

Servitization in a post-pandemic world...

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Servitization has been a major area of discussion within our industry for many years, but as we recover from the pandemic and enter the new normal, is servitization more important than ever? Or did the massive disruption we saw across recent years expose the dangers of outcome-based service models?

In some ways, perhaps servitization in our industry is more imperative than ever before. The one thing that the pandemic created was a need for closer working relationships between service providers and their customers.

Suddenly, when all industries were facing unprecedented new challenges as the world locked down in response to the pandemic, the need for closer integration across business ecosystems was laid fully bare for all to see.

In all corners of industry, we saw companies engaging in co-creation towards new solutions.

We saw innovation between companies in completely different industrial spheres. The collaboration between Dyson and JCB to build ventilators to overcome a shortage within the UK is a good example.

We also saw it clearly amongst solution providers, such as our partner on this study, HSO, working closely alongside its clients to help them understand how they can leverage the powerful tools within the Microsoft Dynamics cloud platform, so that they can better serve their customer's needs in the challenging and unprecedented backdrop of the pandemic.

With a depth of experience that draws across multiple-industry disciplines that span manufacturing, energy, construction and retail, HSO's operational knowledge is as one would expect- detailed and well-refined.

However, perhaps it is in their understanding of technology across a broader business ecosystem within finance, marketing and distribution that saw many of their customers lean on them for guidance on how to best build a servitized offering that encompasses all of these business units.

In a sense, the pandemic, having brought service providers and their customers closer, has meant the path towards servitization has been made even more

urgent. This approach of closer integration allowed us to embrace a more meaningful way of working together, which offered a more tangible view into what the growing shift to servitization that has been building as an industrial movement across the last decade might look like.

Yet, there is a flip side.

Servitization is often closely aligned with what many see as its ultimate end point – outcome-based services.

However, it was amongst those industries that had moved almost entirely into an outcome-based service approach that there was perhaps the most significant economic anguish experienced during the pandemic.

In sectors where there had been a move to a pay-per-x model, the sudden abrupt shutdown of industry for months at a time left many service providers exposed to major revenue declines.

Take aviation, for example, where the power-by-the-hour model that Rolls Royce introduced has become an almost de facto approach to service operations. When the vast majority of planes were grounded as borders came crashing down across the world, the pay-per-mile approach meant that servitized revenues fell off the cliff.

With this in mind, Field Service News Research felt it was an important time to reassess the appetite in the industry to understand if the pandemic was seen as the catalyst for us to embrace servitization or, instead, an indication that we had pushed too far away from a break-fix status quo.

Either way, it is time for us to pause and reflect on the most pragmatic steps forward for our industry.

Across the pages of this report, we will present to you the findings of the first phase of this study, which is based on quantitative survey data. These responses represent 190 service management professionals across the globe from multiple industries, including aviation, manufacturing, mining and aggregates, oil and gas, utilities, power generation and more.

Did the pandemic kill servitization or make it inevitable?

Our approach in this study was to split our respondents into three groups which they self-identified within in the opening questions of the study. These groups were:

- Those who identify that they have a servitized element within their service portfolio
- Those who stated they currently didn't have a servitized element within their portfolio but were actively working towards developing one
- Those who stated they currently didn't have a servitized element within their service portfolio and were not intending to introduce one in the foreseeable future.

Within this report, we will be looking at the responses from those in the first two groups.

It is also important to note that before we began this study, we felt it was imperative to ensure all respondents were clear in their understanding of the topic.

Servitization itself has become something of a nebulous term in the last decade as it has become more prevalent within industry discussions. Therefore, to ensure that all respondents had a clear frame of reference, we outlined the following definition on the opening page of the study.

There are many different phrases used to define servitization, but for the purposes of this study, we shall use the definition within the Field Service News Glossary, which is thus;

"Servitization, or Advanced Services, is the final element in a three-tiered perspective of offering services.

The first layer of service is basic service, whereby a company offers goods and spare parts on a transactional level.

The second level of service is intermediate service, where product repairs, maintenance, overhauls, help desks, training, and condition monitoring are offered within a service contract agreement.

The final layer is advanced services. In some cases, this may be a fully outcome-based service model; in others, it might be more akin to a customer success model. The degrees of servitization vary both on the situation and customer and service provider maturity.

However, what is present in all servitized business models is a move away from transactional or contract-based sales towards true partnership. In the manufacturing sector, CAPEX asset costs are often replaced by long-term subscription costs.

Within advanced services models, SLA adherence is replaced with guarantees of uptime, and perhaps most critically, there is a transfer of risk from the customer to the service provider, which is compensated by more profitable and longer-term agreements."

With all respondents given this clear definition, it would seem that despite the aforementioned potential exposure to risk that the pandemic illustrated, the continuing movement towards servitization as a prevalent mode of service contract within our industry remains in place.

Indeed, the study findings show that 68% of companies within our response set stated that they had a servitized offering within their existing service portfolio.

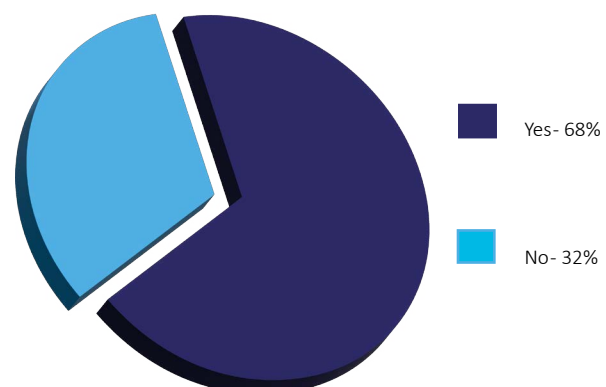


Fig.1 Do you have a servitized element within your service portfolio?



Of those who currently did not have such an offering, 72% were actively developing an offering.

Meanwhile, only 8% of companies stated that they didn't have any servitized offerings in place and would not be introducing any such offerings in the foreseeable future.

As a useful frame of reference, we can reflect back to another study held by Field Service News Research in 2021 when we were still very much in the middle of the pandemic. At this point, we saw that 64% of companies currently included a servitized element within their service portfolio.

Of course, while the two studies are neatly separated around the pandemic in terms of timing, we must consider that while there may be some crossover in terms of response group, ultimately they are two separate sets of data with too many variables for direct comparative analysis.

However, with both studies having a sizeable enough response group to produce a robust snapshot of the thinking in our industry, then we are able

to draw a conclusion that the trend towards servitization certainly wasn't particularly harmed by the pandemic.

Similarly, we must take into account that as the response sets in this study, like all Field Service News Research studies, are more populated by our readership, these readers are perhaps engaged in more sophisticated industry discussions than others in industry, and there may be a natural skew of numbers towards more sophisticated approaches to service strategies.

However, again the sheer volume of responses in favour of servitization would suggest that even if we are to factor in this weighting of the FSN audience as a representation of those in the industry at a leading edge of service thinking, the movement towards servitization seems to continue to be growing at pace in this post-pandemic world.

As we continue to move through this first report from the study, we will now take a deeper dive into what are the approaches for those organisations taking this path and what are the drivers for them doing so.



Fig.2 Growth of servitization in last three years

Is the movement towards servitization growing?

In the opening segment of this report, we looked at the headline finding of the study that the pandemic has had no negative impact on the continuing shift towards servitization. In fact, when we take a closer look at the data, we can see that, if anything, the shift towards servitization has increased since the pandemic.

Indeed, amongst the sample set of service organisations involved within this particular study, we have seen a significant increase within the last year amongst those organisations who have stated they now have some servitized element within their service portfolio.

Over two-thirds (38%) of the organisations within the study who stated that they do have such an offering also stated that they have only been able to offer this solution within the last year. This is compared to just under a fifth of companies (19%) who have had a servitized offering in their portfolio for two years and 14% who have stated that they have had such an offering for more than three years.

The fact that we see an increase in the number of companies offering servitized solutions across this reducing time frame certainly suggests that, in general, we are seeing a continuous increase in the number of companies adopting servitization principles within their service operations and wider business. However, if we look at those companies who have been providing servitized

offerings for more than five years, we see that this group is almost a third (29%) of the total respondents that have a servitized element within their service portfolio.

While on the surface, this may seem anomalous, one interpretation of the data that sits comfortably alongside both the findings of earlier industry studies into this area, as well as the anecdotal evidence of industry discussions at large, is that we may be seeing those earlier adopters who were at the forefront of the movement represented here.

These were the organisations that were pioneers within the development of advanced service strategies, and the wider industry is quickly following in their footsteps. This hypothesis is also supported by the weighting these organisations have towards an outcome-based approach to servitization (80% of this group indicated that their pricing was at least somewhat based on outcome-based pricing compared to 71% of the total response set) which could indicate further maturity along the traditional advanced service spectrum.

One way to ascertain if this hypothesis is correct will be to understand the maturity of the servitization offering such companies are offering customers – and this is a key area we shall be exploring in the qualitative side phase of this study when we undertake our series of follow-up interviews.

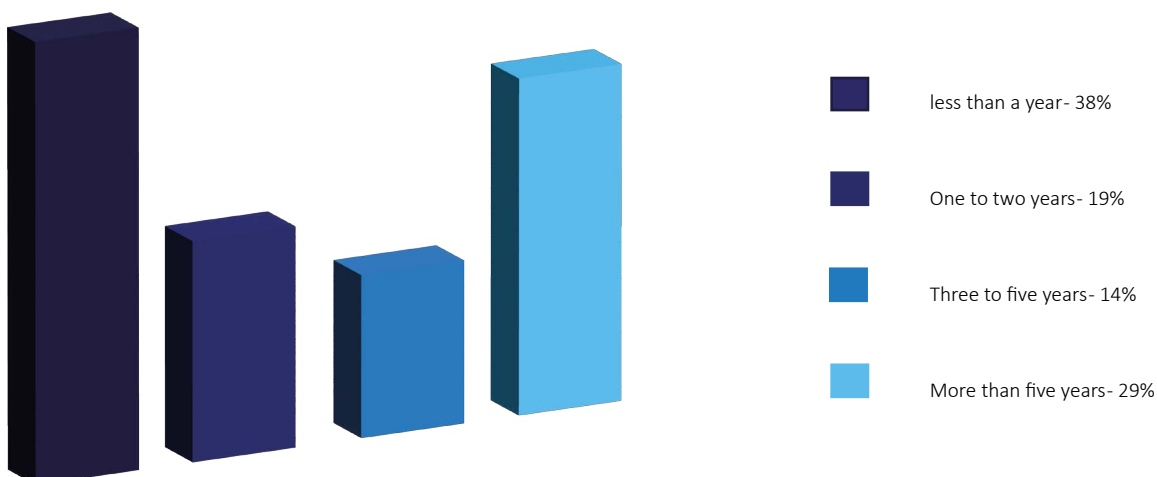


Fig.3 How long have you had a servitized element within your service operation?

The alignment of servitization and outcome-based services

One of the key discussions and debates around servitization is whether a fully servitized offering is, by default, an outcome-based solution. There is, of course, much nuance around this conversation, and it is one that has been debated and will continue to be debated across the opinion pages of Field Service News.

However, within a data-driven report such as this, where the intention is to outline the trends of the market without editorialisation, we can see that the consensus amongst those organisations who are actively offering a servitized element within their service portfolio is that the two terms are increasingly becoming synonymous.

Indeed, almost three-quarters (71%) of the respondents in this study who do offer a servitized element within their service portfolio have stated that their servitized offering is based around an outcome-based pricing model.

Meanwhile, amongst those organisations that state that they are currently in the process of developing their own servitization offering, 86% state that they intend it to be a fully outcome-based priced offering.

However, as we discussed in the opening section of this report, in such complex strategic discussions, terms can often become somewhat vague and be used interchangeably. We, therefore, once again wanted to drill down further to better understand how our respondents were defining outcome-based services.

We asked our respondents, therefore, to state which of the following options was closest to their definition of cost-per-outcome-based pricing.

- Fully outcome-based, where the customer pays the price for an outcome which includes service, parts, installation and the asset.
- Only the service is outcome related- the customer pays for the services based on a set result. The asset remains as Capex
- Services have some element of outcome-based pricing- but it is not a 100% outcome-based pricing model.

The third option in this list was not selected by any of the respondents, which is good as this allows us to better define the meaning of the terms and how our

respondents have interpreted this part of the study.

However, there was more of a balance between the first two options. Technically, within most broad definitions of servitization, including our own, the first option would be preferable, and this was selected by 64% of organisations wherein we see both service and products combined into one contract.

However, it is interesting to note the number of companies who have adopted a servitization approach that is detached from product and focuses around the pricing of service.

It will be fascinating to dig deeper into this aspect of the study in our follow-up interviews and identify if those organisations who have taken this approach also include any parts and consumables within their pricing structure.

What these findings do reveal, however, is that there is a much broader spectrum of servitized offerings arising as more companies adopt such approaches.

Interestingly, given the potential risk of a fully outcome-based model that was laid bare by the pandemic, it could be that this 'servitization-lite' approach allows for a more balanced approach to advanced service design and something we may see further development of in the future.

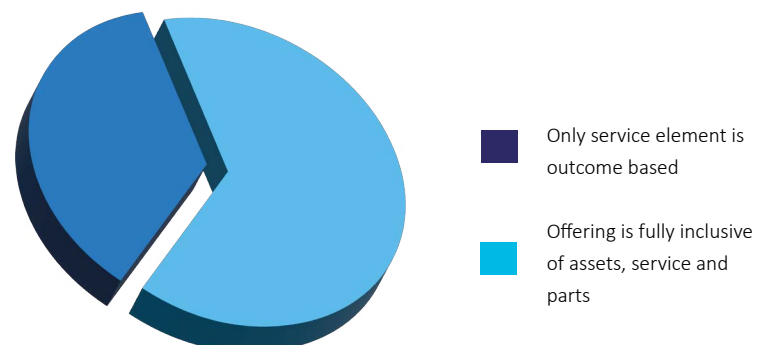


Fig.3- Is your offering fully outcome-based (including assets, service and parts)

What are the drivers for developing servitization offerings?

When we reflect back on the many industry discussions around servitization, there are three fundamental reasons why companies choose to develop a servitized offering within their service portfolio.

These are generally as follows:

- Longer-term contracts
- Greater profitability
- Becoming more embedded within customer operations

However, when we go beyond these headline benefits, we often find that many of the key organisations that are held up as examples of servitization were driven down this path either by a market or customer pull.

For example, Rolls Royce's famous power-by-the-hour solution was originally developed to support their Viper engine, although it soon evolved from a significant number of customer pulls from both commercial and defence sectors that wanted to expand on this new approach to pricing. Another excellent example of servitization would be MAN Trucks UK.

The innovation within their servitized solution was borne out of the necessity of an industry (haulage) that had simply no further margins to squeeze. With profit lines already paper thin, there was little room for growth for a truck manufacturer already 5th place in a congested market.

However, by working with the industry to improve the margins of operation, they were able to grow from 50 million to 500 million within a decade.

Often, this detail can get overlooked in the discussion around servitization. We rarely look at the drivers behind the innovation and, perhaps, naturally, more directly at the innovation itself.

Yet, with more and more organisations embracing servitization, it is important to understand whether these drivers of either market or customer pull that are consistently present in many of the early case studies of servitization remain essential or if servitization has become a mainstream enough strategy that the pendulum has swung, and service providers are able to successfully convince

their customers of the benefits of a servitized solution.

Or perhaps, as we touched on earlier in this report, has the pandemic introduced a new wave of customer pull that is further driving the need for more servitized offerings across manufacturing sectors?

To help us better understand the drivers towards servitization, we asked our respondents to identify what was their primary driver in terms of undertaking the development of a servitized element within their service portfolio.

We presented this question to both those who stated they had already provided a servitized offering and to those who were actively developing such an offering and gave them five primary options to select from.

These were:

- Customer pull
- Reacting to competitors
- Designed to drive additional service revenue
- Designed to drive additional revenue in product sales
- Strategic move to disrupt the market

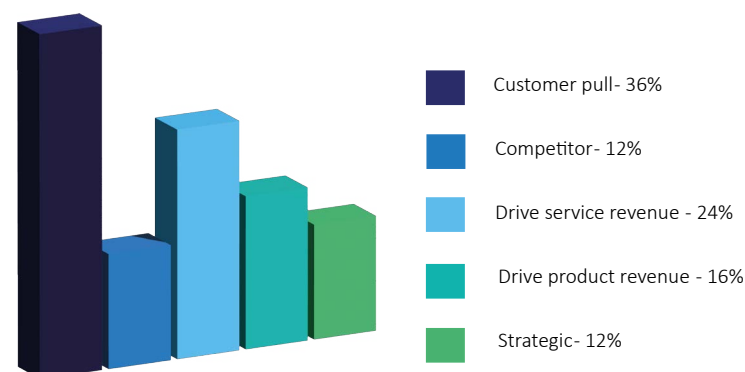


Fig.4- What is the primary reason for developing a servitized offering?



Amongst those companies who had already developed a servitized offering, customer pull indeed remains the most prevalent driver, which was cited by over two-thirds (36%) of the organisations within the study response set.

The second most widely cited response was to drive additional service revenue, which just under a quarter (24%) of respondents in the group cited. However, it is important to note that when combined with the option to drive additional revenue from product sales which 16% of respondents cited, then driving additional revenue generation was the most widely cited response across the group accounting for two-fifths (40%) of responses.

Interestingly, the most reactive option in the response set, i.e. reacting to competitors and also the most progressive option, i.e. a strategic move to disrupt the market, were both equally cited with the joint lowest number of citations from this group at 12% each – bookending either side of the chart.

Amongst those organisations within the study who were currently in the process of developing a servitized element to their service portfolio, we saw a continuation of this pattern, although the emphasis on driving revenue was even further magnified, while the impact of customer pull was reduced. Drivers for additional revenue were both cited by approximately a third of

respondents as the primary driver, with driving service revenue being cited by 35% of respondents in this set while driving additional product revenue was cited by 32%.

Therefore, with over two-thirds (67%) of the respondents introducing a servitized element into their service portfolio to drive additional revenue, the question of whether we are witnessing a shift from customer/market pull to service provider push does certainly become evident.

Customer pull within these organisations, who currently find themselves in the development stage of their own servitization journey, certainly remains a common driver, with over a fifth (21%) of organisations in this group stating this to be the case.

Having explored the drivers for adopting servitization, the next area we wanted to consider within this study was who was the driving force within the organisation behind the move.

Given that the effective development of servitization requires the buy-in from all business units within the organisation and entails a broad strategic shift, traditionally, servitization is driven from the executive level.

However, with the increasing focus on service innovation and the ongoing requirement for identifying new revenue opportunities, particularly in the current challenging economic environment, are those in sales or service leadership roles playing a role in driving servitization?

Amongst those organisations that have already developed a servitized element in their service portfolio, we certainly still see the majority of organisations having their servitization program driven by either the CEO or the executive board.

In fact, this is the case amongst over two-thirds (67%) of companies. However, almost a quarter (24%) of companies stated that their servitization initiative was driven by service leadership. This is a significant number and, again could be seen as an indication of how we see the growth of servitized business strategies. We are also seeing the growing importance of service leaders within an organisation.

It is interesting to see that while service leadership appears to be gaining a greater share of influence amongst organisations that see servitization as a part of their strategic business future, sales leadership is far less frequently driving such innovation.

Of course, given the nature of our audience, which is predominantly comprised of service leaders, we do have to take into account that there will certainly be a layer of bias that could skew this particular set of results within the study.

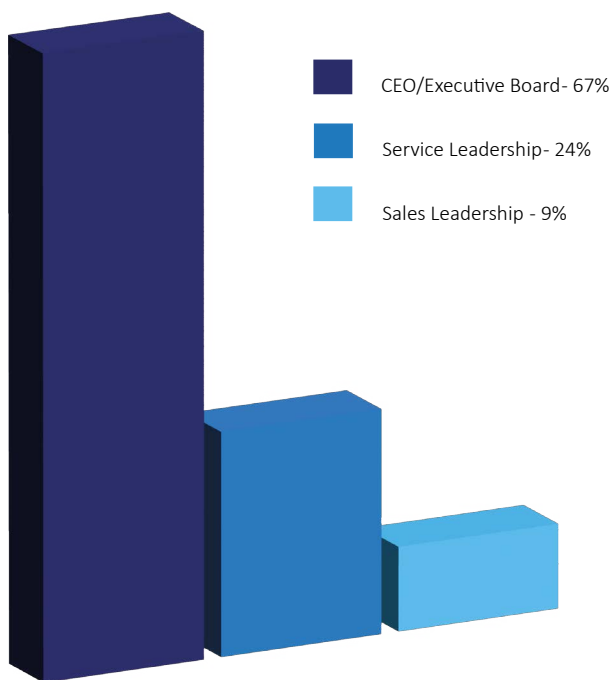


Fig.5- Who is the driving force of servitization in your organisation?



The processes and time frames for establishing servitization

Having explored the key reasons why organisations are undertaking servitization and what the primary drivers are, now let us take a closer look at the processes involved in developing servitization.

Of particular interest within this study, is that due to the way the study is structured, we can also examine the differences between the process and approach by those who have already developed a servitized solution, against the expectations of those who have are in the development stage.

To begin, we can contrast the timeframes of the actual deployment of a servitized solution and the expectations of those in the development phase.

We asked those respondents who had already established a servitized platform how long it took them to take the project from development through to a live solution available to their customer base.

Over two-thirds (67%) of the respondents within this group stated that the duration was more than a year, with slightly over a quarter (28%) of these stating that the process took more than two years.

Just over a fifth (22%) of respondents that have an active servitized element in their service portfolio stated that it took them between six months to a year to go from development to live, while just over a tenth (11%) stated that it took less than six months.

One area for further exploration in our follow-up interviews for the qualitative phase of this study, will be to explore what the differences are between organisations at both ends of the spectrum – is there something those that are able to develop such offerings faster already have in place to facilitate more rapid development? Or is there something they are overlooking?

As we return to the hard data of this report, how do these timeframes compare with the expectations of those in the development stage?

It would certainly seem that the current expectation has a more optimistic outlook in terms of the length of time to develop such solutions than the current reality. Amongst those companies, just under two-fifths (39%) expect

the process to take more than a year, and only a little over a tenth (11%) are planning for the project to take more than two years.

The most common estimation within this response group is for the project to take between 6 months and a year which was 39% of this segment of the study. Meanwhile, over a fifth (22%) of companies currently in the development process of their servitization offering believe they will take less than six months to develop their servitization offering.

With this understanding of the expected and actual time frames for the development of servitized elements within a service portfolio, we shall now look at the approaches companies have already taken in developing their servitized offerings and compare these with the approaches outlined by those in the planning stage of doing so.

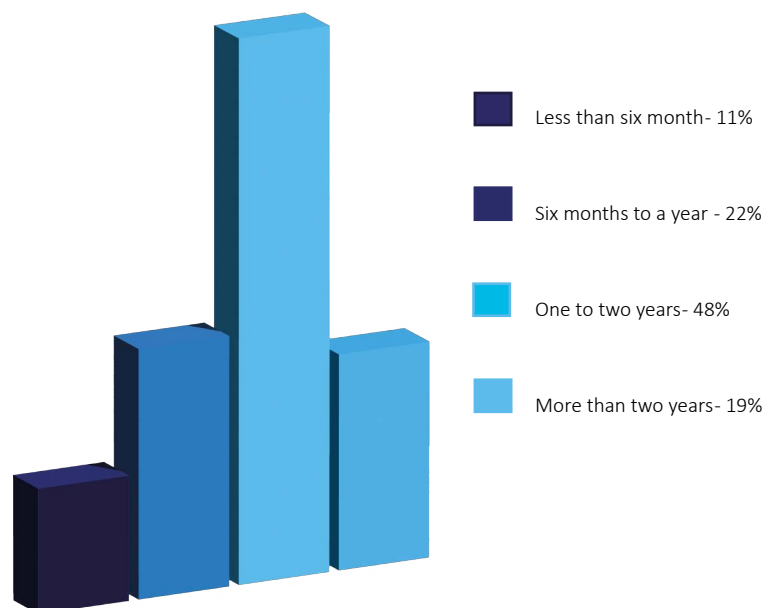


Fig.6 -How long did it take to develop your servitized offering?

How is servitization being implemented?

We asked our respondents what approaches they took in terms of strategically developing their servitized solution. When looking at those companies with an existing servitization element within their service portfolio, just under a fifth (17%) of companies devised the solution internally with their existing team.

The most common approach, however, was to seek guidance from external third-party consultants, which just over two-fifths (41%) of companies did.

A small number of companies (9%) devised their strategy internally after hiring key staff with servitization experience. While this section is too small to draw a meaningful and robust conclusion from it is also worth noting that these organisations all developed their servitization projects in less than a year.

The final section of this group, which was the second largest section in the subset of those companies who have developed a servitized element in their service portfolio, were those who devised their strategy in partnership with a customer – which was a third (33%) of the response set.

When we look at those who are currently developing their servitization strategy, a similar percentage of companies (29%) are also working with their customers. This is an important trend to identify as the concept of co-creation

between service provider and customer has been the hallmark of successful servitization case studies, as we referenced earlier in this report.

In terms of comparison between those who have already developed their servitization offering and those currently working on the development of such projects, the biggest variance is shown in organisations currently developing their solutions who are devising their strategy internally with their existing team. Amongst those who are currently developing their strategies, this equates to well over two-thirds (38%) of respondents.

The number of organisations that were turning to third-party consultants is reduced amongst this response set, with slightly over a quarter (27%) of companies in this group. The number of companies hiring key staff with servitization experience is slightly reduced, with just 6% of companies doing so.

It is interesting to see more companies essentially seeking to develop their servitization solutions internally at this stage – whether this is a result of the concepts being better understood as the conversation has become more mature is certainly an area we shall be exploring in our follow-up interviews within the qualitative phase of this study.

As we saw in both groups, many companies were developing their servitization



Fig.7 - How did you approach developing your servitization offering?



offerings with an existing customer. However, for those who didn't or are not currently taking this path, what are the plans for their servitization offering?

We asked both groups if they were developing this solution for a specific subset of clients or if they believed this solution would be suitable for all clients.

Amongst those organisations that had already developed a servitized offering, over two-thirds (67%) of respondents stated that they felt their servitization solution was only suitable for a select group of clients, while 33% stated they would be aiming to move all clients to their servitized offering.

When we look at the data from those in the group currently developing their servitization offering, this was very closely mirrored (64% to 36%), which would indicate that the majority of organisations who have either introduced or are introducing servitization into their service portfolio see their servitized offering as something that sits adjacent to and in addition to more traditional service offerings.

This is also reflected in how organisations approach rolling out their

servitization offerings as commercial offerings.

Of those organisations with an existing servitized element within their service portfolio, just under a quarter (23%) of companies initially made their servitized offering only available to a select number of clients, while just over a quarter (27%) of companies made their servitized offering available on a single product line only.

A third (33%) of companies in this group took a regional approach to deployment, which was marginally the most common of the approaches we saw in this study.

Meanwhile, the least common was to take a 'big bang' approach, which saw a complete rollout of the solution to all customers in all regions across all product lines. Just under a fifth (17%) of companies in this group opted for this approach.

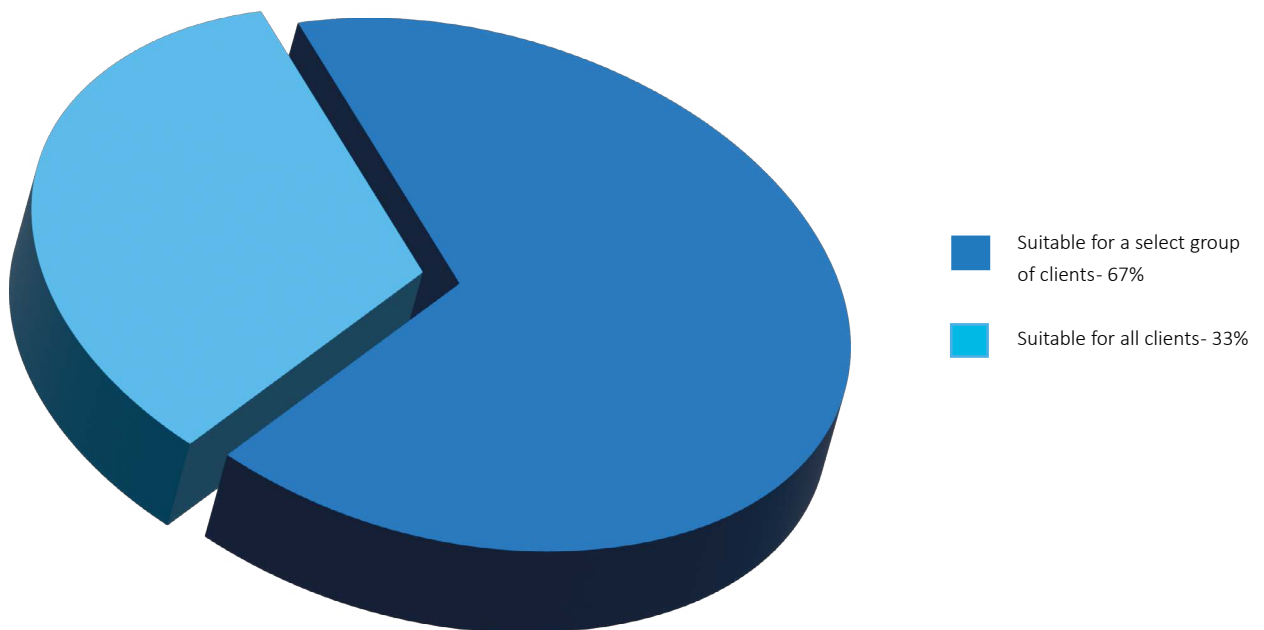


Fig.8 - Is servitization right for all of your clients or just a select group?

Does servitization require internal structure changes?

Another component of the discussion surrounding developing a servitized offering is whether there will need to be significant changes to the existing structure of the organisation.

In some ways, service operations do not need a significant restructure, particularly for those organisations that have already made the move to a more proactive style of service.

However, in certain service organisations, the transition may require some form of redevelopment of the service organisation – for example, the way spare parts are accessed can be changed significantly within a servitized business.

We asked our respondents whether they had, or intended to, change the structure of their service operation either when introducing or when planning a servitized offering.

Amongst those organisations who have established a servitized element within their service portfolio, the response was almost evenly split, with 48% of companies stating they had not changed the structure within their service organisation and 52% stating that they had.

However, amongst those organisations who were currently developing their servitization offering, there was a clearer weighting towards making changes to their service operations, with over two-thirds (67%) stating they intend to do so.

The other side of this conversation is, of course, the changes that are required to the sales department. There is a significant difference between product sales and service sales. However, when it comes to servitization and, in particular outcome-based solutions, the sales approach becomes even more complex.

This is very much reflected in the responses to the question we put to those who have already established a servitization element within their service portfolio. We asked, 'Have you had to change your sales approach to accommodate the servitized offering?'

In response to this question, almost three-quarters (72%) of respondents stated that they had indeed changed their sales approach.

However, when we look at the respondents within the group who have are still

currently developing their sales approach, the number of organisations who believe they will have to change their sales approach is actually considerably lower, with less than two-thirds (61%) stating they will be making changes.

There could be a number of reasons for this variance, it could be an indicator perhaps that those organisations later to the party in terms of servitization have already introduced changes to their sales approach that are more in line with modern service-sales approach and thus are more aligned to proactive service methodology, so there is a smaller adaptation curve.

Alternatively, it could be simply that many organisations currently underestimate the additional complexity of selling servitization. This is certainly an area that we will be investigating further during our follow-up interviews in the qualitative phase of this study.

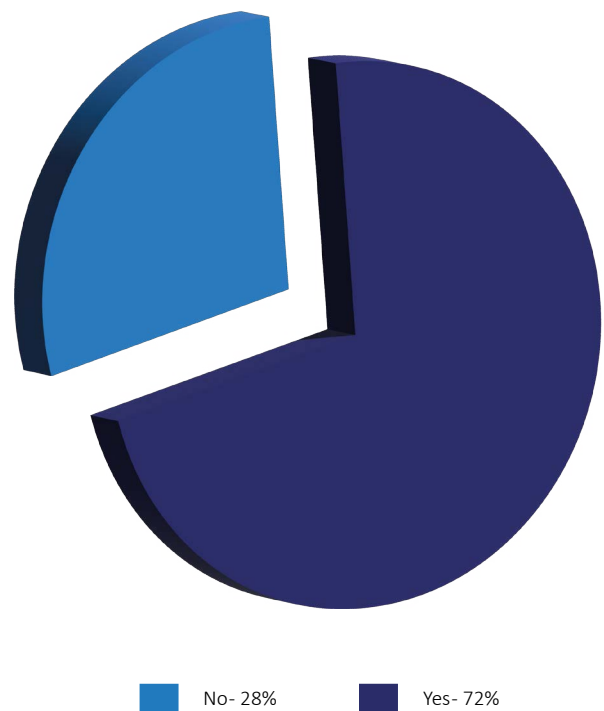


Fig.9 - Have you changed your sales approach since adopting servitization?



What technology is empowering servitization?

In our industry at large, there has been a consistent integration between effective service operations and the technology we use within our sector. However, as we outlined earlier in this report servitization as a strategic operation has been in existence for at least fifty years.

So the question remains is servitization dependent on investing in technology?

We asked those organisations who have introduced a servitized element into their service portfolio, 'How critical is the use of technology to enable you to deliver the servitized solution?'

The response here was emphatic. All respondents stated that they believed technology was important and that it would be challenging to operate a servitized model without technology. A third of all respondents within this segment of the study went further to state that they believed that it was critical and that servitization couldn't be delivered without it.

In addition, when we put this same question to the group currently developing their servitized offering, once again, all respondents stated technology was important, and almost three-quarters stated they felt it was critical.

To dig deeper into which technologies were viewed as important for servitization, for those organisations who had already developed a servitized element within their service portfolio the following technologies were the most frequently cited.

- IoT (i.e. assets capable of connecting remotely) – 100%
- Data Analytics/Big Data – 71%
- FSM System – 69%
- Artificial Intelligence – 64%
- CRM System – 58%

We also asked those organisations who are currently developing their servitization offering which technologies they needed to either introduce or improve upon. When we compare these responses with the key technologies that were listed above, there is a clear correlation between the two groups.

- IoT (i.e. assets capable of connecting remotely) – 56%
- Data Analytics/Big Data – 44%
- FSM System – 39%
- Artificial Intelligence – 39%
- CRM System – 58%

As we look at the comparison of these two sets of data, it is interesting to see that those who are developing their servitization offering see less need within these core technologies than those who have already established their offering.

Once again, this will be a key area of discussion within our follow-up interviews within the qualitative phase of this study.

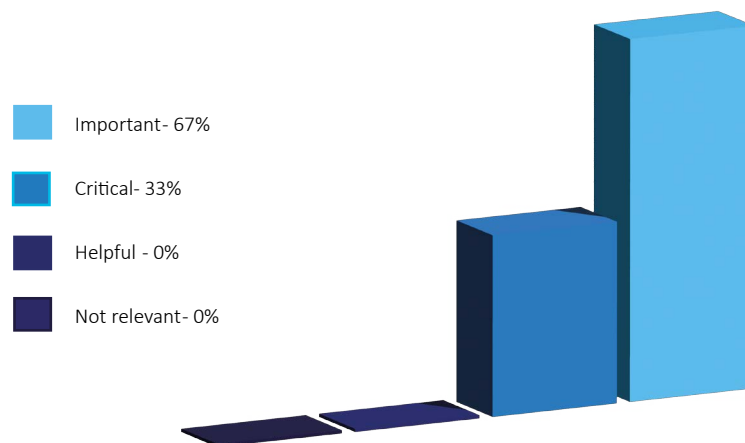


Fig.10 - How important is technology to servitization?



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