



## Field Service Management

Providing the best capabilities to help employees serve customers

October 2016

### FIELD SERVICE MANAGEMENT

IFS  
ORACLE FIELD SERVICE CLOUD  
(FORMERLY TOA TECHNOLOGIES)  
SERVICEMAX

CONSTELLATION  
ShortList™

7  
solutions  
to know

CLICKSOFTWARE  
PTC  
SAP  
VERTICAL SOLUTIONS

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The Constellation ShortList™ presents vendors in different categories of the market relevant to early adopters. In addition, products included in this document meet the threshold criteria for this category as determined by Constellation Research.

This Constellation ShortList of vendors for a market category is compiled through conversations with early adopter clients, independent analysis, and briefings with vendors and partners.

### About Constellation Research

As an award-winning Silicon Valley-based strategic advisory and futurist analyst firm, Constellation Research serves leaders and organizations navigating the challenges of digital strategy, business-model disruption and digital transformation.

Constellation works closely with solution providers, partners, C-suite executives, board of directors, and its Constellation Executive Network of buy-side leaders to lead the way in research coverage and advise clients how to achieve valuable business results.

### About This Constellation ShortList™

Field customer service occurs when resources or services are deployed onsite at a client. Field service management software enables companies to be flexible and nimble when providing service.

These offerings are great at detecting problems before having to send someone to repair or fix a customer's issue. In the event they must send someone, they can communicate in real-time with customers, provide on-site information about products and repair issues while offering relevant and timely service. These offerings help companies improve their operational efficiencies by optimizing work-order routing and technician scheduling, which results in quicker resolution of issues.

Analytics used in field services often optimize when services are deployed and how assets are tied to deployment of resources. They have advanced scheduling systems that let the customer know when the technician or field-service employee will arrive within a reasonable window of time. Helping provide an excellent customer experience is the most important aspect of field service management solutions.

## Threshold Criteria

Constellation considers the following criteria for these solutions:

- Good diagnostics prior to rolling out the truck
- Resource management
- Case management
- Communication with the customer on the status of the technician's arrival
- Scheduling
- Resource allocation
- Inventory optimization
- Mobile enablement

## The Constellation ShortList™

Constellation evaluates over 25 solutions categorized in this market. This Constellation ShortList is determined by client inquiries, partner conversations, customer references, vendor selection projects, market share, and internal research.

These are the best-of-breed vendors that provide applications and services without bundling into another platform:

- IFS
- Oracle Field Service Cloud (formerly TOA Technologies)
- ServiceMax
- ClickSoftware
- PTC
- SAP
- Vertical Solutions

## Frequency of Evaluation

Each Constellation ShortList evaluation will be updated every 90 days as needed.

## Evaluation Services

Constellation clients may work with the analyst and research team to conduct a more thorough discussion of this Constellation ShortList. Constellation can also provide guidance in vendor selection and contract negotiation.

## Business Themes



Consumerization of IT & The New C-Suite



Next-Generation Customer Experience

To learn more:

Visit [www.constellationnr.com/ShortList](http://www.constellationnr.com/ShortList)  
or email [shortlist@constellationnr.com](mailto:shortlist@constellationnr.com)



### Dr. Natalie Petouhoff Vice President and Principal Analyst

Dr. Natalie Petouhoff focuses on the integration of traditional business strategy and operations with social and digital business transformation

at scale. Her research dives into the latest trends in software that result in increased customer and employee engagement with major shifts in revenue and costs. She was previously a management consultant and systems integrator, a Forrester Research analyst and a digital and social media strategist – all roles that helped thousands of clients provide better customer experiences.

