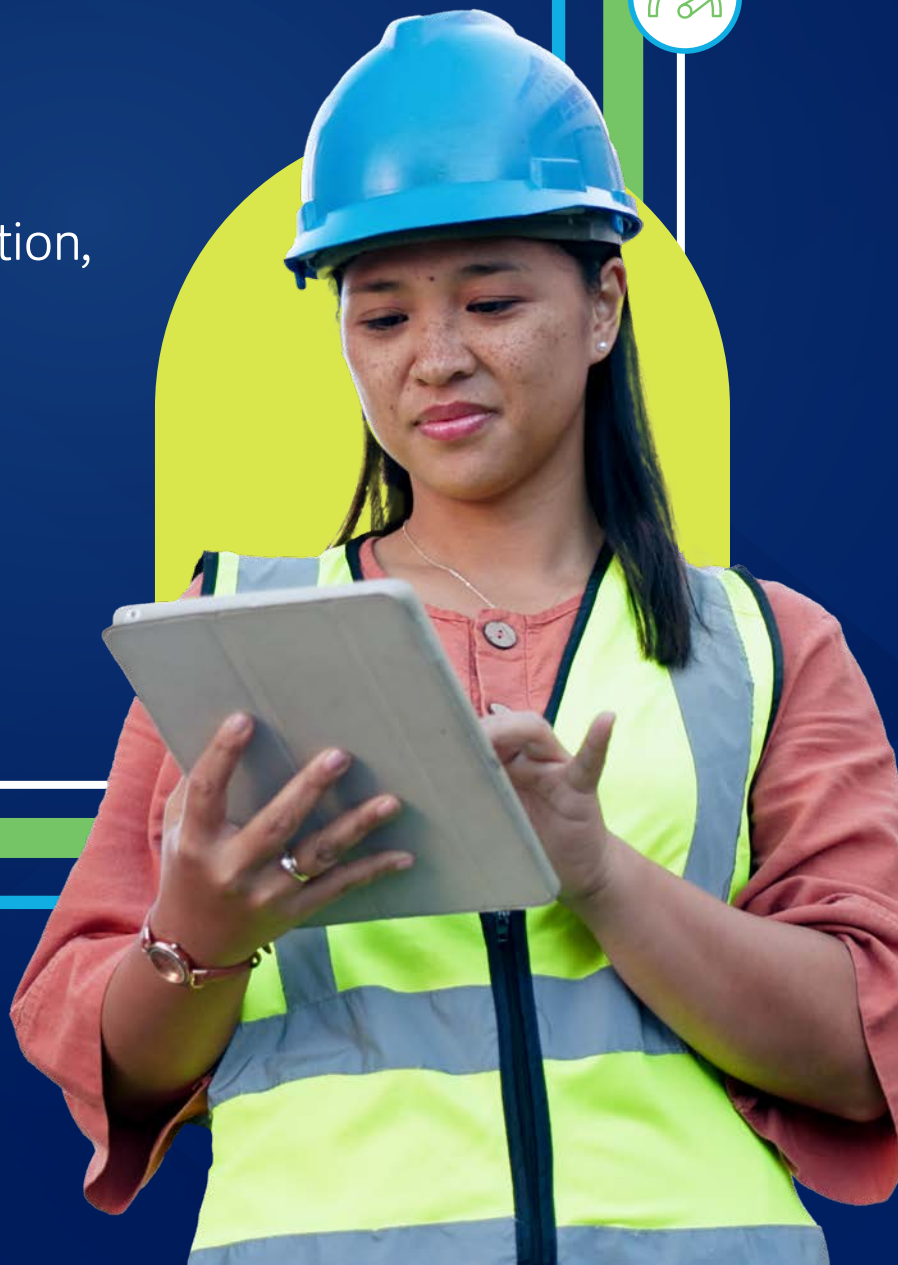
FIELD SERVICE INSIGHTS

THE 2025 STATE OF FIELD SERVICE REPORT

Exploring the Future of Service Delivery, AI Adoption, and Customer Strategy



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A Foreword From Our Producer

In our latest report from Field Service Insights, we explore how new technologies and evolving service models are improving outcomes in the field service sector. The data shows significant gains in areas like asset uptime and first-time fix rates, largely due to the adoption of technologies such as AI and remote diagnostics. These advancements not only enhance efficiency but also contribute to better customer experiences.

Our Field Service events bring these insights to life, providing a platform for industry leaders to share best practices and explore the latest innovations. Whether it's leveraging AI for predictive maintenance or enhancing customer satisfaction through real-time data access, our events offer valuable opportunities for professionals to connect and drive transformation in their organizations.

To dive deeper into these insights and connect with peers who are shaping the future of field service, we invite you to visit us online, join us at our upcoming events and explore how you can apply these strategies to elevate your service delivery.

Maureen Azzato
Portfolio Director
FIELD SERVICE

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Executive Summary

This report presents key findings from a recent survey of field service leaders, offering insights into the current state and future trends shaping the industry. The data explores the impact of new technologies like AI, the evolving roles of service teams, and the growing importance of customer satisfaction and sustainability.

These results provide a valuable resource for field service leaders looking to understand current challenges and opportunities, and to stay competitive in this rapidly transforming sector.

About the Respondents

This report is based on a survey of 100 field service leaders. The respondents are senior leaders at companies that provide services in a variety of industries.

56%

Operations

22%

IT

22%

Service/Support

Most of the companies represented in the study make in annual revenue:

32%
$1 billion to $10 billion

25%
More than $10 billion

Key Insights

Among the respondents:

88%
increased asset uptime by 6-15%.

75%
improved first-time fix rates by 11-30%.

77%
see “good” speed-to-value on technology investments.

93%
have partially implemented AI.

68%
face data challenges when implementing AI.

91%
“somewhat agree” they have the tools to attract next-gen talent.

85%
use mobile apps with real-time data access.

66%
will adopt AI-enhanced customer portals in 12 months.

62%
will adopt AI-powered diagnostics in 12 months.

54%
currently measure customer satisfaction.

70%
have a “moderate integration” of sustainability practices.

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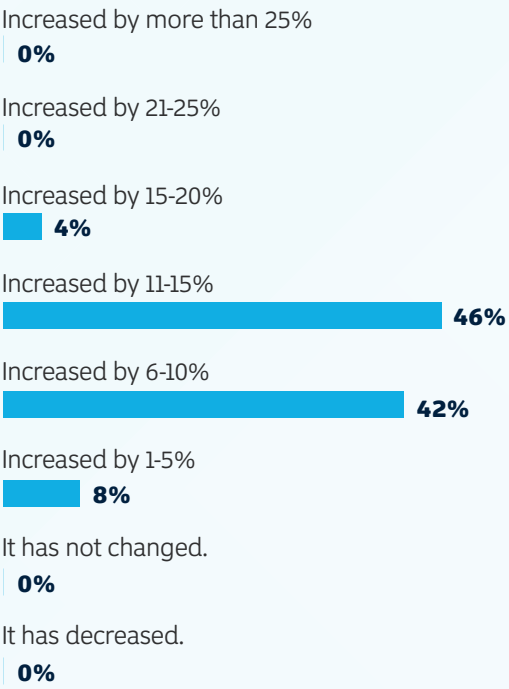
New Technologies and Service Models Improve Service Outcomes

The implementation of new field service solutions and technologies has led to significant improvements in multiple areas of field service. Although some of the gains have been relatively modest in metrics like average asset uptime and first-time fix rates, even small increases can result in significant improvements in customer satisfaction and revenue.

Most of the respondents (88% total) report an increase of 6-15% in average asset uptime over the past 12 months. Any increase in uptime means customers face fewer issues when using their assets. This can result in significantly fewer service calls, which reduces costs and improves the customer experience overall.

How has your organization's average asset uptime changed in the past 12 months due to the implementation of new field service solutions and technologies?



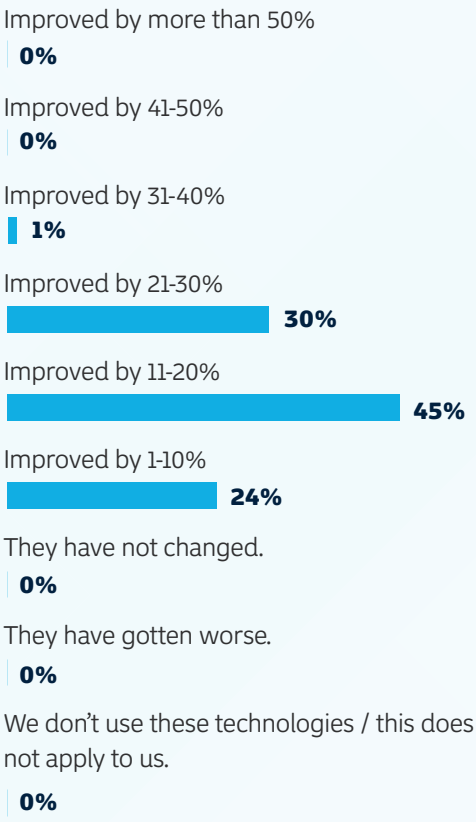
Remote diagnostic and assistance technologies have proven to be highly beneficial to first-time fix rates. Specifically, 75% of surveyed leaders indicate an 11-30% improvement in first-time fix rates due to these technologies.

This enhancement not only boosts efficiency but also reduces the need for multiple site visits, saving time and resources while improving customer experience.

Despite these advancements in remote and self-service, most service issues still require on-site intervention. At 55%, a slight majority of respondents state that only 1-10% of their service issues can be resolved through remote service or customer self-service, while 40% report a slightly higher range of 11-20%. These figures highlight the ongoing need for skilled field technicians while also indicating room for growth in remote service capabilities.

However, the prevalence and value of remote and self-service are set to change in the coming months. About half of the respondents (51%) anticipate that 11-20% of their service issues will be resolved

To what extent has the adoption of remote diagnostic and assistance technologies improved your first-time fix rates in the last 12 months?



remotely or through customer self-service within the next 12 months. That's an increase of 11%.

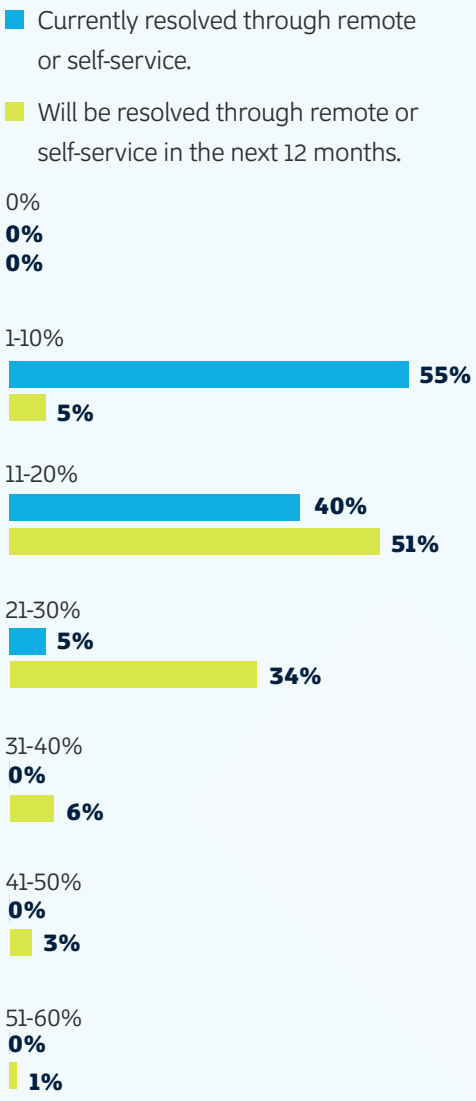
Notably, 34% of the respondents expect this figure to reach 31-40% in 12 months, an increase of 29%. This projected increase suggests a growing emphasis on developing and implementing remote service solutions, which could significantly alter field service operations and resource allocation.

It also suggests that deployments of new technologies and capabilities can generate value within the fiscal year if those implementations are effective.

Indeed, the respondents say the speed-to-value of recent technology investments is generally positive, with 77% rating their speed-to-value as "good." This indicates that they've witnessed returns within expected timeframes when investing in new field service technologies.

However, only 5% report "excellent" speed-to-value, or rapid returns on technology investments that exceed their expectations. While most organizations are seeing benefits from their investments, some are handling implementation

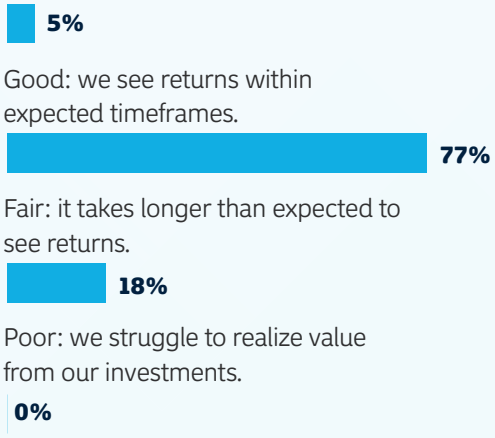
According to your estimation, what percentage of your service issues can currently be resolved through remote service or customer self-service, and what percentage will be resolved through remote service or customer self-service in the next 12 months?



and adoption more effectively than others. Companies that face integration challenges with legacy systems, internal resistance to change from stakeholders or ineffective technology strategies may fall behind competitors in the race to deliver new service capabilities.

Nonetheless, these results paint a positive picture of how technology is transforming field service. Most organizations are realizing the benefits they expected from their technology investments, and they anticipate more positive changes on the horizon. As this sector continues to evolve, organizations that effectively leverage these advancements are likely to gain a competitive edge through improved efficiency, customer satisfaction, and resource utilization.

How would you rate your organization's speed to value from recent technology investments?



> We provide value back to the customer through servitization, but this mindset must shift from simply selling products to offering a complete, reliable solution. By using technology, we monitor both the field and the machines to ensure maximum efficiency and uptime for our customers. No matter the service industry, it's all about understanding the machines and positioning them for success.
>
> **Danielle Waterworth, Vice President, NA AG, CNH Industrial, Field Service East 2024, Panel: "Data Enablement for Sale"**

Artificial Intelligence Impacts Multiple Areas of Field Service

Artificial intelligence (AI) is transforming the field service sector, with rising rates of adoption and significant impacts across multiple operational areas. The survey results reveal that while most organizations have begun implementing AI, there's still substantial room for growth. The next 12 months will likely be characterized by efforts to optimize this technology to enhance service delivery and operational efficiency.

A significant majority of field service leaders (93%) report that they have "partially" implemented artificial intelligence (AI) in their operations, indicating a formal and growing approach to AI adoption. Despite this high percentage, only 4% have implemented AI "extensively," suggesting that while many organizations recognize the potential of AI, comprehensive integration remains limited.

To what extent has your organization implemented AI in field service operations?

Extensively: We have taken a formal approach to AI adoption and it is prevalent in our field service organization.

4%

Partially: We have taken a formal approach to AI adoption and it is growing in its impact on our field service organization.

93%

Limited: We are beginning our formal approach to AI adoption but it is limited to only pilot projects.

3%

Not at all: We have only some informal internal use of AI tools or we are not using AI at all.

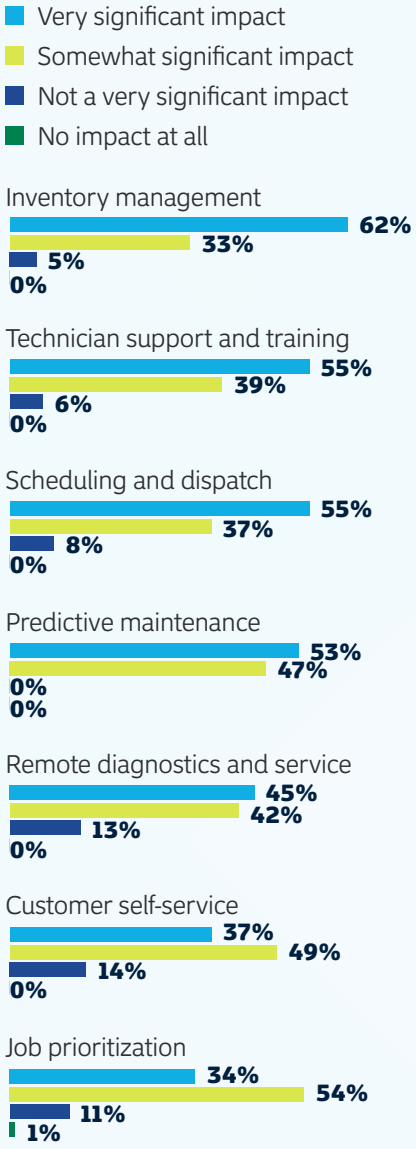
0%

This gap highlights an opportunity for companies to deepen their AI strategies to fully leverage its benefits across their operations.

Respondents anticipate that AI will have a very significant impact on several key areas within field service over the next 12 months. Notably, 62% believe that inventory management will benefit greatly from AI, which could lead to more efficient stock control and reduced operational costs. Additionally, 55% expect very significant improvements in technician support and training as AI tools enhance knowledge sharing and skill development, ultimately leading to better service delivery.

Scheduling and dispatch are also expected to see significant enhancements, with 55% of leaders recognizing the potential for AI to optimize these processes. For example, leveraging AI and telematics can help improve fleet efficiencies, while AI-enhanced scheduling software can lead to better resources allocation and reduced travel times for technicians. This not only improves productivity but has an impact on the employee experience.

In your view, how significant an industry-wide impact will artificial intelligence (AI) have on the following areas of field service over the next 12 months?

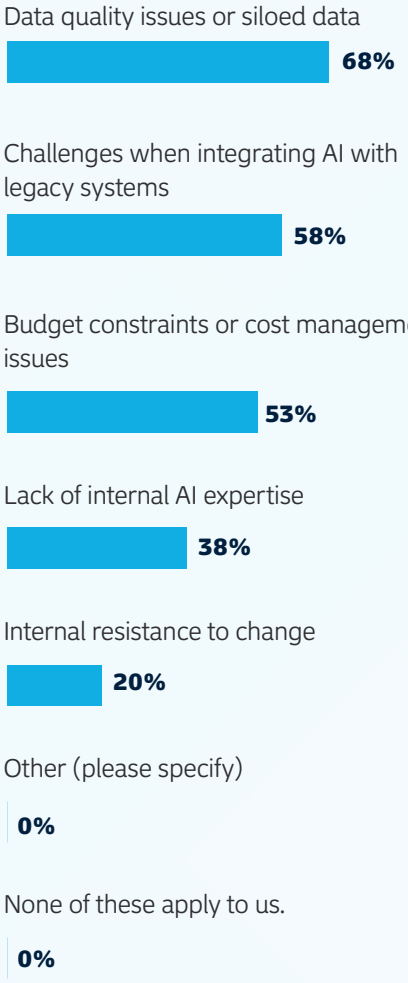


Furthermore, 53% of respondents believe predictive maintenance will be transformed by AI. Organizations have spent the past several years working toward this capability by implementing new analytics solutions, digital twin technologies, and data collection techniques. Artificial intelligence can be combined with these strategies to automatically identify equipment failures before they occur and recommend courses of action to prevent downtime in the first place.

In this way, AI-driven predictive maintenance will allow organizations to guarantee asset uptime for customers and even offer new and more valuable service models.

While the outlook on AI's impact is optimistic, respondents also face notable challenges in its implementation. This aligns with other research into generative AI adoption. For example, Deloitte found that 55-70% of organizations need 12 months or more to resolve AI adoption challenges.[1]

Which of the following challenges have you encountered in your efforts to implement AI over, resulting in reduced speed-to-value?



[1] "The State of Generative AI in the Enterprise: 2024 year-end Generative AI report." January 2025. Deloitte. https://www2.deloitte.com/content/dam/Deloitte/us/Documents/consulting/us-state-of-gen-ai-q4.pdf

Data quality issues or siloed data are a concern for 68% of leaders, pointing to the need for better data management practices to enable effective AI use. Although this is a common challenge in technology integration, addressing it often requires significant internal changes and a restructuring of the organization's data infrastructure. Many organizations are turning to cloud computing to address their silos as well as new data governance and cleaning processes.

Additionally, 58% report difficulties integrating AI with legacy systems, which can hinder the seamless adoption of new technologies. Common means of addressing this challenge include API integration, microservices architecture (breaking down applications into individual services), and data mapping techniques.

Finally, budget constraints or cost management issues affect 53% of respondents, indicating that financial considerations remain a critical factor in the pace of AI adoption. Demonstrating the ROI of AI investments is often critical for field service operations to unlock funds, so many organizations will start with "quick wins" and proven use cases of AI before expanding their adoption rate.

Overall, the findings illustrate that while many field service organizations are beginning to embrace AI, there is still considerable room for growth and improvement. By addressing data quality and integration challenges and investing in comprehensive AI strategies, companies can enhance their adoption rates and drive better service outcomes.

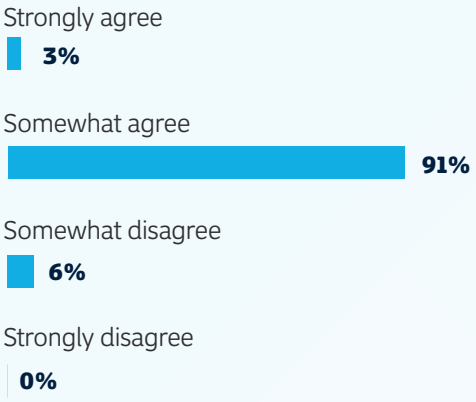
> As long as customers maintain access for us, our newer generation systems collect data every 10 milliseconds. This means that every event happening within the machine is transmitted to us. It took nearly 10 years to analyze and understand which data points truly matter because we were initially overwhelmed with information. Now, with our refined understanding, we can focus on the critical data, allowing us to proactively address issues before they become problems.
>
> **Patrick Dell, Field VP, AMS Service Operations, Varian Medical System, Field Service East 2024, Keynote: "Mobilizing Field Service Excellence"**

Service Teams Update Processes to Meet Next-Generation Needs

Field service organizations are making strides in adapting to evolving industry demands. AI and technology adoption will be critical drivers of future changes, as well as improvements to how organizations measure customer satisfaction. Importantly, field service teams are also reorienting their internal operations to attract the next generation of field service technicians.

A significant 91% of respondents "somewhat agree" that they have the necessary tools, technology, onboarding processes, and job benefits to attract and retain next-generation field service technicians. This high percentage suggests that companies are aware of the importance of modernizing their operations to attract talent, but they recognize that they could have more resources in place.

How much do you agree or disagree with the following statement: "We have the tools, technology, onboarding processes, and job benefits we need to attract and retain the next generation of field service technicians."



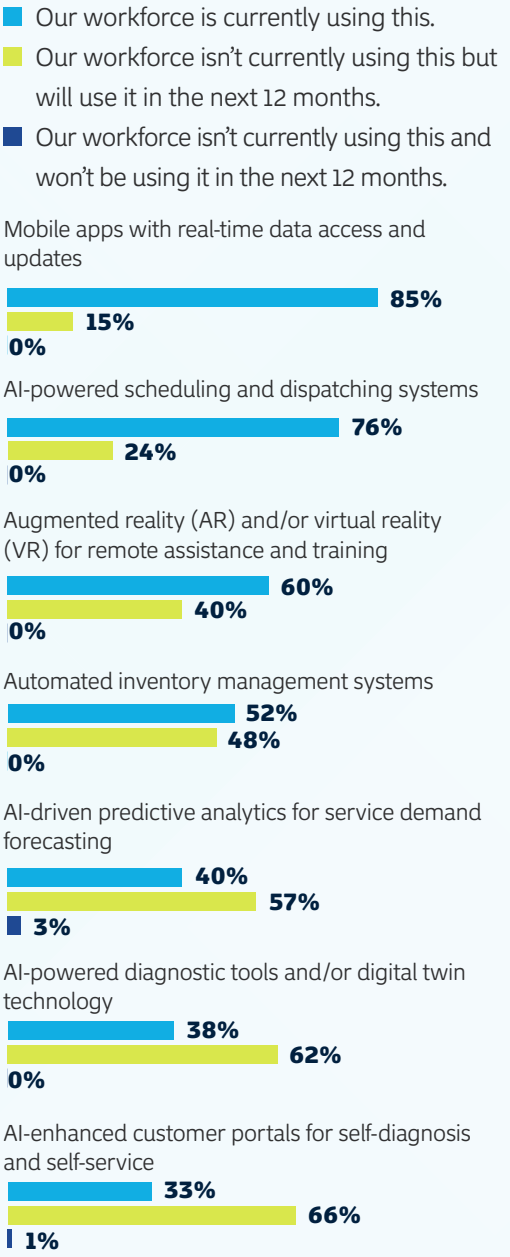
Many veteran technicians are aging out of the workforce and taking their experience with them, so it will be critical for field service leaders to find a way to save that knowledge and create workplaces that attract digital-first workers. This may require the integration of new mobile apps or knowledge capture solution among field technicians, as well as the implementation of AI cameras and telematics devices on fleet vehicles.

Thankfully, rates of technology adoption among field service workforces are promising.

Mobile apps with real-time data access and updates are the most widely used (85%), enabling technicians to stay informed and responsive. AI-powered scheduling and dispatch systems are already used by 76% of the respondents' workforces, suggesting a strong trend toward optimizing resource allocation.

Augmented reality (AR) or virtual reality (VR) for remote assistance and training has reached 60% adoption. This indicates a growing emphasis on innovative learning and support methods, especially the adoption of new self-service models.

Which of the following technologies and solutions is your field service workforce currently using, and which ones will they use in the next 12 months?



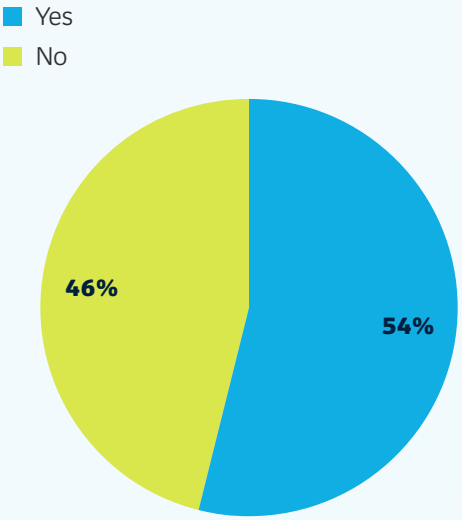
Finally, 52% of the respondent organizations use automated inventory management systems. These tools are helping to streamline supply chain operations, but the slow adoption rate suggests that organizations are focusing on other priorities first.

The results also tell us that the next 12 months are set to see a surge in AI-related technologies.

AI-enhanced customer portals for self-diagnostic and self-service are desired assets with 66% of respondents planning to implement them. This shift could significantly reduce the workload on technicians while empowering customers.

AI-powered diagnostic tools and digital twin technology are on the horizon for 62% of organizations, potentially transforming how technicians approach problem-solving. Lastly, AI-driven predictive analytics for service demand forecasting is planned by 57% of respondents, which could greatly enhance resource planning and efficiency.

Has your organization used some method to measure customer satisfaction with field service operations in the past 12 months?



Field service leaders also indicate that they are focusing more on customer satisfaction. This aligns with results that suggest companies are moving toward an uptime-as-a-service model of field service.

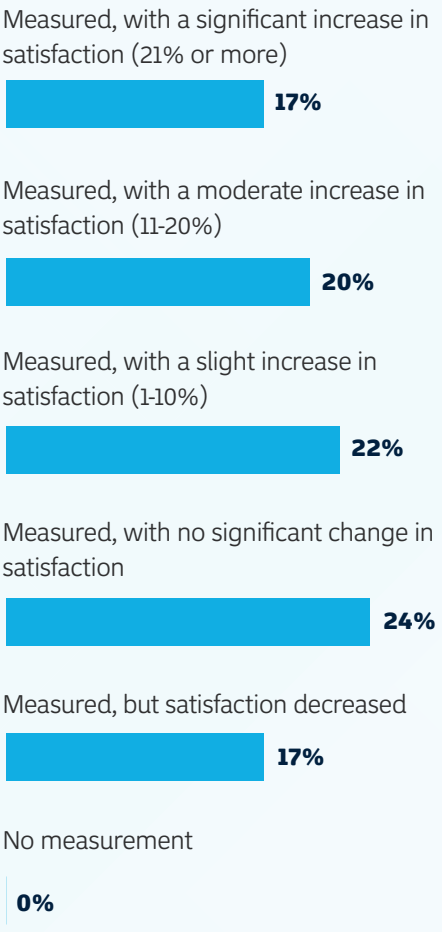
For example, customer satisfaction measurement is a priority for 54% of organizations, as they have employed at least some methods to gauge it in the past 12 months.

Among those measuring customer satisfaction, 59% report an increase over the past year, with 17% noting a significant increase of 21% or more. This positive trend suggests that many organizations' efforts to improve service quality through technology adoption are paying off.

Organizations that have seen increased customer satisfaction attribute it to various strategies, based on conversations with the respondents. These include implementing dedicated post-service follow-up, providing technicians with better data access, improving escalation processes for complex requests, and focusing on preventative measures.

However, some organizations have experienced stagnant or declining satisfaction. These respondents say this is due to challenges with new service tools, technical issues with service platforms, or changes that didn't resonate well with clients or internal stakeholders.

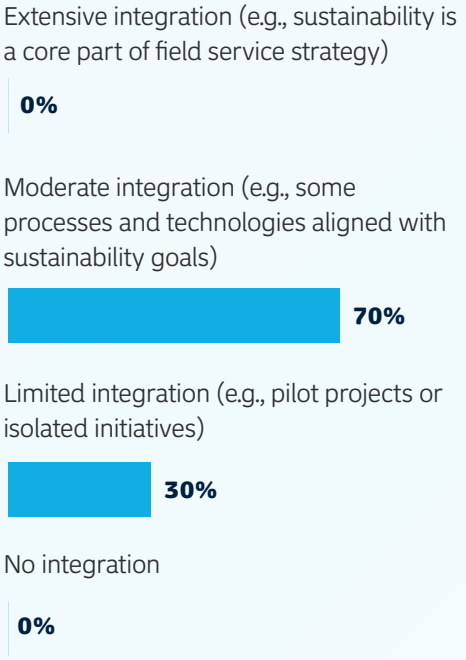
Since you said "yes," how has your customer satisfaction changed over the past 12 months?



Sustainability is also gaining traction in field service operations, with 70% of organizations reporting a "moderate integration" of sustainability practices over the past 12 months. While this shows a growing awareness of environmental concerns, the fact that sustainability is not yet a core part of most field service strategies indicates either a potential for further development in this area. Nonetheless, it also suggests that many organizations have a desire to focus on other priorities first.

Overall, these findings highlight the ongoing transformation in field service, with technology adoption, customer satisfaction, workforce transformation, and sustainability considerations shaping the industry's future. Organizations that continue to invest in these areas are likely to be better positioned to meet evolving customer expectations and operational challenges.

How has your organization integrated sustainability practices into field service operations over the past 12 months?



> We focus a lot on customer satisfaction by sending out surveys and asking for feedback, which is important and necessary. However, we don't spend enough time measuring internal satisfaction. This means asking our internal teams to evaluate their peers, as they are often leading indicators of customer satisfaction.
>
> **Cristy Gaudet, Karl Storz, Field Service East 2024, Keynote: "Extraordinary Moves by Ordinary People"**

Conclusion: Key Takeaways from the Current State of Field Service

The field service sector is currently marked by a significant push toward technology integration, with AI playing a pivotal role in reshaping operations. While many organizations have adopted AI to some extent, fully leveraging its potential remains a key challenge and opportunity. By strategically investing in AI and addressing challenges related to data and system integration, companies can unlock substantial gains in efficiency and service quality.

Looking ahead, AI-driven changes to service models will likely redefine how field service is delivered. From AI-enhanced customer portals to predictive analytics, these advancements promise to streamline processes and significantly enhance customer experiences.

As AI continues to evolve, it will be important for organizations to prioritize data quality, system compatibility, and talent development to stay ahead.

Internal efforts focused on training the next generation of technicians, improving customer satisfaction, and creating more streamlined processes are crucial for long-term success. By equipping technicians with the right tools and knowledge, focusing on customer feedback, and integrating sustainability into core strategies, companies can build more resilient and customer-centric operations.

These efforts will not only enhance revenue and reduce costs but also contribute to a more agile and customer-centric future for field service.

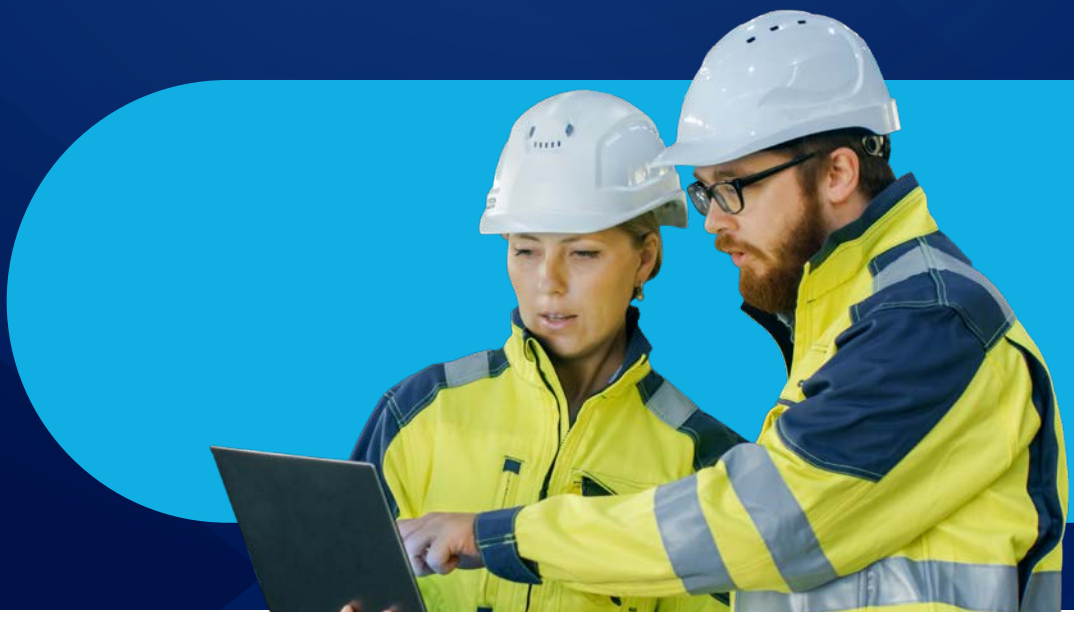
Key Suggestions

Prioritize investments in AI-driven technologies to optimize inventory management, enhance technician support, improve predictive maintenance, and promote safety. These investments will ensure your organization remains competitive and can meet evolving customer demands.

Address data quality and integration challenges before expanding on AI and technology adoption. Overcoming these challenges will enable easier integration, faster speed-to-value, and better service results.

Attract and retain the next-generation field service technicians by providing them with the necessary tools, technology, onboarding processes, and job benefits. Implementing technologies like AI cameras, telematics programs, AR tools, and automated scheduling solutions will ensure your workforce is equipped to handle the demands of modern field service operations.

Measure and act on customer satisfaction metrics, proactively address customer feedback, and continuously improve service processes. These strategies are essential for driving loyalty and positive outcomes, and they enable you to build stronger relationships with your customers.



About the Author

FIELD SERVICE INSIGHTS

Field Service Insights, the industry research and digital publishing arm of the Field Service conference series, delivers cutting-edge data and analysis on trends, challenges, and opportunities in the field service and customer support sectors. Through comprehensive research reports, webinars, and thought leadership initiatives, we empower senior-level field service leaders to make informed strategic decisions and stay ahead in the rapidly evolving service landscape.

Our deep industry intelligence not only informs field service leaders but also connects innovative solution providers with key decision-makers, fostering a dynamic ecosystem that drives the future of service excellence in the field service space.

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