The State of Field Service 2015

Establishing insights into field service: the little-known industry that keeps our world running.
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Repairmen keep our world running. From repairing HVAC systems to climbing wind turbines and everything inbetween, they maintain the infrastructure that keeps our society operating smoothly in the little-known industry called field service.

This survey, commissioned by ServiceMax, the leading field service management solution, reports on the state of the field service industry from consumer perspectives. It explores the characteristics of repairmen and women working in the field service industry and demographic trends of the consumers who request it.

ServiceMax polled 4,122 people over the age of 18 from all demographics, occupations, and economic classes, to deliver a first-of-its-kind assessment of the industry. The results establish the state of Field Service today and how it will change over time.
The State of Field Service 2015

This report addresses the following questions:

- How well-known is field service?
- When and why is it requested?
- Who requests field service?
- When do repairmen excel and when do they fall flat?
- How are smarter machines set to take the field service industry to the next level?
- Has this mobile workforce begun using technology to improve efficiency and boost consumer satisfaction? Or have repairmen stayed true to their traditional clipboards and tool belt approach?
- How can we improve inefficiencies with the latest developments in mobile and cloud technology?
What We Found:

Ubiquitous, but either underappreciated or unnoticed:
The majority of Americans are not very familiar with the term “field service,” but once defined, 55% report needing it in the past few months.

If you’re coming into my home, you better know who I am:
To improve the quality of field service delivered, consumers ask that repairmen provide personalized recommendations on whether to upgrade or whether to service an existing machine. They also expect the repairman to have knowledge of the existing devices and past issues.

Your repairman’s white van probably doesn’t have the part you need:
Did your repairman have to come back a second time to finish up the job? It’s most likely because he didn’t have the correct parts needed to solve the issue the first time around.
What We Found:

*When I was your age…:*
Younger people are more familiar with the term “field service” than older generations, but they’re less likely to call a repairman when something goes wrong or starts acting up.

*Millennials want to be hands-off:*
Younger generations are more interested in subscription based field service models and more comfortable with having a repairman proactively reach out to fix their machines.

*I can do it myself:*
Although men are significantly more familiar with the term “field service” than women, they’re less likely to request it. Men are more interested in leasing products for a monthly fee than purchasing it upfront for the full price.
What Is Field Service?

Although 55% of Americans have required a repairman’s service in the last year, few are actually familiar with the term “field service.”

How familiar are you with the term “field service?”

- 10.58% Extremely familiar
- 15.57% Very familiar
- 30.46% Somewhat familiar
- 25.52% Not very familiar
- 17.87% Not at all familiar
How Do You Describe Field Service?

Some people have no clue:

• “Speaking with strangers in order to introduce or experience an item or service.”
• “Computerized service companies use to track employee quality of work, inventory, etc.”
• “Going out and volunteering in nonspecific ways. So, instead of volunteering at a marathon, you would volunteer to cut down invasive species in a forest.”

...and others hit the nail on the head.

• “Repair person comes to your location to make repair to product, as opposed to taking the product to a service/repair center.”
• “Out in the field like oil drilling.”
• “Maintenance, repairs, or assistance provided by the company, corporation, or business at the consumers location.”
• “Field service management (FSM) refers to a hosted or cloud-based system that combines with hardware and internet service to support companies and customers.”
Using Field Service: Why & When

People use field service for a wide variety of reasons, but most tend not to call a repairman unless it’s an emergency.

Under what circumstances do you request a repairman to visit your home?

<table>
<thead>
<tr>
<th>Circumstance</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>When a product completely breaks down</td>
<td>68.93%</td>
</tr>
<tr>
<td>When I purchase a product and need it installed</td>
<td>44.24%</td>
</tr>
<tr>
<td>For periodic maintenance</td>
<td>40.44%</td>
</tr>
<tr>
<td>When I anticipate or experience a minor problem with my product to prevent complete breakdown</td>
<td>36.79%</td>
</tr>
<tr>
<td>I never request services to fix my products</td>
<td>12.98%</td>
</tr>
</tbody>
</table>
Using Field Service: Why & When

Most people find their repairman through personal connections.

How important are the following when selecting a repairman?

- Personal recommendation: 22.1%
- Ease of scheduling: 18.8%
- Ability to choose a convenient window of time: 18.7%
- Company reputation: 18.7%
- Cost: 15.8%
- Ability to fix the problem on the first visit: 15.6%
- Expertise in particular issue: 15.5%
- Reliability: 14.5%
- Quality: 14.3%
Using Field Service: Why & When

When it comes to requesting field service, avoiding future breakdowns isn’t a top priority for most people, even if it would mean saving money.

Why do you typically request field service for your products?

- To fix the issue(s) with the product(s): 74.57%
- To help avoid more serious issues: 43.21%
- To save money by preventing the need to completely replace the product(s): 41.75%
- To keep the product(s) in better condition: 36.11%
Field Service For Every Generation

Younger generations are more familiar with the term “field service.”

How familiar are you with the term “field service?”

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Somewhat + extremely familiar</th>
<th>Not very + not at all familiar</th>
</tr>
</thead>
<tbody>
<tr>
<td>29 or younger</td>
<td>64.13%</td>
<td>25.87%</td>
</tr>
<tr>
<td>30-59</td>
<td>56.04%</td>
<td>43.96%</td>
</tr>
<tr>
<td>60 or older</td>
<td>65.33%</td>
<td>34.67%</td>
</tr>
</tbody>
</table>
Field Service For Every Generation

People are more likely to use field service to prevent issues in the future as they get older.

Why do you typically request “field service” for your product(s)?

29 or younger
- To fix the issue(s) with the product(s): 65.98%
- To help avoid future, more serious issues: 42.83%
- To save money by preventing the need to completely replace the product(s): 1.35%

60 or older
- To fix the issue(s) with the product(s): 49.32%
- To help avoid future, more serious issues: 50.00%
- To save money by preventing the need to completely replace the product(s): 6.76%
- Other: 49.32%
Field Service For Ladies & Gents

Men are more open to the concept of proactive field service than women.

How comfortable would you be with the idea of a repairman reaching out to you before your product broke down to perform service in a proactive manner, and ensure that your product was always fully functional?

73.62% Extremely + very comfortable

80.84% Extremely + very comfortable

Female respondents Male respondents
Field Service For Ladies & Gents

In addition to being more open to the idea of proactive field service compared to women, men are also more interested in leasing a product for a monthly fee.

How interested would you be in leasing the product for a monthly fee instead of purchasing the product upfront for the full price? (The monthly fee over time would include periodic maintenance, as well as upgrades so that you’d always have the most up-to-date product.)

- Females: 54.03% extremely + very interested
- Males: 60.67% extremely + very interested
How Do We Feel About Field Service

Contrary to popular belief, people don’t hate their field service experiences. In fact, the vast majority of survey respondents reported high rates of satisfaction with their field service experiences.

How satisfied were you with the most recent field service that you received?

- Extremely + Very satisfied: 82.90%
- Somewhat satisfied: 13.82%
- Not very + not at all satisfied: 3.28%
How Do We Feel About Field Service?

*In fact, it’s twice as important as the repairman arriving on time.*

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>The problem did not get resolved on the first visit</td>
<td>76.32%</td>
</tr>
<tr>
<td>The repairman had poor communication skills</td>
<td>36.84%</td>
</tr>
<tr>
<td>The repairman did not arrive on time</td>
<td>34.21%</td>
</tr>
<tr>
<td>The repairman didn’t complete the job in the designated window of time</td>
<td>23.68%</td>
</tr>
<tr>
<td>The repairman’s appearance and/or demeanor was unsatisfactory</td>
<td>21.05%</td>
</tr>
</tbody>
</table>
How Do We Feel About Field Service?

Most important for consumer satisfaction is fixing the problem the first time.

For those of you that were satisfied with your most recent field service, was your problem solved on the first visit?

91.55% Yes
8.45% No
The Repairman’s Tool Belt

It might be the 21st century, but most repairman still depend on the tried and true essentials – tool belts and clipboards – to get the job done.

What did your repairman bring during the service?

- **68.36%**: Traditional toolkit or belt
- **55.42%**: Clipboard or pen and paper
- **50.26%**: Smartphone (e.g. iPhone or Android)
- **20.28%**: Laptop
- **19.49%**: Tablet (e.g. iPad)
- **13.29%**: User manual
- **5.24%**: Other
Technician Efficiency: First-Time Fix Rates

However, despite a lack of high tech tools, most repairmen get the job done during the first visit.

Did your repairman fix the problem on the first visit?

80.90% Yes
19.10% No
**Technician Efficiency: First-Time Fix Rates**

If the repairman needs to come back for a second visit, it’s most likely because he/she didn’t have the correct parts to fix the issue the first time around. That means time wasted both for the customer and the technician.

Why wasn’t the issue fixed the first time?

- **60.63%** - The repairman didn’t have the parts needed to solve the issue
- **23.08%** - The repairman didn’t know how to fix the problem
- **15.38%** - The repairman didn’t have the tools needed to solve the issue
- **13.12%** - The repairman didn’t solve the problem within the designated time slot
- **5.88%** - The repairman arrived too late to service the product in the time allotted
The Future of Field Service: Smarter Repairmen & Machines

Field service is poised to adopt technology trends that get the job done faster and more efficiently.

When providing service, how could your repairman do a better job?

- Know the history of the device and whether service had previously been delivered: 39.53%
- Provide a recommendation on whether to purchase a new product, or service the existing one: 39.08%
- Offer me customized solutions: 32.87%
- Share information about the issue before arriving: 32.09%
- Have up-to-date technology (iPhones, Tablets, etc.): 26.30%
- Other: 11.59%
The Future of Field Service: Smarter Repairmen & Machines

In the future, you’ll never hear the question, “What seems to be the problem?” again. Repairmen will diagnose the problem in advance and be prepared to offer customized solutions when they arrive on-site.

How comfortable would you be with the idea of a repairman reaching out to you before your product broke down to perform service in a proactive manner and ensure that your product was always fully functional?

77.21% Extremely + very comfortable

22.79% Not so + not at all comfortable
Imagine a world where products and services never break down.

If the price of the product included a guarantee that it would never break down or be out of service, would you be more likely to purchase that product?

83.68% More + somewhat more likely
The Future of Field Service: Smarter Repairmen & Machines

Imagine if you purchased machines and products the same way you stream television shows and videos: through a subscription model.

How interested would you be in leasing the product for a monthly fee instead of purchasing the product upfront for the full price? (The monthly fee over time would include periodic maintenance, as well as upgrades so that you’d always have the most up-to-date product.)

- 57.30% Extremely + very interested
- 42.70% Not very + not at all

57.30% Extremely + very interested
42.70% Not very + not at all

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Bringing It All Together: The 2015 State Of Field Service

Prediction of Future of Field Service

We can clearly say two things about the State of Field Service:

• Consumers are very happy with its delivery
• Consumers are simultaneously looking forward to changes in its delivery.

The good news is manufacturers are a step ahead, capitalizing on the abilities of connected machines to usher in an entirely new outcomes-based business model — one where consumers can rent a warm room, instead of owning a heater with a service contract. The youngest generation of consumers are already prepared and excited for this change, as the numbers show.

In the future, the world of clipboards is an anachronism, and consumers couldn’t be happier.
Who Are We And How Did We Do This?

About ServiceMax

ServiceMax leads the massive, global industry of field service management software – an $18B market worldwide. As the only provider of complete end-to-end mobile and cloud-based technology for the sector, the company continues to reimagine and create solutions for the 20 million people globally who install, maintain, and repair machines across dozens of industries. ServiceMax goes to every length – from joining technicians on service calls to publishing the industry’s leading online publication – to help customers discover untapped innovation, unleash new revenue streams, drive efficiency, and most importantly delight their end-customer. To learn more, please visit www.servicemax.com.

About The Survey

On behalf of ServiceMax, SurveyMonkey Audience conducted an online survey of 4,128 adults (aged 18+), specifically 2071 Americans and 2051 Britons. The survey was fielded June 1-2, 2015 in the United States and the United Kingdom. Respondents for this survey were selected from an opt-in panel, and had expressed prior consent to participate in online surveys.
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