FIELD SERVICE INSIGHTS

After The Event Report

Field Service East

August 25 – 27, 2025

Insights and strategies from the live event

Foreword

Insights from the producer

I'm pleased to share this comprehensive "After the Event" report, based on the contents of our recent Field Service East 2025 conference.

This report captures the essential insights, strategic discussions, and transformative ideas that emerged from our August gathering, where industry leaders explored the AI-powered service revolution and its practical applications across field service organizations. The conversations spanning AI integration, modern leadership approaches, customer experience optimization, and workforce development represent the forward-thinking perspectives that define our community's commitment to excellence and innovation. These discussions directly address the most pressing challenges facing field service professionals today, from scaling AI implementations to building psychologically safe work environments.

We hope you'll find this comprehensive report both informative and actionable as you continue to drive transformation in your organizations—and be sure to register for Field Service Next West 2026 in April!

Jonathan Massoud
Head of Content & Growth
Field Service Next

Register for Field Service Next 2026 Today!

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The Expanding Role of Artificial Intelligence in Field Service

The artificial intelligence revolution in field service has moved from pilot projects to implementations that deliver substantial business value. Organizations are achieving remarkable results through strategic AI deployment, including reductions in field calls, annual productivity gains, and higher accuracy in diagnostic recommendations.

However, successful AI adoption demands phased implementation with clear business goals and change management strategies. The key insight emerging from industry leaders is that AI doesn't need to be flashy to be effective; it simply needs to solve problems faster, reduce waste, and deliver measurable efficiency improvements. This way, it can transform operations from reactive maintenance to proactive, intelligent service delivery.

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Keynote: The AI Revolution in Field Service: From Hype to Hyper-Efficiency

Yasir Sheikh
Global Head of Applications &
Connected Services
Honeywell

Summary

Yasir Sheikh from Honeywell demonstrated how the company has successfully moved AI from experimental concepts to practical field service applications, achieving measurable results including a 30% reduction in field calls through remote solutions, $11 million in annual productivity gains, and a 13% reduction in journey time, saving 150 tons of CO2 annually. The session emphasized that AI doesn't need to be flashy to be effective—it simply needs to help solve problems faster and deliver efficiency. Sheikh outlined Honeywell's phased approach to AI deployment, from cross-functional innovation teams identifying high-impact use cases to pilots in controlled environments, followed by measurement and scaling across the organization.

Key Recommendations

- AI implementation should focus on phased deployment with clear business goals rather than trying to implement AI everywhere at once.
- The biggest cost in AI deployment is change management, not the technology itself, as organizations must prepare their workforce for new processes.
- Successful AI adoption requires integration into core workflows and measurable improvements in revenue, efficiency, or customer satisfaction rather than remaining experimental.
- Trust-building is critical for AI success, requiring operators and technicians to have confidence in AI recommendations before taking action.

From The Session

"AI does not have to be flashy or futuristic. The real power is in helping us fix the problem faster, avoid frustration, and get on with our daily lives. That's exactly what AI is doing in field service; it's cutting down waste, preventing unnecessary trips, and delivering efficiency."

Yasir Sheikh, Global Head of Applications & Connected Services, **Honeywell**

Keynote: Building Your AI Roadmap: From Pilot to Enterprise-Wide Adoption

John Tocado
Principal Analyst- Systems Development
JLG Industries

Summary

John Tocado of JLG Industries described his journey implementing AI in field service. He discussed his approach of practical management, using systematic roadmaps, and addressing the need for thorough data audits before starting major projects.

Tocado demonstrated success with rapid prototyping, building scalable teams, and achieving fast wins. For example, he achieved 85% email response accuracy in two weeks.

Finally, he stressed that AI excels at tasks like summarization and search, but still cannot substitute for human care, ownership, or decision-making, especially when managing customer relationships and complex service issues.

Key Recommendations

- Implement one AI feature at a time to ensure user adoption and avoid overwhelming field technicians with complex multi-feature systems.
- Conduct thorough data audits early in the planning process to prevent costly surprises and project failures after contracts are signed.
- Use fast prototyping with tools like ChatGPT to validate AI concepts quickly and determine ROI before investing in full-scale development.
- Focus AI applications on prediction-based tasks like summarization and document search rather than complex troubleshooting or decision-making.

From The Session

"Think of AI like a college intern: they know everything but understand nothing. You must manage them carefully, with clear instructions and strict oversight."

John Tocado, Principal Analyst- Systems Development, **JLG Industries**

Case Study: Autonomous Service Journey: Service AI that Delivers the Right Fix, Right Part, Right Now

Ashok Kartham
Founder & CEO
Circuitry.ai

Josh Russell
VP of Products
Circuitry.ai

Summary

The session demonstrated how Circuitry.ai partnered with Takeuchi to implement autonomous service AI technology that dramatically improves field service operations through intelligent decision-making. The presenters showcased real-world results, including a 50% reduction in inbound calls, a 60% decrease in average call handling time, and 97.5% accuracy in diagnostic recommendations.

The autonomous service model applies principles similar to autonomous vehicles, utilizing knowledge-driven guidance, predictive intelligence, and automated orchestration to ensure technicians get the right fix, right part, and right decision every time.

Key Recommendations

- Start AI deployment immediately without waiting for perfect data - companies can begin training AI models with existing documentation and let the system organize and classify information automatically.
- AI accuracy of 97.5% matches subject matter expert performance - enabling first-time fix rates of 90% and providing technician-level expertise at scale.
- Deploy AI workers as team members across multiple platforms - service advisors, parts advisors, and warranty specialists can be accessed through Teams, WhatsApp, mobile apps, and existing CRM systems.
- Transform warranty processing from manual scoring to automated adjudication - achieving 93% accuracy in claim scoring while reading policies and applying business rules automatically.

From The Session

"We always study our accuracy a couple of different ways in our AI model, but we hit 97.5%, which means that's an SME at that point, right? That's one of your most skilled experts. When your percentage is that high, meaning 97.5% of the time, they're providing the right answer for the right failure."

Josh Russell, VP of Products, **Circuitry.ai**

Panel: Bringing Humans and AI Agents Together for a More Confident Workforce

Lee Pisacano
SVP, ICE Specialist Sales and Solutions
Salesforce

Yasir Sheikh
Global Head of Applications & Connected Services
Honeywell

Summary

Honeywell's transformation from traditional field service operations to AI-enhanced service delivery demonstrates the practical benefits of integrating artificial intelligence with human expertise. The company achieved $11 million in annual productivity savings by implementing Salesforce Field Service Lightning, while also realizing 30% productivity improvements in remote case resolutions and technician efficiency.

The session highlighted how field technicians can evolve from reactive maintenance workers to trusted consultants by leveraging AI-powered work packages that provide comprehensive customer insights, historical data, and upselling opportunities. This transformation enables service organizations to deliver more strategic value while maintaining the human connection that customers trust, particularly in complex building management systems where Honeywell operates across 10 billion+ buildings globally.

Key Recommendations

- **Systematic AI adoption approach:** Focus on proving specific use cases that deliver measurable revenue, productivity, and efficiency benefits rather than implementing AI for technology's sake.
- **Transform technicians into consultants:** Equip field engineers with comprehensive customer data and service history to build trust and identify growth opportunities during site visits.
- **Centralized platforms enable insights:** Consolidating service operations through unified platforms creates the foundation for AI-driven decision making and enhanced customer intimacy.
- **Change management is critical:** Success requires organizational commitment from the executive level down while allowing operational teams to drive deployment specifics.

From The Session

"They are like doctors. When the patient sees a doctor, the trust is automatically there because the patient knows that this person has the solutions for their problems. This is how our customers see our engineers. They put more trust into the engineers, into our field engineers and remote engineers, than the commercial guys."

Yasir Sheikh, Global Head of Applications & Connected Services, **Honeywell**

Presentation: Master the AI Dialogue: How to Avoid Becoming Part of Gartner's Predicted 40% Failure Rate in Agentic AI Projects

Tim Burge
Director of Product Marketing
Aquant

Summary

The session addressed why nearly 40% of agentic AI projects are projected to fail by 2027, emphasizing that successful AI adoption in field service environments requires more than implementing new technology. Speakers stressed the unique complexity of service organizations, where AI must span everything from troubleshooting to supply chain and preventative maintenance—not just isolated processes or point solutions.

The discussion highlighted the necessity for genuine domain expertise, rigorous change management, and visible executive sponsorship to drive meaningful adoption and measurable ROI from AI investments. Practical strategies included gamification, contribution leaderboards, and performance-linked incentives to encourage tool usage and capture essential institutional knowledge. The conclusion underscored that adoption and alignment are as critical as technical capability in realizing AI's business value in service contexts.

Key Recommendations

- AI projects in field service fail without strong change management, executive sponsorship, and continuous stakeholder alignment.
- Domain expertise and a holistic approach are vital; siloed or IT-only-led initiatives miss real operational needs.
- Adoption must be fostered via gamification, recognition, and aligning tool usage with desired performance outcomes.
- Measurable outcomes and robust baseline data are essential for evaluating true AI project ROI.

From The Session

"ROI will never be achieved without adoption. No matter how strong the business case, if people don't use the tools, you won't see value. Adoption strategies need continuous reinforcement—not just a launch and forget approach."

Tim Burge, Director of Product Marketing, **Aquant**

Panel: Maximizing Aftermarket Efficiencies with AI: Driving Productivity & Profit

Tyson Stull
Global Service Operations Leader
Dynapower/Sensata

John Walls
Insight Architect
Neurobuilt

Naimish Rajyaguru
National Service Head
Symphony

Moderator:
Michael Blumberg
President
Blumberg Advisory Group

Summary

Field service leaders discussed strategic approaches to AI implementation at a panel focused on maximizing aftermarket efficiencies. The conversation emphasized starting with clear problem statements rather than seeking AI solutions first, with panelists highlighting how AI can enhance productivity, reduce operational costs, and improve customer experiences.

Key discussions centered on practical applications, including automated invoice processing, predictive maintenance through data analysis, and AI-generated service reports that save significant labor hours and improve deliverable quality.

The panel explored the human dimension of AI adoption, addressing workforce challenges and the importance of change management. Speakers emphasized that AI should relieve stress on field technicians while maintaining the human touch in customer relationships, transforming the role of field engineers into more customer-advisory positions focused on soft skills rather than purely technical expertise.

Key Recommendations

- Focus on existing problems first, then identify where AI can provide economical solutions rather than starting with AI and hunting for problems to solve.
- AI implementation must include clear value propositions for end users to ensure adoption, addressing "what's in it for me" from the field engineer's perspective.
- Successful AI applications in aftermarket services include automated back-office operations, predictive maintenance through data harvesting, and AI-generated service reports that significantly reduce labor costs.
- The field service engineer role is evolving toward customer advisory positions where soft skills and relationship management become more valuable than purely technical abilities.

From The Session

"Focus on the problems you already have. You know what you need to fix within your organization. Just remember that AI is there to help you, but it is not a cure-all for everything. It is a solution in your toolbox."

Tyson Stull, Global Service Operations Leader, **Dynapower/Sensata**

Presentation: Closing the Loop: AI-Powered Validation in Field Services

Daniel Herrera
Director Managed NOC & Engineering Dispatch Services
Ciena

Summary

Daniel Herrera from Ciena addressed the critical challenge of improving first-visit resolution rates in field service operations. The company faced low resolution metrics, customer satisfaction issues, and significant resource waste from repeat dispatches. To tackle this problem, Ciena developed an AI-powered image analysis solution that compares before-and-after photographs of network equipment to identify configuration discrepancies in real-time.

The innovative solution uses artificial intelligence to highlight visual differences between initial arrival photos and completion photos, enabling remote NOC engineers to validate field technician work before site departure. This approach bridges the gap between highly skilled remote technicians and field personnel, ensuring proper execution of maintenance procedures.

The pilot program, conducted with their most complex 6,500 device, demonstrated the potential to exceed their 10% improvement goal for first visit resolution rates.

Key Recommendations

- AI-powered image comparison enables real-time validation of field work, preventing costly return visits and improving first-visit resolution rates.
- Starting with focused, fit-for-purpose AI applications delivers faster results than pursuing comprehensive solutions that exceed immediate needs.
- Strong user stories and clear requirements are essential when partnering with AI vendors to ensure solutions match operational objectives.
- Visual validation technology can extend beyond equipment checks to include HVAC monitoring, facility quality assessments, and environmental condition documentation.

From The Session

"You need to develop a strong user story that really fits your needs and partner with the AI companies to find out what works best and what they can deliver. But remember, you still need to deliver against your user story. We purposely started small so that we could grow once we made sure this would work the way we wanted it to."

Daniel Herrera, Director of Managed NOC & Engineering Dispatch Services, Ciena


OPENING KEYNOTE
Leadership Renewal: Best Practices for Engaging Yourself and Others for Optimal Team Performance
Christine Miners
Rick Lash

Achieving Digital Transformation Through Systems Integration

Leaders say that successful digital transformation in field service depends on integrating new technologies with legacy systems while prioritizing user adoption and change management. However, plenty of organizations are still encountering major hurdles, often related to internal resistance rather than technical problems.

Successful organizations are implementing AI-powered platforms that eliminate administrative burden while leveraging remote diagnostics and predictive analytics. Organizations that involve stakeholders early and treat data as a managed asset will achieve greater automation and efficiency, without sacrificing human expertise.

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Fireside Chat: A Seamless Transition: Legacy System Integration in Field Service Management

PJ Fernandez
Innovation & Incubation Director
Schneider Electric

Rob Van
Vice President of Service
Envelop Group

Summary

This session explored the critical challenges of integrating modern technologies like AI and IoT with existing legacy systems in field service management. The primary barriers to successful modernization were identified as change management and user adoption rather than the technology itself, with workforce shortages making digital transformation essential for operational efficiency.

Both leaders emphasized that successful modernization requires a comprehensive journey mapping process that involves stakeholders across all organizational levels, from executives to front-line operators. The discussion highlighted practical examples of AI implementation, including Schneider Electric's development of AI-powered tools for EV charger installations and enhanced service management platforms that leverage machine learning to optimize technician dispatch and partner management.

Key Recommendations

- Journey mapping is the critical first step to successful legacy system integration, requiring a comprehensive understanding of current processes and stakeholder involvement.
- The biggest challenge in modernization is overcoming employees' fear of change and job displacement, not technology implementation.
- The implementation of AI and IoT has become mandatory for field service teams to address workforce shortages and operational demands.
- Finding champions at both executive and working levels is essential for driving successful technology adoption and change management.

From The Session

"The main challenge is that people are afraid of change and worry that AI will take away their jobs. In reality, we will always need people to manage processes and partner relationships. As the business grows, there will be even more work to do—but the nature of those jobs may change over time."

PJ Fernandez, Innovation & Incubation Director, **Schneider Electric**

Fireside Chat: Integrating Remote Diagnostics with Field Service Management Platforms

Jessica Murillo
VP Chief Operating Officer,
Technology Lifecycle Services
IBM

Carlos Carnelos
Americas IT Transformation Executive
IBM

Summary

The integration of remote diagnostics with field service management platforms requires a coordinated approach across people, process, and technology dimensions. IBM's Technology Lifecycle Services demonstrates how organizations can successfully embed automation and AI-driven insights into daily workflows while maintaining human expertise and customer focus.

The approach begins with designing products that can communicate proactively and extends to implementing processes that consume diagnostic data to trigger automated workflows. This frees technicians from repetitive tasks to focus on complex problem-solving and customer interaction.

Successful integration demands significant organizational change management, as organizations must educate users, ensure tools are intuitive, and demonstrate clear benefits to encourage adoption. When properly implemented, remote diagnostics can achieve impressive results, such as 90% automated case resolution and 33% improvement in time to solution when AI assists human agents.

Key Recommendations

- Integrate remote diagnostics across three dimensions: design products to communicate proactively, embed data consumption into daily workflows, and ensure users are educated on intuitive tools.
- Focus on out-of-the-box solutions before custom development, as many vendors are already integrating AI capabilities into their platforms natively.
- Measure adoption metrics alongside traditional KPIs, as tracking how often teams use AI tools creates internal competition and drives technology acceptance.
- Implement heavy-duty organizational change management that shows people how technology benefits them personally, moving them from routine tasks to more interesting problem-solving work.

From The Session

"It's so easy for us to change technology, but it is so hard to change people. So you really have to understand how people have to understand how it's gonna benefit them, how it's gonna make their life easier. They can go off and work on the more interesting problems versus the routine problems."

Jessica Murillo, VP Chief Operating Officer, Technology Lifecycle Services, **IBM**

Panel: Data-Driven Decision Making: Optimizing Legacy Data for Modern Field Service Analytics

Tyson Stull
Global Service Operations Leader
Dynapower/Sensata

John Walls
Insight Architect
Neurobuilt

Erik Bleyl
CEO
Enterbridge

Yasir Sheikh
Global Head of Applications & Connected Services
Honeywell

Moderator:
Roy Dockery
Senior Director, Support and Field Services
TSIA

Summary

This panel session explored the critical challenges organizations face when transforming legacy data into actionable insights for modern field service operations. Industry experts discussed the complexities of data governance, ownership, and standardization across global teams, emphasizing that data should be viewed as a strategic asset rather than a byproduct of service delivery. The conversation highlighted how organizations must first audit and understand their existing data before leveraging it for AI-driven insights and predictive maintenance.

The panelists shared practical approaches to data monetization and customer value creation, demonstrating how properly managed data can drive operational efficiencies and generate new revenue streams. They addressed the human factors involved in AI transformation, stressing the importance of maintaining customer relationships while leveraging technology to enhance service delivery and decision-making capabilities.

Key Recommendations

- Treat data as a managed asset with clear ownership and governance policies, similar to how organizations manage processes and procedures.
- Start with a comprehensive data audit to understand what legacy information exists before attempting to implement AI or predictive analytics solutions.
- Focus AI implementation on solving specific business problems rather than searching for applications after acquiring the technology.
- Maintain the human element in customer relationships while using data and AI to enhance service efficiency and decision-making capabilities.

From The Session

"Adopting AI quickly is the only real advantage companies can have, since the technology is now so widely available with the technology exposure and platform consolidation. The competitive landscape has become very reduced at this point."

Yasir Sheikh, Global Head of Applications & Connected Services, Honeywell

Presentation: Scaling Safe, Efficient Field Operations with SAP FSM at EDF Power Solutions

Hollie Breeden
Senior Continuous Improvement Manager
EDF Power Solutions

Summary

EDF Power Solutions successfully transformed field operations by implementing SAP Field Service Management across its renewable energy assets. The deployment eliminated 1.9 hours of administrative burden per service order by digitizing maintenance workflows and replacing paper-based processes with mobile smart forms. Through careful change management and user adoption strategies, EDF achieved over 85% technician adoption rates while generating a projected five-year NPV of $7.1 million.

The transformation demanded a focus on user experience and trust-building. By addressing fundamental barriers like iPad setup issues and providing hands-on support through their "crawl, walk, run" approach, EDF demonstrated how successful digital transformation combines the right technology with proper change management.

The company is now building on this foundation with AI capabilities to further enhance corrective maintenance processes and reduce troubleshooting time for its 440 field technicians servicing wind turbines, solar panels, and battery storage systems.

Key Recommendations

- Digital transformation success requires focusing on user experience and trust-building, not just technology deployment.
- Eliminating administrative burden through mobile smart forms can save nearly 2 hours per service order for field technicians.
- A phased "crawl, walk, run" adoption approach with dedicated support accelerates user acceptance and system utilization.
- Building AI capabilities on top of solid field service management foundations unlocks additional operational value and efficiency gains.

From The Session

"Everything I do, I do for Rodney, 'cause Rodney is more than just a wind technician. He's a dad. He loves playing with his kids. He loves riding his motorcycle, and he loves watching Sunday football. I want to ensure he comes home not only safely, but also with less mental load from work, so he's able to just enjoy his life."

Hollie Breeden, Senior Continuous Improvement Manager, **EDF Power Solutions**

Presentation: Smarter Installed Base, Stronger Revenue Outcomes

Joe Kenny
VP of Customer Transformation
ServiceMax

Summary

Joe Kenny from ServiceMax discussed how artificial intelligence, particularly generative AI, can transform service organizations by leveraging installed base data to drive stronger revenue outcomes. Kenny highlighted the failure of many previous industry transformations, including IoT implementations, digital twins, and outcome-based service models, noting that less than 15% of organizations successfully transitioned to outcome-as-a-service models.

He emphasized that while only 25% of AI initiatives currently meet ROI objectives and just 16% achieve enterprise-wide rollout, generative AI offers genuine potential by automating low-value administrative tasks that burden technicians and back-office staff.

ServiceMax's approach embeds AI throughout its platform to enable technicians to work more efficiently through natural language queries for parts ordering, manual retrieval, scheduling, and accessing historical repair data. Kenny demonstrated measurable improvements, including 12% performance gains in triage, 20-30% improvements in first-time fix rates, and reduced mean time to repair, all tied to concrete ROI metrics.

Key Recommendations

- Generative AI can eliminate low-value administrative tasks, freeing technicians to focus on customer-facing activities and revenue-generating opportunities.
- ServiceMax's AI platform leverages vast installed base data to provide instant access to repair histories, parts recommendations, and troubleshooting guidance through natural language queries.
- Organizations can achieve measurable ROI from AI implementations with 12% triage improvements and 20-30% gains in first-time fix rates.
- Successful AI adoption requires shifting from technology-driven initiatives to business problem-focused solutions with clear metrics and measurable outcomes.

From The Session

"We're identifying low-value tasks that typically fall to technicians and back-office employees and letting Gen AI take over: ordering parts, filling out customer debrief forms, rescheduling appointments, and looking up manuals and schematics. Tell them the process, and they can use simple questions to get through the work faster, with better outcomes and better results."

Joe Kenny, VP of Customer Transformation, **ServiceMax**

Evolving Service Paradigms: Strategic Transformation in Medical Device Support

Angela Thomas
Executive VP Growth & Strategy for Global Services
GE Healthcare

Summary

The medical device service industry is undergoing a fundamental transformation from cost center to revenue generator, driven by evolving customer expectations and technological advances. Healthcare providers now demand consumer-grade service experiences, including self-service capabilities, real-time updates, and personalized service contracts.

Companies must adapt by implementing strategic scaling approaches that balance workforce development with flexible service models, including multi-vendor support and hybrid offerings tailored to regional requirements.

Technology integration has become critical for competitive advantage, with remote diagnostics, AI-powered predictive maintenance, and IoT connectivity enabling proactive service delivery. Organizations must embed service innovation into their entire product lifecycle management, from pre-purchase through post-operative support, while developing scalable knowledge management systems and data-driven KPIs. Success requires alignment between service strategies and broader business objectives, transforming service into strategic, customer-centric value creation.

Key Recommendations

- **Make connectivity non-negotiable** - Service organizations must prioritize digital integration and eliminate manual processes to remain competitive.
- **Transform from cost center to revenue generator** - Service operations should evolve from reactive device maintenance to proactive, strategic value creation.
- **Embrace proactive service models** - Leverage AI, IoT, and predictive analytics to anticipate issues before they occur rather than responding after failures.
- **Align service with business objectives** - Embed service innovation throughout the product lifecycle and ensure service strategies support broader organizational goals.

From The Session

"I don't care what industry you're in; I think service is the heart of it. Service makes a very big chunk of the organization's revenue and value. Nobody wants something without the service to it or some type of guarantee. So, make connectivity non-negotiable."

Angela Thomas, Executive VP Growth & Strategy for Global Services, **GE Healthcare**


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Business Strategies for Improving Operations & Generating Value

Field service is shifting from a cost center to a standalone profit generator by aligning operations with strategic goals and real customer value. This has empowered teams to secure and justify larger investments for service initiatives, including digital transformation and AI adoption.

According to field service leaders, building successful new business models requires establishing unified "North Star" goals that align different departments with service revenue opportunities. In this section, you'll learn how these types of interdepartmental collaborations and cross-functional teams are generating revenue, generating opportunities.

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27 **Panel:** Understanding and Aligning Service Revenue within your Organization

Keynote: Cultivating Service Value: Strategies for Organizational Alignment from Field to Management

Steve Nava
Sr. Director Service & Support
LGC Diagnostics & Genomics

Summary

Field service leaders must actively advocate for their organizations by treating service as a profit center rather than just a cost center. Steve Nava from LGC Diagnostics & Genomics emphasized the importance of combining the "art" of customer relationships with the "science" of operational efficiency to maximize service value.

Organizations need to quantify service value through meaningful metrics while ensuring alignment between field teams, management priorities, and customer expectations to create sustainable competitive advantages.

Service teams should function as an extension of the sales organization by actively listening for customer opportunities and addressing broader customer needs beyond immediate technical issues. This approach transforms service from a reactive fix-it function into a proactive revenue generator that strengthens customer relationships and supports overall business growth.

Key Recommendations

- **Balance customer value with operational efficiency** by focusing on both world-class service delivery and cost-effective execution methods.
- **Position service as a profit center** by thinking in terms of investments in customers rather than purely transactional costs.
- **Empower technicians to act as sales extensions** by training them to identify opportunities and address comprehensive customer needs during service visits.
- **Align internal stakeholders** by consistently communicating service value to finance, sales, and leadership teams to secure investment and support.

From The Session

"You can have this whizzbang engineer who fixes everything in the first few minutes they walk in, and the customer hates them. And then you have this other engineer who goes in there and builds a relationship with the customer. They might struggle a little bit, but they ultimately get it fixed, and the customer loves them. This is where that blending of art and science comes together."

Steve Nava, Sr. Director Service & Support, **LGC Diagnostics & Genomics**

Keynote: Transforming Aftermarket Services: Leveraging Predictive Maintenance for Profitability

Doug Beck
US Industrial Automation Services Leader
Schneider Electric

Summary

Industrial organizations are entering a new era shaped by AI and predictive analytics, as they seek to address urgent challenges in field service, like an aging workforce and the need for much higher technician efficiency. The shift from reactive and preventive maintenance to predictive, data-driven approaches is key, leveraging connected assets and embedded AI to optimize technicians and service outcomes.

Implementing predictive maintenance is delivering real impact. Companies have seen up to 50% faster commissioning, 20% lower operational costs, 40% fewer truck rolls, and 25% energy savings.

Successfully navigating this transformation requires industry-wide collaboration and a fundamental move toward condition-based models that maximize uptime and customer satisfaction while making better use of limited talent.

Key Recommendations

- **Workforce Crisis:** The field service industry faces a critical staffing gap as demand grows 7% annually while the workforce increases less than 1%.
- **Technology Imperative:** Organizations must leverage AI and predictive analytics to make technicians 2-4x more efficient to bridge the growing labor shortage.
- **Predictive ROI:** Companies implementing predictive maintenance achieve 40% fewer truck rolls, 20% OpEx savings, and 50% faster equipment commissioning.
- **System Integration:** Effective predictive maintenance requires system-based AI connecting all assets end-to-end, not just individual asset monitoring.

From The Session

"We're standing at the edge of the next industrial revolution. If we look at the technology that's being deployed into our interconnected systems and our infrastructure, there is a need to transform our service businesses faster than ever before."

Doug Beck, US Industrial Automation Services Leader, **Schneider Electric**

Presentation: Guru Marketing: How Field Service Leaders Build Authority, Attract Ideal Clients, and Drive Growth

Michael Blumberg
President
Blumberg Advisory Group

Summary

Michael Blumberg introduced the concept of "Guru Marketing" as a strategic framework to help field service leaders transform their organizations from being under their OEM's shadow into market authorities who attract ideal clients and drive sustainable growth. The session emphasized that field service organizations must move beyond traditional approaches of simply "fixing equipment" or selling "genuine parts" to become recognized experts who educate their markets and demonstrate thought leadership.

The core principle involves shifting from "always be closing" to "always be educating" through the four pillars of Guru Marketing: knowledge creation, content dissemination, organizational integration, and leading with purpose.

Blumberg stressed that in today's competitive landscape, only 3% of buyers are ready to purchase at any given time, making it essential to nurture the remaining 97% through educational content and value-driven messaging that positions service teams as trusted advisors rather than simple product representatives.

Key Recommendations

- Authority and expertise differentiate field service organizations when product features become commoditized and customer relationships span decades.
- Educational content marketing targeting the 97% of prospects not ready to buy today creates stronger relationships and doubles closing rates.
- AI tools enhance guru marketing by enabling market segmentation, personalized campaigns, and scaled content creation while amplifying human expertise.
- A clear value proposition using the "X, Y, Z" formula—defining who you help, what problem you solve, and the resulting impact—attracts ideal clients more effectively than generic messaging.

From The Session

"People aren't sitting around waiting for a management consultant to come and call them to solve their problem. They're trying to solve a problem that they're dealing with or avoid a problem that they may experience in the future."

Michael Blumberg, President, **Blumberg Advisory Group**

Presentation: Predictive Maintenance: Transforming Reactive Service into Proactive Solutions

John Tocado
Principal Analyst- Systems Development
JLG Industries

Summary

The session explored the pivotal shift from reactive to predictive and preventative maintenance in field service, with a central focus on leveraging real-time data and AI-driven analytics. By transitioning from traditional break-fix approaches to predictive models, organizations can significantly minimize unplanned downtime, reduce costs, and improve customer satisfaction. Key speakers discussed the need to evaluate parts failures deeply, understand the true value of data, and build robust business cases before investing in predictive maintenance solutions.

Critical insights included the complexity of calculating ROI for predictive maintenance, assessing the organizational readiness for data-driven decision-making, and the necessity of hybrid approaches. The discussion also stressed the importance of customizing business models to unique operational environments, advocating for collaboration between technical teams and service leaders to ensure solutions are scalable and relevant across different industries.

Key Recommendations

- Predictive maintenance reduces unplanned downtime and maintenance costs by leveraging AI and IoT for early failure detection.
- Start with preventative strategies and progress to predictive models for best value, but always validate ROI and data readiness beforehand.
- A hybrid approach combining predictive and preventative maintenance often delivers optimal operational and financial results.
- Service models and business objectives must be clearly defined before investing in predictive maintenance technology.

From The Session

"Before investing in predictive maintenance, understand your business model, your data, and what truly drives value. Sometimes a hybrid solution—combining predictive insights with preventative actions—delivers the strongest results."

John Tocado, Principal Analyst - Systems Development, **JLG Industries**

Presentation: Warranty Basics: Streamlining Processes and Reducing Costs in Field Service

Naimish Rajyaguru
National Service Head
Symphony

Summary

Warranty management in field service faces significant challenges, particularly in diverse markets like India, where seasonal businesses must handle massive volume spikes within limited timeframes. Symphony Limited's comprehensive warranty automation system demonstrates how AI integration can transform complex manual processes into streamlined digital workflows. The company processes 60% of warranty validations through AI, handling dramatic seasonal fluctuations from 100 daily calls in December to 12,000 during peak summer months.

The approach emphasizes three core principles: reducing fraudulent claims through robust authentication, ensuring product traceability through serial number mapping, and maintaining optimal inventory control through predictive analytics. By implementing end-to-end automation from customer complaint registration to final satisfaction surveys, organizations can achieve measurable improvements in customer experience while significantly reducing operational costs and manual administrative overhead.

Key Recommendations

- **Automate warranty validation using AI** to handle 60-80% of claims without human intervention, reducing processing time and errors.
- **Implement predictive spare parts management** based on historical failure data to optimize inventory levels and reduce stockouts during peak demand.
- **Create seamless customer workflows** from complaint registration to satisfaction surveys, using OTP-based closures and automated payment systems.
- **Leverage seasonal patterns** to predict demand and adjust inventory distribution before peak service periods arrive.

From The Session

"We aren't just selling a product; we're also selling trust. The customer is buying the product not just for personal use, but also for their family and friends to use."

Naimish Rajyaguru, National Service Head, **Symphony**

Panel: Understanding and Aligning Service Revenue within your Organization

Jim Rivest
VP of Support Services
Screen GP Americas

Jatin Thakkar
GM Global Services and Solutions
Carestream

Doug Beck
US Industrial Automation Services Leader
Schneider Electric

Rob Van
Vice President of Service
Envelop Group

Cheyenne Starks
Innovation Manager
Comfort Systems USA

Moderator:
Michael Blumberg
President
Blumberg Advisory Group

Summary

The panel explored critical strategies for aligning service revenue across organizational departments and establishing service as a profitable business unit. Key discussions centered on creating value propositions to demonstrate service worth to different departments, establishing unified North Star goals that all stakeholders can understand, and securing CEO-level support for service initiatives.

The panelists emphasized the importance of treating service as a standalone profit and loss center rather than a cost center, enabling better investment justification and strategic decision-making. Additionally, the session covered best practices for harmonizing data systems, establishing a common language across departments, and leveraging customer insights to drive continuous improvement throughout the organization.

Key Recommendations

- **Establish service as a standalone P&L** to gain organizational credibility, secure investment, and demonstrate clear value rather than operating as a cost center.
- **Create unified North Star goals** that align different departments around service revenue opportunities, ensuring finance, sales, and operations speak the same language.
- **Implement tiered KPI structures** where metrics are assigned based on what individuals can actually control and influence at their organizational level.
- **Build cross-departmental advocates** by demonstrating specific value propositions to each function and enlisting allies like sales teams to support service initiatives.

From The Session

"If you don't have a CEO who's leading that drive for services, it becomes difficult to compete for the necessary investment. Your CEO must be your North Star, but there must also be buy-in from the very top to the very bottom to drive a services business effectively."

Doug Beck, US Industrial Automation Services Leader, **Schneider Electric**


FIELD
SERVICE
What Does It Mean
Psychological Safety
Agentforce
Service

Empowering the Field Service Workforce with Tools & Leadership

Expectations of the field service workforce are changing quickly and dramatically. Leaders must abandon traditional hierarchical management strategies in favor of trust-based, flexible leadership models that prioritize professional development instead of command-and-control.

Among employees, the "fear of change" that characterized the latest industrial revolution is beginning to subside. Not only are team members more familiar with digital tools and advanced technologies, but they are also actively advocating for work-life balance and growth opportunities at their jobs. This section explores how the field service workforce is changing, what new skills are necessary for roles in field service, and how leaders plan to empower the workforce in the coming years.

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Keynote: Breaking All the Rules: Why Old Ways of Leading Don't Work Anymore

Laurie Battaglia
CEO
Aligned at Work

Summary

Modern employees have fundamentally changed their expectations and are no longer afraid to advocate for what they need. According to Laurie Battaglia, this creates unprecedented challenges for leaders in field service organizations.

Traditional leadership methods are failing as workers prioritize flexibility, work-life balance, and development opportunities as key factors in where they apply. Although monetary compensation still matters, leaders must adapt their management styles to meet employees where they are rather than trying to force them back to outdated models.

Key Recommendations

- Power has shifted to employees who now expect organizations to prove why they should want the job rather than being grateful for employment opportunities.
- Flexibility and development outweigh salary increases as the primary factors driving employee retention and satisfaction in today's workforce.
- Trust must be the starting point rather than something employees need to earn over time to create effective working relationships.
- Immediate and frequent feedback is essential for retention, as employees no longer accept annual reviews or "no news is good news" communication styles.

From The Session

"Your employees have lost their fear. They are no longer afraid of change, they're not afraid of you anymore, and they're not afraid to speak up and ask for what they need, and that is the best possible thing for both you and your business."

Laurie Battaglia, CEO, **Aligned at Work**

Keynote: Exploring Service Opportunities in Power, Cooling, and IoT for Data Centers of All Sizes

Gregory Ratcliff
Chief Innovation Officer
Vertiv

Summary

Gregory Ratcliff, Chief Innovation Officer at Vertiv, presented a compelling case for field service companies to capitalize on the massive growth in data center infrastructure. Rather than simply adopting AI technology, Ratcliff advocated for serving the AI companies themselves, highlighting that the industry is investing $3 trillion in AI infrastructure that requires continuous service and maintenance.

He explained that data centers of all sizes create numerous service opportunities in power systems, cooling infrastructure, and IoT monitoring.

The keynote provided practical insights into data center operations, revealing how every watt consumed must be removed through cooling systems. These facilities operate as living, breathing entities requiring constant maintenance and upgrades.

Ratcliff outlined specific service opportunities, including power distribution installation, technical water loop maintenance, IoT sensor calibration, and energy optimization services. He positioned these as pathways for field service providers to establish long-term contracts with high-uptime requirements.

Key Recommendations

- **Embrace the AI infrastructure opportunity:** Instead of just implementing AI in your own operations, consider serving the companies building AI data centers, which represent a $3 trillion market with continuous service needs.
- **Focus on reliability over break-fix:** Data centers require a mindset centered on availability and uptime rather than traditional repair approaches, as these facilities often maintain six to seven nines of reliability.
- **Leverage specialized technical services:** Opportunities exist in areas like technical water loop maintenance, IoT calibration, and power distribution that don't require massive infrastructure investments but offer long-term contract potential.
- **Prepare for technology evolution:** Stay ahead by understanding emerging trends like liquid cooling, DC power systems, and digital twin technologies that will create new service demands in enterprise data centers.

From The Session

"I need to embrace my customers when they deploy new technology as a service organization, and I need to help them get over the hump. I can't just send them out with the technology we'd developed, expecting them to have the mindset and deep experience we'd learned while developing those products."

Gregory Ratcliff, Chief Innovation Officer, **Vertiv**

Panel: Fueling the Talent Pipeline: Innovative Strategies for Recruitment in Field Service

Josh Westling
Branch Manager of Service
Seatrax

Kevin Garell
Sr. Director, Global Services & Support
Boston Dynamics

Cheyenne Starks
Innovation Manager
Comfort Systems USA

Melody Brown
Vice President of People & Team Engagement
NPower

Moderator:
Dennis Papas,
Director of Technical Support Services, North America
Diasorin

Summary

The panel discussion focused on innovative approaches to talent acquisition in field service, addressing the critical shortage facing the industry. Key strategies emerged around looking beyond traditional recruitment channels and embracing alternative talent pipelines such as trade schools, community colleges, apprenticeships, and career changers.

The session emphasized the importance of prioritizing soft skills and problem-solving abilities over specific product experience, particularly as technology evolves rapidly and creates new roles.

The conversation highlighted how successful onboarding and retention require transparent communication about job expectations, robust mentorship programs, and investment in comprehensive training systems. Panelists shared practical experiences about adapting interview processes, implementing learning management systems, and creating rotational programs to better match candidates with suitable roles within their organizations.

Key Recommendations

- Alternative talent pipelines like trade schools, community colleges, and apprenticeships offer highly trainable candidates with strong soft skills.
- Problem-solving ability and communication skills are more valuable than specific product experience in rapidly evolving technical fields.
- Transparent communication about job expectations and company culture during recruitment prevents turnover and improves retention rates.
- Mentorship programs and learning management systems are essential for transferring tribal knowledge and accelerating new hire productivity.

From The Session

"Our trainees hit a brick wall when they try to find jobs, and they're told they don't have a degree or they don't have experience. But those who do take the chance, either as an apprentice or an intern, find that our students are at the top of the game. They get the technology, they're highly trainable, and they have really strong soft skills."

Melody Brown, Vice President of People & Team Engagement, **NPower**

Panel: Measuring and Improving Call Center & Tech Support Performance in Field Service

Travis Myers
Director of Customer Support
JLG

Dennis Papas
Director of Technical Support Services, North America
Diasorin

Naimish Rajyaguru
National Service Head
Symphony

Moderator:
Mark Hessinger
Strategic Advisor
Mark Hessinger Consulting

Summary

This panel explored strategies for aligning key performance indicators between call centers and field service teams to create seamless customer experiences. The discussion emphasized how organizations are moving beyond traditional siloed metrics to implement customer 360-degree views that consider technical support, field service orders, customer contracts, and overall success rankings.

Panelists shared practical examples of leveraging AI and automation to reduce call volumes, with one company achieving an 80% reduction through intelligent chatbots and self-service solutions.

The session highlighted the critical importance of uptime as a universal KPI across industries, from heavy equipment rental to medical devices. Speakers demonstrated how AI-powered analytics, virtual assistants, and automated troubleshooting can dramatically improve first-call resolution rates while reducing operational costs.

Key Recommendations

- Align call center and field service KPIs around shared outcomes like uptime and customer satisfaction rather than managing departments in isolation.
- Implement AI-powered chatbots and automated troubleshooting to handle routine queries, potentially reducing call volumes by 60-80%.
- Establish comprehensive knowledge bases before deploying AI solutions to ensure successful automation and preserve tribal knowledge from retiring technicians.
- Focus on low-effort, high-quality customer experiences that drive technician loyalty more effectively than satisfaction scores alone.

From The Session

"We partner with our rental channel customers to make sure that we are aligning our KPIs with theirs and that we're driving business value because we're a premium product, and we overcome our competition on uptime because our 60-foot lift doesn't rent for any more than our competitors. So that's super important to us to align with KPIs."

Travis Myers, Director of Customer Support, JLG Industries

Panel: The Human Touch in a Digital World: Balancing Automation with Personal Service

Naimish Rajyaguru
National Service Head
Symphony

Greg Wilson
Senior Admin, U.S. Navy Veteran
Cincinnati Incorporated

John Tocado
Principal Analyst- Systems Development
JLG Industries

Moderator:
Marc Guthrie
CEO
Help Lightning

Summary

The panel explored the critical challenge of maintaining authentic customer relationships while implementing artificial intelligence and automation in field service operations. Organizations are discovering that successful AI deployment requires a thoughtful approach that enhances rather than replaces human connections, with companies using technology to handle routine tasks while preserving the emotional bonds that drive customer loyalty.

The discussion revealed that most business decisions are influenced by non-rational factors, making personal relationships essential even in B2B environments where customers often choose service providers based on trust and emotional connections rather than purely on cost considerations.

Key Recommendations

- AI should be used to support human agents rather than replace them, allowing technology to handle routine tasks while preserving the emotional relationships that build customer loyalty.
- Organizations can significantly reduce costs by implementing AI-driven solutions like WhatsApp chatbots, which can handle up to 74% of service requests while maintaining quality customer interactions.
- Companies should focus on growth rather than workforce reduction when implementing AI, using increased efficiency to capture market share and expand services rather than simply cutting costs.
- Voice-based AI interactions face significant challenges in field environments due to noise and data quality issues, making text-based communication channels more reliable for initial customer contact.

From The Session

"Deciding whether to let go of employees is a decision for the C-suite, but if we cut everyone because our efficiency improves by 50%, our competitors will do the same, drop prices, and we'll end up no better off. We need our people to stay competitive because prices will likely fall. Instead of downsizing, let's focus on growing the company and capturing market share from our competitors."

John Tocado, Principal Analyst- Systems Development, **JLG Industries**

Panel: Veterans in Field Service: Creating a Culture of Outreach, Employment, and Mentorship for our Veteran Community in Field Services

Greg Wilson
Senior Admin, U.S. Navy Veteran
Cincinnati Incorporated

Bruce Nelson
Vice President, Strategic Initiatives, U.S. Army Veteran
Hytec

Cappy Surrett
Former U.S. Navy Officer
Disney Parks Leader

Moderator:
Edward Krzysik
VP Client Strategy, U.S. Army Veteran
Help Lightning

Summary

This panel discussion explored the significant value that veterans bring to field service organizations through their unique skillsets, work ethic, and leadership qualities. The conversation highlighted how military experience translates directly to field service success, with veterans demonstrating superior punctuality, dedication, teamwork, and problem-solving abilities that make them ideal candidates for technical roles.

The discussion emphasized three critical areas for organizations to focus on: strategic hiring practices that actively seek out veteran talent, comprehensive outreach programs that support veteran causes and build company culture, and robust mentoring systems that help veterans transition successfully from military to civilian careers.

Key Recommendations

- Veterans provide 25-35% lower turnover rates and 15-20% faster time to productivity compared to non-veteran hires, making them valuable long-term investments.
- Military training instills essential soft skills like punctuality, dedication, and teamwork that cannot easily be taught, while technical skills can be developed through training programs.
- Successful veteran integration requires ongoing mentorship and cultural support to help them navigate civilian workplace dynamics and career advancement opportunities.
- Organizations benefit from establishing veteran employee resource groups and outreach programs that strengthen company culture while supporting the broader veteran community.

From The Session

"You can train for skills, but you can't train for passion or work ethic. Veterans bring innovation to the table in that they can use whatever they have at hand to create something. Passion, leadership, commitment, teamwork, and innovation—those are what veterans can bring to any workplace."

Cappy Surrett, Former U.S. Navy Officer, **Disney Parks Leader**

About the Author

FIELD SERVICE INSIGHTS

Field Service Insights, the industry research and digital publishing arm of the Field Service conference series, delivers cutting-edge data and analysis on trends, challenges, and opportunities in the field service and customer support sectors. Through comprehensive research reports, webinars, and thought leadership initiatives, we empower senior-level field service leaders to make informed strategic decisions and stay ahead in the rapidly evolving service landscape.

Our deep industry intelligence not only informs field service leaders but also connects innovative solution providers with key decision-makers, fostering a dynamic ecosystem that drives the future of service excellence in the field service space.

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