



Field Service Palm Springs

April 22 - 24, 2025

Insights and strategies from the live event

Sponsored by: **GEOTAB** **lytx**

Foreword

Insights from the producer

As the producer of our recent Field Service Palm Springs 2025 conference, I'm pleased to share this year's 'after the event' report—an exciting new asset that distills key insights and strategies from the live event.

This year's event brought together industry leaders to explore how AI-driven automation, remote service innovation, and new workforce strategies are shaping the future of field service. From practical applications of predictive maintenance to the latest in customer experience and leadership, our conversations featured actionable recommendations for organizations navigating rapid industry change.

Thanks to the help of our Field Service Insights team, you can take key learnings from the conference back to your team members in this practical, digestible format. I hope you enjoy this report.



Maureen Azzato

Portfolio Director

Field Service Palm Springs 2025

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Executive Summary

Field Service Palm Springs 2025 showcased how organizations are transitioning from reactive to predictive service operations.

Artificial intelligence emerged as a central theme, with leaders emphasizing the necessity of building robust asset data foundations before pursuing advanced analytics. Companies demonstrated targeted AI implementations delivering measurable operational improvements, particularly natural language processing for analyzing technician comments and customer feedback. Presenters positioned AI as augmenting rather than replacing human capabilities—handling routine analysis while technicians focus on complex problem-solving.

The conference also highlighted innovative talent management strategies, including successful recruitment from non-traditional backgrounds and structured career development pathways to improve retention.

Additionally, service leaders presented data-driven inventory optimization approaches balancing centralized control with localized availability amid supply chain challenges, with AI-powered demand forecasting systems showing promise in predicting part requirements through site-specific pattern analysis.



Harnessing Data to Drive Predictive Service Excellence

At Field Service Palm Springs 2025, speakers emphasized the critical importance of data as the foundation for transforming service operations from reactive to predictive models. Industry leaders shared how organizations are struggling with fundamental data challenges—including incomplete asset records and fragmented information systems—that must be addressed before advanced analytics or AI implementations can succeed.

Many presenters stressed that success begins with comprehensive asset registration, noting that many service organizations cannot identify even half of their installed assets by make, model, and serial number. Case studies from companies demonstrated how centralizing and leveraging service data can yield immediate benefits. Sessions repeatedly highlighted the importance of creating feedback loops between field technicians, engineering teams, and product development.

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Panel: Accelerating Speed to Value from Your Technology Investments, Whether You Build, Buy, or Blend Both Approaches

Sara Smith
Service AI Program Owner
Waters

Craig Bruns
Vice President – Customer Support
Crown Equipment

Shawn LaRocco
Chief Service Officer
626

Barret Van Allen
Business Segment Leader
Geotab

Logan Lewis
COO
EnterBridge

Moderated by
Marc Guthrie
CEO
Help Lightning

Summary

The panel explored evolving ROI expectations in field service technology investments, as many organizations now require faster payback periods. Panelists emphasized that implementation is merely the starting point, and true ROI realization depends on successful adoption.

According to the panelists, frontline staff often resist technologies that solely increase workload without personal benefit. To address this, they recommended structured change management using models like ADKAR (Awareness, Desire, Knowledge, Ability, Reinforcement). They also discussed involving end-users early in technology selection processes and applying different criteria to build-versus-buy decisions based on uniqueness of problems, technical competency, and desired level of control.

Key Recommendations

- **Apply structured change management methodology:** Follow frameworks like ADKAR to guide people through the five elements needed for successful change adoption.
- **Include end-users early in technology selection:** Involve frontline staff in buying decisions to increase adoption and reduce resistance to new systems.
- **Balance efficiency gains between company and frontline staff:** Share productivity benefits with technicians rather than pushing solely for maximum output.
- **Consider long-term support when selecting vendors:** Evaluate vendors based on their ability to provide ongoing partnership after implementation, not just their technology offerings.



From The Event

It's extremely hard in field service to identify and track ROI. If you provide technicians with technology that can do six jobs a day, they may still only do four to five a day if they aren't familiar with the tools. You must blend company efficiency and adoption with technician efficiency and adoption to achieve success.

Craig Bruns, Vice President, Customer Support, **Crown Equipment**

Panel: Using Data to Get to More Predictive and Proactive Service

Matt Rust

Director, Field Service (Northeast)
Eppendorf

Collin Rush

Director, InfoLink Customer Support
Crown Equipment

Mike Harris

SVP Commercial Development
PremiStar

Ben Vollmer

Director
RSM

Moderated by

Aaron Salow
CEO & Founder
XOi

Summary

The panel examined strategies for transitioning field service organizations from reactive to predictive maintenance models. Participants emphasized that establishing comprehensive asset data is foundational, highlighting that many companies cannot identify half of their installed equipment by make, model, and serial number.

Gaining technician buy-in is critical, and senior technician buy-in is particularly effective. Successful implementations focus on tools that simplify workflows rather than creating additional administrative burdens.

For building the business case, panelists recommended starting with straightforward applications like equipment age reporting and prioritizing specific high-value use cases. Finally, they cautioned that predictive capabilities are becoming customer expectations.

Key Recommendations

- **Establish complete asset registration as your foundational step:** Before pursuing advanced analytics, ensure you have comprehensive data about the equipment you service.
- **Deploy technology that benefits technicians first:** Secure field adoption by implementing tools that solve technicians' problems rather than simply extracting data from them.
- **Start with focused use cases that demonstrate clear ROI:** Choose a business problem or equipment segment rather than attempting to analyze your entire data set.
- **Demonstrate value to customers beyond avoiding failures:** Show how maintenance improves equipment performance and efficiency.



From The Event

Start with the end in mind, but break the work into manageable pieces. Don't take on more than your organization can handle. It's better to deliver real value to a specific group than to try to please everyone and accomplish nothing. For example, if your goal is to build the world's best asset registry for your customers, focus on that first. Don't worry about automating work orders or other initiatives until you've completed the asset registry. Tackle one challenge at a time, master it, and then move on to the next.

Ben Vollmer, Director, **RSM**



Fireside Chat: How to Get Your Data House in Order to Make It Actionable for AI Projects and More

Joseph Lang
VP Service Technology
Comfort Systems USA

Moderated by
Aaron Salow
CEO & Founder
XOi

Summary

This session highlighted strategies for leveraging structured data and AI in field service operations. Joseph Lang of Comfort Systems USA emphasized three key approaches:

First, he suggested combating knowledge loss from technician turnover by extracting insights from asset records and equipment manuals. Second, he recommended overcoming data fragmentation by integrating disparate ERP systems, enabling identification of equipment-specific failure patterns and targeted technician training.

Finally, Lang told the audience to evolve business models beyond reactive maintenance by using historical lifespan data and real-time analytics. This can create risk-adjusted service agreements that shift customer focus from cost to operational reliability.

Key Recommendations

- **Consolidate legacy system data using integration tools:** Employ platforms like Microsoft Fabric to map critical fields across disparate ERPs, reducing integration time by 40%.
- **Implement predictive planning beyond maintenance:** Analyze equipment replacement patterns and IoT data to develop tiered service plans that reduce emergency calls.
- **Integrate lifecycle analytics into sales training:** Teach teams to position aging equipment replacement as operational risk mitigation rather than capital expense.
- **Deploy AI in phases for knowledge retention:** Start with equipment manual analysis before expanding to work orders, reducing onboarding time while maintaining answer accuracy.



From The Event

We're not trying to monetize data – we're operationalizing it. This isn't about selling insights as a product; it's about reducing our cost basis to drive profitability while keeping customers' equipment running longer.

Joseph Lang, VP Service Technology, Comfort Systems USA



Case Study: Using Your Data to Better Prepare for Service Calls and Improve CX

Dave Pitchford

Director of Customer Operations

The Coca-Cola Company

Summary

Coca-Cola tackled service challenges through their Tech Connect Portal, a mobile platform giving technicians instant access to equipment histories and predictive insights via QR code scanning. The system reduced repeat calls by providing repair histories and AI-driven failure predictions.

A breakthrough application involved identifying high-incident locations like Burger King Freestyle dispensers with recurring problems. By analyzing service patterns and dispatching senior technicians to address root causes, they achieved an 18% improvement in first-time fix rates and 22% higher customer satisfaction.

Their feedback loop enables technicians to submit insights that drive engineering improvements and prevent future failures.

Key Recommendations

- **Leverage predictive analytics for failure anticipation:**
Combine repair histories, parts trends, and AI models to prioritize high-risk calls and prepare trucks with likely-needed components.
- **Create centralized technician portals with QR access:**
Provide immediate equipment histories, repair manuals, and technician notes during service visits.
- **Establish technician-engineer feedback channels:**
Enable field teams to submit repair observations and design suggestions directly to R&D.
- **Implement location-based performance monitoring:**
Track service frequency, repair times, and parts costs to identify problem sites for targeted intervention by senior technicians.



From The Event

When you think about all the different data sources that we pull together—repair histories, parts usage, customer feedback—they all yield a better response rate. So, ultimately, we always talk about the total customer experience, but we want to talk about the technician experience as well. If your technicians aren't empowered, your customers won't be either.

Dave Pitchford, Director of Customer Operations, The Coca-Cola Company



Panel: Multiplatform Hell: Doesn't Anyone Have a Turnkey, Integrated Platform for Easy Plug & Play?

Denny Lawrence
Manager of Service
Technology
Comfort Systems USA

Steve Demanovich
VP Service Operations
Albireo Energy

Amit Venugopal
Managing Director
VASS US & Canada

Moderated by
David Bishop
Managing Partner
Twin Bishop Strategies

Summary

This panel explored the challenges organizations face when managing multiple software platforms across field service operations. Participants described vastly different approaches, from Comfort Systems' decentralized model, where 46-50 companies choose their own, to Albireo Energy's "rip the band-aid off" strategy that standardized all acquisitions onto a single system.

A key theme was the importance of prioritizing field technician experience while ensuring back-office financial integrity. Panelists emphasized understanding end-to-end business processes before integration, using middleware platforms to connect systems strategically. Successful implementations depend on change management practices, including extended support periods, in-person training, and gathering feedback.

Key Recommendations

- **Define end-to-end business processes before selecting technologies:** Understand your complete workflow before implementing new systems to ensure all needs are addressed.
- **Cultivate internal champions to drive technology adoption:** Respected team members can help influence others, regardless of their position in the organization.
- **Provide extended support during and after system implementations:** Plan for on-site support during launch, followed by 3-6 months of continued check-ins.
- **Establish a field council with representatives from every branch or region:** Create a forum for user feedback to share the best practices and identify improvements.



From The Event

Without technicians, we don't have a business. They may stay at your company for the culture and the technology, but they may also move to a different company if it means earning an extra dollar per hour. They need to see the value in your technology for it to make a difference, and if it's not easy to use, they won't use it.

Denny Lawrence, Manager of Service Technology, **Comfort Systems USA**



Point/Counterpoint: Home-Grown Service Solutions vs. External Tech Solutions: What's the Right Path?

Andy Kaszyucki

Senior Director, Network & Field Operations

Northwestel

Summary

This session explored the advantages and disadvantages of using custom service solutions compared to off-the-shelf products. Andy Kaszyucki from Northwestel advocated for out-of-the-box solutions, particularly for smaller organizations with resource constraints. These types of companies can enjoy benefits like lower upfront costs, vendor-provided maintenance, and faster implementation.

Anne Emberson from Nalco Water championed a hybrid approach, particularly for larger companies with specialized expertise. She believes rapidly changing technology makes flexibility crucial, and combining vendor partnerships with internal expertise can deliver higher value while mitigating risk. Both speakers acknowledged that integration complexity and long-term maintenance are critical considerations of either approach.

Key Recommendations

- **Assess your organization's size, resources, and time constraints:** This will help you decide between custom and out-of-box solutions.
- **Consider a hybrid approach:** off-the-shelf solutions can't always address specialized inventory requirements, so combining vendor products with customization might make sense.
- **Establish strong governance for custom developments:** This will prevent single-person dependencies and ensure sustainability beyond individual employee tenure.
- **Minimize integration complexity by limiting connectors between systems:** Doing so will reduce regression testing requirements and system vulnerabilities.



From The Event

For those of you who are in smaller companies, or who have limited resources or a low-scope project, an off-the-shelf product is probably better for your purposes. You don't want to implement a service solution that's beyond the capabilities of the people working within your company.

Andy Kaszyucki, Senior Director, Network & Field Operations, Northwestel



Panel: Efficiencies, Efficiencies, Efficiencies: Driving Technician Technology Utilization for Measurable Results

Jessica Murillo

Chief Operating Officer for
Technology Lifecycle Services

IBM

Haroon Abbu

SVP, Digital Technology & Data
Analytics

Bell & Howell

Isabella Rios

Executive Director of Americas
Service

Rapiscan Systems

David Gardner

Director, Resource Planning &
Coordination

Dish Network

Moderated by

David Bishop

Managing Partner

Twin Bishop Strategies

Summary

This panel explored strategic approaches to improving field technician efficiency with technology and analytics.

For example, Bell & Howell shared moved from being “over-indexed in technology but under-indexed in value” to implementing metrics that measure technician and customer outcomes. IBM highlighted its implementation of throughput metrics to standardize productivity measurement across diverse service scenarios.

The discussion highlighted emerging applications such as Dish Network’s chatbot providing just-in-time training refreshers for technicians, Rapiscan’s predictive maintenance kits for secure facilities, and Bell & Howell’s Internet of People and Things (IOPT) platform that enables real-time service adjustments based on SLAs and technician capacity.

Key Recommendations

- **Establish clear metrics that balance both operational efficiency and customer experience:** Define specific KPIs that track productivity while ensuring quality standards are maintained.
- **Build a solid data foundation before implementing advanced solutions, including AI:** Ensure you have quality data collection in place and your technicians are versed in current technology.
- **Deploy AI tools that assist technicians with documentation and customer communication:** Prioritize tools that translate technical work into customer-friendly explanations and records.
- **Create predictive parts kits based on service data and failure analysis:** Use historical repair information to anticipate secondary failures and ensure technicians have appropriate parts.



From The Event

We put together something called ‘Field Service 10 Metrics,’ which measures technician efficiency, including utilization, realization, calls per technician per day, and some customer-facing metrics like mean time to repair, response times, and resolution time. We wanted to make that distinction between utilization and realization.

Haroon Abbu, SVP, Digital Technology & Data Analytics, **Bell & Howell**





AI as a Strategic Enabler: Transforming Service Operations for Maximum Value

Field Service Palm Springs 2025 showcased how AI is transcending the hype cycle to deliver measurable operational improvements across the service lifecycle. Presenters consistently emphasized the evolution from probability-based maintenance models to more actionable Remaining Useful Life (RUL) measurements that field teams find more meaningful and practical.

Rather than deploying comprehensive AI solutions immediately, speakers advocated targeted implementations focused on high-value use cases that demonstrate clear ROI, allowing organizations to build momentum and refine their approaches. Several organizations shared how they're using natural language processing to analyze unstructured data from technician comments, customer feedback, and service records to identify recurring issues and improve product design.

The consensus among speakers was that AI shouldn't replace human technicians but rather augment their capabilities. Systems can handle routine data analysis and knowledge retrieval to free up skilled personnel for complex problem-solving and customer relationship management.

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Panel: Taking AI to the Next Level: Ensuring Accuracy and Speed to Value to Solve Real Service Problems

Stephen Goulbourne
Global Program Director – Global Service
Mettler Toledo

Greg Friesen
VP & General Manager, Global Services
Ciena

Jeff Martin
VP of Global Sales Strategy
Lytx

Clinten van der Merwe
SVP, Head of Global Service and Project Management
TOMRA Recycling

Jeff Nieze
VP Solution Strategy
Baxter Planning

Moderated by
Thomas Cottureau
CEO and Co-Founder
SightCall

Summary

This panel explored how AI helps service teams address challenges while ensuring accuracy and delivering value. Panelists discussed challenges like improving first-time fix rates, reducing time to resolve cases, protecting field technicians through safety monitoring, and capturing expert knowledge. They also suggested measuring ROI through metrics like reduced service visits, improved customer satisfaction, and safety improvements.

The speakers highlighted that successful AI implementation requires human oversight and should start with internal use before customer-facing applications are enacted. AI should augment rather than replace human expertise, serving as a tool to empower service teams and improve customer and employee experiences.

Key Recommendations

- **Focus AI implementation on improving key metrics like first-time fix rates and case resolution time:** It's critical to demonstrate clear ROI quickly.
- **Start AI deployment internally, with subject matter expert oversight:** Extend to customer-facing applications gradually to build trust and proof of concept.
- **Use AI to automate repetitive support tasks first:** This will allow your technical experts to focus on complex problem-solving and process improvement.
- **Implement AI that augments, rather than replaces, technician capabilities:** Human expertise must be part of the equation to maintain service quality and team engagement.



From The Event

Customer uptime is critical, but we must achieve it in the most cost-effective way possible. From a knowledge management perspective, our AI copilots must enable us to truly understand our customers, as this informs the most effective ways to support them.

Stephen Goulbourne, Global Program Director – Global Service, **Mettler Toledo**



Keynote: Moving Beyond the Hype: How to Use AI as a Human Enabler to Improve Customer and Enterprise Outcomes

Greg Parker

VP Innovation & Portfolio Management

Johnson Controls

Summary

During this keynote address, Greg Parker of Johnson Controls advocated for a practical, near-term approach to AI in building systems. He stressed the need to focus on clear, outcome-driven goals rather than hype.

A persistent theme throughout the conference, Parker recommends combining AI with human expertise, as this would let technology handle routine tasks while people focus on higher-value work. Parker highlighted the importance of infrastructure, cybersecurity, and employee training, using the Milwaukee Brewers' stadium as an example of AI and human teams collaborating effectively.

Success, he concluded, depends on aligning technology with customer needs and stakeholder priorities, not just adopting new tools.

Key Recommendations

- **Define clear outcome objectives before implementing AI solutions:** Determine exactly what you're trying to improve before evaluating technology options.
- **Conduct cybersecurity and privacy assessments for all AI implementations:** Ensure new technologies fit holistically within your system without creating vulnerabilities.
- **Align IT teams and facility management teams from the beginning:** Foster tight collaboration between technical and operational stakeholders throughout assessment and implementation.
- **Focus your training beyond the basics:** Emphasize purpose and context, so your employees understand not just how to use new technologies but also why they matter.



From The Event

Ask yourself, 'What am I trying to improve?' Perhaps you want to improve efficiency, reduce your operational costs, strengthen your system's reliability, or reduce safety risk. Once you find an answer, you can evaluate AI solutions based on their capabilities in that area, and then free up your workforce to focus on higher-value tasks.

Greg Parker, VP Innovation & Portfolio Management, [Johnson Controls](#)

Partner Fireside Chat: Differentiating Field Service in the Era of Intelligence

Caroline Davidson
VP, Experience Delivery and BI
Bell Canada

David Miskus
Director, Strategy and BI
Bell Canada

Bulent Cinarkaya
VP & GM, Field Service Management
ServiceNow

Summary

During this fireside chat, Bell Canada executives discussed transforming field service operations by integrating ServiceNow's platform for their 10,000 technicians and 12,000 vehicles. Their vision involves seamless communication with partners, transparency for customers, and operational efficiency through a 40:1 management ratio.

High-quality data is a prerequisite for AI, so the leaders suggested focusing on foundational tools, early frontline engagement, a simple skills taxonomy, and continuous improvement. The overall goal should be to boost efficiency, which improves the customer experience.

Key Recommendations

- **Create detailed requirements before evaluating technology vendors:** Document your specific needs to receive more accurate proposals and avoid irrelevant solutions.
- **Simplify your operational taxonomy before implementing new systems:** Reduce complexity by streamlining skills classifications, processes, and data structures.
- **Engage frontline workers early in the technology selection process:** Include dispatchers, capacity planners, and field technicians in workshops to understand pain points.
- **Establish robust governance for continuous improvement:** Collect ongoing feedback and make regular enhancements—don't treat change management as a one-time event.



From The Event

We're quite sensitive to performance. If a technician is finished 45 minutes before the end of their shift, we don't just let them go home. We look at their historical performance on various skills, check what health and safety modules they need brushing up on, and drop them a custom module for virtual training in the last hour of their day.

Caroline Davidson, VP, Experience Delivery and BI, Bell Canada

Panel Discussion: How AI Can Help Achieve Key Service Metrics and Expand Your Service Offerings

Vasiliy Krivtsov

Director of Reliability
Analytics

The Ford Motor Company

Petchiraj Piramuthu

Vice President of Data and
AI

Tavant

Joseph Lang

Vice President of Service
Technology

Comfort Systems USA

Moderated by

Aaron Salow

CEO & Founder

XOi

Summary

This panel highlighted AI's transformative impact on service delivery metrics and maintenance strategies. Experts emphasized the shift from probability-based models to Remaining Useful Life measurements, which provide more actionable insights for field teams.

Panelists showcased how AI-IoT integration enables real-time condition monitoring to prevent emergency repairs and service disruptions. They discussed NLP applications for analyzing unstructured data from technician notes and customer feedback to identify recurring issues and improve products.

As AI increasingly handles technical knowledge and diagnostics, the industry is evolving toward prioritizing technicians' soft skills rather than expecting comprehensive technical expertise across all equipment.

Key Recommendations

- **Adopt remaining useful life (RUL) metrics over probability-based models:** Make technical forecasting more actionable for field teams while enabling better preventive maintenance scheduling.
- **Deploy sensors for early failure detection:** Collect and analyze equipment data to schedule maintenance before failures impact customers.
- **Implement NLP to mine unstructured data:** Extract insights from technician comments and service reports to identify patterns and improve routing.
- **Develop technicians' soft skills alongside AI tools:** As AI handles technical knowledge, prioritize communication abilities and customer relationship skills in hiring and training programs.



From The Event

When something goes to failure, your cost is exponential to fix it. If you can find a way to do what I call predictive analysis and head off the problem before it becomes a problem, you save yourself time, money, risk, and customer satisfaction. That's why we look at it from an operational standpoint versus a sales product when it comes down to leveraging these types of information.

Joseph Lang, VP Service Technology, **Comfort Systems USA**



Case Study: Using AI to Optimize Labor Usage and Elevate Technician and Customer Safety

Rajib Bora

VP Field Services

Freudenberg e-Power Systems

Summary

Freudenberg e-Power Systems is applying AI to transform battery management for large-scale applications in transportation. As production scales from 400 megawatt-hours to 3 gigawatt-hours annually, they aim to maintain safety standards without proportionally expanding their workforce.

Bora highlighted how battery misuse can trigger dangerous thermal runaway events. The company is transitioning from reactive service, where technicians manually analyze data after problems occur, to a proactive model where AI continuously monitors battery management systems to detect anomalies and predict failures.

This approach optimizes labor resources while significantly enhancing safety by preventing potential catastrophic incidents.

Key Recommendations

- **Deploy AI monitoring for proactive service models:** Continuously analyze operational data to identify issues before they become critical failures.
- **Automate repetitive monitoring tasks:** Free technical experts for complex problem-solving by using AI for routine data analysis.
- **Define clear safety thresholds for AI alerts:** Establish parameters that trigger notifications to effectively prevent dangerous situations.
- **Implement gradual AI adoption:** Introduce automation incrementally to allow for adaptation and refinement of monitoring algorithms.



From The Event

Currently, I call it a reactive model: A problem happens, somebody calls us, we go and look at the historical data, and we make some judgment. In the future model, we want to warn the customer about the state of battery health before it happens. We'd do this through continuous monitoring of the BMS data.

Rajib Bora, VP Field Services, **Freudenberg e-Power Systems**



Winning the Talent War: Innovative Approaches to Building and Retaining Service Teams

The persistent challenge of recruiting, developing, and retaining field service talent emerged as a critical focus area at Field Service Palm Springs 2025. Speakers revealed how organizations are abandoning traditional hiring approaches that prioritize existing technical skills in favor of identifying candidates with the right attitude, aptitude, and mechanical inclination.

Companies shared success stories of recruiting from non-traditional backgrounds, such as retail and hospitality, through targeted social media campaigns, reducing onboarding time, and improving technician retention. Multiple sessions addressed the need for structured career development pathways with clear progression benchmarks to reduce attrition among mid-career technicians. Presenters even detailed innovative onboarding programs that combine classroom learning with field mentorship to accelerate time-to-productivity.

Finally, the integration of AI-powered knowledge systems was highlighted as a key strategy for capturing institutional expertise from retiring technicians while providing accessible troubleshooting guides for new hires.

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Closing Panel: How to Seismically Change the Culture of Your Service Organization and Teams

Mindy Booknis

Director, Global TSS Support
as a Service

IBM

Nick Cribb

President

Sam Service

Michel Zweers

Sr. Manager, Global Service
Business Development & Marketing

Hach

Moderated by

Len VanderHulst

former SVP Global Service

Eppendorf

Lenny Cumberledge

Field Service Director

Gojo Industries

Summary

In this panel, field service leaders discussed transformative cultural changes within service organizations. Panelists highlighted shifts from traditional break-fix models toward consultative relationships, technical specialists becoming brand ambassadors with commercial sensitivity, and the growing importance of mental health support for field teams.

A common theme was the evolution from purely transactional service models to building deeper emotional connections with both customers and employees, as service technicians are an organization's frontline representatives. In one example, Lenny Cumberledge from Gojo Industries shared how its mental health resources helped technicians who were exposed to traumatic healthcare environments during the pandemic.

Key Recommendations

- **Measure emotional customer connections as well as technical results:** Track the quality of your customer relationships, not just resolution times.
- **Offer tailored mental health resources to your team members:** Partner with clinics and experts to provide help for field teams exposed to traumatic situations.
- **Align employee recognition with your company's purpose:** Reward behaviors that drive your organization's cultural and value-driven goals.
- **Host regular gatherings and encourage communication between team members:** Foster trust through open Q&As with leadership, informal "coffee hours," and other events.



From The Event

You're not just there to fix customer problems; you're also there to advise them and maintain strong relationships. While we don't expect service technicians to be sellers, we want them to have commercial-sensitive skills. Developing these skills is something we prioritize from day one.

Michel Zweers, Sr. Manager, Global Service Business Development & Marketing, **Hach**



Opening Keynote: Red Carpet Ambition: Creating an Effective Service Culture of the Future with New Leadership Approaches

Fabio Raffone

VP Service Operation Americas

Tetra Pak

Summary

Fabio Raffone from Tetra Pak shared how his organization reduced engineer turnover from 10% to 3.4% in three years through strategic cultural initiatives. The presentation highlighted Tetra Pak's "red carpet ambition" approach, which emphasizes that service engineers should deliver such exceptional service that customers metaphorically roll out a red carpet for their next visit.

Central to Tetra Pak's approach was a significant investment in employee development, dedicating 15% of each employee's time annually to competence development. The company created clear career paths with global promotion rules, fostered trust through open communication, and implemented recognition programs, including personal outreach from leadership.

Key Recommendations

- **Invest in competence development as a retention strategy:** Allocate significant time for employee skill development to increase both service quality and worker loyalty.
- **Create transparent career advancement paths with clear progression criteria:** Establish well-defined levels and requirements so employees can visualize their future.
- **Build trust through consistent leadership behaviors and authenticity:** Demonstrate reliability and consistency in your leadership approach, avoiding techniques that feel forced or unnatural.
- **Implement personal recognition practices from leadership to frontline employees:** Make direct contact with team members to acknowledge their contributions and benchmarks.



From The Event

We have many people doing the same job, so why don't we communicate and help each other more? My daily focus is connecting my 700-person team with colleagues worldwide, using the same approach to strengthen our collective impact.

Fabio Raffone, VP Service Operation Americas, Tetra Pak:



Panel: Fire Them Up Fast: Engaging New Hires Within the First Few Months or Risk Losing Them

Bruce Nelson
VP, Strategic Initiatives
Hytech

Fernando Vivieca Vargas
Caribbean Field Service Director
DISS

Ryan Wilson
VP Service Technology
DSL Ltd.

Patrick Dell
Field Vice President, AMS
Service Operations
Varian

Moderated by
Sean Albertson
Founder & CEO
CX4ROCKS

Summary

This panel addressed critical strategies for engaging new hires within their first 90 days to reduce turnover. Key tactics included pairing recruits with empathetic mentors (not just skilled technicians), alternating administrative tasks with hands-on work to foster purpose, and identifying employees' motivations.

The panelists suggested deliberate travel for mentorship and virtual relationship-building for remote teams. They also suggested balancing technical training with soft skills, especially for customer-facing roles that require technicians to act as brand ambassadors.

Key Recommendations

- **Match new hires with great mentors, not just great technicians:** Choose mentors who communicate well and explain the “why” behind procedures.
- **Alternate onboarding between administrative and hands-on tasks:** Intersperse paperwork with actual jobs so new employees feel purposeful and connected immediately.
- **Establish structured check-ins during the first 90 days:** Regular communication demonstrates care for employees' well-being and addresses issues before new hires become disengaged.
- **Watch for early warning signs of disengagement:** These can include lateness, reluctance to participate, or a lack of connection with the rest of the team.



From The Event

We must identify our people's passions. We may propose a salary and a bonus plan, but as soon as someone comes into our company, we must understand what really matters to them, personally. Provide them with a personal mission, so they can find something in our organization they care about.

Fernando Vivieca Vargas, Caribbean Field Service Director, **DISS**



Case Study: Using Social Media for Targeted Recruitment and Image Building Strategies

Josh Zolin

CEO

Windy City Equipment

Summary

Josh Zolin of Windy City Equipment presented an innovative recruitment approach using social media as an alternative to traditional “fishing” via job boards or expensive “hunting” through headhunters. His strategy leverages the fact that 79% of job seekers research employers on social media before applying.

By authentically showcasing company culture across platforms tailored to demographic preferences—LinkedIn, Facebook, Instagram, and TikTok—his team attracted pre-aligned candidates. Over five years, this approach yielded two executive appointments and approximately 40 frontline hires.

Supplementing podcasts and YouTube videos expanded their reach while simultaneously strengthening their employer brand and customer relationships.

Key Recommendations

- **Tailor content to platform demographics:** Use TikTok for 20-somethings, Instagram for 30s, Facebook for 40s, and LinkedIn for diverse age groups.
- **Visualize career progression paths:** Show candidates clear advancement opportunities beyond basic compensation.
- **Activate employees as recruitment ambassadors:** Encourage team members to share company content, generating higher trust than official communications.
- **Maintain consistent posting schedules:** Commit to regular content regardless of immediate results, as recruitment success requires sustained effort.



From The Event

I often say your brand breeds your culture, and your culture feeds your brand. Being consistent across platforms is vital in this. It's about that consistency inside and outside of your organization. Don't say you are one thing and then be another. People will pick up on that very quickly.

Josh Zolin, CEO, Windy City Equipment

Panel Discussion: Hiring & Grooming 24/7/365: Deepening Your Leadership and Technician Bench

Ewan Stewart
Region VP Service, Midwest
Comfort Systems

Gail Norris
US Lead, SITRAIN Digital Industry
Academy, Digital Industry Division
Siemens

Kip Kuntz
Director of Field Services
BayWa r.e.

David Mueller
Vice President, Global Service
Hach

Moderated by
Sean Albertson
Founder & CEO
CX4ROCKS

Summary

This session explored innovative approaches to the field service talent shortage by challenging conventional hiring practices. Panelists advocated prioritizing attitude and mechanical aptitude over technical credentials.

Comfort Systems USA partnered with ATC to recruit from the retail and hospitality sectors through social media, improving retention by 15% year-over-year. Siemens and BayWa r.e. showcased structured upskilling programs for emerging fields like renewable energy, with SITRAIN combining technical education and apprenticeships.

BayWa r.e. now leverages contextualized recruitment and referral methods to attract environmentally motivated talent. Meanwhile, Hach's 12-week program accelerates productivity through combined classroom and field mentorship.

Key Recommendations

- **Collaborate with specialized training organizations:** Use partners like ATC to identify candidates with technical aptitude through social media analysis and behavioral assessments.
- **Conduct monthly growth conversations:** Replace annual reviews with regular feedback sessions that align career goals with skill development opportunities.
- **Establish transparent career advancement frameworks:** Develop skillset matrices with clear progression benchmarks to reduce mid-career attrition by demonstrating growth potential within the organization.



From The Event

If we can fast-track this and take it from 12 months down to six months, now we've got them out there doing productive work a lot faster than they would in the traditional mechanism. By the time they get through a year, they've paid for themselves and they're out working. If we could take a five-year, journeyman-level training and bring it down to three years, then we've made a big impact on our ability to serve our customers.

Ewan Stewart, Region VP of Service, Midwest, **Comfort Systems USA**





Optimizing the Global Parts Ecosystem: Balancing Efficiency, Cost, and Customer Satisfaction

Field Service Palm Springs 2025 speakers explored the increasing complexity of managing parts inventory and logistics in an era of continued supply chain volatility and rising customer expectations. Presentations revealed how organizations are balancing centralized control with localized availability to meet service-level agreements while navigating market challenges.

Service leaders emphasized data-driven strategies for inventory optimization, while presenters consistently highlighted the financial imperative of effective parts management.

One company even revealed its implementation of AI-powered demand forecasting systems. Those systems can analyze failure patterns and environmental conditions to predict part requirements with high levels of accuracy.

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Panel Discussion: Act Local, Think Global: How Digitalization is Supporting Improved Service Parts Inventory Management

Megan Schlam
VP, U.S. Services Execution
[Schneider Electric](#)

Allison Dozark
VP
[Ellison Technologies](#)

Chuck Kellen
Associate Director, Continuous
Improvement & Maintenance, Digital
Product Manager, Asset Optimization
[EDFR NA](#)

Summary

This panel examined strategies for balancing global inventory efficiency with local responsiveness amid supply chain disruptions. Experts discussed managing tariff impacts through dedicated committees, customer parts contracts, and refurbishment programs.

They highlighted organizational structures that enable centralized operations while maintaining regional relationships, with digital tools optimizing inventory placement and delivery routes. The conversation emphasized data quality as a foundation for effective digital transformation, showcasing AI applications that range from administrative automation to enhanced troubleshooting and predictive maintenance recommendations.

Speakers noted the growing customer expectation for Amazon-like speed in parts delivery across global operations.

Key Recommendations

- **Form tariff mitigation committees for data-driven pricing strategies:** Create structured approaches to navigate volatile tariff environments affecting global supply chains.
- **Balance centralized operations with local support through regional coordinators:** Standardize processes while maintaining personalized customer relationships.
- **Deploy AI for predictive parts bundling during maintenance visits:** Bring components with high failure probability to reduce future service calls and enhance customer satisfaction.
- **Implement team-based profit-sharing for parts organizations:** Increase accountability and cost-saving focus by giving employees a financial stake in inventory optimization outcomes.



From The Event

The world has gotten faster, and I think there was a lot of acceptance during COVID that things were on back order and there were shortages. However, the Amazon effect is real—people want parts and they want them right now. When you're in a break-fix situation, 24 hours is too long. How do you have the right part in the right place at the right time and get it to your customer within your SLA?

Megan Schlam, VP, U.S. Services Execution, [Schneider Electric](#)



Case Study: Global Spare Parts Harmony: Using Data Analytics and AI to Elevate SLA Commitments and Maximize Profits

Chris Dickerson

VP, Service Planning & Logistics

Nokia

Summary

Chris Dickerson of Nokia detailed the intricate management of global spare parts operations across 70+ countries through a 'science + art' framework. The science involves predictive analytics and AI-driven demand forecasting, while the art encompasses cross-functional decision-making spanning sales, finance, and customer teams.

Nokia employs real-time installed base management, dynamic routing, and contingency planning for geopolitical challenges, including remote location solutions like unmanned depots. Drawing from what it learned about lead times during the pandemic, Nokia implemented consignment agreements and AI-enhanced failure analysis, recognizing that parts optimization directly impacts contract renewals and legacy system profitability.

Key Recommendations

- **Create cross-functional logistics committees, aligning inventory with business priorities:** Ensure parts allocation supports deployments while addressing geopolitical risks.
- **Deploy AI-driven failure analysis for predictive replenishment:** Leverage component lifecycle data to anticipate needs, reducing downtime and SLA penalties.
- **Establish hybrid fulfillment solutions for remote areas:** Combine autonomous depots with gig-economy drivers to overcome last-mile challenges in isolated regions.
- **Conduct quarterly legacy inventory audits:** Transform underutilized older parts into revenue opportunities through proactive customer upsell conversations.



From The Event

Science plus art equals customer satisfaction. That's how I look at spare parts planning and logistics. The science part is getting all the data, using AI, and understanding your customer commitments. The art is taking that information and making the right business decisions. But it's all about customer satisfaction.

Chris Dickerson, VP, Service Planning & Logistics, **Nokia**



Case Study: Optimize Spare Parts Inventory by Taking a Disciplined, Mathematical Approach

Brian Key

Director of Service Products

Multivac

Summary

Brian Key of Multivac presented a mathematical approach to spare parts inventory optimization that balances customer needs with financial responsibility. He described Multivac's vision of creating an inventory 'river' that maintains high fill rates while minimizing obsolescence.

Key outlined the brand's use of ABC analysis for prioritizing inventory, as well as various forecasting methods ranging from simple averages to exponential smoothing. This forward-deployment strategy includes regional stock machines that can be 'robbed' of parts for urgent needs through a documented process.

Multivac currently achieves a 5.1 inventory turnover rate, a 2.9% empty bin rate, and an 88% fill rate.

Key Recommendations

- **Apply ABC analysis to focus inventory management efforts:** Prioritize category A items representing the most critical and fastest-moving parts.
- **Implement advanced forecasting models with seasonality factors:** Use exponential smoothing rather than simple averages to capture demand fluctuations.
- **Create formal 'rob parts' protocols for emergencies:** Document when taking parts from stock machines to trigger inventory level evaluation.
- **Set safety stock based on maximum replenishment times:** For critical components causing significant downtime, consider the worst case rather than average lead times when establishing buffer inventory levels.



From The Event

Effective inventory management makes parts inventory not a pond, but a river, and one that supports customers well. The end goal is to have very few stockouts, a high order fill rate, low excess and obsolete inventory, and a barrier to competitor entry because there's no need for customers to go elsewhere to get the needed part.

Brian Key, Director of Service Products, [Multivac](#)

Panel Discussion: Avoiding Expensive Parts Over Stocks and Out of Stocks: Harnessing Your Costs and Uncertain Delivery Dates

Robert Contino
Senior Manager of Capital
Service Operations
[J&J MedTech](#)
[Orthopaedics](#)

Melissa Hogan
Sr. Director, Digital
Transformation &
Continuous Improvement,
Asset Optimization
[EDF Renewables NA](#)

Joy Čavić
Senior Transformation
Manager– Global
Technical Service
[ResMed](#)

Moderated by
Michael Blumberg
President & CEO
[Blumberg Advisory](#)
[Group](#)

Summary

The panel addressed optimizing medical device parts inventory amid supply volatility and changing customer demands. Discussions focused on balancing centralized and localized inventory approaches, with EDF Renewables showcasing a hybrid model using regional hubs while maintaining site-level critical spares.

ResMed highlighted challenges managing 400+ global service centers with inconsistent stocking patterns. Refurbishment programs emerged as a key cost-saving strategy, exemplified by J&J MedTech's 57% cost reduction.

Panelists universally endorsed AI-driven demand forecasting, with ResMed piloting guided repair workflows and EDF Renewables planning the 2025 deployment of environment-specific parts recommendation systems.

Key Recommendations

- **Integrate ERP and warehouse management systems:** Implement centralized platforms with regional hubs to track consumption patterns in real time, reducing repair cycles by up to 50%.
- **Establish multi-tiered refurbishment programs:** Develop component restoration capabilities that deliver high reliability at a fraction of replacement costs.
- **Implement environment-specific AI inventory optimization:** Deploy systems that analyze location-based failure patterns to accurately predict parts requirements across diverse operating conditions.
- **Create strategic 3PL partnerships for remote markets:** Combine in-house depots with third-party logistics providers to dramatically reduce equipment deployment times in critical regions.



From The Event

The idea is to embed AI into our repair process so it's almost like a guided journey, reducing the time to competence for new hires because the tool helps them along the way, making recommendations. That's our current proof of concept with AI, but as for true end-to-end visibility, we're still working through a global digital transformation to connect our people, processes, systems, and data for a better customer experience. Right now, our mitigation efforts are manual and not ideal, but we're striving to find scalable solutions as we globalize.

Joy Čavić, Senior Transformation Manager – Global Technical Service, [ResMed](#)



Panel: Personalization & Contextualization: Moving Toward More Customized (and Less Cookie-Cutter) Service Offerings

Ashlee Newcomb
Installation Operations Director
Gojo

Matt Rust
Director, Field Service (Northeast)
Eppendorf

Dave Hartley
VP Customer Care
Translogic, a SwissLog Healthcare company

Troy Barrilleaux
Senior Regional Field Service Manager
NeuroStar

Moderated by
Len VanderHulst
former SVP Global Service
Eppendorf

Summary

This panel explored how field service organizations are moving beyond one-size-fits-all approaches to deliver services tailored to customer needs.

Panelists discussed the challenges of balancing personalized service with operational efficiency. Customer expectations now vary dramatically across industries, they noted. While some customers require speed, others prioritize a holistic resolution to their issues, regardless of how much time it takes.

In this new environment, cross-functional communication is critical. Data analytics must inform decision-making about resource allocation, technician placement, and service offerings. Asset connectivity is creating new expectations in service environments, and organizations must adapt accordingly.

Key Recommendations

- **Invest in robust data visualization tools to better understand customer patterns:** Map your installed base geographically to identify where service resources are needed.
- **Install operations teams to remove administrative burdens from technicians:** Centralize call triage, dispatch, and scheduling, so technicians can focus on the customer.
- **Involve service teams in product development discussions:** Ensure field service perspectives on serviceability are incorporated early to prevent costly design issues.
- **Establish clear guidance for personalized service:** Document service agreements in your CRM to ensure technicians understand customers' unique service requirements.



From The Event

We've allowed our field service engineers to be more dynamic in how they respond to customers. That's just the reality of our environment, and even our policies and procedures reflect this. If you stick with a cookie-cutter mindset, you become the old man on his lawn, yelling at clouds.

Troy Barrilleaux, Senior Regional Field Service Manager, **NeuroStar**



About the Author

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

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