

Magic Quadrant for Field Service Management

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Vendors' positions in this Magic Quadrant reflect clients' expectations in areas like augmented-reality-enabled customer collaboration, knowledge harvesting, AI-driven quality control and customer self-service. When assessing vendors, seek proof of improved technician-supported business outcomes.

This Magic Quadrant is related to other research:

[Critical Capabilities for Field Service Management](#)

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Additional Perspectives

- [フィールド・サービス管理のマジック・クアドラント](#)
(17 November 2021)

Market Definition/Description

Gartner defines field service management (FSM) as a discrete market within the broader customer service and support software market. Field service providers (FSPs) typically dispatch technicians to remote locations to provide installation, repair or maintenance services for equipment or systems. They may manage, maintain and monitor these assets under a predefined service or maintenance contract.

Gartner's view of the FSM market is focused on transformational technologies and approaches to meeting the future needs of end users. It is not focused on the market as it is today.

FSM technologies must:

- **Manage demand and customer experience (CX):** They handle the receipt of work requests from external sources, such as customers (through multiple self- and assisted service channels), Internet of Things (IoT) connections and service-brokering networks. They also import work requests from internal systems such as ticketing, maintenance, repair and operations (MRO), product life cycle management, application performance monitoring (APM), long-cycle project management, and enterprise asset management (EAM) systems.
- **Plan work:** They offer skills-based workload balancing, forecasting of shift requirements, schedule optimization and routing for short- and long-cycle work requests. They also offer SLAs and cost prioritization, parts demand planning and purchasing, contracted or contingent third-party service provider management, customer approval coordination, and geographic information system (GIS)-based planning.
- **Inform and enable technicians:** They do this via apps on mobile and wearable devices for Global Positioning System (GPS) tracking, telematics, equipment work history, real-time service collaboration, customer communication, knowledge management integration and work instruction management, inspections, safety forms, parts sourcing, and customer quoting. Organizations provide remote expert guidance for technicians and customers in the field through multimodal service support user experiences (UXs) via, for example, remote video and augmented reality (AR)-based communications systems, IoT visualizations, and chatbots (see [Transcend Omnichannel Thinking and Embrace Multiexperience for Improved Customer Experience](#)).
- **Debrief work orders:** They enable online or offline mobile collection of time and parts used, tasks completed, updates to equipment records, site evidence, customer recommendations, signoffs, approvals for additional work, and satisfaction surveys.
- **Perform invoicing, analytics and integration:** They enable preparation of pro forma invoices, which are supplemented by tax and landed cost calculations, and general ledger distribution calculations that often happen after reaching the ERP system. They also provide field service performance management reports and dashboards, predictive analytics, intelligent business process management (workflows), alerts and notifications, and APIs and connectors for ERP, CRM and GIS application integration.

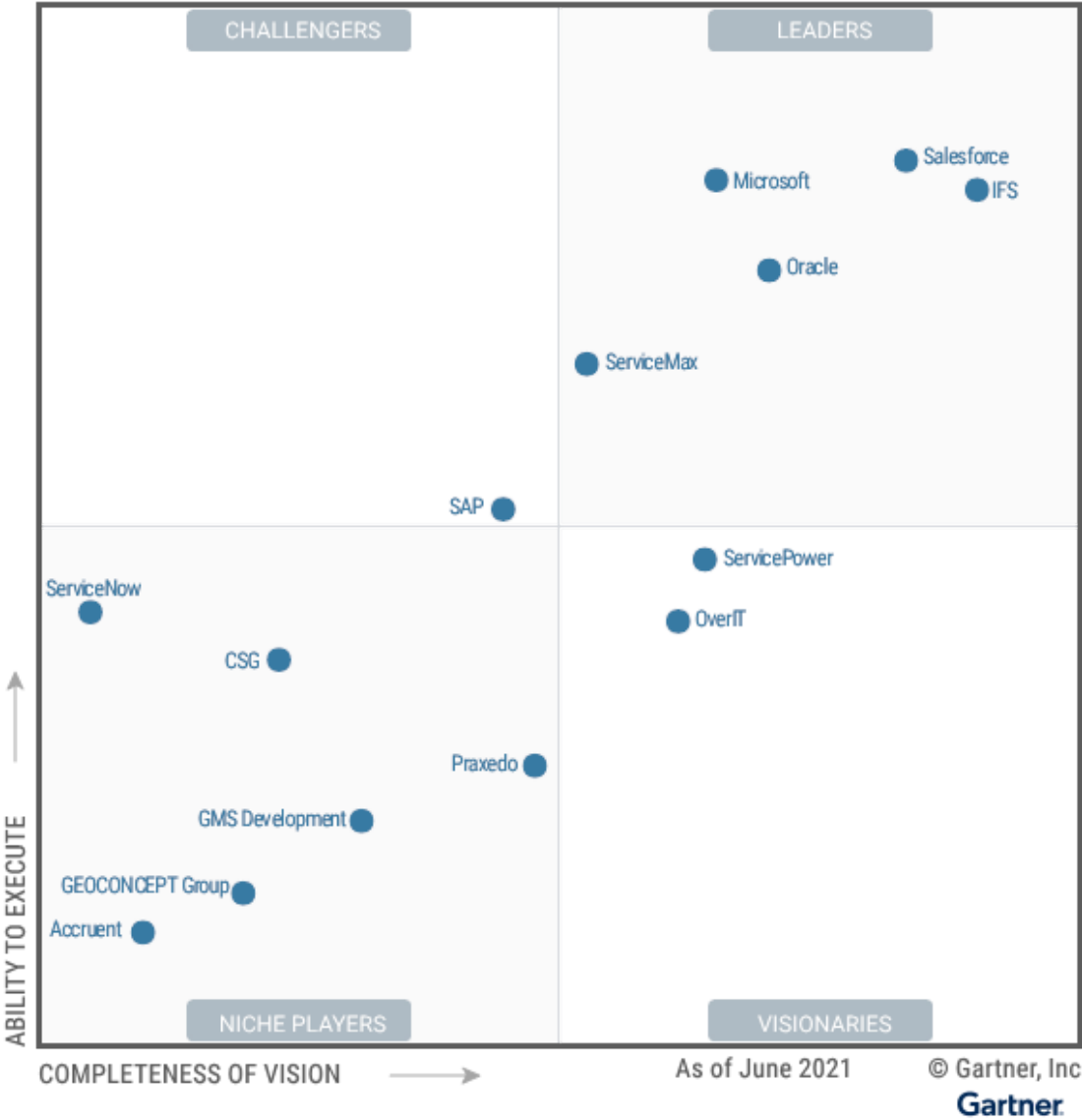
Optional functionality defined below is especially important in organizations that handle complex service use cases for mission-critical equipment, provide both on-site and in-depot service, or have FSM-driven pricing. Key optional functionality includes the ability to:

- **Manage additional operations:** They should handle installed equipment management, maintenance agreement management, maintenance plans, subcontractor management, warranty and claims management, reverse logistics, depot repair, equipment supersession, engineering change requests, and customer pricing management.

FSM products operate across multiple communication channels (including websites, supply chain solutions, third-party service-brokering solutions and analytics). FSM applications draw on software in various markets (including customer relationship management [CRM], enterprise resource planning [ERP], EAM, APM, IoT, digital twins, workforce management, vendor management, product life cycle management and supply chain markets [specific supply chain examples include transportation management and fleet management]).

Magic Quadrant

Figure 1: Magic Quadrant for Field Service Management



Source: Gartner (August 2021)

Vendor Strengths and Cautions

Accruent

Accruent is a Niche Player in this Magic Quadrant. This status reflects its deep product capabilities but lack of strong marketing and product management. Gartner estimates that Accruent's FSM offerings generated \$20 million of Fortive's \$4.6 billion of revenue in 2020.

Accruent provides end-to-end FSM capabilities via its vx Field and optional vx Maintain (for planned maintenance); vx Observe (for IoT); and vx Field Contractor (for subcontractors) products. Accruent focuses on work planning for subcontractor-heavy workforces and IoT-connected equipment monitoring.

New capabilities include easier commissioning and control of IoT-monitored assets and a chatbot to aid diagnostics. Accruent's clients tend to be midsize servicers, utilities and retailers, mostly in North America and EMEA.

Strengths

- **Functionality:** Accruent's scheduling and subcontractor management supports blended workforces with advanced requirements, such as for long-cycle, automatic break, technician-centric scheduling and forecasting. Its vx Observe offering has many certified IoT integrations, which is important for condition-based and predictive maintenance providers.
- **Cost:** Accruent's profitability (despite lower-than-average prices) and implementation templates help midsize organizations with small budgets achieve an ROI without having to worry about the vendor's viability.
- **End-user product support:** Accruent has strong customer retention. Some customers have highlighted positive experiences with its training and initial support in particular.

Cautions

- **Product management and release cadence:** The number and breadth of Accruent's recent enhancements is well below the average for vendors in this Magic Quadrant.
- **Addressable market:** Accruent lacks advanced security support capabilities and global presence, and it positions itself primarily at the upper end of the midmarket. Large enterprises may have difficulty finding the implementation resources and platform functions needed for global rollouts.

- **Partners and brand awareness:** Accruent does not attract independent software vendors (ISVs) in areas like AR and knowledge management, and lacks growth in its FSM customer base beyond existing Accruent customers. Customers seeking adjacent functionality may need to seek additional partners independently.

CSG

CSG is a new Niche Player in this Magic Quadrant. This status reflects its scalable solutions but narrow industry focus. It generated revenue of \$990 million in 2020, of which Gartner estimates \$30 million came from FSM.

CSG's FSM products focus on machine learning (ML)-powered scheduling optimization, warranty, knowledge management and integration with its separate communications platform.

Recently, CSG expanded its AR-supported Visual Connect solution to simplify curation of recordings and annotations from the field as reusable knowledge. It is investing in conversational AI and IoT-connected services as well.

Most of CSG's FSM customers are large communications service and broadband providers based in North America. CSG also has some insurance provider customers.

Strengths

- **CX:** CSG claimed a 100% customer retention rate for 2020 in terms of both annual contract value (ACV) and customer logos, and some customers have reported strong communications and product support.
- **Scalability:** CSG has several large, multicountry FSM customers. In addition to increasing product efficiency, these provide proof points for CSG's best practices and strong design input for R&D.
- **Industry focus:** CSG's domain expertise and experience in consolidating many legacy systems make it a suitable choice for communications service providers (CSPs), which can also benefit from adjacent CSG products, such as its billing and revenue management and communication platforms.

Cautions

- **Growth:** CSG's total corporate revenue growth in 2020 was flat. Prospective FSM customers should study its plans for the growth of its customer base, R&D investment and how it will address competition.

- **Pricing/packaging:** Although CSG's FSM products appear inexpensive at first, some customers that Gartner has been in contact with have indicated that too many functions are packaged as add-on modules. Prospective customers should collect documentation about which capabilities are included and excluded.
- **Product breadth:** CSG has limited functionality in areas such as preventative maintenance contract agreements and time-and-materials-based invoicing, which are important for many companies, especially in industries other than communications service provision. Additionally, although a mobile UI refresh is on CSG's roadmap, the current mobile app is dated and much of its UI is not intuitive.

GEOCONCEPT Group

GEOCONCEPT Group is a Niche Player in this Magic Quadrant. This status reflects its strong scheduling and forecasting functionality, but poor sales execution and growth. Gartner estimates its revenue from FSM to be below \$9 million.

GEOCONCEPT's Opti-Time product is focused on forecasting and scheduling optimization, but GEOCONCEPT has also expanded its planning capabilities based on historical data and added GPS support to its mobile app. It is investing in automating truck stock counts using RFID tags and predicting work duration and weather impact on scheduling.

Most of GEOCONCEPT's customers are midsize or large organizations in the energy and utilities, healthcare, and auditing industries in EMEA. GEOCONCEPT also has a small presence in North America.

In June 2021, after the cutoff date for this Magic Quadrant, GEOCONCEPT Group merged with two other vendors, Danem and B&B Market, to become Nomadia. Nomadia expects combined annual revenue of \$20 million, with \$15 million specific to FSM. In September 2021, GEOCONCEPT will become GEOCONCEPT by Nomadia.

Strengths

- **Scheduling and forecasting:** GEOCONCEPT's Opti-Time has strong in-day scheduling features but also powerful simulation, analytics, and integration functions to help with forecasting and planning both short- and long-cycle work. GEOCONCEPT has also improved the scalability of its UI and kernel.
- **Pricing:** The starting price for Opti-Time is among the lowest for products from vendors evaluated in this Magic Quadrant. The price is based on resources scheduled, not number of dispatchers.

- **Operations:** GEOCONCEPT customers that Gartner has had contact with have received good end-user training and support, with access to senior resources, where possible. Furthermore, GEOCONCEPT has provided this support while remaining profitable in all but one of the past five years.

Cautions

- **Sales execution and growth:** For the second year in a row, GEOCONCEPT did not significantly grow its customer base in 2020. It expects the completion of its transition to SaaS and the formation of Nomadia to change this in 2022, but prospective customers should seek evidence of continued growth.
- **Brand awareness:** Despite numerous press mentions, GEOCONCEPT is not well known, especially outside the utilities industry and EMEA.
- **Product breadth:** GEOCONCEPT has not invested heavily in innovation based on technologies such as the IoT for equipment as a service and AR-supported collaboration.

GMS Development

GMS Development is a Niche Player in this Magic Quadrant. This status reflects its innovation in the areas of AI-supported work planning, analytics and contracts management, but small customer base and limited implementation capacity. Gartner estimates that GMS generated over \$10 million in FSM product revenue for 2020.

GMS's Service1 has broad functionality, with a focus on scheduling and operations. Most recently, GMS extended its natural language interfaces for technicians (such as the car UI) and refreshed its mobile app. It has also invested in the capability to run on the Salesforce platform, alongside SAP software, or on a stand-alone basis.

GMS's operations are mostly in EMEA. Its customers are mainly large manufacturers, healthcare providers and specialty service providers.

Strengths

- **Functionality and experience:** GMS Service1 has deep contract administration, warranty, predictive schedule optimization and analytics functionality. Additionally, GMS continues to offer templates for its target industries.

- **Innovation:** GMS-funded benchmarking has shown the company's schedule optimization to be highly scalable. Furthermore, its investments in Newton AI have yielded speech-, inventory-, document- and work-duration-related capabilities that help with scheduling and debriefing work orders.
- **CX:** Customers like GMS's release cadence (which aligns with that of Salesforce), the level of customer engagement, and the design experience, particularly when working with GMS's professional services.

Cautions

- **Implementation capacity:** GMS has performed its most recent implementations itself – and did not have implementation or sales partner support. Customers may need to allocate extra time and hire from a relatively inexperienced pool of partners to help overcome any potential, growth-driven constraints on GMS's resources.
- **Customer base:** GMS has sold to large organizations but has relatively few customers overall. Prospective customers may have difficulty getting references from organizations of similar size in their industry, and should allow extra time to conduct pilots and other due diligence.
- **Integrations:** Despite improvements to its integrations with SAP and Salesforce, GMS has relatively few templated integration connectors.

IFS

IFS is a Leader in this Magic Quadrant. This status reflects its strong understanding of this market and broad functionality, which are, however, offset by low adoption of its multitenant offerings and high implementation costs. It generated over \$860 million in revenue in 2020. Gartner estimates that \$240 million of that came from all FSM products, and \$90 million of that from the IFS Field Service Management (FSM) product.

IFS FSM is an end-to-end solution with emphasis on scheduling, contracts and operations. IFS has recently improved its customer self-service, chat and platform functionality. It is investing in containerization architecture that preserves the choice of single or multitenant deployment.

IFS has deployments across the world, with high concentrations in the energy and utilities, manufacturing, and telecom sectors in EMEA and North America. Additionally, in November 2020, it acquired Clevest, a provider of utilities mobile workforce management solutions.

Strengths

- **Product functionality:** IFS FSM is one of the broadest and deepest FSM products we reviewed, especially in areas such as parts logistics, contracts, billing and warranty. It also addresses underserved requirements like project-oriented service and forecasting.
- **Sales execution:** IFS more than doubled its FSM license growth in 2020, helped by its geographical expansion to more than 60 countries, and acquisition of industry expertise.
- **Marketing execution:** Despite a low level of global brand recognition, IFS had one of the highest numbers of press mentions of the vendors in this Magic Quadrant. It also maintains a strong pipeline for FSM revenue growth.

Cautions

- **Market responsiveness and platform:** Some customers have reported to Gartner that it is difficult to influence IFS's roadmap. Also, while other vendors have responded effectively to demand for low-cost packaged ERP integrations and multitenant deployments, IFS integrations remain difficult, despite API and integration partner investments. Also, only a small percentage of customers have chosen IFS's multitenant offering. Prospective customers should study IFS's product management process and roadmap and join its customer advisory boards.
- **Implementation:** Partly due to IFS's growth, prospective customers should plan for the possibility that the implementation resources of IFS and its partners may be scarce. Also, implementation costs may be relatively high and fairly difficult to predict.
- **Portfolio and pricing structure:** IFS now has several field-service-related products and multiple licensing types. As a result, FSM pricing proposals can be complex and lacking in transparency. Customers should plan for a long learning curve and expect to have to expend extra effort when negotiating contract prices.

Microsoft

Microsoft is a Leader in this Magic Quadrant. This status reflects its strong sales strategy and product functionality, which are, however, offset by a lack of product maturity in some areas. Microsoft generated revenue of \$143 billion in its fiscal 2020, of which Gartner estimates over \$190 million came from Dynamics 365 Field Service (D365 FS).

D365 FS has broad functionality and emphasizes IoT and AR capabilities. Microsoft recently integrated Dynamics 365 Remote Assist with its new Power Platform-based mobile app to improve stakeholder collaboration. It is investing in areas such as scheduling, connected equipment and self-service.

Microsoft's FSM customers vary in size and are geographically diverse, with an especially strong presence in North America and EMEA, often in the healthcare, manufacturing and facilities management industries.

Strengths

- **Addressable market:** Microsoft has broad geographical coverage for FSM products and services, including offerings from what it claims to be over 100 gold (top-tier) ISVs. It also supports multiple cloud deployment options and hybrid deployments using private, public and government clouds.
- **Sales strategy and execution:** Microsoft's FSM user base growth in 2020 was among the highest of the vendors evaluated in this Magic Quadrant. It achieved this growth primarily through partners — an approach that reduces its direct investment risk and the cost of sales, ensures viability and enables more investment in R&D.
- **Product breadth:** D365 FS has some coverage of all the critical capabilities assessed for this Magic Quadrant. It also has significant depth in areas such as connected equipment triage (for the IoT), AR-enabled guided support and inherited Power Platform capabilities (Power BI, Power Apps, Power Automate, Power Portals) and Dataverse.

Cautions

- **Product depth:** Customers seeking deep functionality in areas like parts logistics, forecasting and scheduling for subcontractor-heavy workforces may need to seek partners to extend the capabilities of D365 FS. Also, although its latest mobile app is based on the established Power Platform, it is new and deployed only by early adopters.
- **Implementation CX and community:** Some customers that Gartner has had contact with have indicated difficulty finding peer communities and knowledgeable partners to help overcome the product learning curve, improve upgrade management and overcome integration challenges. Customers may need specialized staff to provide domain and technical expertise for the Microsoft ecosystem.

- **Value and pricing:** Microsoft D365 FS is priced similarly to more mature products in the market, despite some lack of depth. Some customers have reported to Gartner that pricing and flexibility issues are key drawbacks.

Oracle

Oracle is a Leader in this Magic Quadrant. This status reflects its strong product strategy, which is, however, offset by a low number of ISV partnerships. Oracle generated \$39 billion during its fiscal 2020, of which, Gartner estimates, \$240 million came from Oracle Field Service (OFS).

The OFS product is focused on scheduling and multiexperience support. Recently, Oracle has connected its Multivariate State Estimation Technique 2 (MSET2), which is a broad ML capability for IoT prognostic applications, to OFS. It is continuing to invest in Cloud Service Logistics (CSL) and simplifying cost capture in mobile apps.

OFS customers tend to be large organizations in the cable and telecom, manufacturing, and utilities industries, in all regions, but especially North America, EMEA and Latin America.

Strengths

- **Product strategy:** Oracle has expanded its FSM coverage by packaging OFS with CSL (which includes capabilities like return of merchandise authorization [RMA], parts logistics and pro forma invoicing) and MSET2 (which can generate work order requests in OFS based on detected anomalies). It is also investing in integration with its multiple ERP and CRM solutions.
- **Marketing strategy:** OFS is now a separate pillar within Oracle Service (and no longer a hidden component), which reflects a distinct emphasis by Oracle. Also, Oracle offers usage-based pricing for the mobile app used by technicians who work for its customers' subcontractors. Additionally, Oracle's packaging gives these subcontractors free use of the scheduling engine.
- **Platform:** Oracle OFS has strong schedule optimization capabilities. Additionally, customers can extend Oracle's AR-enabled collaboration and chatbot ("digital assistant")-based guided support and its knowledge management capabilities to its mobile app. The Oracle Cloud@Customer option allows a customer to run OFS in its own architecture, if needed.

Cautions

- **Mobile extensibility:** Despite recent investments, some Oracle customers with whom Gartner has had contact have indicated that its mobile forms are difficult to extend and expand.
- **Ecosystem:** Despite Oracle's size and geographical reach, OFS has very few ISV partners. Customers needing capabilities not delivered by Oracle directly may need to find development partners and maintain custom solutions.
- **Product positioning:** Although OFS is ERP-agnostic, Gartner finds that customers using a competitor's ERP are often unaware of this or may intentionally exclude OFS from their shortlists. As a result, customers may lose the potential benefit of additional sources of innovation ideas. Also, OFS is not featured in the press as often as many competing products evaluated in this Magic Quadrant.

OverIT

OverIT is a Visionary in this Magic Quadrant. This status reflects its strong product innovation, which is offset by a relatively poor upgrade CX. Gartner estimates that OverIT generated over \$50 million in 2020, with \$17 million coming from FSM licenses.

OverIT's Geocall FSM product has broad capabilities and a focus on scheduling, technician enablement and multiexperience support. Recent investments in AI have added AI-predicted skill requirements and work duration estimates, while improving the vendor's knowledge harvesting with autotagging and just-in-time knowledge sharing.

OverIT's customer base is largely made up of manufacturing and energy organizations in EMEA, but it also includes some organizations in Latin America and North America.

Strengths

- **Innovation:** OverIT consistently develops cutting-edge capabilities. For example, it was one of the first vendors to offer hands-free mobile debriefing and first-party AR-supported collaboration for both employee-to-employee (E2E) and employee-to-customer (E2C) scenarios (through its SPACE1 product). More recently, OverIT has introduced AI-driven functionality to help organizations harvest field knowledge and redistribute it to the workforce.
- **Pricing flexibility:** OverIT offers low-cost entry points for its products. It has been able to deploy to regions where cost prevents many vendors from competing.

- **Industry expertise and integration:** OverIT has a deep understanding of, and has developed key capabilities and configuration templates for, its primary industries. It also has key integrations with, for example, GISs and ERP applications popular in industries such as utilities, oil and gas, and telecommunications.

Cautions

- **Upgrade CX and business model:** While SPACE1 is mostly multitenant, many Geocall customers require on-premises or single-tenant deployments, and customization to meet localization, regulatory or business requirements. Some customers with whom Gartner has had contact with have found upgrading difficult and costly, and some, therefore, defer it (which increases support costs). New clients should either avoid customizations or ensure skilled resources are available to maintain them.
- **Marketing and geographical ecosystem:** Despite having large customers in Latin America and recent investments in North America and Asia/Pacific, OverIT has low brand awareness and traction outside its home region (EMEA). Customers with operations in other regions may need to provide their own resources for both software and services.
- **Commercial field service:** Compared with other vendors in this Magic Quadrant, OverIT received low scores for customer-facing features like self-service chatbots, portals and invoicing. Many of its customers use it for use cases that do not emphasize these areas, such as owned linear infrastructure.

Praxedo

Praxedo is a Niche Player in this Magic Quadrant. This status reflects its low implementation service requirements, but narrow geographical presence and small size. Praxedo is a privately held organization and, based on Gartner's estimates of its 2020 revenue, is among the smallest vendors in this Magic Quadrant.

Praxedo's FSM offering focuses on mobile app functions and built-in analytics, along with basic scheduling optimization and plug-in connectors for ERP applications and other systems. Recently, Praxedo has built IoT signal-based workflows, enhanced its routing functions and improved its recurring work order functions. It is investing in AI-based quality control and its own IoT platform.

Praxedo's customers are often large telecom, retail and energy sector service providers, and their subcontractors, in EMEA.

Strengths

- **Implementation cost:** Praxedo has embedded a digital adoption solution in its FSM offering and further enhanced its industry and integration templates. This improves the time to value for customers. Furthermore, its ratio of professional services to product cost is the lowest of the vendors in this Magic Quadrant.
- **Industry expertise:** Praxedo targets specific industries and develops its organization vertically with specialization in sales, support, and offering native integration connectors and analytics.
- **Sales strategy:** Praxedo achieves economies of scale and strong growth by selling first to a large telecom service provider or facilities management company, and then selling to its subcontractors. Additional sales are conducted prescriptively, which creates consistency and better integration for the large organization, while also lowering the total cost of ownership and complexity for its subcontractors.

Cautions

- **Capacity and geographical breadth:** Praxedo only has offices in France, the U.K., Germany, Spain and Canada, and partners only support a small number of Praxedo customers' service needs. Customers may have to wait for Praxedo's corporate resources to become available or develop skills in-house, and they may have to invest in their own software development.
- **Product breadth:** Praxedo lacks strong functionality for managing complex parts sourcing and predictive maintenance use cases. Also, it relies on partners for key areas such as voice of the customer (VoC), the IoT and advanced analytics. Prospective customers should check Praxedo's suitability using detailed pilots and questionnaires. They should also budget for costs from additional vendors.
- **Release cadence:** Praxedo is self-funded and, although it releases bug fixes biweekly, it introduces new capabilities only twice a year. Prospective customers should take steps to ensure its roadmap includes the enhancements they need.

Salesforce

Salesforce is a Leader in this Magic Quadrant. This status reflects its strong sales growth, which is, however, offset by customer feedback about shortcomings in terms of implementation cost and support. Salesforce generated revenue of over \$21 billion in its fiscal 2020, of which Gartner estimates \$420 million came from its FSM offering, Salesforce Field Service.

Salesforce Field Service is focused on scheduling, mobile functionality and broad features for knowledge management and collaboration. Recently, it introduced customer self-service and partnered with ServiceMax to co-sell its Asset 360 offering. It is investing in technician enablement and industry verticalization.

Salesforce's FSM customers are primarily in North America and EMEA, in industries such as commercial and residential services, utilities and retail.

Strengths

- **Alliances and partnerships:** Salesforce has more ISV partners for its FSM than any other vendor in this Magic Quadrant. They support capabilities like project management, payments, forms and industry-specific field service. Salesforce's new Visual Remote Assistant (for AR-supported collaboration) and Asset 360 (for warranty, RMA and process management) products are offered as part of partnerships with TechSee and ServiceMax, respectively.
- **Product breadth:** For FSM use cases, Salesforce has tailored adjacent products, such as its Trailhead learning management system (integrated with scheduling for skills matching and gamification for technicians and subcontractors) and knowledge management solution (artifacts can be attached to work orders).
- **Sales execution:** Salesforce has the strongest growth and highest FSM revenue of the vendors in this Magic Quadrant. This is attracting new partners that will further extend its capabilities and geographical footprint.

Cautions

- **Extensibility:** Some customers have found built-in reports to be inflexible and had difficulty creating localized scheduling rules and workflows. Also, because Salesforce built its mobile app for FSM outside the Salesforce mobile platform, some have had difficulty extending its capabilities. Salesforce believes that use of its standard Lightning Web Components can help address this issue.
- **Product depth:** Certain areas of functionality, such as mobile features, parts supply chain features, and integrations of financials require customization and enhancement to support some production field service organizations. Customers may need to budget for add-on products and development services.
- **Support:** Some customers have reported to Gartner that Salesforce's support expertise has not kept up with the pace of product innovation, and that Salesforce is slow to resolve issues after its initial response. Self-implementation costs can increase substantially without strong support resources.

SAP

SAP is a Challenger in this Magic Quadrant. This status reflects its strong geographic strategy and business network, which are, however, offset by a lack of product innovation and some inconsistency in support and upgrade communications. SAP generated over \$31 billion in revenue during 2020, of which Gartner estimates \$195 million came from its FSM offering, SAP Field Service Management (FSM).

SAP's FSM is an end-to-end solution with a focus on third-party service collaboration and connected equipment. Recently, SAP has improved its scheduling and secured partners for AR and parts prediction. It is investing in ML-based scheduling and improved analytics capabilities.

SAP's FSM customers are geographically diverse but concentrated in the industrial machinery, high-tech, and energy and utilities industries.

Strengths

- **Business network integration:** SAP's FSM solution is integrated with SAP's Asset Intelligence Network. The combination provides a standard way to enable an organization and its customers, vendors and subcontractors to communicate equipment structure and telemetry. SAP's FSM solution is also integrated with SAP FieldGlass, and this combined crowdsourcing platform enables its customers to build a marketplace to foster subcontractor ecosystems and advertise and manage work.
- **SAP portfolio integration:** SAP's FSM solution is integrated tightly with SAP ERP, SAP Service Cloud, SAP Predictive Maintenance and Service, SAP Intelligent Asset Management (IAM) and several other SAP products. Prebuilt integrations mean that SAP implementations entail less risk in one of the most common areas in which implementation costs overrun, while also improving product usability.
- **Industry and geographic strategy:** SAP's FSM solution is closely aligned with SAP's existing customer base. This has naturally resulted in an emphasis on functionality for industries that require broad capabilities for managing complex equipment structures, subcontractors, and both equipment and parts logistics. Deployments tend to correspond to the broad geographical presence of the rest of SAP's portfolio.

Cautions

- **Support and vision consistency:** Customers have reported to Gartner that SAP's support is difficult to manage and keep track of, especially when resolution requires a long time frame. They have also reported that SAP's communications about its roadmap and vision for FSM are inconsistent. Customers may need to seek contractual commitments from SAP if certain roadmap items are critical.
- **Marketing strategy:** SAP markets its FSM solution to existing SAP customers only — an approach that risks stifling innovation, which would otherwise be inspired by relationships with other providers. Also, the way SAP markets its commitments to integrations with partners such as Microsoft is inconsistent, as shown by its removal of Azure as its preferred ERP platform recommendation and delays in executing Microsoft Teams integration.
- **Product maturity:** SAP lacks strong AI-driven scheduling optimization case studies, and its scheduling optimization is used (and influenced) by relatively few customers. Also, SAP has been refreshing much of its mobile app functionality, so prospective customers should allocate time for detailed testing and piloting.

ServiceMax

ServiceMax is a Leader in this Magic Quadrant. Its position reflects its domain expertise and deep functional depth, offset by immature schedule optimization and market confusion about its direction. Gartner estimates that ServiceMax generated FSM revenue of over \$100 million in 2020.

ServiceMax's Core offering is focused on commercial functions such as contracts, warranties and complex process flows. Recently, it has added support for larger projects and field change orders, along with ServiceMax Engage for customer self-service. It is investing in chatbots and ML-supported scheduling.

ServiceMax's customers tend to be industrial equipment and medical device manufacturers, dealers and construction-related service providers in regions including North America, EMEA and Asia/Pacific (where it has a small presence).

After the evaluation period for this Magic Quadrant, ServiceMax announced that it had signed a definitive agreement to acquire LiquidFrameworks, a specialist in FSM functionality for the energy sector.

Strengths

- **Product depth:** Of the vendors evaluated for this Magic Quadrant, ServiceMax has some of the deepest functionality for commercial providers of complex, equipment-centric services. An indicator of this strength is the firm traction of Asset 360, a product authored by ServiceMax and co-funded by Salesforce and ServiceMax, that adds warranty, RMA and process flow management functionality (among other features) to Salesforce Field Service.
- **Partnerships and alliances:** ServiceMax has over 40 ISV partners and premier alliances with several vendors that provide sophisticated capabilities like parts-related AI, low-code form development and compliance. It also has global system integration (SI) partners, and is rapidly attracting more. ServiceMax's offering is built on the Salesforce platform.
- **Industry expertise and thought leadership:** ServiceMax provides industry-specific packages for the medical device, oil and gas, and OEM manufacturer dealer network sectors (among others) that include forms, analytics, connectors, best-practice flows, project management and commitment to industry-specific roadmaps. It also has a vibrant community and has published books, articles and other detailed guidance on FSM.

Cautions

- **Portfolio direction:** ServiceMax Core is built on the Salesforce platform, so the decision to create Asset 360 to extend Salesforce's own FSM product has caused some confusion in the market. ServiceMax indicates that it is committed to both products, but customers should carefully evaluate the direction of its overall product portfolio.
- **Scheduling optimization:** The nature of ServiceMax's customer base has not driven it to invest heavily in scheduling optimization. Although ServiceMax can be a good fit for organizations heavily focused on equipment details and telemetry, customers with heavy scheduling automation requirements in other parts of their organization may need to seek complementary optimization products.
- **Market responsiveness:** ServiceMax has a long track record of innovation in response to demand, and sometimes to alter market conditions affecting its customers. But it has not recently been first to market with many functions in areas such as AR-supported collaboration, labor requirements forecasting and AI.

ServiceNow

ServiceNow is a new Niche Player in this Magic Quadrant. This status reflects strong customer experience feedback, which is offset by the relative immaturity of its product and marketing. ServiceNow generated over \$4.5 billion of revenue in 2020, of which Gartner estimates more than \$20 million came from FSM.

ServiceNow's Field Service Management offering is focused on mobile process complexity and extensibility. Recently, ServiceNow has added scheduling optimization and connected field service (using the IoT) to its capabilities. It is investing heavily in ML, which it will use for FSM requirements like identifying the next best action in its mobile app.

Many of ServiceNow's new FSM customers have previously chosen ServiceNow products in other areas, such as IT service management and customer service. They are primarily in the telecommunications, manufacturing, and transportation industries in North America and EMEA.

Strengths

- **Platform extensibility:** Customers with whom Gartner has had contact have indicated that ServiceNow's overall Now Platform works very well, and that this is their main reason for considering ServiceNow for FSM.
- **Customer base:** ServiceNow has a significant customer base that uses adjacent products for Customer Workflows, Employee Workflows, and IT Workflows. By using the same architecture and established best practices, new FSM capabilities like ServiceNow's Connected Operations (for IoT connectivity and analysis) and knowledge management may achieve a faster-than-expected ROI.
- **CX:** Although ServiceNow is relatively new to the FSM market (it is one of the latest vendors to launch a dedicated FSM product), recent feedback from some customers has been positive. Additionally, ServiceNow indicates that renewal rates are at 100% over the past year, and its growth rates are among the highest (by percentage) of the vendors in this Magic Quadrant.

Cautions

- **Product maturity and innovation:** Most of ServiceNow's recent product additions are features already present in products from other vendors in this Magic Quadrant. Furthermore, its roadmap, which includes items like crew scheduling and a mobile app SDK, does not indicate innovation.

- **Alliances and partnerships:** Despite having numerous ISV partners overall, ServiceNow has very few ISV partners specifically for FSM. Customers may need to develop their own capabilities to satisfy any unmet requirements. Some existing customers have indicated expectations of high costs for development work.
- **Industry template configurations and integrations:** ServiceNow has no prebuilt integration templates specifically for FSM. It offers integration connectors or “spokes” with its native IntegrationHub tool that work with all ServiceNow products and enable execution of third-party APIs, but customers may need to hire SIs to configure integrations for FSM, such as with ERP, GIS and CRM systems. Also, ServiceNow’s packaged industry best practices and direct configuration guidance for FSM are limited.

ServicePower

ServicePower is a Visionary in this Magic Quadrant. This position reflects its strong product strategy and marketing strategy, which are offset by the limitations of its platform and capital. Gartner estimates that ServicePower generated over \$35 million in FSM revenue in 2020.

ServicePower has a suite of FSM products that emphasizes scheduling optimization, mobile functionality, warranty claims and subcontractor ecosystem management. Recently, ServicePower added integrations for knowledge management, computer vision and virtual appointments. It is investing in data warehousing for analytics and usability for subcontractors and insurance providers.

ServicePower’s customers are mostly midsize and large manufacturing, insurance and retail organizations in North America and EMEA.

Strengths

- **Sales execution:** Of the vendors evaluated for this Magic Quadrant, ServicePower achieved one of the highest revenue growth rates in 2020. It has expanded its industry footprint to cover the property and casualty insurance and home security sectors, among others.
- **Subcontractor ecosystems:** ServicePower has comprehensive functionality to support the intelligent management of blended workforces, contractor onboarding, schedule optimization, claims and invoice adjudication, as well as a network of available servicers (for certain industries and geographies).

- **Product strategy:** ServicePower tailors its products, integration packaging and template configurations to different sizes of customer, different industries and different workforce compositions.

Cautions

- **Platform:** Several of ServicePower's products are built on a variety of technologies, and some users sometimes have to navigate multiple styles of UI, which impedes adoption. Also, the scheduling optimization engine requires a single-tenant deployment. In addition, some customers may find the mobile app difficult to extend.
- **Pricing complexity and rigidity:** ServicePower has many separate products. It can be difficult to understand all the options and to negotiate pricing.
- **Geographical breadth:** ServicePower sells primarily in North America and EMEA. Elsewhere, customers may need to use alternative products or build their own localizations to comply with regulations, customs and data residency requirements.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

Added

- CSG
- ServiceNow

Dropped

- FieldAware
- FieldPower

Inclusion and Exclusion Criteria

For Gartner clients, Magic Quadrant research identifies and analyzes the most relevant providers in a market. The inclusion criteria represent the specific attributes that Gartner analysts deemed necessary for vendors to have in order to be included in this Magic Quadrant.

Market Presence and Momentum

A vendor's presence in the market and the observed momentum of its growth are factors that affect its inclusion in this Magic Quadrant. A vendor with stagnant sales or an ineffectual marketing organization should concern prospective buyers.

Gartner sought independent confirmation – from Gartner's Peer Insights platform and direct communications with customers, for example – that each vendor had customers that:

- **Covered at least two regions:** A minimum of 10 new FSM customers that first began using the product no earlier than 1 October 2019, covering at least two of the following regional markets: North America, Latin America, EMEA, Asia/Pacific and Japan.
- **Had achieved midsize or large, stabilized deployments:** A minimum of five new FSM customers with more than 150 technicians in production environments for between six and 24 months. These customers had to be actively using the latest major version of the software and had to have deployed integration with system(s) of record.

Additionally, each vendor had to provide evidence of:

- **Revenue traction:** Evidence of revenue growth, year over year, and at least \$8.5 million in FSM software license, maintenance and support revenue (excluding professional services), per generally accepted accounting principles (GAAP) or International Financial Reporting Standards (IFRS), during the four fiscal quarters that end closest to 31 December 2020. This revenue threshold had to be met by the product suite submitted for review, not a combination of other overlapping or non-FSM products. The following had to be well represented and supported:
 - Large or midsize businesses (average deal size above 150 mobile technicians).
 - Two major geographical markets (out of North America, Latin America, EMEA, and Asia/Pacific and Japan).
 - Two industries (examples being utilities, telecommunications, high tech, oil and gas, manufacturing, aerospace and defense, automotive, financial services and insurance, chemicals, medical devices, healthcare).

Gartner required written confirmation of achievement of the revenue and growth requirements. The confirmation had to be from an appropriate finance executive. If a vendor chose not to supply this confirmation, Gartner was at liberty to use its own market research, as well as insights from public sources, to judge its eligibility for inclusion.

- Alternatively, a vendor could satisfy the revenue traction requirement by providing:
 - Confirmations from five customers secured since October 2019 that were each live before 1 October 2020 with over 1,000 technician licenses in active use.
 - Confirmation of revenue growth of at least 20%, year over year.
- **Functional breadth:** The submitted product had to provide functionality to support at least the first five of the following six functions (plus integration and extensibility):
 - Demand management and customer experience
 - Work planning and scheduling
 - Technician enablement and multiexperience support
 - Work order debriefing
 - Analytics and proforma invoicing
 - Management of agreements, subcontractors and operations

- **Market awareness:** Recognition by the market, as evidenced by regular appearances on the shortlists of Gartner clients, by appearances at tradeshows, and by mentions as a competitor by other vendors.
- **Market following:** Thought leadership, adopted by customers in live operations, communicated through webinars, market-related white papers, blog articles and user communities.

Short-Term Viability

To be included in this Magic Quadrant, each vendor had to provide evidence of:

- **Funded operations:** Sufficient cash to fund 12 months of operation at the current burn rate.
- **Onboard professional services capacity:** Sufficient professional services to fulfill customer demands during the next 12 months.
- **Additional professional services capacity:** A practice and ecosystem with sufficient third-party consulting and integration firms to grow at a double-digit pace for two years.
- **Sales pipeline:** A pipeline of prospective customers and an adequate sales team to drive growth in new business.
- **Forecast revenue:** Evidence that results for the upcoming four quarters (from 1 January 2021) will exceed the previous four quarters' results.

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate providers on the quality and efficacy of the processes, systems, methods or procedures that enable IT providers' performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation. Ultimately, providers are judged on their ability and success in capitalizing on their vision.

Product or Service: This includes current product/service capabilities, quality, feature sets and skills defined in the market definition and detailed in the subcriteria, whether offered natively or through OEM agreements/partnerships.

Vendors that directly support a wide range of functionality or a high degree of depth of functionality and complexity have greater market potential and are rated accordingly. This is a cross-industry Magic Quadrant, so the evaluation of a provider's offering is focused on the provider's ability to serve several distinct industry sectors, as well as on its ability to provide intuitive, industry-specific configuration templates and integrations.

To score highest, the vendor likely will offer customers a choice of deployment models, including on-premises, "private cloud" hosted and multitenant software as a service (SaaS), with SaaS receiving the highest weighting. See the critical capabilities definitions in Note 1 for additional FSM subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: A vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

The vendor will be measured on its flexibility in supporting multiple pricing scenarios, such as in-house licensed, hosted, SaaS and business process outsourcing.

Market Responsiveness/Record: Ability to respond, be nimble and achieve competitive success as opportunities develop, competitors act, requirements evolve and market dynamics change. This criterion also considers a vendor's history of responsiveness.

Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver an organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. It can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of an organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	High
Customer Experience	High
Operations	Medium

Source: Gartner (August 2021)

Completeness of Vision

Gartner analysts evaluate providers on their ability to convincingly articulate logical statements about current and future market direction, innovation, customer needs, and competitive forces, as well as how well they map to Gartner’s position. Ultimately, providers are rated on their understanding of how market forces can be exploited to create opportunity for themselves and their customers.

Market Understanding: Ability of a vendor to understand buyers’ requirements and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers’ wants and needs, and can shape or enhance them with their added vision.

A vendor should demonstrate strategic actions around partnership opportunities and trends in the market, such as CX enablement, the composable enterprise, the shift toward outcome-based contracts, digital service (technician or customer) support channels, predictive analytics and parts planning, and third-party service partner integration, as well as new application functionality (such as AR, AI, IoT enablement, customizable workflows and forms, short- and long-term labor capacity planning tools and field knowledge management).

The vendor's strategies should address ongoing vendor market dynamics such as platform versus best of breed, venture funding, coopetition, consolidation, ecosystem development and industry requirements.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through a website, advertising, customer programs and positioning statements.

A vendor should have a well-articulated strategy for revenue growth and a sustained opportunity for profitability. Key elements of the strategy include a sales and distribution plan, internal investment priority and timing, and partner alliances. A vendor should influence a market by offering users proven best practices, expected results, templates and samples by industry. We sought evidence that customers continue to grow their solutions and that there is a range of modular choices (at varying price points) that do not lock them into a platform decision.

Sales Strategy: The strategy for selling products that uses a well-respected network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base. These should achieve success for a significant percentage of the vendor's business.

Offering (Product) Strategy: A vendor's approach to product development and delivery, with emphasis on differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Each vendor should openly communicate to its customers and to Gartner a "statement of direction" for its next two product releases that keeps pace with or surpasses Gartner's vision for the FSM market. Each vendor should understand major technology/architecture shifts in the market and communicate a plan to exploit them and address customer migration needs.

Business Model: The soundness and logic of a vendor's underlying business proposition can determine the extent of its success. Sales channel and partnership strategies for implementation, integration, training and support are important components.

Vertical/Industry Strategy: A vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets. A provider must ensure sufficient diversification to ensure a continuous revenue stream and drive best practices across industries, while still investing the appropriate focus and expertise in strategic industries to ensure its product can be part of Gartner's evaluation process.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes. A vendor's innovation should demonstrate synchronization with its market understanding and strategy.

Geographic Strategy: A vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside its "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for the geography and market.

Depth of partnerships should be visible through joint implementations, integration certification, professional certification, pricing and deployment options, in addition to easy-to-follow written programs.

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Low

Source: Gartner (August 2021)

Quadrant Descriptions

Leaders

Leaders demonstrate a market-defining vision of how technology can help service professionals achieve business objectives. Leaders have the ability to fulfill their vision through products, services, ecosystems and solid business results in the form of revenue and earnings. They have strong partner programs, which are formalized and “gamified,” and they track proof of renewal every year.

Leaders have significant, successful reference customer deployments in North America, EMEA and Asia/Pacific in a wide variety of industries, with multiple proof points above 2,000 users. They have a robust native scheduling engine that is scalable to thousands of employee and third-party technicians. They also have strong and innovative technology-based service enablers (such as IoT enablement, social collaboration, AI-driven decision support and chatbots), and end-customer engagement tools for, and coverage (either directly or through certified partners) of, all six categories of FSM capability. Leaders have many successful integrations with multiple systems of record (especially ERP and CRM systems) from multiple providers; and many deployments in multitenant deployment models.

Other providers measure themselves against the Leaders and emulate their strategies and tactics. Leaders demonstrate market strength, based on installed-base depth, and they affect market trends in terms of all the criteria by which they are evaluated. Leaders’ software users often consider that they are gaining a competitive advantage over others in their industry.

Challengers

Challengers are often larger than Niche Players, and demonstrate a high volume of business, especially with existing customers. Challengers have the size to compete worldwide and an existing base of customers to sell to.

Challengers understand the evolving needs of service organizations, but may lack the ability to lead customers into new functional areas with their functional vision, product breadth, innovation or enhancement velocity. Challengers tend to have a good technology vision for architecture and other IT organizational considerations, but they may not have a strong influence on the direction of the FSM market. They may lack native scheduling optimization, robust mobile apps, proven integration with multiple ERP providers, or proven coverage of both high-volume and high-complexity use cases.

Challengers often have a strong market presence in other application areas (such as parts and asset management, salesforce automation, customer engagement center support, finance and order management). But they either have not demonstrated a clear understanding of the FSM market's direction (toward end-to-end processes) or are not well-positioned to capitalize on emerging trends, due to incomplete product breadth or the nature of their delivery model.

Visionaries

Visionaries lead many competitors in terms of technology, functionality or business model innovation. They influence, or have strong potential to influence, the direction of the FSM market. However, they are typically limited in terms of execution or demonstrated track record. In general, their products and market presence are not complete or established enough to challenge the Leaders.

Like Leaders, Visionaries have a robust scheduling engine that is scalable, strong and innovative; technology-based service enablers; and coverage, either directly or through certified partners, of all six categories of FSM capability. They have single-tenant and multitenant offerings with proven scalability and adoption, and are introducing new ways of utilizing cloud processing power or deeper support for underserved field service business models, such as outsourced field service and connected outcome-based field service (packaged IoT).

Although Visionaries have many of the same product capabilities as Leaders, these are not as deep or as fully proven through repeatable deployments at scale. In addition, Visionaries' reference customers or partners may point to gaps in service or functionality execution. Visionaries may not yet have the alliances and partnership maturity necessary to execute globally and to deliver the innovation and flexibility enhancements expected by the market. As they mature in execution, Visionaries could become Leaders, Challengers or Niche Players, depending on their pace of innovation and how their vision evolves.

Niche Players

Niche Players offer strong FSM products, but they may lack some functional components, may not show the ability to consistently handle deployments of more than 1,000 field technicians across multiple geographies, or may lack strong business execution.

Niche Players may offer complete portfolios for a specific industry or use case. However, they face challenges in one or more important areas in terms of supporting cross-industry requirements, such as complex forecasting and translation of SaaS's cloud computing power into functionality. They may have an inconsistent track record of implementation or inconsistent references, or may lack the ability to support large-enterprise requirements.

Despite these potential shortcomings, Niche Players can often offer the best solutions for the needs of particular service organizations, given the price-to-value ratio of their solutions.

Context

FSM suites have achieved mainstream recognition among CIOs and field service leaders. However, because these products vary in functionality from broad to narrow, and because of differences in terminology and usage by industry, in organizational size, and in B2C and B2B requirements, sales cycles can be long. Vendors have focused largely on functionality without building a continuum that properly facilitates the education process during the sales cycle, which leads to a lengthened process or even “no decision” results.

Prospective customers should first consider how much weight any existing relationships with vendors carry, and their desire for platform, best-of-breed and packaged business capabilities (PBCs; see [2021 Strategic Roadmap for the Composable Future of Applications](#)).

Next, they should narrow their lists of potential suppliers according to the nature of the service required. At the highest level, most organizations fall into one or both of the following categories:

- **Organizations with a high volume of work orders per technician per day and high schedule volatility:** Technicians in these organizations perform many work orders per day (more than eight) and many of the technicians' planned schedules change dramatically throughout the day, due to emergency or other unplanned work and customer cancellations (see [How to Achieve Scheduling Optimization in Field Service](#)). For these organizations, we often advise using products capable of real-time intraday schedule optimization at scale (as opposed to batch optimization), such as those of CSG, GEOCONCEPT Group, Oracle, Salesforce and ServicePower.

- **Organizations with complex, or both complex and high-volume, service requirements:** Dispatchers in these organizations must carefully analyze each work order to identify the most appropriately skilled technician. Orders are often for special parts, tools, knowledge artifacts and helpers that must be coordinated ahead of the visit. Vendors such as Accruent, Microsoft, SAP and ServiceMax specialize in complex services, but also provide basic schedule optimization. There are also vendors like IFS that add capabilities such as customer management or invoicing traditionally found only in ERP applications.

Third, they should look for vendors that serve specialized needs, such as for:

- **AI-informed decision support:** Organizations able to train AI models should look for vendors with capabilities in areas such as prediction of necessary parts, prediction of work duration and prediction of future traffic conditions. They should also assess conversational AI embedded in chatbots and digital assistants and computer vision, which are emerging in field service use cases. GMS Development, Salesforce and ServicePower are examples of relevant vendors.
- **Native GIS capabilities:** Several vendors, especially those that work with gas or electrical transmission utilities, have integrations with GISs. Data from a GIS is useful to enable visualization of hidden infrastructure (such as transmission pipelines beneath a street) or to determine the GPS locations of assets that do not have an address (such as cell towers and telephone poles). Vendors such as GEOCONCEPT Group and OverIT offer native capabilities, in addition to integrations.
- **Use of subcontractors:** Organizations that outsource field service work through brokers, talent agencies or by directly managing subcontractors or freelancers should look for software that can help align vetted vendors, onboard new vendors, and assign work to other organizations in a way that integrates with internal scheduling (see [Eight Components of Successful Outsourced Field Service Management](#)). Vendors such as SAP, Praxedo and ServicePower specialize in connecting external providers with the primary organization. Several other vendors integrate with companies like Field Nation and WorkMarket to provide this functionality.

- **Asset centrality and connectivity:** Organizations that manage equipment with heavy reliance on integration with IoT platforms should look for capabilities that help triage work demand initiated directly by customers' equipment or via machine customers acting as proxies for the equipment (see [Why Machine Customers May Be Your Service Departments' Best Advocates](#)). However, some vendors, such as Accruent, Microsoft, SAP, ServiceMax and ServiceNow, have special strengths or more proof points in this area.
- **Ease of implementation:** For organizations looking for an easy-to-learn solution with a short implementation time and the ability to easily create new screens, checklists and forms in a mobile app, products from vendors such as Oracle and Praxedo are often suitable.

Other needs can also be defining factors that help identify the most suitable products — for example, support for complex or regulatory custom mobile forms, depot repairs and returns, warranties, predictive maintenance contracts, maintenance plans and workforce attributes (including experience level and knowledge of existing digital tools; see [The Future of Field Service Management](#)). The systems of record to be integrated and the effort required to integrate them may also greatly influence an organization's choice. In many cases, a service organization must evaluate not only a vendor's suite of product offerings, but also the ecosystem of providers that can fill any functional gaps in the main vendor's offering.

This Magic Quadrant evaluates prominent FSM vendors, but is not intended to be an exhaustive examination of all FSM vendors, solutions and products. It is intended to be a valuable tool with which to assess and compare vendors. However, readers are encouraged to develop a clear understanding of their own objectives and requirements, and to use this Magic Quadrant in conjunction with inquiries with Gartner analysts.

Vendors included in this Magic Quadrant have demonstrated an ability to provide multitenant SaaS and, in many cases, single-tenant hosted products that support FSM for midsize and large enterprises in a range of industries. Some provide narrow, but deep, field service scheduling optimization or mobile apps. Others provide broad service suites.

It is common for large enterprises to use more than one FSM application, depending on the industry, nature of service and regional makeup of their user base.

Market Overview

Gartner estimates that revenue from packaged FSM cloud subscriptions, software licenses and maintenance – not including services – amounted to \$3.01 billion during the 12 months ending in December 2020 (up approximately 16% from 2019).

The past year has been marked by improvement in capabilities that improve all four pillars of great customer service (getting connected, process orchestration, knowledge and insight, and resource management), customer experience and across all 10 FSM critical capabilities (see Note 1). Among the biggest trends were:

- **Augmented reality (AR)-supported collaboration:** In early 2020, many organizations had small, casual pilots of AR solutions underway, but they often lacked integration and usability optimized for technicians using FSM mobile apps and the ability to capitalize on insight from interactions. Fueled by the no-touch service requirements of COVID-19 safety considerations, all vendors in this Magic Quadrant now have their own solution, an OEM solution or at least one integrated ISV mobile video collaboration solution that uses AR to improve live guidance (see “Augmented Reality for Customer Support” in [Hype Cycle for Customer Service and Support Technologies](#)). Many customer organizations are even using mobile AR to enable technicians to collaborate with customers for previsit diagnostics or support.
- **Knowledge harvesting and curation:** Several products, especially from vendors whose portfolios contain knowledge management solutions, now offer ways to record sessions and use AI and process orchestration to facilitate curation for contributions to knowledge management archives that technicians and remote experts can reuse in other interactions.
- **Customer self-service:** Most products now offer basic customer self-service portals that allow customers to do things like follow the status of work orders and initiate work requests. Some vendors have taken this further by adding capabilities like the ability to register new products, review IoT-based telemetry and pay invoices.
- **IoT:** All vendors in this Magic Quadrant have a partnership or built-in functions that help automate the creation of work orders based on demand initiated by other systems (such as APM, customer service and ticketing systems, and machine customers [see [Why Machine Customers May Be Your Service Departments’ Best Advocates](#)]), and directly from equipment in the field. These capabilities help enable outcome-based contracts, where accountability for maintenance is outsourced to a separate field service provider entity.

- **Mobile extensibility:** All vendors in this Magic Quadrant now offer the ability to extend their out-of-the-box mobile apps using low-code or no-code methodologies. Several also offer the capability to “deep link” their apps to “sidecar apps” (apps that are homegrown or sourced externally), usually with single sign-on options.

There are also trends among customers in several industries that fewer vendors have addressed effectively, but that we expect to grow in importance in vendor roadmaps. Some examples:

- Use of ML and natural language processing to mine historical work order data and use it to provide more accurate and efficient scheduling optimization automation. This is valuable for purposes such as:
 - Predicting the parts needed for a repair and driving work order assignment based on this prediction.
 - Predicting work duration based on the individual and dozens of other inputs.
 - Suggesting the best action based on past success.
 - Predicting which knowledge artifacts and guides will be most useful and preloading them on technicians’ devices for offline consumption.
- Quality control driven by computer vision that can help automate the process of verifying that technicians complete tasks as prescribed.
- Subcontractor enablement that helps subcontractor organizations integrate with customers’ FSM systems.
- Digital prebriefing to better prepare technicians, avoid misalignments and callbacks, and ensure parts availability before technicians travel to sites.
- Support for regulatory guidelines like ISO 55000, 9001, 27001, SOC2 and 21 CFR Part 11.
- Built-in platform integration with adjacent systems, such as customer engagement centers, GISs, and systems used for knowledge management, ticketing, digital twins, ERP and EAM.
- Risk mitigation techniques that help organizations prioritize the work that carries the largest risk of impediments to safety and productivity and of increased business loss.

- Advanced analytics that include built-in dashboards and drill-in analysis, as well as broad and deep capabilities to pull together relevant data from multiple systems, including FSM systems.
- Handle scheduling for technicians whose remit includes project work (with product support for requirements like task dependencies, work breakdown structure and earned value analysis) and field service work.

Note 1. Critical Capabilities: Detailed Functionality Requirements

Gartner evaluated vendors' product strategy and ability to execute against that strategy using 10 critical capabilities, which are described in greater detail in the companion Critical Capabilities report (see [Critical Capabilities for Field Service Management](#)). For clarity, a high-level summary is provided below:

- **Demand management and customer experience** covers the general product capabilities that reduce the customer's (or work requester's) level of effort to initiate, triage and manage work, and enhance their awareness of work progress and issues. A product should gather all work order demands in one place, including the parts, tools and skills that technicians will need to be successful.
- **Connected equipment triage** focuses on IoT and/or APM platform integration, sensor data visualization, advanced analytics and escalation workflow development tools that are useful for deriving an actionable and defined scope of work based on data collected from real-time or near-real-time equipment or environment sensors.
- **Work planning and scheduling** concerns functions such as automated technician, crew and equipment schedule optimization, routing, capacity planning, parts prediction and allocation, certification management, and organization of multichannel demand.
- **Technician enablement** provides communication via mobile devices and applications to ensure that technicians are engaged and arrive on site well prepared, with the right tools, parts, knowledge, site information and equipment information.
- **Multiexperience service support** involves remote expert guidance with video streaming, AR with collaborative annotation and self-served guided repair instructions, and self-service virtual assistants with suggested knowledge base artifacts. It should enable, and improve the quality of, technicians' access to resources for assistance using multiple communications modalities.

- **Work order debrief** includes technicians' ability to record time, expenses, parts, tasks completed, approval signatures, checklists, surveys, videos or pictures, and recommendations digitally. Bar code readers, voice-to-text and handwriting recognition may be used for more accurate and timely work order reporting.
- **Invoicing and reporting** supports pricing and discounting for parts, labor and packaged tasks, thought-leading reports and analysis, pro forma and/or final customer invoices and credit memos. It also includes recurring billing for maintenance agreements and negotiated pricing contracts.
- **Agreements, operations, contractors** encompasses primarily back-office and subcontractor user-facing functions, such as maintenance agreements and prediction-based planning, installed equipment management, contract entitlements, customer warranty and warranty claims, reverse logistics, depot repair, subcontractor enablement, scheduling and payment adjudication, and third-party service provider networks.
- **Integration** refers to connectors that link FSM application data and functionality with business processes that are outside the FSM application's own functionality area (such as integration platforms, ERP, CRM, mobile, order management, billing, multiechelon parts distribution, network management and time-keeping systems, among others).
- **Platform, extensibility, industry** considers deployment modes, architecture, size and complexity of existing deployments, as well as packaged localizations, configurations and implementations by industry, and the effort required to add low-code-based, customizable intelligent forms, logic and process models.

Additional Capabilities

Additional capabilities and features, such as those listed below, increase the breadth of market applicability and "value-add," and impact our evaluations accordingly:

- Reporting and service advanced analytics
- Field parts, tools and material/parts management
- Case-based reasoning/real-time technician knowledge management, harvesting and access
- Reverse logistics and depot repair

- A console to administer mobile app permissions and configure workflow and forms
- Service sourcing, onboarding and subcontractor enablement
- Social enablement to connect technicians, customers and back-office personnel
- Integration with knowledge management to aid the sharing of learned expertise
- Sales integration for quoting, opportunities management and offers
- Project management software
- Engineering change request management
- Fleet management
- Telematics capabilities, such as tracking of driver behavior

Evaluation Criteria Definitions

Ability to Execute

Product/Service: Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

Overall Viability: Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

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Marketing Execution: The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

Customer Experience: Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

Operations: The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

Marketing Strategy: A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

Sales Strategy: The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

Offering (Product) Strategy: The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

Business Model: The soundness and logic of the vendor's underlying business proposition.

Vertical/Industry Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

Innovation: Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

Document Revision History

[Magic Quadrant for Field Service Management - 6 July 2020](#)

[Magic Quadrant for Field Service Management - 16 April 2019](#)

[Magic Quadrant for Field Service Management - 27 September 2017](#)

[Magic Quadrant for Field Service Management - 3 November 2016](#)

[Magic Quadrant for Field Service Management - 22 December 2014](#)

[Magic Quadrant for Field Service Management - 9 October 2013](#)

[Magic Quadrant for Field Service Management - 17 October 2012](#)

[Magic Quadrant for Field Service Management - 28 September 2011](#)

[Magic Quadrant for Field Service Management - 17 June 2010](#)

[Magic Quadrant for Field Service Management - 5 May 2009](#)

[Magic Quadrant for Field Service Management, 2008 - 18 April 2008](#)

[Magic Quadrant for Field Service Management, 2007 - 11 May 2007](#)

[Magic Quadrant for Field Service Management, 2006 - 3 April 2006](#)

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Table 1: Ability to Execute Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	High
Customer Experience	High
Operations	Medium

Source: Gartner (August 2021)

Table 2: Completeness of Vision Evaluation Criteria

<i>Evaluation Criteria</i> ↓	<i>Weighting</i> ↓
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Low

Source: Gartner (August 2021)