2025 Field Service Pulse Survey: Discrete Manufacturing Edition

Strategic Priorities, Technology Investments, and Customer Expectations Shaping the Future of Field Operations

Written by:
Blumberg Advisory Group, Inc.

Sponsored by:
Zuper

BLUMBERG ADVISORY GROUP

ZUPER™

Table of Contents

I. Executive Summary

The **2025 Field Service Pulse Survey: Discrete Manufacturing Edition**-an in-depth study of 128 senior service leaders across industrial equipment, medical devices, and high-tech electronics-confirms that field service is no longer a company afterthought but a strategic driver of growth. Three findings dominate the data:

1. **Integration Is the New Bottleneck**

   94 % already run a standard or advanced FSM suite, and 74 % prefer best-in-breed stacks—but ERP/CRM integration tops the pain list. Firms investing in open APIs and data governance will unlock the full value of modernization.

2. **AI Has Crossed from Pilot to Imperative**

   96 % are piloting or scaling AI; automated scheduling, skills-and-parts matching, and predictive maintenance lead the charge. Most respondents expect payback within 12 months, and 92 % call advanced features "very/extremely critical" for competitiveness.

3. **Profit-Center Mindset Separates Leaders from Laggards**

   73 % see service as a revenue generator. Teams that already run service as a profit center outperform cost-center peers on labor productivity and first-time-fix—yet culture change, data quality, and talent remain decisive hurdles.

Why it matters: Customers now demand transparency, performance guarantees, and self-service-while talent shortages intensify pressure to automate. Over the next 12–18 months, competitive advantage will accrue to organizations closing integration gaps, operationalizing AI, and anchoring KPIs in customer outcomes. The sections that follow translate these survey insights into a practical roadmap so you can benchmark maturity, prioritize investments, and turn field service into a durable growth engine.

II. Study Methodology

Purpose and heritage.

Since 1969, Blumberg Advisory Group has maintained a continuously updated research database that chronicles how manufacturers run, refine, and monetize aftermarket and field-service operations. This 2025 discrete-manufacturing survey extends that archive by capturing today's technology priorities, operational pain points, and performance goals as firms navigate AI, tighter customer expectations, and persistent labor shortages. The results become both a snapshot of current realities and a fresh data layer enriching more than five decades of longitudinal insight.

Recruitment and timing.

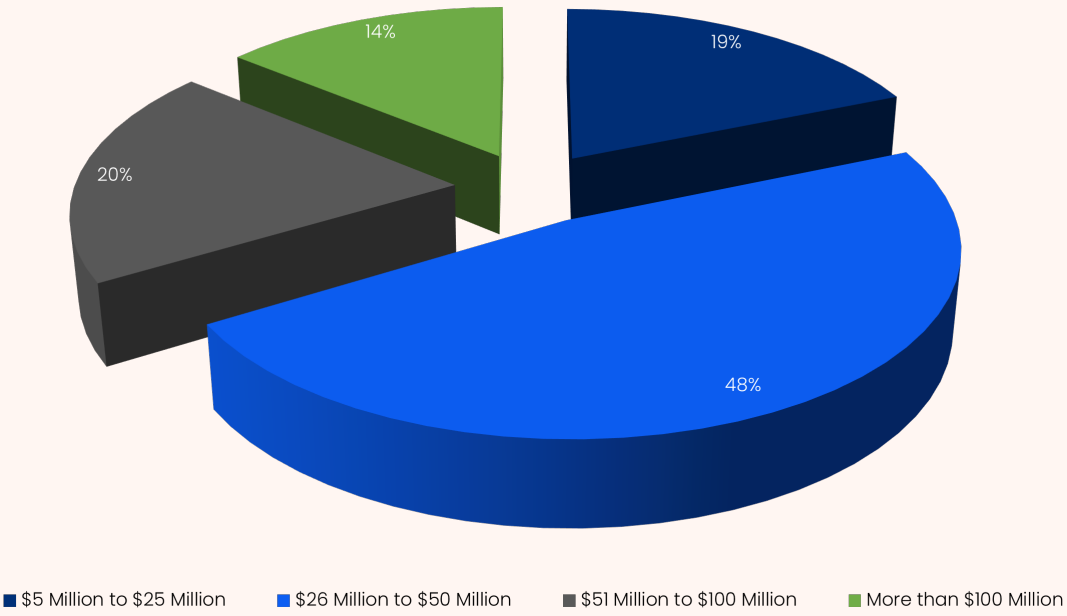
Invitations were sent to field-service leaders—senior managers through C-suite executives—via industry newsletters, professional associations, and partner mailing lists. The questionnaire remained open from **March 28 to April 28, 2025**. Eligibility required that respondents (1) work for an OEM or independent service organization in discrete manufacturing, (2) oversee at least ten field technicians, and (3) currently use or are evaluating commercial Field Service Management software.

Respondent profile (n = 128).

Participants form a balanced cross-section of discrete manufacturing service leadership. Nearly half hold vice-president or director titles, one-third are senior managers, and the remainder sit in C-suite or general-manager roles. Sector distribution skews toward industrial equipment makers, followed by medical-device firms and high-tech electronics producers, with additional representation from capital goods and instrumentation companies. Company revenue spans mid-market enterprises under $250 million to global manufacturers exceeding $1 billion, providing a broad lens on scale-driven challenges and opportunities.

Figure 1

What is your company's approximate annual revenue?



III. Market Context: Field Service at an Inflection Point

In 2025, field service leaders are operating under intense pressure. B2B customers now expect real-time transparency, straightforward pricing, and performance-based guarantees, demanding more accountability than ever. Yet, delivering on these expectations is increasingly complex.

A persistent labor shortage continues to strain operations, with over 70% of organizations struggling to find skilled technicians. Rising wages, longer backlogs, and the declining interest in skilled trades compound the challenge. Meanwhile, service margins remain under pressure from fuel and transportation inflation, which is further complicated by escalating tariffs that increase the cost and unpredictability of spare parts sourcing.

These conditions are forcing a strategic reset. Technology, especially AI, is emerging as a critical enabler. With 94% of companies now using AI tools in field service, automation is helping offset labor constraints, streamline scheduling, and improve first-time fix rates. However, successful deployment depends on strong data governance, systems integration, and process standardization.

> *Tariffs, talent shortages, and rising service expectations are redefining the rules—AI and integration agility are no longer optional, they're survival strategies.*
>
> *- **Michael Blumberg**,*
> *President*
> *Blumberg Advisory Group, Inc,*

At the same time, competitive dynamics are shifting. As macroeconomic uncertainty slows capital spending on new equipment, many companies are beginning to reposition service as a strategic lever for revenue growth. Forward-looking organizations are investing in flexible, best-in-breed platforms and outcome-based service models powered by real-time data and AI-enhanced decision-making.

The following survey findings reveal how 128 field service leaders are confronting these realities—and where they plan to invest to drive resilience, productivity, and growth in the months ahead.

IV. Key Findings

A. Platform Adoption & Maturity

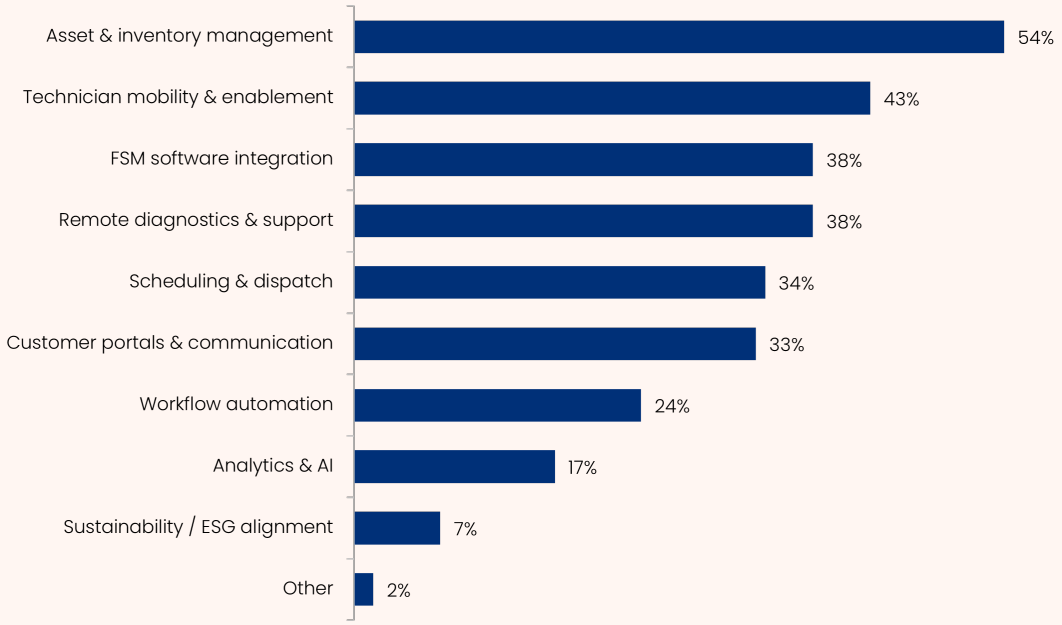
The survey confirms that modern Field Service Management platforms are now the rule, not the exception, within discrete manufacturing. Ninety-four percent of respondents report running either a standard or an advanced FSM suite, underscoring that basic digitization of work orders, scheduling, and parts workflows is complete. What differentiates organizations today is the depth of capability deployed and how effectively those capabilities are stitched into the broader application landscape.

A majority, 74% —favor a best-in-breed architecture over an all-in-one monolith. That choice reflects a desire to layer specialized tools for AI-driven scheduling, knowledge management, or predictive maintenance on top of a core work-order backbone. Yet the openness to point solutions magnifies the industry's most pervasive operational headache: getting data to flow cleanly between FSM, ERP, and CRM estates. In follow-up interviews, several service vice presidents noted that every new feature module "pays for itself twice," once in functionality and again in the extra integration effort it forces the organization to tackle.

Maturity levels inside the platform are uneven. Asset and inventory management ranks as the most fully developed capability, cited as "mature" by 54% of leaders, followed by technician mobility and real-time enablement at 43%. Advanced AI features—such as dynamic skills-and-parts matching—remain in the early-adopter stage for all but the top quartile of firms. Those leaders report measurable gains in first-time-fix rates and labor productivity, suggesting maturity is beginning to translate into hard performance advantages.

Figure 2

Which areas of FSM are the most advanced at your company?
Select up to 3 areas listed below



The data point to an industry with standardized digital work-order plumbing but still wrestling with the complexity created by best-in-breed sprawl. The firms that resolve integration friction fastest—and push maturity beyond core asset and mobility functions into predictive, AI-assisted workflows—will widen the performance gap in the next 12 months.

B. Investment Outlook & Strategic Importance

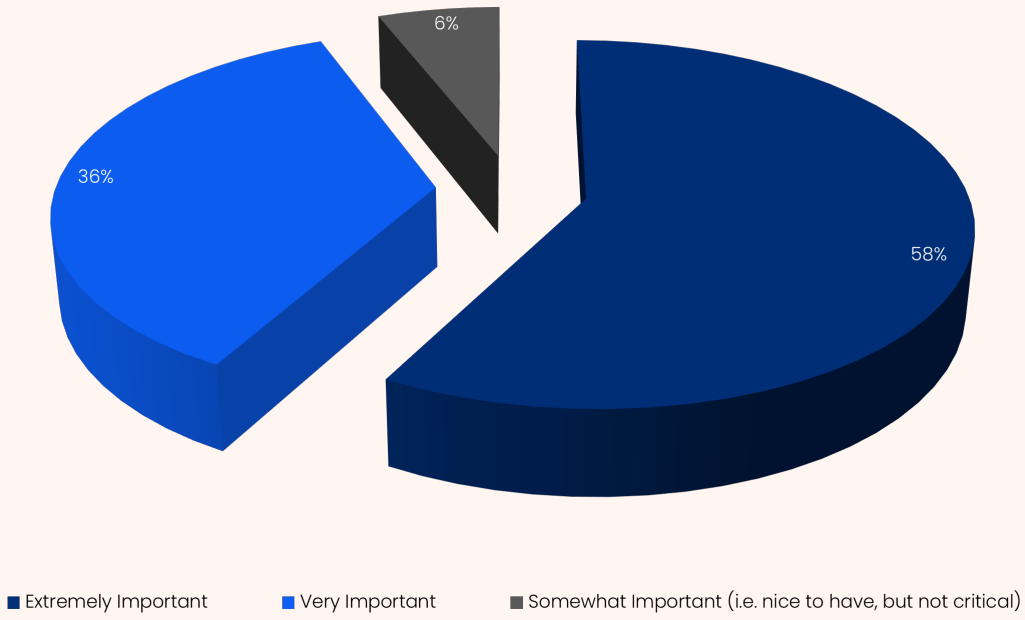
Field-service modernization is no longer discretionary spending—it sits squarely on the strategic agenda for nearly every discrete manufacturer we surveyed. Half of all respondents intend to remain with their current FSM vendor yet plan substantive upgrades in the next 12–18 months; another 20% are actively budgeting for a complete platform switch. Slightly more than one in four companies described their investment posture as "hold/maintenance mode," signaling that deferral is the rare exception rather than the rule.

Return-on-investment expectations are equally assertive. Ninety-four percent of leaders anticipate measurable payback in a single fiscal year, and almost one-third expect positive cash flow in six months or less. Speed-to-value thus becomes a critical selection criterion: during post-survey interviews, decision-makers emphasized "out-of-the-box" integrations, rapid AI co-pilots, and pre-configured mobile workflows as deal-clinching features.

Strategically, respondents rank "platform flexibility" and "vendor vision for AI" alongside traditional must-haves such as reliability and total cost of ownership. 92% judge a supplier's innovation roadmap as "very or extremely important" in the buying decision, a finding that underscores the market's appetite for future-proof architectures rather than static feature checklists.

Figure 3

How important is flexibility (e.g., configurable dashboards, custom workflows) in an FSM platform for your company?



The implication is clear: capital flows toward solutions that promise near-term efficiency gains and a credible path to predictive, outcome-based service models. Vendors—and internal IT teams—unable to demonstrate rapid time-to-value or a compelling innovation story risk sliding off shortlists, regardless of incumbent status.

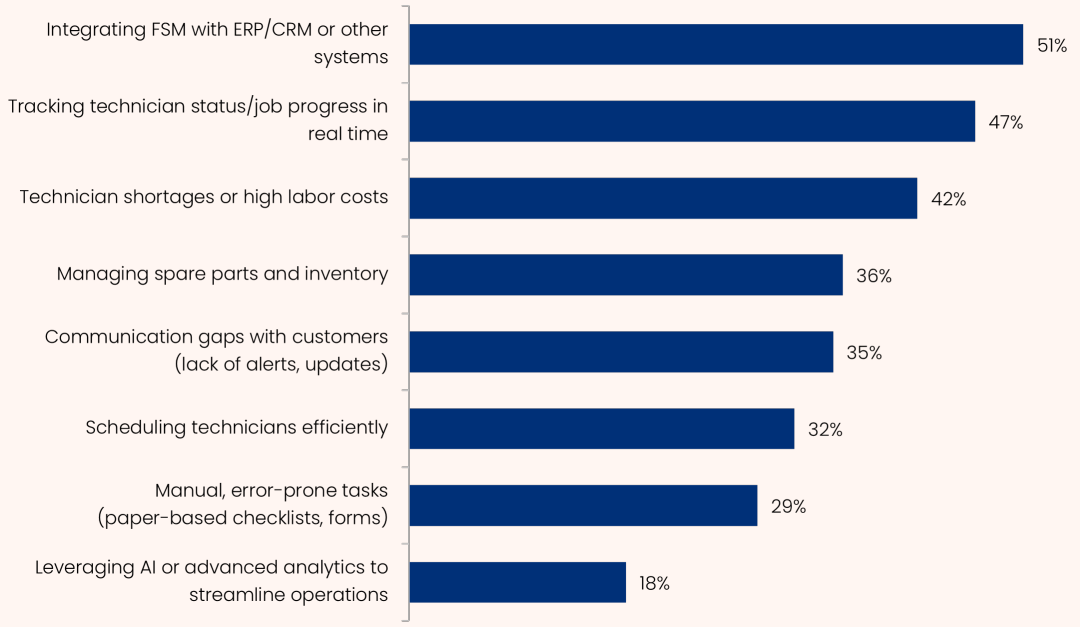
C. Operational Pain Points

Despite the near-universal adoption of FSM platforms, core execution hurdles erode service productivity and customer experience. Foremost is **system integration**: 51 percent of respondents say pushing clean, bidirectional data between FSM, ERP, and CRM estates remains their biggest headache. In practical terms, technicians still arrive on site without an up-to-date service history. At the same time, finance teams struggle to reconcile parts consumption and warranty credits—friction that shows up as excess truck rolls and delayed invoicing.

Close behind is the challenge of **real-time field visibility**. Forty-seven percent admit they cannot consistently track technician location, job status, or parts usage during the workday. Without that live feed, dispatchers rely on phone calls and best guesses, which inflate travel time and make it impossible to give customers accurate ETAs. Leaders who have solved this problem note immediate gains in first-time-fix rates and customer satisfaction; laggards, by contrast, report higher escalation costs and SLA penalties.

Figure 4

What are the biggest challenges you face with your current field service operations? Select up to 3 challenges listed below.



The third constraint is the **human capital squeeze**. Forty-two percent cite technician shortages or elevated labor costs as a top-three operational burden. The talent deficit drives overtime spending and forces managers to triage service requests, often pushing less lucrative jobs to the back of the queue. While AI-guided diagnostics and remote-support tools can extend technician capacity, their impact is muted when integration gaps and limited field visibility persist.

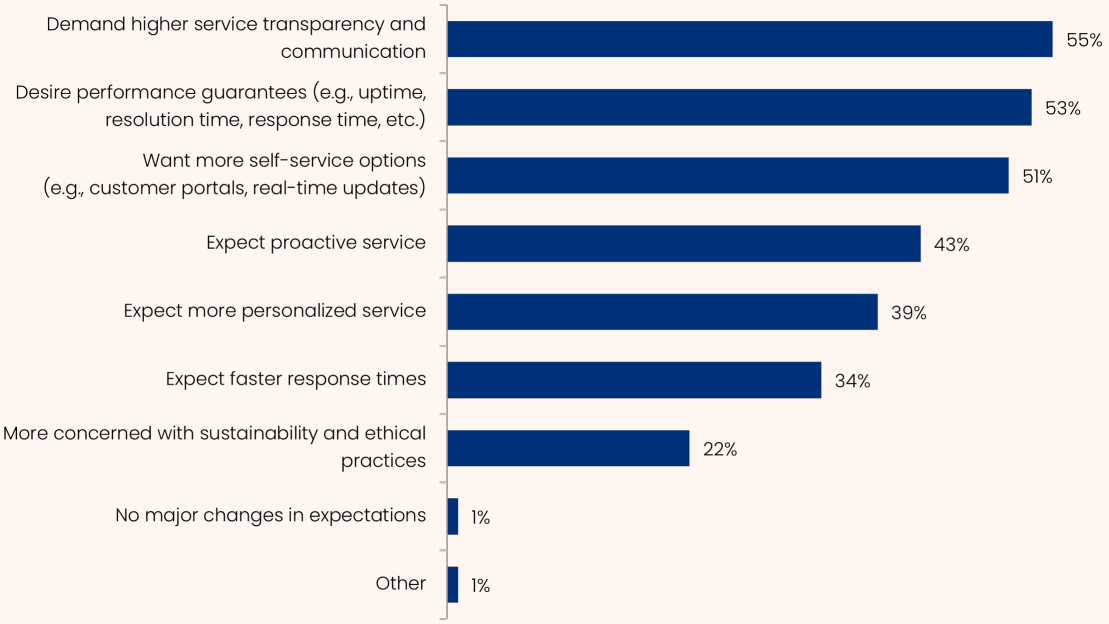
In combination, these pain points form a reinforcing loop: weak integrations undermine real-time tracking, poor visibility magnifies the impact of labor shortages, and staffing gaps, in turn, make it harder to allocate resources toward systemic fixes. Breaking the loop requires a concerted push on middleware, data standards, and mobile intelligence—investments many respondents have earmarked for the coming budget cycle but have yet to execute fully.

D. Customer-Driven Pressures

Customers of Discrete Manufacturers now evaluate their field service interactions through the same friction-free lens that shapes consumer lives. The survey reveals three clear mandates. First, **radical transparency**: a majority—55 percent—want real-time status updates, cost breakdowns, and clear escalation paths for every job. Second, **performance guarantees**: 53 percent expect uptime or first-time-fix commitments written directly into contracts, shifting risk from plant managers to service providers. Third, **self-service options**: 51 percent prefer booking, rescheduling, and tracking visits through digital portals rather than e-mail or phone.

Figure 5

How have your customers' expectations around service delivary changed in the past 1-2 years?



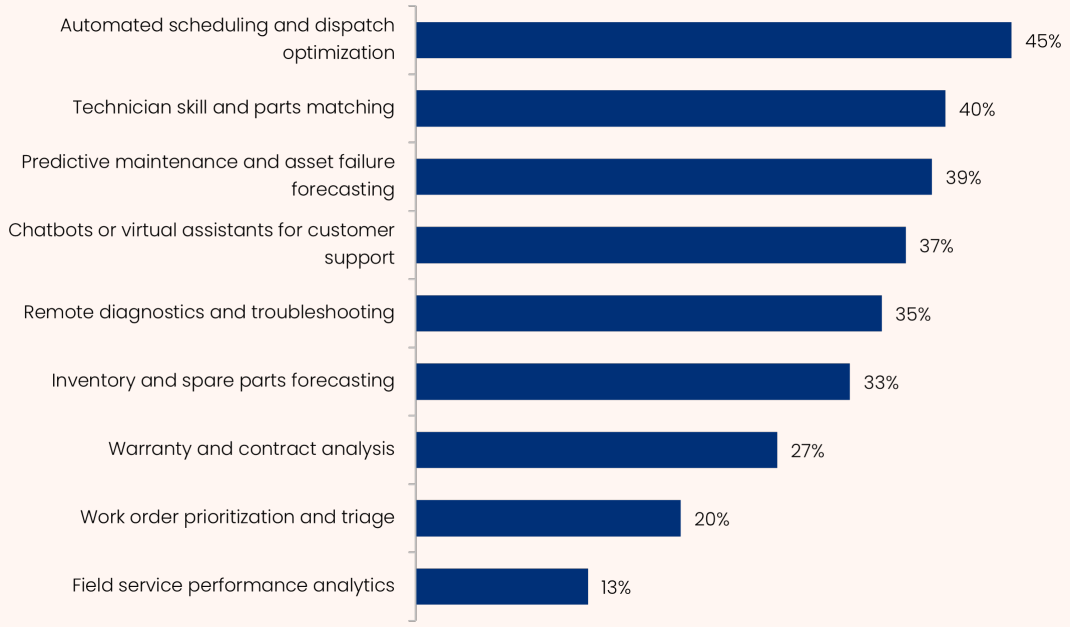
These expectations upend traditional break-fix economics. When customers see the gap between promise and performance, tolerance for missed ETAs or repeat visits collapses. Providers must, therefore, move from reactive dispatch to predictive, outcome-based workflows. This evolution only succeeds if integrations are tight enough and AI is mature enough to surface the right technician, part, and guidance on the first attempt. Those who align service terms with these customer pressures convert transparency into trust, guarantees into premium pricing power, and self-service into lower support overhead. Lagging firms, by contrast, experience rising SLA penalties and eroding renewal rates as buyers gravitate to competitors willing—and able—to put hard metrics on the line.

E. AI & Advanced Analytics Readiness

The survey clarifies that artificial intelligence has moved well beyond the hype cycle: **96% of discrete manufacturing field service leaders are piloting or scaling their operations' AI/ML capabilities**. Adoption is concentrated in three high-return domains. The most common is **automated scheduling and dispatch (45 %)**, where optimization engines factor skills, parts availability, and travel time in near real-time. Lagging slightly behind is **skills-and-parts matching (40 %)**, which pairs work orders with technicians who possess the proper certifications and ensures the required component is on the truck. Rounding out the top tier is **predictive maintenance (39 %)**, where machine-learning models trigger service events before equipment fails, protecting customer uptime and boosting contract renewal rates.

Figure 6

Which of the following AI-driven features are or would be most impactful for your company?

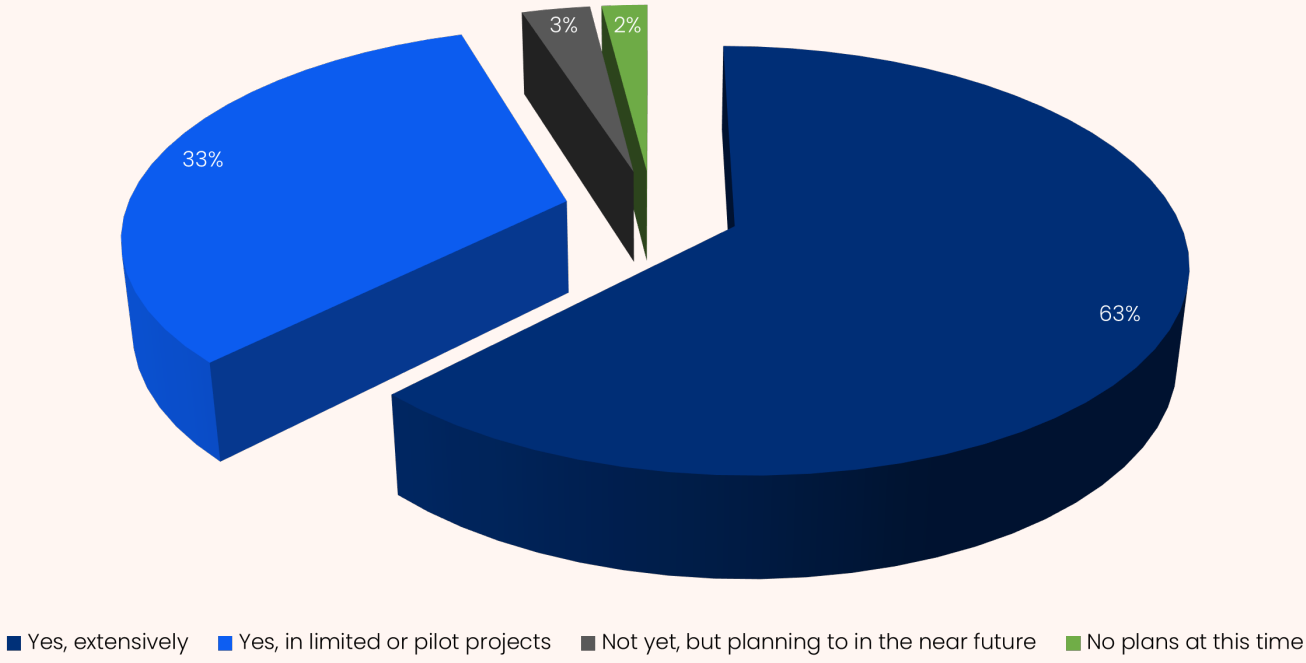


Yet enthusiasm meets friction at the integration layer. **Half of all respondents name data connectivity with ERP, CRM, and IoT sources as the No. 1 roadblock to scaling AI.** Another **45% grapple with data quality and silo issues**, admitting that inconsistent asset hierarchies and incomplete service histories undercut algorithm accuracy. A further **41% cite budget constraints**, often linked to the hidden costs of cleansing data and retraining teams rather than the software license itself.

Readiness has moved mainly beyond early experimentation. According to the survey, **most (63%) field service leaders leverage AI extensively**, while another **one-third actively engage in limited or pilot projects**. This means 96% of organizations are at some stage of AI adoption. Leaders in the "extensive use" category are **embedding AI into daily workflows—improving first-time fix rates, technician efficiency, and service consistency**. Those still in pilot mode face hurdles such as data silos, integration challenges, and unclear ROI. Yet, with only 5% not planning to adopt AI, inaction is becoming the riskier path forward.

Figure 7

Are you currently leveraging AI or machine learning capabilities in your field service processes?



The lesson is straightforward: AI delivers outsized returns only when fuelled by clean, connected data and guided by a workforce trained to trust its recommendations. Organizations that invest early in middleware, master data, and change management will convert today's pilots into tomorrow's profit drivers—while those content to "wait and see" may find the talent gap and customer pressure widening faster than incremental fixes can close.

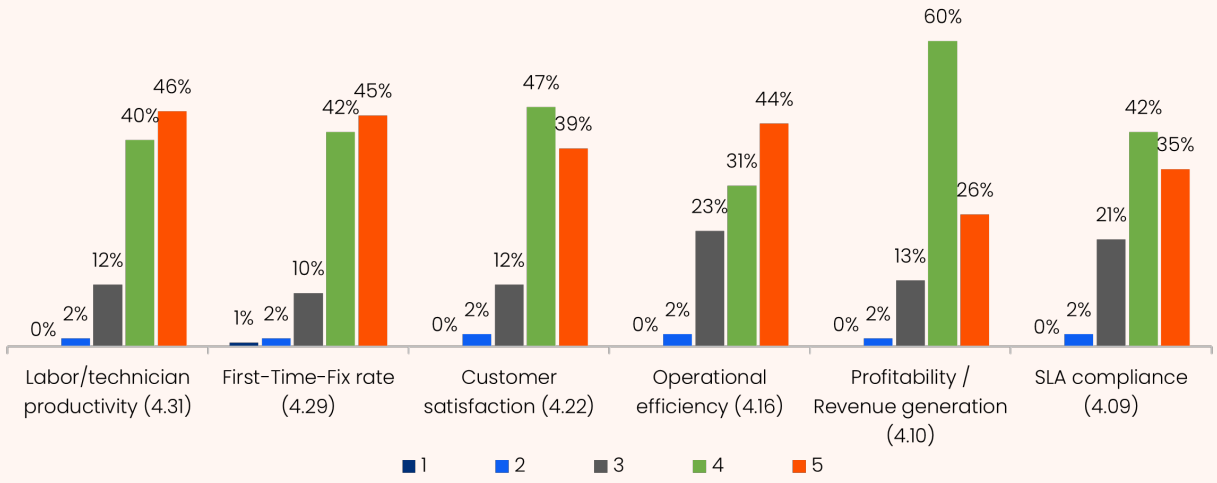
F. Profit-Center Mindset & KPI Performance

Across the entire sample, field service is no longer viewed as a necessary cost. Still, as a potential growth lever, **73% of respondents believe their organizations can turn service into an independent profit engine**. Survey results indicate that Field Service Management (FSM) platforms are driving substantial performance gains across a wide range of operational metrics—not just in isolated areas.

Companies rated their FSM systems highly across several key performance indicators. However, the narrow variance between these and other KPI ratings suggests that the benefits of FSM are broad-based. This consistency reflects the role of FSM as a foundational enabler of operational excellence across the service value chain.

Figure 8

How do you rate the impact of your current FSM on the following performance indicators? Rate each from 1=No Impact to 5=High Impact.



Expectations for future gains are equally assertive: **94% forecast payback from new initiatives—whether AI pilots or deeper integrations—within one year**. That short ROI window raises the bar for technology vendors and internal IT teams, who must prove that investments translate quickly into higher utilization, fewer repeat visits, and steadier annuity revenue.

The data point toward a cascading formula for profit-center success. First, align KPIs with customer outcomes (uptime, response time, MTTR) rather than activity metrics. Second, those outcomes should be used to justify targeted technology that amplifies technician productivity and predictive capability. Finally, early wins should be reinvested into data quality and integration projects that underpin scalable gains. Organizations that follow this cycle are positioning field service to cover costs and drive durable, margin-rich growth in 2025 and beyond.

V. Implications for Field Service Leaders

The 2025 Field Service Management (FSM) Survey findings present a clear and urgent call to action for service leaders navigating a rapidly evolving landscape. Faced with shifting customer expectations, labor constraints, technology disruptions, and heightened performance pressures, the data underscores leaders' critical decisions to future-proof their organizations and capitalize on service as a growth engine.

1. Reframe the Role of FSM from Operational Tool to Strategic Asset

The data reveals that 94% of companies utilize standard or advanced FSM platforms, delivering significant value in technician productivity and first-time fix rates. However, to move beyond incremental gains, service leaders must champion FSM as a strategic enabler that supports business model transformation enhances customer experience, and drives revenue growth. Leaders who continue viewing FSM as a back-office system risk falling behind competitors, leveraging it for proactive engagement and real-time performance optimization.

2. Embrace AI as a Force Multiplier—But Solve the Foundation First

AI adoption is gaining momentum: 96% of companies pilot or actively deploy AI capabilities. Still, integration hurdles and data fragmentation remain the most common barriers. Field Service leaders must prioritize investments in data governance, systems integration, and process standardization to unlock AI's full potential in automated dispatch, skill and parts matching, and

predictive maintenance. Companies that treat AI as an optimization layer rather than a replacement for core capabilities are more likely to scale initiatives successfully.

3. Flexibility Is Non-Negotiable—Best-in-Breed Wins

Three-quarters of respondents prefer a best-in-breed tech stack and 94% rank flexibility in FSM platforms as "Very" or "Extremely" important. Service leaders should resist the temptation to default to monolithic systems for convenience alone. Instead, they should adopt a modular architecture that allows integration with emerging technologies and agile adaptation to changing business needs.

4. Customer Expectations Are Outpacing Capabilities

Today's service customers expect transparency, performance guarantees, and digital-first options. Yet, FSM systems often lag in supporting these capabilities, particularly among companies with larger technician bases or higher revenues. This disconnect poses a risk to loyalty and margin. Leaders must align investments in mobile enablement, self-service portals, and real-time communication tools with evolving expectations.

Figure 9

What Discrete Manufacturers Must Get Right About Field Service

VI. Highlight on Zuper

Translating Survey Insights into Strategic Capability

The findings of this report highlight the urgent need for flexible, intelligent FSM platforms capable of driving operational efficiency and business growth. Zuper aligns with these priorities, offering a modern, integrated solution that helps service organizations address their most pressing challenges: system integration, technician enablement, AI adoption, and the shift toward profit-centered service delivery.

Zuper's platform is built on a modular, API-first architecture that supports seamless integration with ERP, CRM, inventory, and other enterprise systems. This flexibility enables organizations to adopt best-in-breed tools without compromising interoperability or scalability. The platform incorporates advanced automation and AI features to improve dispatch efficiency, technician matching, and maintenance forecasting. These capabilities are supported by real-time operational data, helping companies overcome barriers related to data silos and system fragmentation.

Zuper also enhances technician performance through a mobile-first interface, consolidating job information, asset history, parts availability, and guided workflows. This level of enablement supports higher productivity and stronger first-time fix rates.

For organizations seeking to transform service into a revenue-generating function, Zuper offers configurable SLAs, service contract management, and performance analytics—making monetizing uptime and aligning service delivery with business outcomes easier. Its low-code configuration model ensures rapid deployment and a fast path to ROI.

By addressing the core themes emerging from this study—flexibility, AI-readiness, technician productivity, and profit-center orientation—Zuper delivers a future-ready platform that meets the demands of today's field service leaders serving the discrete manufacturing market.

Figure 10

Zuper Platform Summary: Alignment with FSM Priorities

Field Service Priority	How Zuper Aligns
Flexible Integration	Modular, API-first architecture integrates seamlessly with ERP, CRM, and workforce systems.
AI-Driven Optimization	Automated scheduling, technician matching, and predictive maintenance supported by real - time insights
Technician Enablement	Mobile-first interface with access to job details, parts, workflows, and asset history in the field
Profit-Centered Operations	Supports SLA management, contract monetization, and service analytics to drive revenue outcomes
Rapid ROI and Deployment	The low-code configuration enables quick implementation and measurable results within months.

VII. From Insight to Action

Positioning Field Service for Strategic Growth

Field service is no longer a support function—it is fast becoming a strategic lever for operational efficiency, customer loyalty, and revenue growth. To fully realize this potential, service organizations must move beyond incremental improvements and embrace a clear strategy built on modern technology, data-driven decision-making, and operational agility.

The path forward requires flexible platforms, AI-enabled processes, empowered field teams, and alignment between service execution and broader business goals. Companies that modernize their FSM infrastructure and reframe service as a profit center will be best positioned to compete in a rapidly evolving market.

Whether you're just beginning this transformation or optimizing an established system, now is the time to act. Start by assessing your current capabilities, identifying high-impact opportunities, and aligning with partners who can accelerate your progress. Moving from insight to execution will deliver measurable results and define your organization's future in the field service economy.

BLUMBERG ADVISORY GROUP

About Blumberg Advisory Group, Inc.

Blumberg Advisory Group is a leading research and consulting firm specializing in the Field Service, Aftermarket, and Reverse Logistics industries. With over 30 years of experience, we help Manufacturers, Independent Service Organizations, and technology vendors accelerate growth, improve operational performance, and achieve service transformation. Our proprietary frameworks, market intelligence, and benchmarking studies provide actionable insights that guide strategic decisions across service delivery, digital innovation, and customer experience. Through custom research and advisory services, we empower clients to unlock their X-Factor—what sets them apart—and leverage it for sustainable competitive advantage. Learn more at www.blumbergadvisor.com.

ZUPER™

About Zuper

Zuper is redefining field service operations with the industry's most advanced and intelligent field service management platform. Trusted by thousands of users worldwide and integrated with more than 60 best-in-class tech solutions, Zuper empowers field service organizations with technology their teams love, helping them boost operational efficiency, enhance profitability, and increase revenue. Zuper gives fast-growing businesses a competitive advantage, enabling them to delight customers in every interaction and drive growth. Operating since 2020 and headquartered in Seattle, Zuper is on a mission to transform field teams into Zuper heroes. For more information, visit www.zuper.co