce is a proven technology platform for customer-centric engagements. Manufacturers are evolving to explore the transformation of business models to support a more customer-centric view and are looking to partner with companies that can help on this journey. Salesforce delivers an integrated platform, which enables service, sales, and marketing functions to work with a shared focus on the customer. Salesforce's AppExchange enables a sense of collaborative innovation, which enables rapid deployment of new capabilities and a partnership between customers and partners.

Challenges

The primary challenge for Salesforce resides in its ability to have out-of-the-box functionality for aspects of service outside of the primary field service functions such as fleet management, HCM, and service demand forecasting. Salesforce does provide integration with other applications via the MuleSoft product set and with the acquisition of ClickSoftware, which is likely to bolster these areas in the future. Salesforce is also perceived to be a CRM company and must continue to invest in industry-specific solutions to support field service to build on its platform around the 360-degree view of the customer.

Consider Salesforce When

Manufacturers in the industries of commercial equipment, construction, consumer packaged goods, high tech, industrial equipment, and medical devices should consider Salesforce if they are looking for a tightly integrating field service solution into a CRM platform, which can enable a 360-degree view in customer interactions and service experiences. Salesforce is focused on customer management and

recognizes through acquisitions like ClickSoftware the opportunity within field service management to close the loop on customer engagements.

SAP

SAP is positioned in the Leaders category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

SAP (NYSE: SAP) is a global technology provider of end-to-end service management capabilities headquartered in Walldorf, Germany. SAP, founded 1972, has delivered products for the service life-cycle management market for over 40 years with approximately 96,000 employees globally across all of its products. SAP, a publicly held company, does not share its number of service-specific customers; however, it supports customers over 100 countries in over 30 languages. SAP has over 8,000 strategic partners and alliances with companies such as Accenture, Atos, Capgemini, Cognizant, Deloitte, DXC Technology, EY, HCL, IBM, Infosys, LTI, NTT DATA, PwC, Tata Consultancy Services, T-Systems, and Wipro.

SAP is a well-known technology vendor in the service management market delivering product offerings to a number of manufacturing subvertical industries such as aerospace and defense, automotive, chemicals, commercial equipment, consumer packaged goods, high tech, industrial equipment, medical devices, and mining equipment. SAP supports the field service market through its SAP Field Service Management, which provides a varied range of capabilities including mobile workforce management, mobile order management, scheduling optimization, warranty and service contract management, installed base management, fleet management, contractor management, augmented reality (AR), business intelligence, artificial intelligence, predictive maintenance, and customer portals. The product is modular and is deployed in the hosted public cloud.

Strengths

A proven vendor of end-to-end functionality in service life-cycle management, SAP has delivered a set of product offerings and a platform that allows manufacturers to support a variety of tasks across levels of complexity, volumes of workloads, or number of technicians required to complete a work order. SAP's global scale and industry-focused approach allows the company to support manufacturers of all size and profile across a number of maturity models.

SAP's acquisition of Coresystems in 2018 provided more capabilities specifically within contractor management (SAP Crowd Service), which is an area where manufacturers are beginning to focus more resources as the ability to have a dynamic workforce becomes more critical to success. The nature of the workforce is changing, and customer's expectations around who will deliver resolution is evolving, and SAP delivers a product to support this changing model.

Challenges

SAP's primary challenge is with integrations with applications outside of the SAP product set. As manufacturers look for agility and a variety of applications to support their digital transformation, the need for partners to easily integrate with other applications will grow only in criticality as only a few set of manufacturers will use only one technology partner. SAP has established a large group of global partners and must continue to work to establish an ecosystem of offerings, which can support and create a fully integrated data flow from the customer to the field to the back office.

Consider SAP When

Manufacturers of both midsize and enterprise level should consider SAP if they are looking for an end-to-end service management solution that can integrate with other enterprise applications or be a standalone product. SAP's ERP capabilities provide manufacturers with the opportunity to connect the frontline field operation with the back office to support an end-to-end data flow, which will become more critical in the experience economy.

ServicePower

ServicePower is positioned in the Major Players category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

ServicePower is a privately held global vendor of end-to-end field service management capabilities based in McLean, Virginia, the United States. ServicePower, founded in 1996, has delivered products for the field service market for 22 years with approximately 150 employees globally, all dedicated to service life-cycle management. ServicePower has over 150 service customers, with the majority in North America and Europe and a minority in the rest of the world. ServicePower has strategic partnerships with Group Seven Consulting, HPE, and Jolt Consulting Group.

ServicePower is a well-known vendor in the field service management market and has delivered products to support a number of subindustries within manufacturing such as consumer equipment, high tech, and medical equipment. ServicePower has a suite of products that can be bundled together or packaged separately to support capabilities such as scheduling and route optimization, workforce management, warranty management, contractor management, dispatch management, service demand forecasting, capacity planning, and customer portals. The product is deployed in hosted public cloud.

Strengths

A well-entrenched field service management product, ServicePower supports a broad range of capabilities within an evolving landscape, which demands data to support the field and also inform customers, suppliers, dealers, and partners in near real time. ServicePower's scheduling capabilities enable manufacturers to dynamically plan throughout the day as changes occur delivering real value in calculating drive time, traffic, and duration of work. The integrated capabilities allow manufacturers to coordinate the front line, the call center, dispatch, and customers to receive service and resolve issues efficiently.

ServicePower has been able to provide a relatively fast ROI for manufacturers deploying the product, and those quick wins must be magnified. The digital journey is not a sprint, and ServicePower must continue to show the value within the product across the broad set of needs for manufacturers as they transform from product-focused businesses to a more service-centric model.

Challenges

The primary challenge for ServicePower resides in its need to innovate faster for its customers and manufacturers as the market is demanding digital tools that can deliver for the future of field support. ServicePower has a broad set of capabilities; but it must ensure it can build a clear forward-looking road map to support manufacturers in a digital journey, where the path may not be fully visible just yet. Also, ServicePower being a relatively small company will need to invest in supporting the markets it can win in and with manufacturers that may be looking earlier within their digital transformative journeys.

Consider ServicePower When

Manufacturers within industries such as consumer equipment, high tech, and medical equipment should consider ServicePower if they are looking for a set of products that can tackle a variety of field service needs across the service life cycle. The ability to plan, forecast, and dynamically schedule service is becoming critical for manufacturers as the price of a delayed service resolution is more than a missed SLA, but potentially a lost customer.

ServiceMax

ServiceMax is positioned in the Leaders category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

ServiceMax is a privately held global vendor of end-to-end field service management capabilities headquartered in Pleasanton, California, the United States. ServiceMax, founded in 2007, has been delivering products for the field service market for 12 years with approximately 550 employees worldwide, all dedicated to service life-cycle management. Its focus on the service life-cycle management market is highlighted by its approximately 450 customers primarily in North America and Europe, with a minority in Asia/Pacific. ServiceMax has over 90 strategic alliance and certified partners globally with companies such as Accenture, Barkawi (a Genpact company), BearingPoint, Bolt Data, Capgemini, Deloitte, ForeFront Inc., Genpact, Infosys, PwC, Tata Consultancy Services, Tech Mahindra, and Uptima.

ServiceMax is a well-known vendor in the field service management market delivering products to support a variety of industries, both asset intensive and product intensive. ServiceMax supports manufacturers within subvertical industries such as aerospace and defense, construction, industrial equipment, high tech, medical devices, mining equipment, oil and gas and energy, rail products and equipment, and their related manufacturer dealer networks. ServiceMax has a three-product strategy to support the field service market with its Field Service Management, Asset Service Management (ASM), and Zinc Real-Time Communication products. The FSM and ASM products provide end-to-end field service management capabilities including mobile workforce management, order management, scheduling and route optimization, warranty and service contract management, installed base management, contractor management, customer portals, business intelligence, and service parts management. The FSM product is positioned to support service execution management for manufacturers and service organizations, the ASM product supports asset-intensive environments for operators, and the Zinc Real-Time Communication product enables real-time communication between technicians, customers, and the customer support team. While Zinc can be sold as a standalone product, it is typically positioned and sold as part of the overall FSM or ASM solution. The products are modular and are deployed in a hosted public cloud environment on the Salesforce Platform.

Strengths

A proven provider of field service management products, ServiceMax delivers a broad set of capabilities to support the evolving role of the field technician as an intelligent interaction point with a customer, product, or piece of equipment. ServiceMax can deliver products to support simple work or more complex environments that demand advanced intelligence, asset data, and predictive capabilities. ServiceMax also recognized and can support the changing workforce landscape, which is driven by collaboration and a hybrid workforce that has the tools to deliver high levels of quality.

The products enable value beyond the field service organization to ensure integration with other enterprise applications and business functions. ServiceMax has been able to meet its customer needs

and establish relationships or build capabilities that enable transformation within manufacturers along a digital maturity which is varied. Its industry-focused approach provides manufacturers with a tailored solution, which deeply understands what tools are needed to support critical needs while evolving to innovate for the future field worker.

Challenges

The primary challenge for ServiceMax resides with what will be the future focus on the product and service offerings. The ability to deliver products that support both product-centric manufacturers and asset-intensive manufacturers shows a breadth of solutions but also needs to be managed as the strategic goals of these groups aren't always the same. Being a smaller company, ServiceMax will need to ensure if investments in the resources will have this multipronged approach and continue to deliver products at a global scale.

Consider ServiceMax When

Manufacturers and equipment dealers within industries such as aerospace and defense, construction, industrial equipment, high tech, medical devices, mining equipment, oil and gas and energy, and rail products and equipment should consider ServiceMax if they are looking for an end-to-end field service management product that can support asset-intensive, complex work but also has the innovative approach to tackling newer concerns, which will be faced along a digital transformation journey.

Trimble

Trimble is positioned in the Major Players category in 2019 IDC MarketScape for worldwide manufacturing field service management applications.

Trimble (NASDAQ: TRMB) is global technology vendor of end-to-end field service management capabilities headquartered in Sunnyvale, California, the United States. Trimble, founded in 1978, has delivered products for the field service market for 20 years, with approximately 10,000 employees globally and with 250 employees dedicated to service life-cycle management. Trimble's support of the service market is highlighted by the company's 1,500 service customers globally, with the majority in North America and Europe and a minority in Asia/Pacific and rest of the world.

Trimble is a well-known vendor in the field service management space with a historical footprint in geolocation services and fleet management. Trimble's field service solution supports manufacturing industries such as agriculture, commercial equipment, construction, and industrial machinery. Trimble supports the field service market through its Trimble PULSE product, which provides a wide range of capabilities such as mobile workforce management, work order management, scheduling and route optimization, service contract management, installed base management, fleet management, customer portals, dispatch management, and capacity planning. Trimble PULSE has prepackaged vertical-specific versions and is modular. The product can be deployed on-premise or in the hosted public cloud.

Strengths

A technology provider in the field service management market, Trimble has a wide variety of capabilities to support the business needs of manufacturers. Taking advantage of a history of supporting large, dispersed fleets or resources, Trimble is able to deliver products that enable automated scheduling and intelligent capabilities across geographically dispersed field organizations. Trimble's ability to integrate location and vehicle diagnostic data with the field technician data enables a more accurate view into when the service will be delivered.

The product is configurable and enables manufacturers to move along a digital journey at their own pace. Trimble also allows for a level of flexibility within its deployment models and pricing to support use cases of many sizes and risk appetites. Starting small and then building momentum around digital transformation is a path that can show promise for some risk-averse manufacturers.

Challenges

The primary challenge for Trimble is agility in the face of the innovation that is rapidly impacting manufacturers within field service. Trimble is a large organization and the ability to move quickly to support the changing needs of manufacturers will need to be addressed. Trimble has broad capabilities and continues to innovate around technologies like artificial intelligence and augmented reality, but it will need to speed these innovations to beat the competition and deliver at the speed customers demand.

Consider Trimble When

Manufacturers in industries such as agriculture, commercial equipment, construction, and industrial machinery should consider Trimble if they are looking for a solution that can integrate data across the field service team with vehicle and location data seamlessly. Trimble has a deep expertise in geolocation and can enable manufacturers that have disperse install bases of equipment and resources. Trimble has shown a focus on field service management and domain expertise to deliver products to support its key markets.

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 and revenue of each individual vendor within service life-cycle management from the manufacturing industry vertical.

Each of the 10 vendors evaluated in this IDC MarketScape have the ability to support the broad range of capabilities for end-to-end field service management within the manufacturing industry vertical and its supporting network of dealers, suppliers, and partners. All vendors in this study ended up in the Leaders or Major Players categories because of the ability to deliver to the varied needs and processes of field service execution across a diverse set of manufacturing subverticals.

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 a review board 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 platform or application that aids in the processes and set of activities in the delivery of service and support for the field service operation, including work order management, scheduling optimization, route optimization, dispatch management, fleet management, human capital management, installed base management, service demand forecasting, service parts management, contractor management, augmented/virtual reality, warranty management, and capacity planning. The application should be commercially available as a standalone solution and the vendor should have a number of customers that have already deployed the solution. The intent with this IDC MarketScape is to focus on those notable vendors that focus on broad field service management capabilities and can support either cloud or on-premise capabilities.

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

- **Asset-oriented value chain (AOVC):** Industries include chemicals, metals, and pulp and paper.
- **Brand-oriented value chain (BOVC):** Industries include consumer packaged goods, food and beverage (F&B), fashion, and life sciences.
- **Engineering-oriented value chain (EOVC):** Industries include automotive, aerospace and defense (A&D), and industrial machinery.
- **Technology-oriented value chain (TOVC):** Industries include electronics and semiconductors (high tech).

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 a platform within the manufacturing industry vertical.

TABLE 1

Key Strategy Measures for Success: Worldwide Field Service Management Applications in Manufacturing, 2019

Subcriteria	Market-Specific Definition/What Was Assessed	Weighting (%)
Functionality or offering strategy	Future plans for offering functionality are well aligned with current and future customer needs and with priority customer segments. Future plans for a broad range of functionality were assessed including rate of introduction of new solutions in core areas, ability to match evolving business needs, track record in achieving road map strategic objectives, frequency of offering competitive analysis, and vertical focus.	29.0
Innovation	The product offering's unique capabilities generate market value. Innovation is driven through company culture, new releases in the past three years, and innovative technologies such as artificial intelligence, machine learning, and augmented reality capabilities.	22.0
Growth	Firms poised for growth provide relevant specialized offerings that address specific needs, particularly for industries, geographic markets, or the size of the client. Growth strategy is measured by both the diversity of the planned dimension of growth and the measure of enthusiasm of client recommendation across company size and functional areas.	35.0
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 tap its internal development resources and also partner with other companies to bring differentiable and innovative capabilities to the market. Vendor has a clear strategy for both R&D investments and partnering worldwide and in the United States in the next three to five years.	7.0
Other	Future plans for offering enable improvements for return on investment.	7.0
Total		100.0

Source: IDC, 2019

TABLE 2

Key Capability Measures for Success: Worldwide Field Service Management Applications in Manufacturing, 2019

Subcriteria	Market-Specific Definition/What Was Assessed	Weighting (%)
Functionality or offering	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 product addresses functionality around the degree of cloud, range of services offered, modularity, customization, line-of-business customization, and global application deployment.	63.0
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, and through the channel. Vendor effectively retains customers and continues to innovate in customer retention and service areas or as a low-cost provider has a solution in place for customer service that is universally embraced. The product has a broad set of capabilities that include tiered support services, geographic footprint of support, domain expertise support, evaluation period, country support, and a customer council for feedback.	18.0
Pricing model or structure of product/offering	The pricing model is currently aligned with customer's preferences for payment (e.g., license, service, per seat, per transaction). Vendor's current offering can be obtained using multiple different pricing options such as cost per use, monthly pricing with or without a cost-per-usage charge, a flat monthly fee, a guaranteed savings sharing arrangement, or a hybrid of these to meet customer requirements.	3.0
Customer satisfaction	The vendor has demonstrated a level of customer satisfaction in the form of high renewal rates, field service management expertise, industry expertise, marketing message, account management, project management, integration with other enterprise systems, technical skills, and overall value.	16.0
Total		100.0

Source: IDC, 2019

Related Research

- *Service-Driven Transformation for Manufacturers in the Age of Experiences* (IDC #US45557019, September 2019)
- *2019 Product and Service Innovation Survey* (IDC #US44334119, August 2019)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2019: Asset-Oriented Value Chains in the Manufacturing Industry* (IDC #US45120019, June 2019)
- *IDC's Worldwide Digital Transformation Use Case Taxonomy, 2019: Technology-Oriented Value Chains in the Manufacturing Industry* (IDC #US45120119, June 2019)
- *IDC TechBrief: Field Service Management for the Manufacturer* (IDC #US44335719, April 2019)
- *IDC PlanScape: Reinventing Field Service Value Through Connected Products* (IDC #US44089818, July 2018)

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. This study specifically analyzed these offerings from a manufacturing industry vertical perspective.

"The ability to resolve a customer issue and delivery value beyond expectations is becoming a differentiator for manufacturers," says Aly Pinder, program director, Service Innovation and Connected Products Strategies, IDC Manufacturing Insights. "Manufacturers recognize the importance of the field service team to create wow experiences for customers and are investing in the tools and technology capabilities to execute on-demand service, driving revenue, efficiency, and the customer experience."

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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