FIELD SERVICE INSIGHTS

The State of

AI in European Field Service

Exploring Current Applications of AI Technology and Its Potential to Transform the Function

gomocha

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Exploring Current Applications of AI Technology and Its Potential to Transform the Function

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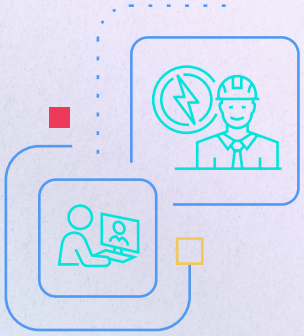
Table of Contents



Executive Summary

Artificial intelligence (AI) offers significant opportunities for field service teams to support operational efficiency and customer value creation. Organisations are increasingly adopting AI-powered solutions to enhance predictive maintenance, optimise scheduling, and improve customer experiences.

While 84% of companies express at least some satisfaction with their current AI applications, many face challenges in implementation, particularly with legacy system integration and data quality issues.

This report is based on a survey of field service leaders from organisations across Europe. Key trends revealed by the study include a shift toward proactive service models, an increasing focus on value delivery to customers, and a growing interest in AI tools that can identify opportunities for efficiency, among others.

About the Respondents

The survey respondents represent a diverse group of European companies across various industries and revenue brackets.

The participants' headquarters are distributed among several European countries, including the United Kingdom (9%), Germany (8%), Belgium (7%), Denmark (7%), and Finland (7%), among several others.

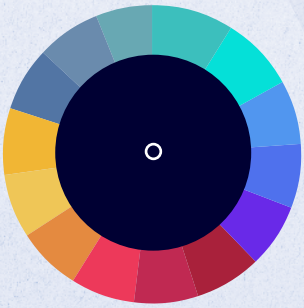
Most of the surveyed companies are large corporations, with 42% reporting annual revenues exceeding $10 billion and 39% falling in the $1 billion to $10 billion range. A smaller portion (12%) have revenues between $500 million and $1 billion, while 7% report revenues between $250 million and $500 million.

In terms of service areas, the respondents come from a range of sectors. Commercial Computers, Heavy Equipment, and Semiconductors each account for 10% of the participants, followed by Construction & Industrial and Manufacturing (9% each), among others.

Regarding the roles of the respondents, there is a relatively even distribution across key positions. IT professionals make up 36% of the participants, followed by those in Operations at 34%, and those in Field Service at 30%.

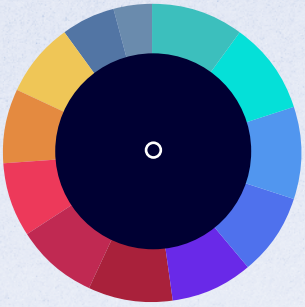
The survey captured insights from high-level decision-makers, with 15% in the C-suite, 27% holding vice president positions, 28% serving as department heads, and 30% at the director level.

In which country is your company's headquarters?



9%	UK	7%	Norway
8%	Germany	7%	Portugal
7%	Belgium	7%	Spain
7%	Denmark	7%	Sweden
7%	Finland	7%	Switzerland
7%	France	7%	The Netherlands
7%	Italy	6%	Austria

What best describes the area in which your organization provides service?



10%	Commercial Computers
10%	Heavy Equipment
10%	Semiconductors
9%	Construction & Industrial
9%	Manufacturing
9%	Medical & Scientific Devices
9%	Transportation
8%	Appliances & Electronics
8%	Information & Communication Technology
8%	Utilities
6%	Enterprise Network Equipment
4%	Domestic Computers

Key Insights

Among the respondents:

- **57%** are only somewhat satisfied with their current applications of AI in field service.
- **42%** reported that AI implementation has only somewhat improved customer satisfaction in field service operations.
- **59%** expect their organisation's investments in AI to increase somewhat over the next 12 months.
- Most are already using AI for:
  - Predictive/prescriptive maintenance **(68%)**
  - Data analytics **(62%)**
  - Content creation **(57%)**
  - Customer service **(57%)**
- In the next 12 months, **56%** plan to implement AI for enhanced diagnostics while **48%** plan to implement it for self-service, training, and job prioritization, in each case.
- The two most important goals for implementing AI are:
  - Optimizing resource allocation **(42%)**
  - Enhancing service efficiency **(39%)**
- The three most important decision-making factors when considering a new AI solution are:
  - Regulatory and compliance requirements **(49%)**
  - Scalability and flexibility **(43%)**
  - Compatibility with existing systems **(39%)**
- **59%** have experienced hurdles in legacy integration while implementing AI while **51%** have experienced a lack of data quantity or quality.
- **52%** say AI has enabled them to move toward more proactive and data-driven service models.
- **65%** say their organisation is only somewhat effective at identifying new efficiency and improvement opportunities. However, **58%** are somewhat likely to invest in an AI-driven tool that proactively identifies new efficiency and improvement opportunities.

Could you have field service efficiencies hiding in plain sight?

If your field service operations are like most, you have hidden efficiencies just waiting to be found.

Efficiencies that could…

- Connect all your data
- Go paperless in the field
- Analyze your service data
- Optimize your service routes
- Learn from every job
- Upsell on-site
- Prevent mistakes
- Get quick business insights
- Streamline data entry
- Simplify asset management
- Manage real-time field data
- Centralize asset intelligence
- Evolve processes continuously
- Control quality precisely
- Integrate subcontractor operations
- Manage multilingual checklists
- Integrate field operations
- Communicate in real-time with field teams
- Notify customers smartly
- Customize performance analytics
- Adapt technology to your processes
- Tailor your service command center
- Architect workflows fast
- Create multilingual checklists
- Ensure precise quality control
- Take an efficient digitization journey
- Automate workflow updates
- Expand field service intelligence
- Unify your field service apps
- Support real-time task oversight
- Streamline field service communication
- Optimize your service order creation
- Support real-time field communication
- Streamline SLA data entry
- Provide customer self-service scheduling
- Streamline service interactions
- Track service performance at every level
- Quote on-site
- Collect payments in the field
- Send smart customer notifications
- Provide instant service wrap-ups
- Practice field service journalism

Turn wasted minutes into productive moments

Reveal hidden efficiencies, powered by smart analysis
Then implement them, with Gomocha

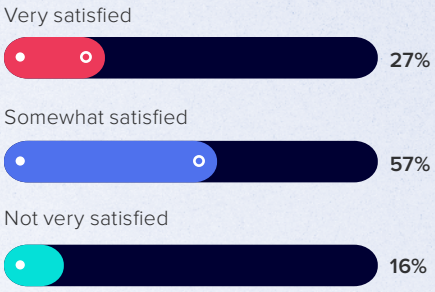
Uncover Your Hidden Efficiencies and Win in a Service-First World

The Current Status of AI Implementation

Artificial intelligence is already generating results in the field service sector as field service leaders use it to enhance operational efficiency and customer satisfaction. The perceived potential of this technology, the identification of new use cases, and documented results of early pilot programs in the field are driving widespread adoption across Europe.

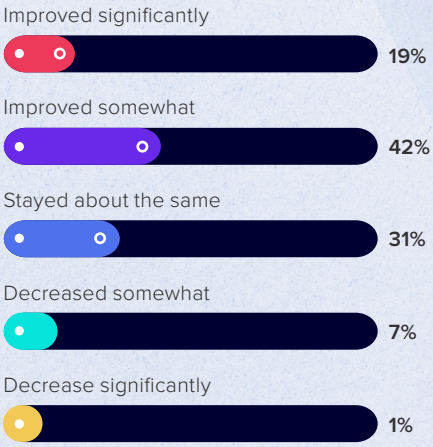
The survey reveals that a significant majority of European companies are satisfied with their current AI applications in field service. A combined 84% of respondents express satisfaction, with 27% being very satisfied and 57% somewhat satisfied.

How satisfied are you with your organization's current applications of AI in field service?



This high level of contentment suggests that AI implementations are largely meeting or exceeding expectations in the field service sector. However, there is still room for improvement, as most respondents are only 'somewhat' satisfied and 16% report being not very satisfied. Some organisations are facing challenges in realizing the full potential of AI in their operations, or they may be struggling with implementation and integration.

How has the implementation of AI technologies impacted customer satisfaction in your field service operations?



The implementation of AI technologies has had a mostly positive impact on customer satisfaction in field service operations. While 19% of the respondents report significant improvements, 42% say that customer satisfaction has improved somewhat since their organisations implemented AI. Nonetheless, 31% say that customer satisfaction stayed about the same, while 8% report a decrease in customer satisfaction.

This suggests that while AI has the potential to enhance customer experiences, its impact is not universally transformative. The fact that some companies have seen a decrease in customer satisfaction since their implementation of AI indicates that the technology may have caused more harm than good. This could be the result of faulty integrations, improper use cases, or negative feedback directly related to customer-facing AI solutions.

To gain a better understanding of how field service teams can successfully leverage AI to improve the customer experience, researchers asked those respondents who say AI improved customer satisfaction how they are using the technology.

Many of these organisations are using AI to analyse real-time data on technician availability, customer behaviour patterns, and service needs to streamline scheduling and dispatch processes. This results in faster response times, minimised delays, and more efficient allocation of resources.

Some companies mention using AI to match service requests with technicians whose skills are best aligned with job requirements, leading to quicker problem resolution. Additionally, AI is being utilised for predictive maintenance, allowing service teams to proactively schedule repairs before problems arise, thereby reducing customer downtime.

Finally, these field service organisations are also leveraging AI to enhance customer interactions and provide more personalised service. Several respondents indicate that AI is being used to offer more responsive and efficient customer service, with some mentioning the implementation of AI-powered chatbots or virtual assistants to handle customer inquiries, as well as AI tools that analyse customer feedback.

These are just a few of the ways AI can be successfully employed in field service to improve the customer experience, but there is the potential for more.

How will your organization's investments in AI change over the next 12 months?

Field service leaders will likely discover new uses for this technology moving forward, as well as best practices for integration, roll-out, and ongoing improvement.

As such, artificial intelligence will be one of the most important investments for European companies in the coming years. A substantial 74% of respondents plan to increase their AI investments over the next 12 months. Only 1% of the companies surveyed plan to decrease their investments.

This trend indicates a growing recognition of AI's potential in field service and a willingness to allocate resources to harness its benefits. While current implementations are largely satisfactory, there is a clear drive to further leverage AI for improved operations and customer satisfaction. The planned increases in AI investments reflect a strategic focus on technology as a key driver of future success in field service operations.

"To truly benefit from AI, you need to understand your business, your equipment, and what makes your experienced technicians successful. Then, you need to incorporate those insights into the AI you're implementing. Without this deeper understanding, you won't get the full value from your AI investment." **— Contributor, Field Service East 2024**

Common Goals and Challenges of AI Integration

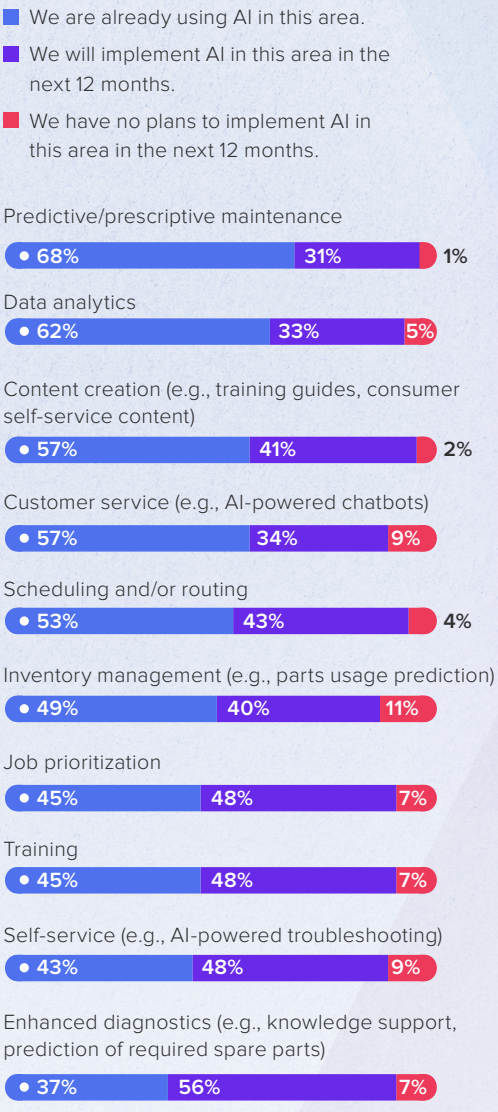
When field service leaders first began exploring artificial intelligence as a tool to improve operations, they started by identifying quick wins and potential use cases to showcase the technology to stakeholders. Now, European companies are actively implementing AI across various field service areas, with plans to expand its usage in the coming year.

Most of the respondents are currently using artificial intelligence for predictive and prescriptive maintenance (68%), data analytics (62%), content creation (57%), customer service (57%), and scheduling and routing (53%).

Looking ahead, enhanced diagnostics shows the highest planned implementation at 56%, indicating a shift towards more advanced AI applications. In each case, almost half of the respondents (48%) are planning to implement AI for customer self-service, training, and job prioritization over the next 12 months.

These trends suggest that European companies are moving from basic AI implementations to more sophisticated applications that can provide deeper insights and automate complex tasks. The use of AI for predictive maintenance and data analytics is notable. This points to field service teams' efforts to move beyond the "break/fix" model of field service and generate new revenue streams from subscription-based services, as well as new customer-facing capabilities like digital twins.

In which of the following areas of field service is your organization currently using AI, and in which are you planning the implementation of AI in the next 12 months?



In the future, field service departments will leverage enhanced diagnostics to provide predictive services to customers and combine this with self-service options to help customers solve problems themselves. These changes have the potential to reduce costs, increase the speed of fix times, and enhance the customer experience.

Overall, the high adoption rates across multiple areas demonstrate a broad recognition of AI's potential to transform field service operations.

The two primary objectives for AI implementation in field service operations reflect a focus on operational excellence and strategic advantage. Optimizing resource allocation (42%) and enhancing service efficiency (39%) are the top priorities, followed closely by enhancing safety and compliance (37%).

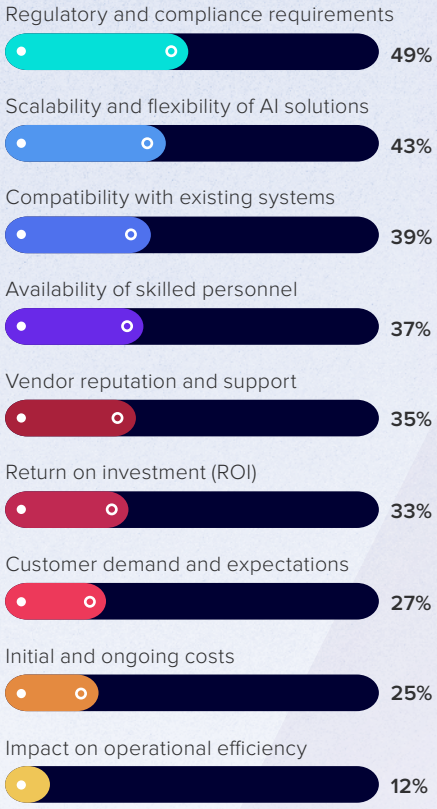
These goals indicate that European companies view AI not just as a cost-saving tool, but as a strategic asset that can drive overall operational improvements and differentiation in the market. The emphasis on resource optimization and efficiency suggests a mature approach to AI implementation, focusing on areas that can deliver tangible business value. Enhancing service efficiency could also drive real business results, not only in time and cost savings but also in customer satisfaction.

When considering new AI solutions, the top three decision-making factors that European companies prioritise are regulatory compliance, scalability, and system compatibility.

Specifically, regulatory and compliance requirements top the list at 49%, followed by the scalability and flexibility of AI solutions at 43%, and compatibility with existing systems at 39%. Interestingly, the impact on operational efficiency ranks lowest at 12%, possibly because it's considered a given benefit of AI implementation.

Which one of the following are your two most important goals for implementing AI as part of your field service operation?

Which of the following are your three most important decision-making factors when considering a new AI solution for your field service function?



This prioritization reflects the complex regulatory environment in Europe and the need for AI solutions that can grow with the business while integrating seamlessly with existing infrastructure. Furthermore, the focus on compliance and scalability suggests that companies are taking a long-term view of AI adoption, prioritizing solutions that will remain viable and compliant as regulations evolve and business needs change.

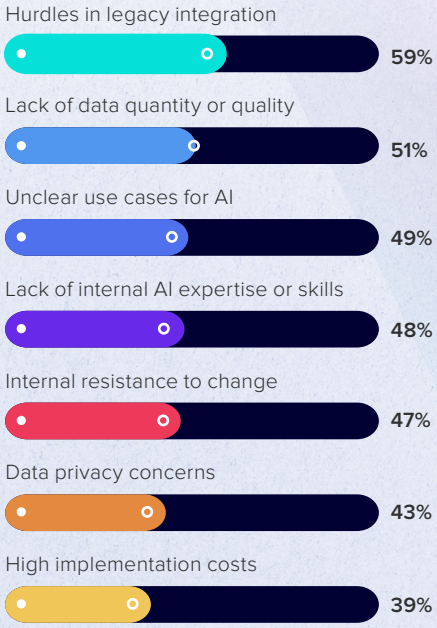
Despite the enthusiasm for and widespread adoption of AI, most European field service teams are facing challenges during implementation and execution.

Legacy system integration is the most significant hurdle at 59%, followed by data quality or quantity issues at 51%. Unclear use cases for AI (49%) and lack of internal AI expertise (48%) are also notable obstacles.

These challenges highlight the complexity of integrating AI into established field service operations. The struggle with legacy systems underscores the need for flexible AI solutions that can work with existing infrastructure. Data issues and lack of clear use cases suggest that companies may need to invest in data management and strategy development to fully leverage AI's potential.

The shortage of internal AI expertise points to a skills gap that companies will need to address through training or external partnerships to successfully implement and maintain AI solutions.

Which of the following challenges have you experienced while implementing AI in your field service organization?



To address these challenges, field service leaders must invest in flexible, API-driven AI solutions that can integrate seamlessly with existing systems while simultaneously developing a long-term plan for modernizing core infrastructure. They must also develop a comprehensive data strategy to obtain clean and usable data, so their new EI programs can run effectively.

Finally, closing skills gaps will be a complex challenge as AI skills and general technology talent are in high demand across the region. However, companies can partner with external AI consultants and provide extensive AI training programs for existing staff to help build internal AI capabilities.

"We've used several AI tools that can identify patterns and extract useful insights from data. As the experts on these systems, you can provide those valuable insights to your customers, so they can improve their equipment's reliability, uptime, and availability. Your engineers will quickly become go-to experts when they are empowered by AI-driven insights." **— Contributor, Field Service East 2024**

AI's Impact on Proactive Service Models

European organisations recognise AI's potential to transform their service models and drive operational efficiency. AI is already making an impact on proactive service delivery, but some companies face challenges in leveraging AI for this approach to service.

Overall, the survey reveals a significant shift toward proactive and data-driven service models enabled by AI. Currently, 52% of respondents report that AI has already enabled them to move toward more proactive and data-driven service models. The remaining 48% anticipate this transition within the next two years.

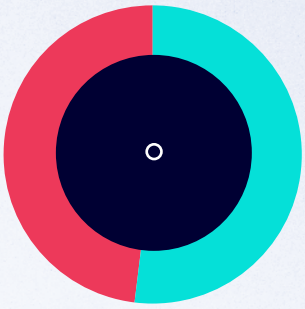
This even split indicates that AI is poised to be the standard underlying solution to this service approach soon. Field service leaders can expect their field service operations to achieve new levels of efficiency, reduce downtime for customers, and anticipate the need for interventions before machines break down.

When it comes to identifying new efficiency and improvement opportunities in field service operations, most organisations (65%) report being somewhat effective. Only 15% consider themselves very effective in this area, while 20% admit to not being very effective.

This distribution suggests that while most companies are making efforts to identify opportunities for improvement, there is significant room for enhancement in proactive efficiency management. More companies will need to conduct throughout analyses of their field service operations to identify use cases for AI technology, as well as opportunities to deliver improved services or entirely new types of service.

Notably, field service leaders can even use AI in this area, using the technology's analytical capabilities to reveal opportunities for efficiency.

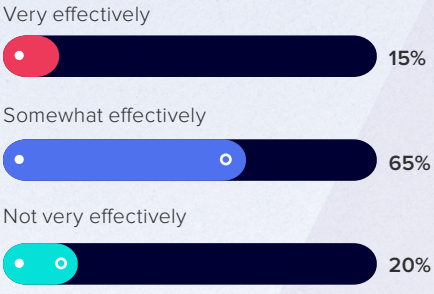
Has AI-enabled your organization to move toward more proactive and data-driven service models?



52% Yes.

48% No, but we anticipate that it will in the next two years.

How proactive is your organization at identifying new efficiency and improvement opportunities in your field service operations?

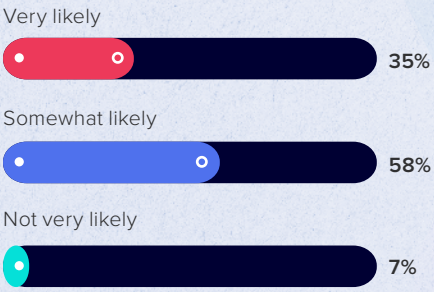


There is even a strong inclination among the respondents towards investing in AI-driven tools for proactively identifying efficiency and improvement opportunities in their field service operations. An overwhelming 93% of respondents express a likelihood of investing in such tools, with 35% being very likely and 58% somewhat likely. This high level of interest underscores the perceived value of AI in enhancing operational efficiency and driving continuous improvement in field service.

These findings collectively paint a picture of a European field service sector that is increasingly embracing AI as a catalyst for transformation. The high percentage of companies either already using or planning to use AI for proactive service models indicates a growing recognition of AI's potential to revolutionise field service operations.

The strong interest in AI-driven tools for identifying efficiency opportunities suggests that companies are looking to AI not just for operational tasks, but also for strategic insights and continuous improvement.

How likely are you to invest in an AI-driven tool that proactively identifies new efficiency and improvement opportunities in your field service operations on your behalf?



"The most effective way to improve our service metrics is to use personalized, context-driven AI. To support our new service technicians, we need to provide them with tools that offer contextual information and help them become better service engineers or help desk technicians. Simply providing generic information can lead to an over-reliance on technology without developing true expertise."

— Contributor, Field Service East 2024

Conclusion: How AI Will Transform Field Service in Five Years

To gain a better understanding of how field service will change in the long term due to the integration of artificial intelligence, researchers asked the respondents to describe how they think the technology will transform the function over five years.

Field service leaders anticipate that artificial intelligence will primarily enhance efficiency and automation. Many respondents believe AI will streamline scheduling and dispatching processes, optimizing technician routes and matching skills to job requirements more effectively. This is expected to result in faster response times, improved first-time fix rates, and overall better resource allocation.

Additionally, AI is predicted to play a crucial role in predictive maintenance, allowing companies to proactively address issues before they escalate. This will reduce downtime for customers and improve overall service quality, but it could also create opportunities to offer new proactive service models that deliver regular revenue.

Another significant transformation expected is in the realm of customer experience. Organisations foresee AI-powered chatbots and virtual assistants handling a larger portion of customer inquiries, providing instant, 24/7 support.

For field technicians, AI is anticipated to offer enhanced diagnostic capabilities, providing them with real-time guidance and access to vast knowledge bases while on-site. With these resources, technicians will be able to handle more complex issues independently, reducing the need for repeat visits and improving customer satisfaction.

As artificial intelligence continues to evolve, its impact on field service is expected to reshape operational processes and customer interactions in unprecedented ways. Field service leaders should prepare for this AI-driven future by investing in the necessary infrastructure and skills, ensuring their organisations are well-positioned to leverage these advancements and maintain a competitive edge.

> “We need to find a way to bridge the gaps in product knowledge, operational knowledge, and field expertise. The danger of only focusing on historical data is that we might not get the right answer. If we simply apply AI to historical data, we often just find more efficient ways to repeat past actions, which isn’t always the best approach.”
>
> **— Contributor, Field Service East 2024**

Key Suggestions

Develop a strategy to leverage AI for proactive and data-driven service models

Field service teams have signalled that they are transitioning towards AI-enabled proactive services as a means of value generation.

Focus on implementing AI solutions that optimise resource allocation and enhance service efficiency

These are field service leaders' top two goals for AI implementation, suggesting that prioritizing these areas can deliver the most significant impact on field service operations.

Develop clear use cases and ROI metrics for AI implementations

Many of the companies surveyed struggle with unclear use cases for AI technology. Establishing concrete objectives will help justify investments and measure success.

Prioritise data quality and AI integration with legacy systems

Data quality will be key to successful AI implementation, and integrating the technology with legacy systems may be necessary to realise key benefits. Addressing these challenges will unlock the full potential of AI in field service operations.

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About the Author

FIELD SERVICE

We launched Field Service in 2002 and have been dedicated to supporting the growth of the service industry ever since. What started off as 100 people in a room discussing the future of service has become 500 senior-level service executives being inspired while learning and developing their company as well as their careers.

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Gomocha is the field service platform for forward-thinking field service operators. Through a combination of service demand management, dispatch scheduling, technician enablement, and analytics—not to mention white glove service—Gomocha uncovers hidden efficiencies, matching skill with demand so your field workers deliver an exceptional customer service experience time after time. With offices on the East and West Coasts of the United States and in The Netherlands, Gomocha has supported the global field services community for more than three decades

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