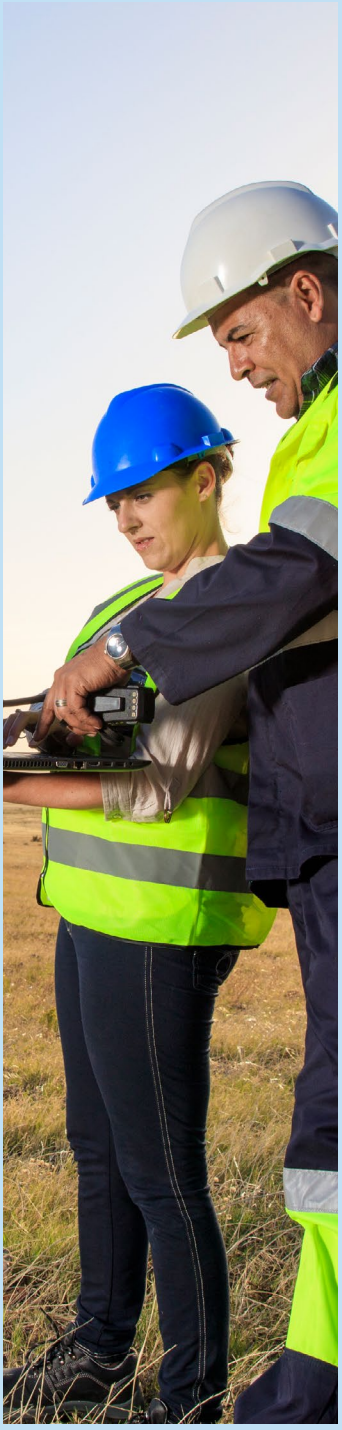
VIEW POINT



FIELD SERVICE BEYOND DISPATCH

A SENIOR LEADERSHIP POINT OF VIEW ON OPERATING-MODEL CHOICES, DECISION INTELLIGENCE AND RESPONSIBLE SCALE

Infosys | CONSULTING

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Executive thesis | Accountable intelligence at the edge. Connect work, assets, inventory, people, risk and evidence from demand through field execution and learning to improve reliability, safety, workforce productivity and decision accountability.

Publication note | This paper combines the original reference material with a vendor-neutral consulting view. Product capabilities change quickly, so platform and roadmap claims should be validated against current vendor documentation before publication or procurement.

Glossary of Key Acronyms and Common Terms

EAM: Enterprise Asset Management — managing physical assets, maintenance and asset history.

FSM: Field Service Management — planning, scheduling and supporting work done by field teams.

APM: Asset Performance Management — using asset data, risk and reliability practices to improve performance.

AI: Artificial intelligence — computer systems that perform tasks such as classification, prediction, optimization, content generation and decision support.

AI assistant or copilot: AI that helps a person retrieve information, create content or complete a task while the person remains in control.

AI agent: Software that can perform a defined sequence of actions within agreed limits and controls.

System of record: The system that is officially trusted to hold a particular business record.

First-time fix: Completing the required repair or service during the first visit.



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Executive Summary

Field service is no longer a dispatch function; it is the enterprise control point where asset risk, customer commitments, workforce capacity, materials, safety and operational evidence converge. Competitive advantage will come from accountable intelligence at the edge—connecting decisions, work execution and field evidence so every intervention improves the next enterprise decision.

The leadership challenge is not to automate more tasks. It is to create an operating model that makes better decisions under real constraints, preserves accountable human authority and turns every completed job into trusted evidence. Done well, this improves reliability, safety, first-time fix, workforce productivity and customer outcomes; done poorly, AI amplifies fragmented data and unclear ownership.

The winning model is not autonomous field service. It is accountable intelligence at the edge: an operating system in which AI recommends or acts only within explicit boundaries, evidence remains visible, people retain authority for consequential decisions and outcomes continuously improve the next decision.

Four leadership moves follow: choose the operating-model anchor before the platform; design the complete work-to-evidence journey, including exceptions; govern data and AI around decisions; and scale through an extensible architecture only when operational value and assurance improve together.

Field service should not be optimized as a sequence of tasks. It should be designed as a governed decision system that converts operational intent into safe action, and field evidence into better enterprise choices.

Recommended position | Treat field service as part of the wider asset and service life cycle. Choose technology based on business fit, connect systems through governed data and interfaces, introduce AI in controlled steps and scale only after the value is proven.

How to use this paper. Use the four operating-model choices to frame the discussion, the capability model to compare needs, the value chain to map processes, and the roadmap to structure delivery. The paper is intended to support leadership discussion — not replace detailed solution design or procurement due diligence.



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1. The Strategic Reset: Field Service Is a Decision System

Field teams are where business plans become real work. A maintenance policy, a customer promise, a safety requirement and a parts plan may all affect one technician's job. When those pieces are disconnected, the result is often avoidable travel, repeat visits, missing parts, schedule changes, poor job records and limited learning from completed work.

1.1 The Traditional View Is Too Narrow

Many field-service programs focus on one simple flow: request → dispatch → complete. That flow matters, but it is only part of the picture. For asset-intensive work, the technician also needs the right asset history, risk level, work instructions, parts, permits, location, previous failures and engineering information. The job should also improve the asset record when it is finished.

Narrow question	Better question
How can we schedule technicians faster?	How can we create schedules that consider risk, skills, parts, permits, travel and customer commitments?
How can we give technicians a mobile app?	How can we give technicians complete, trusted and offline-ready information?
How can we apply AI?	Which decision should AI support, what evidence does it need and who approves the result?
What capabilities are required, how do they map to the process and platform fit, and which system should own each critical record?	Define the required capabilities first, map them to processes and platform fit, then assign clear ownership for customer, asset, work, inventory, workforce and financial information.

1.2 The Real Choice Is the Operating Model

The market is moving in the same direction. Major platforms now offer scheduling, mobile execution, AI assistance and integrations. The bigger difference is the business context around those features. Some platforms are strongest around EAM and asset life cycle; others are built around CRM, ERP, enterprise workflow or equipment service. Current product documentation from IBM, SAP, Microsoft, ServiceNow and PTC shows how quickly AI capabilities are being added to field planning and technician workflows. [2][3][4][5][6]



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2. Four Operating-Model Choices

Field Service Beyond Dispatch

Connected operations. Improved Outcomes.

Asset Lifecycle Led

Plan. Maintain. Extend. Optimize.
From asset strategy to lifetime value, field service keeps the world running.
Links: Assets, Work, Inventory, Risk

ERP Led

One source. more insight. Better Decisions.
Unify financial, operational, and supply chain data with field reality.
Links: Inventory, Work



Customer Service Led

Responsive. Proactive. Trusted.
Convert service interactions into stronrer customer relationships**.**
Links: Customers, Work

Enterprise Workflow Led

Connected People. Smarter Processes, Real Results.
Coordinate people, processes and data across the enterprise.
Links: Work, Workforce, Customers

Figure 1. The operating-model anchor shapes the transformation logic and platform fit.
Source: Infosys Consulting Analysis.

Operating model	Best when	Main strength	Watch-out
Asset-lifecycle led	Reliability, maintenance, safety and critical assets matter most	Connects assets, work, maintenance, inventory and field execution	Customer experience and wider workflow may need extra design
Customer-service led	Appointments, SLAs, self-service and case resolution lead the agenda	Strong customer journey and service communication	Field work can become separated from deep asset history
ERP led	Finance, procurement and supply-chain standardization are the main goals	Consistent enterprise processes and transactions	May not provide enough operational depth for complex field work
Workflow-platform led	Cross-functional work must connect service, IT, HR and operations	Strong orchestration, automation and case management	Asset and maintenance depth may need additional platforms

Convergence point | These operating models are not isolated end states. At enterprise level, they should converge through a shared capability model, clear systems of record, governed data and interfaces, and an integrated decision layer. The anchor establishes design priority; the end-state connects asset, customer, ERP and workflow domains without forcing them into one monolithic platform.

Leadership diagnostic | Ask this early: if the field-service platform stopped tomorrow, what would be most affected — customer service, asset reliability, enterprise workflow or ERP execution? The answer often shows the natural operating-model anchor.

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3. The Intelligent Field-Service Journey

A practical field-service model connects seven steps: identify the work, determine its priority, prepare the job, schedule it, execute it, update the records and learn from the result. Each step requires a clear owner, reliable evidence and proportionate controls. AI can assist at several points, but people remain accountable for decisions affecting safety, compliance, customers or critical assets.

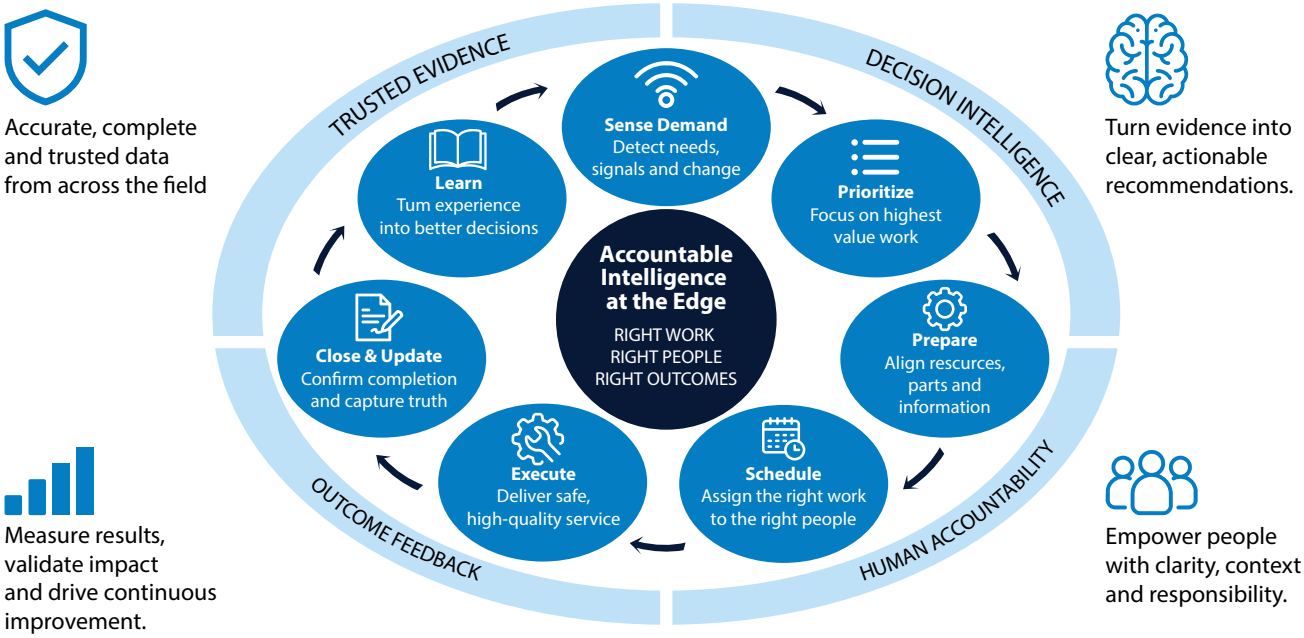


Figure 2. The intelligent field-service decision loop

Step	Question	Useful evidence	Where AI can help	Human role
1. Sense demand	What needs attention?	Requests, alarms, inspections, condition and plans	Classify, summarize, find duplicates and spot anomalies	Check urgency and safety
2. Prioritize	What should happen first?	Criticality, risk, SLA, outage, customer and regulatory impact	Rank work and show trade-offs	Approve priority rules and exceptions
3. Prepare	Is the job ready?	Job plan, skills, parts, permits, tools and access	Find missing prerequisites and draft work packs	Planner checks scope and controls
4. Schedule	Who should do the work and when?	Skills, crews, travel, parts, capacity, time windows, outages, public-safety events and operational restrictions	Optimize and compare scenarios using current operational and situational context	Dispatcher validates context, manages changes and overrides
5. Execute	How should the work be done?	Asset history, instructions, drawings, safety and location	Find knowledge, assist troubleshooting and summarize	Technician remains responsible for the action
6. Close and update	What changed?	Readings, photos, failure codes, parts and configuration	Suggest structured updates and quality checks	Supervisor/data owner approves key changes
7. Learn	Did the work achieve the result?	Cost, reliability, repeat work, SLA, quality and asset outcomes	Compare expected and actual results	Business owner changes rules and strategy

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4. Capability Reference Model

A capability model makes it easier to compare platforms fairly. It keeps the discussion focused on what the business needs rather than on vendor terminology or product names.

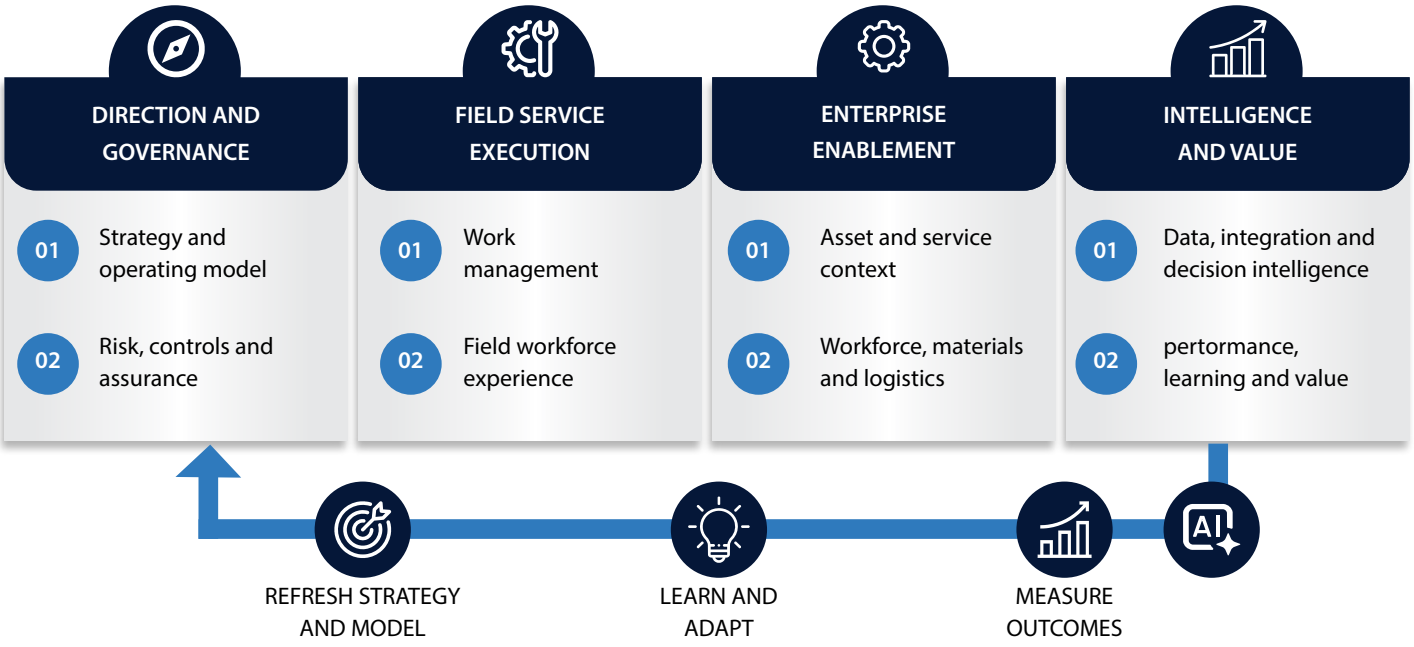
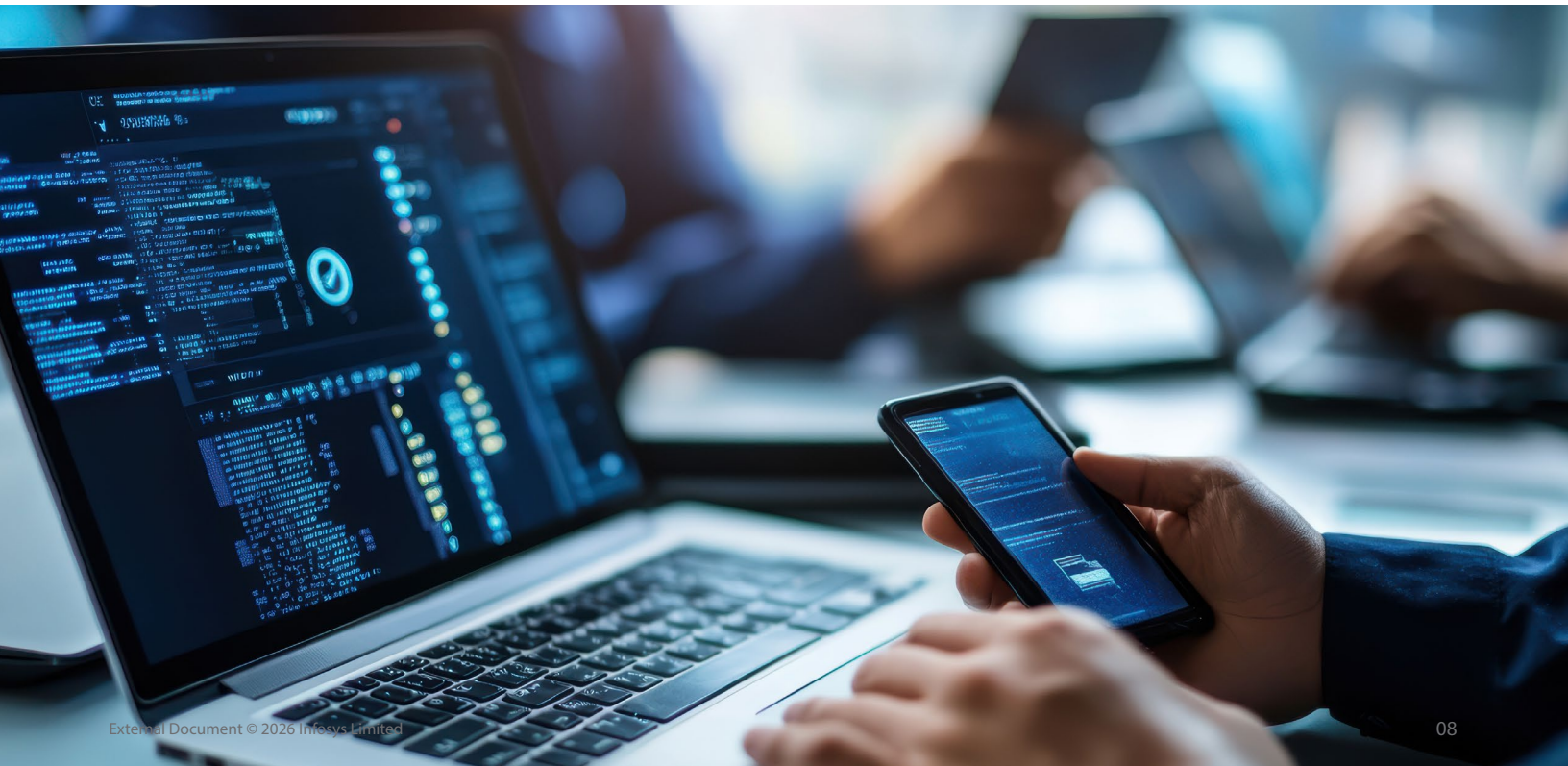


Figure 3. Field service capabilities: connecting strategic direction, field execution, enterprise enablement and decision intelligence. Source: Infosys Consulting Analysis.

4.1 Evaluate Business Fit, Not Marketing Claims

A good selection process should not label one platform as "best" for everyone. Instead, check what is available out of the box, what needs configuration, what needs integration or a partner, what depends on a future release, and what depends on better data. This is especially important for AI, optimization, offline work, contractor processes and industry-specific workflows.

Source note: Current vendor documentation shows AI being applied to scheduling, summaries, technician assistance and workflow automation. See [2]–[8].



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5. From Copilots to Accountable Decision Intelligence

AI is becoming part of planning, dispatch, mobile work and service management. The useful question is not whether a platform has a copilot. The useful question is whether AI can make a specific job easier or a specific decision better — and whether the organization can check the result.

AI pattern	Good use	Control needed
Agentic workflow	Route cases, propose updates and trigger approved actions	Use least privilege, approval gates, rollback and audit
Visual inspection	Defect detection and inspection evidence	Validate the model and manage false positives and false negatives
Technician assistance	Natural-language help and troubleshooting	Use approved knowledge, offline support and safe escalation
Optimization	Crew, skills, travel, priority, parts, outages and appointments	Show constraints, compare scenarios and record overrides
Planning support	Draft work scope, prerequisites, materials and job plans	Use approved templates and engineering checks
Classification and extraction	Requests, notes, images, documents and failure information	Set confidence limits and allow correction
Search and summaries	Work history, procedures, drawings, customer and asset context	Use approved sources and show source and freshness

The best future is not an autonomous dispatcher making hidden decisions. It is a field operating model where people can see the evidence, understand the constraints, challenge the recommendation and learn from the result.



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6. Platform Landscape and Strategic Fit

The platforms reviewed in the original material include IBM Maximo, SAP Field Service and Asset Management, PTC ServiceMax, Salesforce Field Service, Oracle Fusion Field Service, Microsoft Dynamics 365 Field Service and ServiceNow Field Service Management. Their current public materials show a common direction: more AI in scheduling, summaries, technician support, knowledge access and workflow automation. [2][3][4][5][6][7][8]

Platform orientation	Where it may fit	What to validate
Asset-management centered	When field work is tightly linked to maintenance, asset history, inspections, reliability and inventory	Customer journeys, UX, integration and licensing
SAP ecosystem centered	When SAP is the enterprise standard for ERP, supply chain, finance, maintenance and service	Asset depth, mixed-system integration, optimization, mobile and AI
OEM / service-lifecycle centered	When installed-base service, warranties, contracts and equipment service are central	Enterprise EAM depth, non-OEM use cases and integration
CRM centered	When customer engagement, self-service, case management and Customer 360 lead the agenda	Maintenance depth, inventory, asset context and synchronization
Oracle Fusion centered	When Oracle Fusion is the strategic enterprise platform and appointment operations are important	Asset life-cycle depth, maintenance integration and data ownership
Microsoft ecosystem centered	When Dynamics 365, Azure, Microsoft 365 and Power Platform are strategic	Optimization maturity, offline experience, asset depth and partner needs
Enterprise-workflow centered	When field work must connect with customer service, IT, HR and other enterprise workflows	EAM depth, maintenance optimization, asset evidence and inventory

Procurement implication | Shortlist by operating model fit first. Then test the hardest scenarios: emergency work, parts shortages, crew qualifications, offline execution, contractors, asset/customer context, record updates and AI exceptions. A polished happy-path demo is not enough.

● Platform Evaluation Scorecard

Evaluation dimension	Leadership test
Operating-model fit	Does the platform reinforce the enterprise's primary source of field-service value?
Asset and maintenance depth	Can it manage asset history, maintenance strategy, reliability and work execution at the required depth?
Scheduling and optimization maturity	Can it optimize real constraints, explain trade-offs and support disruption?
Mobile and offline resilience	Can field teams execute safely and completely with intermittent connectivity?
Materials and enterprise integration	Can inventory, procurement, finance, customer and engineering context remain synchronized without duplicating ownership?
Data ownership and extensibility	Are systems of record, interfaces, semantic models and extension patterns explicit and governable?
AI control maturity	Can the platform evidence sources, confidence, approvals, overrides, abstention and outcome monitoring?
Implementation complexity	What configuration, integration, partner dependency, licensing and operating-model change are required?

6.1 Questions to Use in a Platform Evaluation

Can the platform show planning, scheduling, mobile execution, inventory and closeout as one traceable process?

Does scheduling consider the real constraints — skills, parts, permits, travel, priorities, outages and customer windows?

Where is the trusted record for asset, customer, work, inventory, workforce and financial information?

What happens when data is missing, systems disagree, connectivity is lost or AI is not confident?

Which features are live today, which are preview or roadmap items, and which need partners or custom work?

How are human overrides, approvals, unsafe suggestions and lessons from outcomes recorded?

7. Architecture for Connected Decisions and Trusted Evidence

Good architecture does not attempt to consolidate every capability into a single monolithic system. Instead, it establishes clear boundaries across distinct modular layers: systems of record, integration, trusted data, intelligence, user experience and governance. This modular structure allows field-service capabilities to evolve without creating a large, tightly coupled application stack. Across all layers, processes and supporting data must remain trusted, verifiable, auditable and complete so that every recommendation and field action can be traced to reliable evidence.

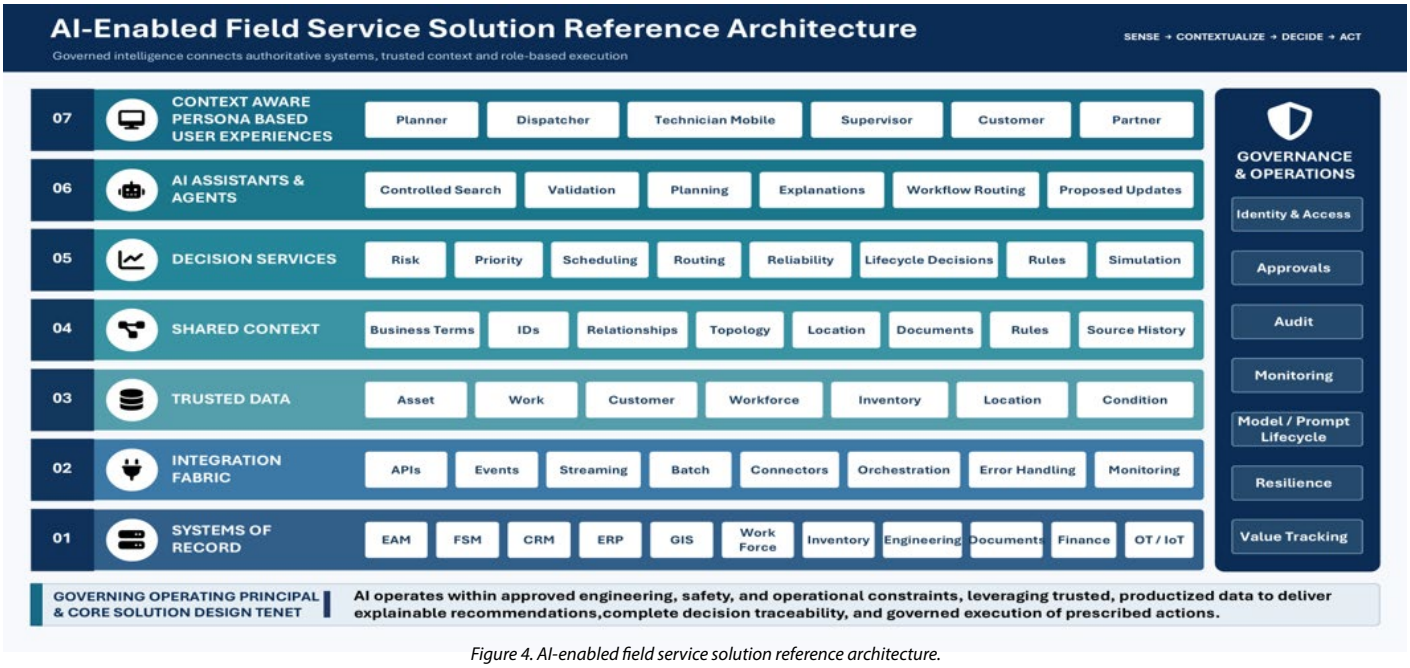


Figure 4. AI-enabled field service solution reference architecture.
Source: Infosys Consulting Analysis.

Architecture principle | AI should not bypass the authoritative system, engineering rules or safety controls. It should use approved evidence, stay within clear limits, explain its recommendation and write back only through governed interfaces.

7.1 Integration Decisions That Matter

Give each critical data object and status change a clear owner.

Avoid two-way synchronization unless the process truly needs it.

Use events for time-sensitive changes and APIs for controlled transactions.

Keep the source of each important piece of evidence visible.

Design offline access, conflict handling and security from the beginning.

Monitor interfaces so failures are seen before they cause missed work or bad decisions.

Source note: NIST AI RMF 1.0 and its Generative AI Profile provide a practical basis for identifying, measuring and managing AI risks. [9][10]

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8. Responsible AI and Decision Control

Responsible AI in field service is not a separate governance workstream; it is part of operational design. As AI begins to influence prioritization, scheduling, work preparation and technician guidance, leaders need clear boundaries for what the system may recommend, when it must abstain and who retains decision authority. The objective is to increase speed and consistency without weakening safety, traceability or accountability.

Decision Assurance Stack

for AI-enabled field service

TRUSTED DECISIONS . SAFER OPERATIONS . HIGHER OUTCOMES

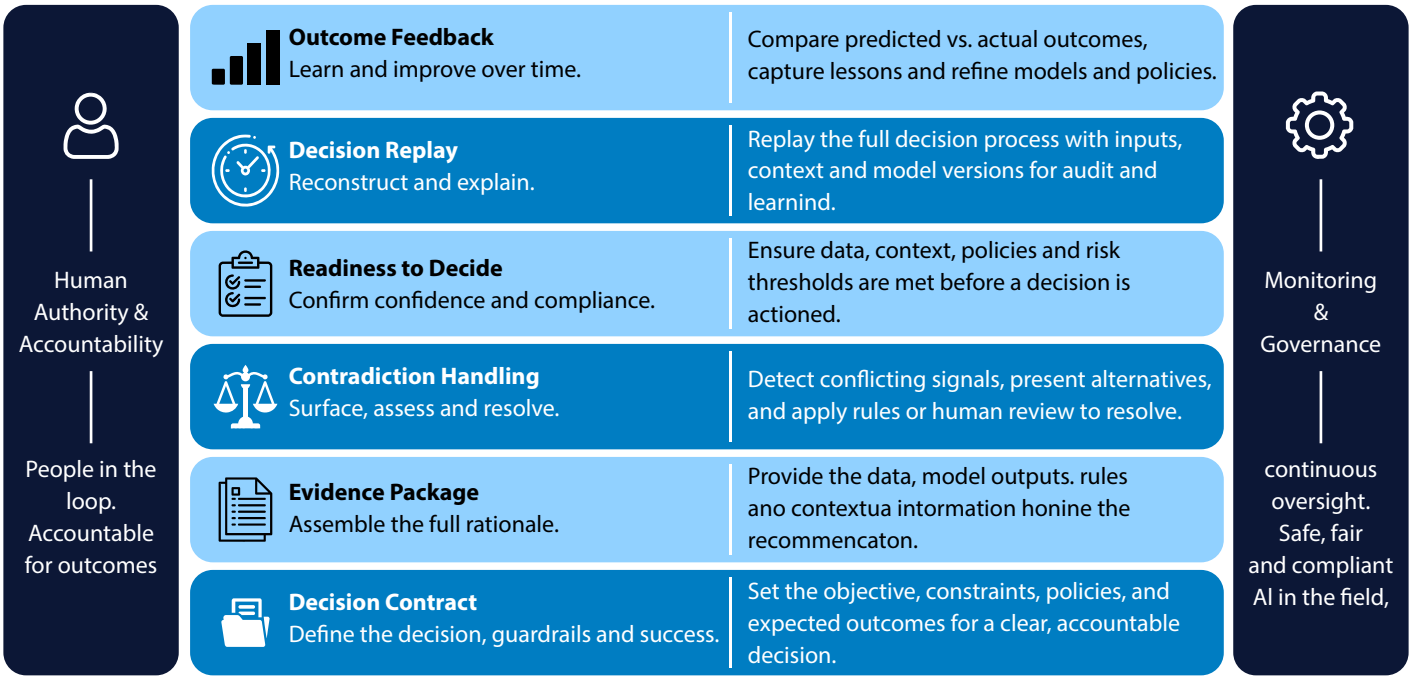


Figure 5. Decision assurance stack for accountable AI-enabled field operations.
Source: Infosys Consulting Analysis.

AI can affect safety, customer service, cost, workforce decisions and asset risk. That means AI controls should be designed around the actual decision being made. NIST's AI Risk Management Framework provides a useful basis for managing AI risks and building trustworthy AI into design, deployment and monitoring. NIST also published a Generative AI Profile and is developing further guidance for critical infrastructure. [9][10]

Control	What it means
Decision contract	Define the decision, owner, evidence, limits, allowed actions, approvals and outcome measure.
Evidence package	Keep the records, documents, location, history, signals, policies and AI output used for the recommendation.
Contradiction handling	Flag material differences between systems or observations instead of hiding them.
Readiness to decide	Check whether the information is good and current enough to recommend, pause or escalate.
Decision replay	Be able to reconstruct what evidence, model/rule version, alternatives and human review led to the action.
Outcome feedback	Compare expected and actual results and use the learning to improve data, rules, models and processes.

8.1 Minimum Controls for Production

Use role-based access and least privilege.

Use approved knowledge sources and show where the answer came from.

Test routine, unusual, conflicting and unsafe scenarios.

Set clear rules for when AI can recommend, when it must stop and when a person must approve.

Monitor errors, overrides, exceptions, unsupported answers and business results.

Control changes to models, prompts, rules, data and integrations.

Make it clear to users what is evidence, what is a recommendation and who is accountable.

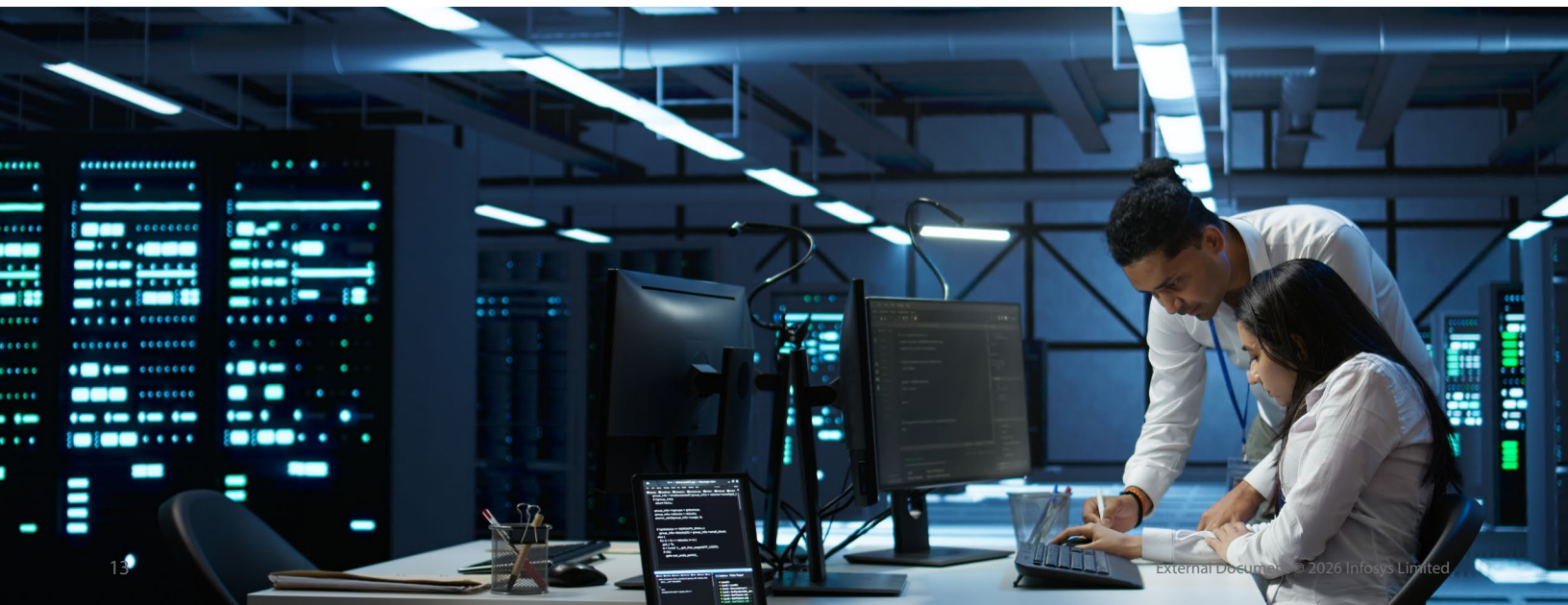
9. Scale Through Proof, Control and Reuse

A field-service transformation should start small and prove value before it becomes a large program. First agree on the operating model, then understand today's problems, design the target state, prove one useful workflow, make it production-ready and then scale the pattern.

Phase	Leadership question	Main outputs	Exit evidence
1. Frame	What outcome and operating model are we aiming for?	Vision, scope, operating model, value streams and decision rights	Leadership agreement and measurable success criteria
2. Understand	Where do work, data and accountability break today?	Capability view, process/system map and pain-point backlog	Evidence-based baseline and priorities
3. Envision	What should the future process and architecture look like?	Future processes, capability model, data ownership and platform fit	Agreed target state and scenarios
4. Prove	Can one bounded workflow create measurable value safely?	Configured proof, connected data, human gates and test set	Operational, adoption, data and AI-control results
5. Industrialize	Can it run reliably at enterprise scale?	Security, integration, monitoring, support and release controls	Production readiness
6. Scale	How do we grow without adding unnecessary complexity?	Reusable patterns, more personas/ processes and benefit tracking	Repeatable rollout and sustained improvement

9.1 A Practical First Proof of Value

Cross-system work readiness | Pick one high-value work type. Connect the request, asset/customer context, skills, parts, procedures, location and recent history. Use AI to flag missing or conflicting prerequisites and propose a work package for an accountable planner. Measure planning time, field exceptions, repeat work, data quality and user confidence.



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10. Measure Outcomes, Assurance and Learning

Benefits should be measured against the client's own baseline. This paper deliberately avoids making universal percentage claims.

The right measures should be embedded in the process so that technical SLAs, KPIs and business operating metrics are captured consistently. Metrics and KPIs provide business leaders with reliable insight into whether initiatives have delivered the intended outcomes: improved service, work quality, asset performance and decision confidence.

Dimension	Examples
Customer and service	Response time, appointment adherence, SLA performance, first-time resolution and customer effort
Workforce and execution	Productive time, travel, schedule adherence, utilization, overtime, exceptions, safety observations and adoption
Asset and operations	Availability, reliability, repeat failure, intervention effectiveness, condition and risk exposure
Planning and materials	Planning time, work-package completeness, backlog, material availability, stock-outs and emergency work
Information quality	Completeness, timeliness, source agreement, identity, location, configuration and closeout quality
AI and assurance	Recommendation acceptance, changes, rejection, escalation, abstention, unsupported responses and override reasons
Delivery and value	Time to mobilize, rework, release quality, benefits achieved, landscape complexity and run cost

11. The Leadership Agenda: Eight Choices That Cannot Be Delegated

Choose the operating-model anchor before choosing the technology stack.

Create one enterprise capability model for business assessment, vendor evaluation, architecture and roadmap traceability.

Prioritize the hardest operational scenarios, not the most attractive demo journeys.

Treat asset, customer, work, workforce, inventory, spatial and document data as governed products with clear owners.

Engineer AI around bounded decisions, explicit evidence, human authority and measurable outcomes.

Design offline operation, safety, security, integration-failure handling and exception management from the start.

Adopt incrementally through a proof that connects systems and demonstrates operational value, not only user enthusiasm.

Build reusable methods, connectors, semantic models, test assets and governance patterns so that each rollout becomes faster and safer.

Infosys Consulting opportunity | The value is not another platform comparison. It is bringing together industry operating models, process design, platform fit, data ownership, integration, AI controls, adoption and value tracking into one transformation plan.

CLOSING VIEW | Competitive advantage will not come from deploying AI to more field tasks. It will come from designing a field enterprise that knows when to recommend, when to abstain, who remains accountable and how every intervention improves the next decision.

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Conclusion

Field service is becoming the enterprise control point where operational intent becomes safe action and field evidence becomes better judgment. A technician application alone cannot create that advantage; the operating model must connect the right work, information, materials, people and decision support at the moment of execution.

Leaders must therefore decide the operating-model anchor, assign ownership for critical records, connect decisions across platforms and define where AI may recommend, act, abstain or escalate. The standard for scale is not adoption alone; it is measurable improvement in operational outcomes, economic value, risk control and learning.

Accountable intelligence at the edge is the destination: every work package should contain better evidence, every schedule should reflect real constraints, every field action should strengthen the system of record and every completed job should improve the next enterprise decision.



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About the Author



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Pravir Kumar is a Senior Consultant in Business Consulting and an IBM-certified Maximo specialist with more than 14 years of enterprise asset management experience. His work spans EAM implementation, modernization, upgrade and support across transmission and distribution, oil and gas, facilities management, transportation and life sciences. Pravir combines functional asset-management knowledge with delivery governance, stakeholder alignment, work management, asset lifecycle management, materials management and asset performance improvement. As an author, Pravir strengthens the paper's EAM and utility operating-model perspective, particularly the connection between AI insight, governed work execution and lifecycle value realization.

Focus areas: Enterprise Asset Management | IBM Maximo | Utilities | Asset Lifecycle Management | Work Management | Digital Transformation

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