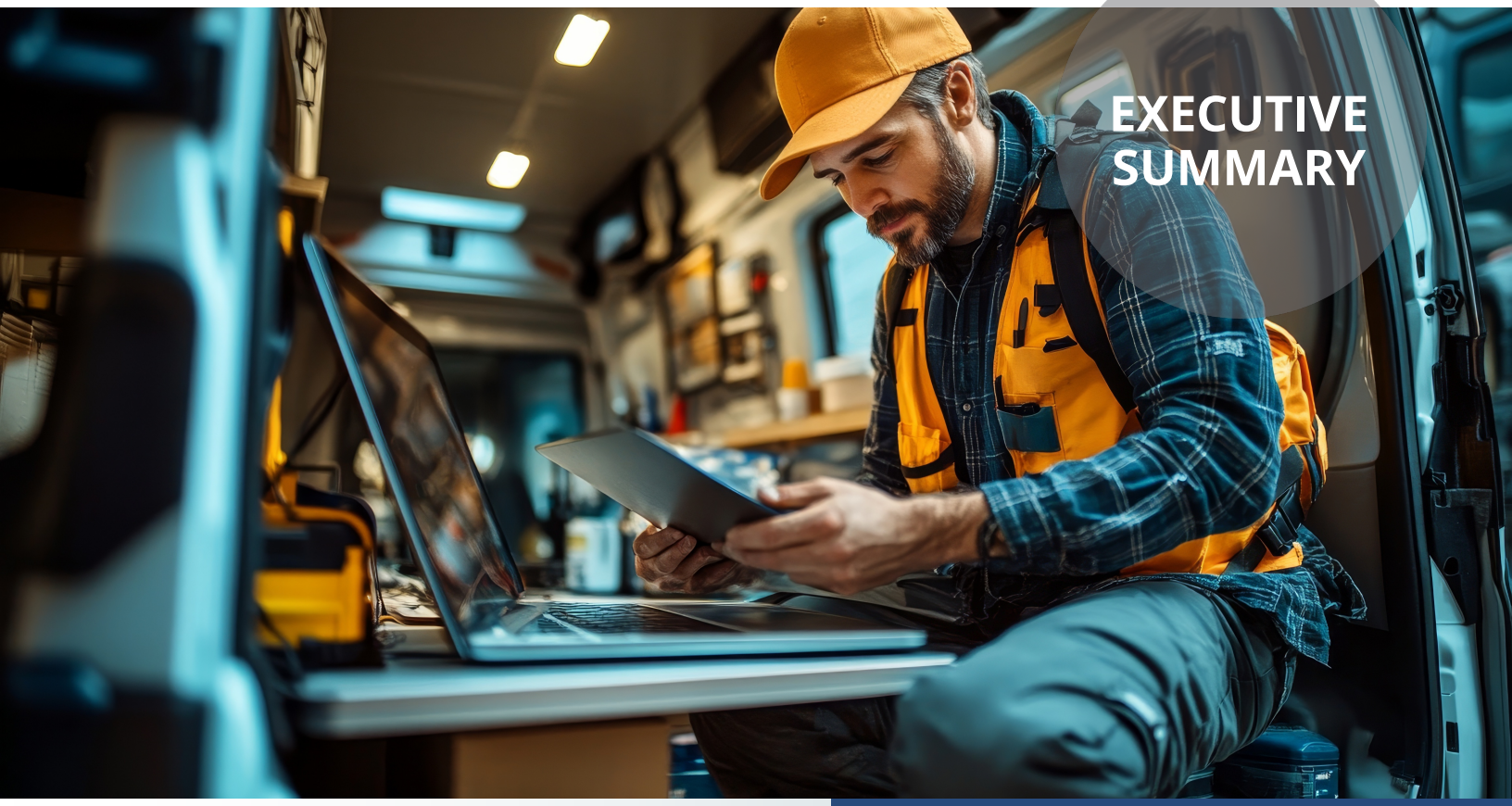
Field Service Management Buyers Guide

Software Provider and Product Assessment



ISG Research

Field Service Management

ISG Research defines field service management (FSM) as the practice of delivering technical support at the customer's site, as opposed to relying solely on remote communication channels such as phone or chat. This approach is critical in today's market, where enterprises are increasingly pressured to enhance customer experiences while minimizing costs. Field service is not merely about dispatching workers; it's a complex orchestration that involves optimizing processes and automating as much of the workflow as possible.

The history of field service management dates back several decades, originating in industries that required on-site technical support, such as telecommunications, utilities and manufacturing. Initially, FSM operations required manual processes, with paper-based systems for tracking service requests, work orders and technician assignments. This approach was often cumbersome and slow, leading to inefficiencies and operational challenges. The introduction of basic scheduling software and mobile communications allowed for more efficient dispatching and communication between technicians and the central office.

As technology advanced, particularly with the rise of mobile devices and cloud computing, field service management also evolved. Early software solutions integrated functionalities such as real-time communication, GPS tracking and comprehensive customer relationship management (CRM) tools. This integration streamlined operations and enhanced the ability to gather and analyze data, leading to improved decision-making and resource allocation. The more recent advent of the Internet of Things (IoT) has further changed approaches to FSM by enabling remote monitoring and predictive maintenance, allowing technicians to address issues proactively rather than reactively.

Today, FSM is characterized by its focus on mobility, automation and data-driven decision-making.

Today, FSM is characterized by its focus on mobility, automation and data-driven decision-making. Enterprises are increasingly adopting advanced technologies like artificial intelligence and machine learning to optimize operations, forecast maintenance needs, and improve customer experience. The evolution of field service management reflects a broader shift in how businesses engage with customers, moving from reactive support to proactive service delivery, aiming to enhance value and maintain competitive advantage in an increasingly demanding marketplace.

Enterprises often look at field service operations as extensions of contact centers and look to those contact center platforms to manage the process. As dedicated FSM tools have developed, they differ from those used for traditional service in several key areas. FSM tools are less focused on managing incoming customer communications than facilitating

continuous dialogue between customers and technicians enroute and between technicians and the organization's information resources.

Everything in field service is focused on mobility: the movement of people and assets from place to place, tracking them and optimizing their deployment. Field service management systems focus on controlling scheduling and communicating updates to everyone involved. Mobile applications are essential in providing remote technicians with technical data, product catalogs, customer histories and information on service-level agreements and warranties. For customers, mobile apps offer communication capabilities and sometimes the ability to upload media (such as photos or videos), with both apps potentially supporting augmented reality functions for enhanced service delivery.

The ongoing revolution in data and AI tools has allowed FSM developers to build more sophisticated applications that allow for finer control of the many variables involved in sending out remote teams. By 2028, two-thirds of enterprises will be using AI to coordinate and optimize processes for scheduling the dispatch and workflow of field service technical teams. Contemporary systems can harness much deeper knowledge resources and company data pools to provide service that is timely, accurate and—from the end customer's perspective—seamless. Many tools can predict when certain types of service or maintenance will be needed and potentially alert the customer to that need.

When evaluating field service management tools, enterprises should consider several factors. The first step is to assess the scalability and flexibility of the software, ensuring it can accommodate the current volume of operations while allowing for future growth. Integration capabilities are also important; the FSM tool should seamlessly connect with CRM, ERP and inventory management systems to facilitate a unified workflow. Finally, enterprises should prioritize mobile functionality, enabling technicians to access real-time information and communicate effectively in the field.

The stakes are very high in this arena. Customer expectations for on-site service are higher than for standard interactions. In B2B contexts, the success or failure of field service on critical systems can have profound effects on an enterprise's operations and profits. Consumers also experience field service as a test of an organization's basic competence. Building a modern field service operation requires an FSM platform that arms workers with precise information and necessary parts and tools, all within a very narrow timeframe.

The ISG Buyers Guide™ for Field Service Management evaluates software providers and products in key areas, including support for mobile applications, mobile workforce

management, scheduling and dispatch optimization, work order and asset management, customer engagement and experience, automation and AI integration, data and analytics, knowledge management, predictive maintenance and proactive service.

This research evaluates the following software providers that offer products that address key elements of field service management as we define it: Comarch, CSG, Epicor, FSM Global, IBM, IFS, Infor, Kapture CX, Microsoft, Nomadia, Odoo, Oracle, Oracle NetSuite, OverIT, Praxedo, PTC, Salesforce, SAP, ServiceNow, ServicePower, ServiceTitan, Simpro and Syncron.

Buyers Guide Overview

For over two decades, ISG Research has conducted market research in a spectrum of areas across business applications, tools and technologies. We have designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of the business requirements in any enterprise. Utilization of our research methodology and decades of experience enables our Buyers Guide to be an effective method to assess and select software providers and products. The findings of this research undertaking contribute to our comprehensive approach to rating software providers in a manner that is based on the assessments completed by an enterprise.

> **ISG Research has designed the Buyers Guide to provide a balanced perspective of software providers and products that is rooted in an understanding of business requirements in any enterprise.**

The ISG Buyers Guide™ for Field Service Management is the distillation of over a year of market and product research efforts. It is an assessment of how well software providers' offerings address enterprises' requirements for field service management software. The index is structured to support a request for information (RFI) that could be used in the request for proposal (RFP) process by incorporating all criteria needed to evaluate, select, utilize and maintain relationships with software providers. An effective product and customer experience with a provider can ensure the best long-term relationship and value achieved from a resource and financial investment.

In this Buyers Guide, ISG Research evaluates the software in seven key categories that are weighted to reflect buyers' needs based on our expertise and research. Five are product-experience related: Adaptability, Capability, Manageability, Reliability, and Usability. In addition, we consider two customer-experience categories: Validation, and Total Cost of Ownership/Return on Investment (TCO/ROI). To assess functionality, one of the components of Capability, we applied the ISG Research Value Index methodology and blueprint, which links the personas and processes for field service management to an enterprise's requirements.

The structure of the research reflects our understanding that the effective evaluation of software providers and products involves far more than just examining product features, potential revenue or customers generated from a provider's marketing and sales efforts. We believe it is important to take a comprehensive, research-based approach, since making the wrong choice of field service management technology can raise the total cost of ownership, lower the return on investment and hamper an enterprise's ability to reach its full performance potential. In addition, this approach can reduce the project's development and

deployment time and eliminate the risk of relying on a short list of software providers that does not represent a best fit for your enterprise.

ISG Research believes that an objective review of software providers and products is a critical business strategy for the adoption and implementation of field service management software and applications. An enterprise's review should include a thorough analysis of both what is possible and what is relevant. We urge enterprises to do a thorough job of evaluating field service management systems and tools and offer this Buyers Guide as both the results of our in-depth analysis of these providers and as an evaluation methodology.

How To Use This Buyers Guide

Evaluating Software Providers: The Process

We recommend using the Buyers Guide to assess and evaluate new or existing software providers for your enterprise. The market research can be used as an evaluation framework to establish a formal request for information from providers on products and customer experience and will shorten the cycle time when creating an RFI. The steps listed below provide a process that can facilitate best possible outcomes.

1. Define the business case and goals.
   Define the mission and business case for investment and the expected outcomes from your organizational and technological efforts.
2. Specify the business needs.
   Defining the business requirements helps identify what specific capabilities are required with respect to people, processes, information and technology.
3. Assess the required roles and responsibilities.
   Identify the individuals required for success at every level of the enterprise from executives to frontline workers and determine the needs of each.
4. Outline the project's critical path.
   What needs to be done, in what order and who will do it? This outline should make clear the prior dependencies at each step of the project plan.
5. Ascertain the technology approach.
   Determine the business and technology approach that most closely aligns to your enterprise's requirements.
6. Establish software provider evaluation criteria.
   Utilize the product experience: Adaptability, Capability, Manageability, Reliability and Usability, and the customer experience in TCO/ROI and Validation.
7. Evaluate and select the technology properly.
   Weight the categories in the technology evaluation criteria to reflect your enterprise's priorities to determine the short list of software providers and products.
8. Establish the business initiative team to start the project.
   Identify who will lead the project and the members of the team needed to plan and execute it with timelines, priorities and resources.

The Findings

All of the products we evaluated are feature-rich, but not all the capabilities offered by a software provider are equally valuable to types of workers or support everything needed to manage products on a continuous basis. Moreover, the existence of too many capabilities may be a negative factor for an enterprise if it introduces unnecessary complexity. Nonetheless, you may decide that a larger number of features in the product is a plus, especially if some of them match your enterprise's established practices or support an initiative that is driving the purchase of new software.

Factors beyond features and functions or software provider assessments may become a deciding factor. For example, an enterprise may face budget constraints such that the TCO evaluation can tip the balance to one provider or another. This is where the Value Index methodology and the appropriate category weighting can be applied to determine the best fit of software providers and products to your specific needs.

Overall Scoring of Software Providers Across Categories

The research finds ServiceNow atop the list, followed by Salesforce and Oracle. Providers that place in the top three of a category earn the designation of Leader. ServiceNow, Salesforce and Oracle have done so in seven categories.

The overall representation of the research below places the rating of the Product Experience and Customer Experience on the *x* and *y* axes, respectively, to provide a visual representation and classification of the software providers. Those providers whose Product Experience have a higher weighted performance to the axis in aggregate of the five product categories place farther to the right, while the performance and weighting for the two Customer Experience categories determines placement on the vertical axis. In short, software providers that place closer to the upper-right on this chart performed better than those closer to the lower-left.

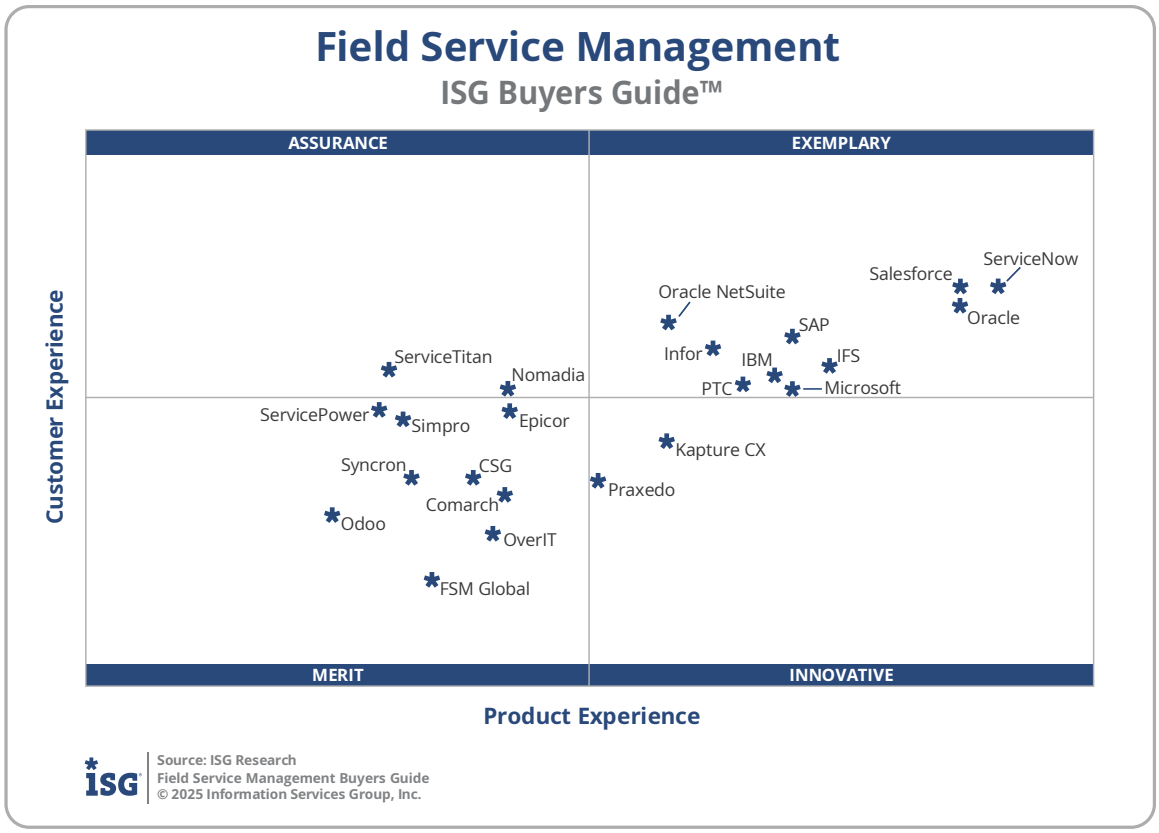
The research places software providers into one of four overall categories: Assurance, Exemplary, Merit or Innovative. This representation classifies providers' overall weighted performance.

Field Service Management

Overall

Providers	Grade	Performance
ServiceNow	A-	*Leader* 83.1%
Salesforce	A-	*Leader* 81.6%
Oracle	B++	*Leader* 81.1%
IFS	B+	73.7%
SAP	B+	73.6%
Microsoft	B+	71.8%
IBM	B+	70.7%
PTC	B+	70.3%
Infor	B	68.7%
Oracle NetSuite	B	67.9%
Kapture CX	B	63.8%
Praxedo	B-	60.1%
Nomadia	B-	59.9%
Epicor	B-	59.1%
Comarch	B-	57.7%
OverIT	C++	55.3%
CSG	C++	55.2%
ServiceTitan	C++	54.8%
ServicePower	C++	54.6%
Simpro	C++	53.7%
Syncron	C++	53.3%
FSM Global	C++	51.8%
Odoo	C+	46.2%

Source: ISG Research
Field Service Management Buyers Guide



Exemplary: The categorization and placement of software providers in Exemplary (upper right) represent those that performed the best in meeting the overall Product and Customer Experience requirements. The providers rated Exemplary are: IBM, IFS, Infor, Microsoft, Oracle, Oracle NetSuite, PTC, Salesforce, SAP and ServiceNow.

Innovative: The categorization and placement of software providers in Innovative (lower right) represent those that performed the best in meeting the overall Product Experience requirements but did not achieve the highest levels of requirements in Customer Experience. The providers rated Innovative are: Kapture CX and Praxedo.

Assurance: The categorization and placement of software providers in Assurance (upper left) represent those that achieved the highest levels in the overall Customer Experience requirements but did not achieve the highest levels of Product Experience. The providers rated Assurance are: Nomadia and ServiceTitan.

Merit: The categorization of software providers in Merit (lower left) represents those that did not exceed the median of performance in Customer or Product Experience or surpass the threshold for the other three categories. The providers rated Merit are: Comarch, CSG, Epicor, FSM Global, Odoo, OverIT, ServicePower, Simpro and Syncron.

We warn that close provider placement proximity should not be taken to imply that the packages evaluated are functionally identical or equally well suited for use by every enterprise

or for a specific process. Although there is a high degree of commonality in how enterprises handle field service management, there are many idiosyncrasies and differences in how they do these functions that can make one software provider's offering a better fit than another's for a particular enterprise's needs.

We advise enterprises to assess and evaluate software providers based on organizational requirements and use this research as a supplement to internal evaluation of a provider and products.

Product Experience

The process of researching products to address an enterprise's needs should be comprehensive. Our Value Index methodology examines Product Experience and how it aligns with an enterprise's life cycle of onboarding, configuration, operations, usage and maintenance. Too often, software providers are not evaluated for the entirety of the product; instead, they are evaluated on market execution and vision of the future, which are flawed since they do not represent an enterprise's requirements but how the provider operates. As more software providers orient to a complete product experience, evaluations will be more robust.

The research results in Product Experience are ranked at 80%, or four-fifths, of the overall rating using the specific underlying weighted category performance. Importance was placed on the categories as follows: Usability (15%), Capability (25%), Reliability (15%), Adaptability (10%) and Manageability (15%). This weighting impacted the resulting overall ratings in this research. ServiceNow, Oracle and Salesforce were designated Product Experience Leaders.

Field Service Management

Product Experience

Providers	Grade	Performance
ServiceNow	A-	*Leader* 66.4%
Oracle	B++	*Leader* 64.9%
Salesforce	B++	*Leader* 64.9%
IFS	B+	59.2%
SAP	B+	58.2%
Microsoft	B+	58.1%
IBM	B+	57.5%
PTC	B+	56.2%
Infor	B	55.0%
Oracle NetSuite	B	53.2%
Kapture CX	B	53.1%
Praxedo	B-	50.0%
Epicor	B-	46.8%
Nomadia	B-	46.6%
Comarch	B-	46.6%
OverIT	B-	46.1%
CSG	B-	45.3%
FSM Global	C++	43.6%
Syncron	C++	42.8%
Simpro	C++	42.5%
ServiceTitan	C++	42.0%
ServicePower	C++	41.5%
Odoo	C+	39.7%

Source: ISG Research
Field Service Management Buyers Guide

Customer Experience

The importance of a customer relationship with a software provider is essential to the actual success of the products and technology. The advancement of the Customer Experience and the entire life cycle an enterprise has with its software provider is critical for ensuring satisfaction in working with that provider. Technology providers that have chief customer officers are more likely to have greater investments in the customer relationship and focus more on their success. These leaders also need to take responsibility for ensuring this commitment is made abundantly clear on the website and in the buying process and customer journey.

The research results in Customer Experience are ranked at 20%, or one-fifth, using the specific underlying weighted category performance as it relates to the framework of commitment and value to the software provider-customer relationship. The two evaluation categories are Validation (10%) and TCO/ROI (10%), which are weighted to represent their importance to the overall research.

The software providers that evaluated the highest overall in the aggregated and weighted Customer Experience categories are ServiceNow, Salesforce and Oracle. These category leaders best communicate commitment and dedication to customer needs.

Software providers that did not perform well in this category were unable to provide sufficient customer case studies to demonstrate success or articulate their commitment to customer experience and an enterprise's journey. The selection of a software provider means a continuous investment by the enterprise, so a holistic evaluation must include examination of how they support their customer experience.

Field Service Management

Customer Experience

Providers	Grade	Performance
ServiceNow	A-	*Leader* 17.2%
Salesforce	A-	*Leader* 17.0%
Oracle	A-	*Leader* 16.9%
Oracle NetSuite	B++	16.1%
SAP	B++	15.7%
Infor	B++	15.3%
IFS	B+	14.7%
ServiceTitan	B+	14.6%
IBM	B+	14.3%
PTC	B+	14.1%
Nomadia	B	13.7%
Microsoft	B	13.7%
ServicePower	B	13.3%
Epicor	B	13.3%
Simpro	B	13.0%
Kapture CX	B-	12.3%
CSG	C++	11.1%
Syncron	C++	11.1%
Praxedo	C++	11.0%
Comarch	C++	10.6%
Odoo	C+	9.9%
OverIT	C+	9.3%
FSM Global	C	7.8%

Source: ISG Research
Field Service Management Buyers Guide

Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Field Service Management in 2025, a software provider must be in good standing financially and ethically, have at least $20 million in annual or projected revenue verified using independent sources, more than 50 workers, sell products and provide support on at least two regions, and have at least 25 customers. The principal source of the relevant business unit's revenue must be software-related, and there must have been at least one major software release in the last 12 months.

Field service management systems must include support for mobile applications used by technicians in the field, mobile workforce management, scheduling and dispatch optimization, work order and asset management. The software should also support customer engagement and experience functions, automation and AI, data and analytics, knowledge management tools and proactive service delivery.

The research is designed to be independent of the specifics of software provider packaging and pricing. To represent the real-world environment in which businesses operate, we include providers that offer suites or packages of products that may include relevant individual modules or applications. If a software provider is actively marketing, selling and developing a product for the general market and it is reflected on the provider's website that the product is within the scope of the research, that provider is automatically evaluated for inclusion.

All software providers that offer relevant field service management products and meet the inclusion requirements were invited to participate in the evaluation process at no cost to them.

Software providers that meet our inclusion criteria but did not completely participate in our Buyers Guide were assessed solely on publicly available information. As this could have a significant impact on classification and ratings, we recommend additional scrutiny when evaluating those providers.

Products Evaluated

Provider	Product Names	Version	Release Month/Year
Comarch	Comarch FSM	N/A	February 2025
CSG	CSG Field Service Management	N/A	February 2025
Epicor	Epicor Field Service Management	N/A	February 2025
FSM Global	FSM Grid	2.0	December 2024
IBM	IBM Maximo Field Service Management	Maximo Application Suite 9.0.6	December 2024
IFS	IFS Field Service Management	6 update 30	August 2024
Infor	Cloudsuite Field Service	N/A	February 2025
Kapture CX	Kapture Frontline	N/A	February 2025
Microsoft	Dynamics 365 Field Service	8.8.131.79	November 2024
Nomadia	Nomadia Field Service	1.6.0	January 2025
Odoo	Odoo Field Service	18.0	October 2024
Oracle	Oracle Fusion Field Service	24B	April 2024
Oracle NetSuite	NetSuite Field Service Management	2024.08.5	August 2024
OverIT	Nextgen FSM	Nextgen Platform 2024 Wave Three	February 2025
Praxedo	Field Service Management	N/A	February 2025
PTC	ServiceMax	Core 24.2	December 2024
Salesforce	Agentforce for Field Service	Spring '25	December 2024
SAP	Field Service Management	2411	November 2024

ServiceNow	Field Service Management	Xanadu	August 2024
ServicePower	Field Service Management	N/A	February 2025
ServiceTitan	Field Service Management	Fall 2024 Release (ST-71)	September 2024
Simpro	Simpro Mobile	13.3	February 2025
Syncron	SLM Platform	N/A	February 2025

Providers of Promise

We did not include software providers that, as a result of our research and analysis, did not satisfy the criteria for inclusion in this Buyers Guide. These are listed below as "Providers of Promise."

Provider	Product	Revenue	Customers	Functionality
FieldAware	FieldAware	No	Yes	No
Fieldcode	Fieldcode	No	Yes	No
Frontu	Frontu	No	Yes	No
Gomocha	Gomocha Field Service Platform	No	Yes	No
Innosoft	Innosoft Field Service Management	No	Yes	No
Mobile Reach	Field Service Management for BMC Helix	No	Yes	No
MSI Data	Service Pro	No	Yes	No
Retriever Comm	Retriever Field Service	No	Yes	No
WennSoft	Wennsoft Signature	No	Yes	No
Atheer	Atheer Technician Co-Pilot	No	Yes	No
KloudGin	KloudGin Field and Asset Operating System	No	Yes	No

About ISG Software Research and Advisory

ISG Software Research and Advisory provides market research and coverage of the technology industry, informing enterprises, software and service providers, and investment firms. The ISG Buyers Guides provide insight on software categories and providers that can be used in the RFI/RFP process to assess, evaluate and select software providers.

About ISG Research

ISG Research provides subscription research, advisory, consulting and executive event services focused on market trends and disruptive technologies. ISG Research delivers guidance that helps businesses accelerate growth and create more value. For further information about ISG Research subscriptions, please visit research.isg-one.com.

About ISG

ISG (Nasdaq: III) is a global AI-centered technology research and advisory firm. A trusted partner to more than 900 clients, including 75 of the world's top 100 enterprises, ISG is a long-time leader in technology and business services sourcing that is now at the forefront of leveraging AI to help organizations achieve operational excellence and faster growth. The firm, founded in 2006, is known for its proprietary market data, in-depth knowledge of provider ecosystems, and the expertise of its 1,600 professionals worldwide working together to help clients maximize the value of their technology investments.