Gartner Magic Quadrant finds field service management options lacking

- Albert McKeon Reprints Published: 15 Nov 2012

Businesses investing in field service management technology will have to cobble their platforms piece by piece, according to a new Magic Quadrant report from Gartner Inc., a consultancy based in Stamford, Conn.

The fractured market will force more buyers to adopt a best-of-breed approach rather than relying on enterprise application suite providers to close gaps in field service management, according to the report's lead author, Gartner analyst William McNeill.

Even that might not be enough. Because field service management vendors don't support a modern platform or application, particularly for mobile, many companies build components themselves, according to the new research.

But some of that build-rather-than-buy mentality lies with the companies' technology buyers, who aren't ready to arm their field service management technicians with smartphones and tablets, McNeill said. Instead, the techs go out into the field with laptops or rugged handheld devices that don't use HTML5, Apple's iOS or Android applications.

As it is, mobile software vendors "don't know which horse to bet on: Apple or Android," McNeill said. "The challenge for [field service management] users is similar: 'Which should we use? Android devices or iPads?' They have to think about what will survive. They're reluctant to use something if the software doesn't catch up."

Designed for CRM, field service management applications enable technicians to troubleshoot problems and fix them on-site.

Magic Quadrant ranked leaders and visionaries

The Magic Quadrant for Field Service Management ranks vendors of field service products as leaders, challengers, visionaries or niche players, based on several metrics that include pricing, track record and customer experience.

While a handful of vendors have separated themselves from the pack, no single vendor has mastered the critical areas of a complete field service lifecycle, the report said. The lifecycle calls for such customer management capabilities as selling and tech support, end-to-end parts management, dispatching and workforce management, and integrated mobile enterprise apps.

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Vendors fail to encompass the entire lifecycle because field service processes can vary from one industry to the next, making it difficult for vendors to have complete expertise, the report said.

McNeill and his colleagues selected just two vendors as leaders in this year's Magic Quadrant: Click Software and TOA Technologies.

Oracle Siebel was the only vendor to rank in the Magic Quadrant's challenger category. And Service Max, Astea International and Servigistics are considered visionaries.

Seven vendors round out the niche player category: SAP, Oracle (Business Suite), IFS, Wenn Soft, Vertical Solutions, ViryaNet and Service Power.

The report didn't summarize the strengths and weaknesses of the Magic Quadrant field, and instead reviewed companies' individual offerings.

McNeill wouldn't comment on vendors' strong and weak points, but said none of the vendors have yet to take advantage of what Gartner calls a "nexus of forces." The nexus isn't a team of cartoon villains but rather a melding of social, mobile, cloud and information capabilities for employees who are working on the shop floor.

Vendors haven't perfected the nexus

Each of the forces existed in field service management for years, but only recently have they started to converge in attempts to engage customers and access information, McNeill said. If used correctly, combining those customer interactions and data stores will lead to high service levels and even new service business models, he said.

Take social media. Mixed with field service management, social programs increase the sharing of information across teams. But "social" in field service management isn't Facebook, the report said. It's the conversation threads between technicians using, for instance, ServicePulse, the renamed product that combines ServiceMax and Salesforce.com's Chatter.

"One big thing is a lot of business buyers hear the word 'social' and freak out," McNeill said. "We're not saying everyone should use Facebook in field service, but what we're saying is use social concepts. It's about creating networks and sharing information in real time."

Despite the potential to improve field service management, social media and the other three nexus forces haven't yet come together in the industry, McNeill said. "We're seeing the precursor for this," he said. "It will be a few more years before the four come together in a cohesive way."

Mobile, particularly, will alternately be a boon and a difficulty for field service, the report said. Devices come and go rapidly, and new mobile form factors will emerge. Sensor data, for one, will enhance the user experience for technicians, integrating virtual and physical worlds.

On the other hand, service technicians using either work or personal mobile devices will complicate things, the report said. Yet, some companies are adapting: One user told Gartner it gave field service techs iPads they could also use for personal activities; others have armed technicians with ordinary consumer devices with protective cases, in order to avoid the higher cost of more rugged ones.

Users have taken to the cloud and Software as a Service (SaaS) platforms, but there's fragmentation among vendors, the report said. Adoption of cloud and SaaS offerings by traditional providers is lower than expected, while the use of pure SaaS providers is robust.

The culmination of social, mobile and cloud lead to the fourth force of the nexus, information. Access to real-time information will increase customer satisfaction for service businesses, the report said.

But a company looking for field service management technology shouldn't base its decision solely on the nexus or on a vendor's position in the quadrant, the report said. Companies should also review a vendor's reference customers, the number of skilled professionals, the existence of a modern service-oriented architecture, cost and an articulated mobility road map.

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