Manufacturing Field Service Buyers Guide

Software Provider and Product Assessment

ISG Research

Manufacturing Field Service

The manufacturing industry is continuously under pressure to streamline its product and supply chain cycles to maximize efficiency while simultaneously meeting cost, profitability and customer expectations. Equipment and product manufacturers are also expected to provide maintenance, repair and operational services promptly to meet customer needs. It is essential that field service teams, as well as those who support manufacturing functions, are efficient and responsive in addressing and resolving customer issues.

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

The history of field service management dates back more than several decades when manufacturers need to maintain or repair equipment. 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 of a manufacturer.

As technology advanced, particularly with the rise of mobile devices and cloud computing, field service for manufacturers has evolved. Early software solutions integrated functionalities such as real-time communication, GPS tracking and comprehensive customer service 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 for manufacturers with enabling remote monitoring and predictive maintenance, allowing technicians to address issues proactively rather than reactively.

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Today, manufacturing field service 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 along with analytics to optimize operations, forecast maintenance needs, and improve customer experience. The evolution of field service management in manufacturing reflects a broader shift in how manufactures engage with customers, moving from reactive support to proactive service

delivery, aiming to enhance value and maintain competitive advantage in an increasingly demanding marketplace.

Manufacturers often look at field service operations as extensions of customer service and look to those applications and platforms to manage the process. As dedicated field service systems have developed, they differ from those used for traditional service in several key areas. FSM has moved beyond just managing schedules and time tracking to and support the workflow and orchestration of a continuous dialogue between customers, en route technicians and the manufacturers operations centers.

For manufacturers, 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 of manufacturers, 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, like those found in more recent agentic AI offerings, has allowed manufactures 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, manufacturers 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 and continuous operations of products purchased 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 Manufacturing Field Service 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, along with specific needs of manufacturers.

This research evaluates the following software providers that offer products that address key elements of manufacturing field service as we define it: FSM Global, IBM, IFS, Kapture CX, Oracle, PTC and Salesforce.

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.

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The ISG Buyers Guide™ for Manufacturing Field Service 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 manufacturing field service 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 manufacturing field service 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 manufacturing field service 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 manufacturing field service 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 manufacturing field service 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 Salesforce atop the list, followed by Oracle and IFS. Providers that place in the top three of a category earn the designation of Leader. Salesforce and Oracle have done so in seven categories, IFS in five and IBM and PTC in one category.

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.

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Overall

Providers	Grade	Performance
Salesforce	B++	*Leader* 80.4%
Oracle	B++	*Leader* 79.8%
IFS	B+	*Leader* 73.3%
IBM	B+	71.6%
PTC	B+	70.2%
Kapture CX	B-	61.7%
FSM Global	C++	51.3%

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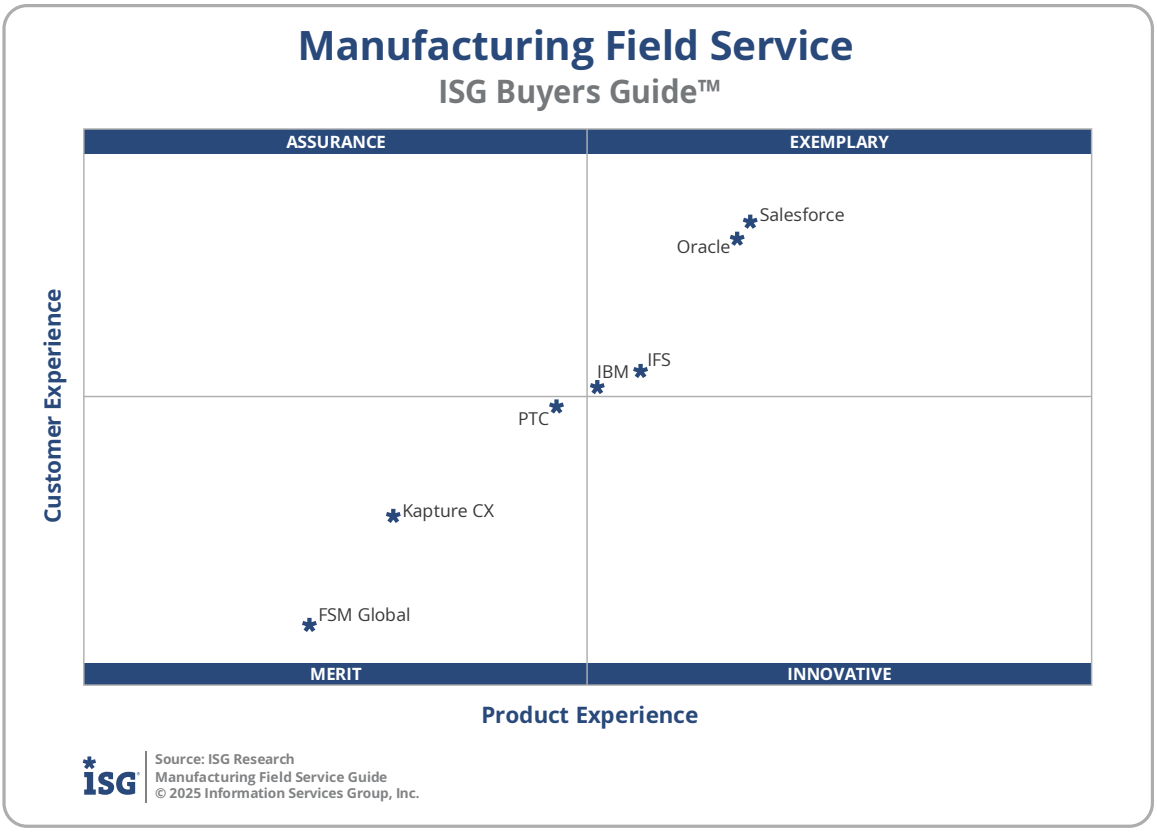
Source: ISG Research
Manufacturing Field Service Buyers Guide

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



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, Oracle and Salesforce.

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.

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.

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: FSM Global, Kapture CX and PTC.

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 manufacturing field service, 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.

Manufacturing Field Service

Product Experience

Providers	Grade	Performance
Salesforce	B++	*Leader* 63.0%
Oracle	B++	*Leader* 62.6%
IFS	B+	*Leader* 58.1%
IBM	B+	57.1%
PTC	B+	55.8%
Kapture CX	B-	48.8%
FSM Global	C++	43.7%

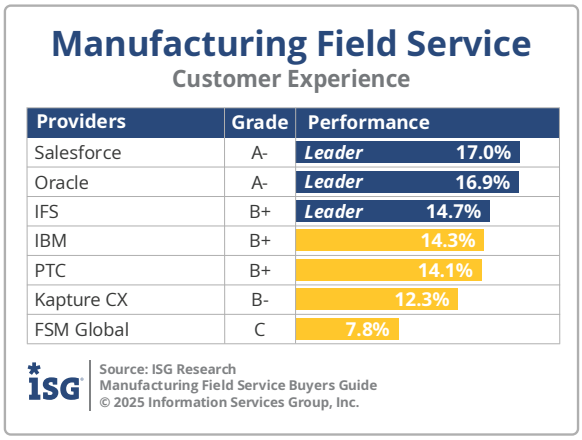
Source: ISG Research
Manufacturing Field Service Buyers Guide

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 (35%), Reliability (10%), Adaptability (10%) and Manageability (10%). This weighting impacted the resulting overall ratings in this research. Salesforce, Oracle and IFS were designated Product Experience Leaders.

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 Salesforce, Oracle and IFS. 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.

Appendix: Software Provider Inclusion

For inclusion in the ISG Buyers Guide™ for Manufacturing Field Service 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 in 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 software needs to specifically support the manufacturing industry with functionality designed for this industry.

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 manufacturing field service 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
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	v.6 update 30	August 2024
Kapture CX	Kapture Frontline	v.2024	February 2025
Oracle	Oracle Fusion Field Service	v.24B	April 2024
PTC	ServiceMax	Core 24.2	December 2024
Salesforce	Agentforce	Spring '25	December 2024

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	Geography	Customers	Industry Functionality
Infor	Cloudsuite Field Service	Yes	Yes	Yes	No
Microsoft	Dynamics 365 Field Service	Yes	Yes	Yes	No
Oracle NetSuite	NetSuite Field Service Management	Yes	Yes	Yes	No
PTC	ServiceMax	Yes	Yes	Yes	No
SAP	Field Service Management	Yes	Yes	Yes	No
ServiceNow	Field Service Management	Yes	Yes	Yes	No
ServicePower	Field Service Management	Yes	Yes	Yes	No
ServiceTitan	Field Service Management	Yes	Yes	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

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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.