

AWARD REPORT AND FINDINGS

IDC 2023 SaaS CSAT Award for Field Service Management (FSM)
Presented to ServiceNow, December 2023

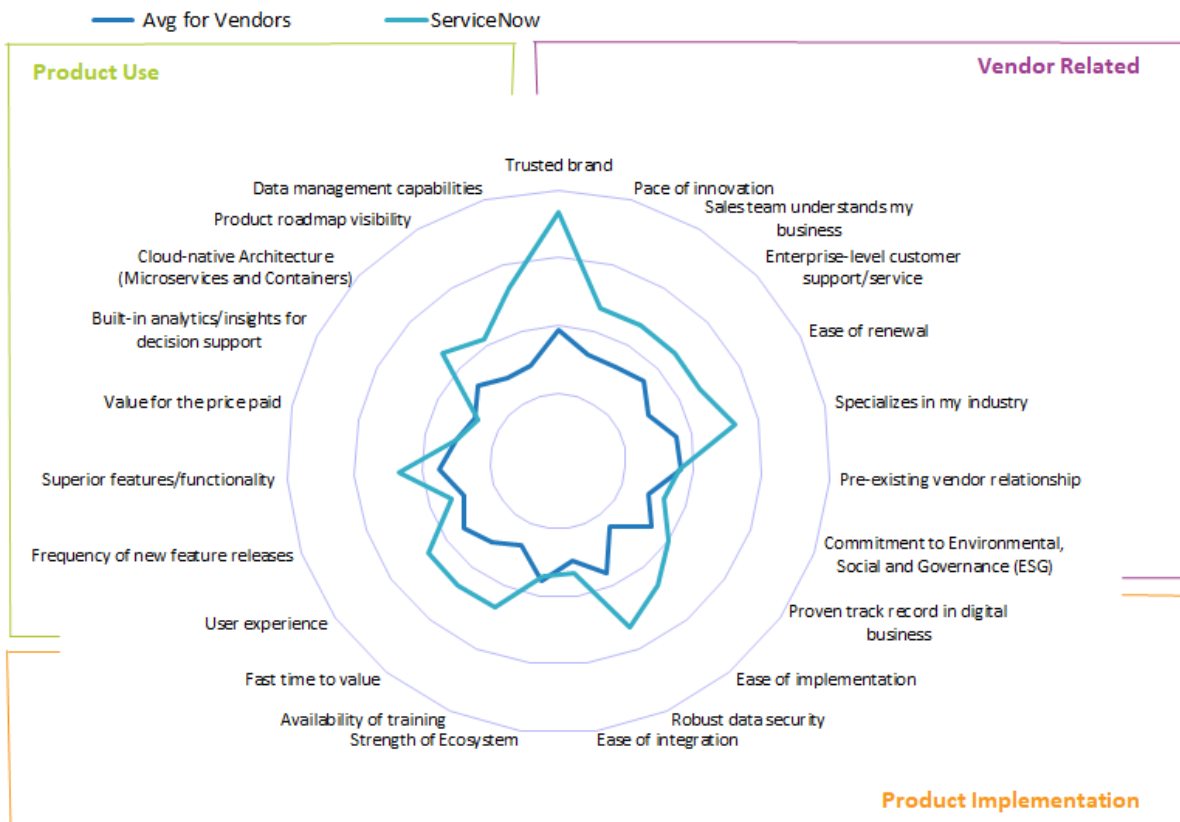
Based on ratings collected in IDC’s 2023 SaaS Path Survey, ServiceNow placed in the highest scoring group for vendors serving the SaaS Field Service Management application market and has been awarded IDC’s 2023 SaaS Field Service Management Customer Satisfaction Award.

IDC’s customer satisfaction award program, the CSAT Awards, recognizes the leading software-as-a-service (SaaS) vendors in each application market who receive the highest customer satisfaction scores based on IDC’s SaaS Path survey. SaaS Path is a global survey of approximately 2,900 organizations across all geographic regions and company sizes, where customers are asked to rate their vendor on more than 30 different customer satisfaction metrics.

How Customers Rate ServiceNow

Figure 1 shows how ServiceNow scored in each of the customer satisfaction categories, relative to the overall average scores in each category across all vendors that were reviewed. The inner line represents the overall group averages, while the outside line depicts ServiceNow scores.

FIGURE 1: ServiceNow Customer Satisfaction Ratings vs. Average Ratings for FSM Vendors



Source: IDC SaaS Path Survey, 2023

Field Service Management Market: Spending Priorities, Value Realization, and Additional Needs

Businesses using field service management software around the world, of all sizes and industries (provided by all FSM vendors, not just ServiceNow), were asked about their FSM application spending. When asked how they expect their organization's SaaS field service management spending to change over the next 12 months, 59.1% of companies stated they expect their spending to increase and 39.1% expect it to remain unchanged. Only 1.8% of respondents expected a decline in spending. Of those companies planning to increase their spending, besides adding more users/licenses, the three most likely areas of additional spend included adding new features, additional modules, and contracting for more professional services.

Field Service Management vendors are delivering substantial value to their clients and continue to innovate to meet evolving customer expectations. When asked about the value being derived from their SaaS FSM applications, relative to the price they paid, 50.9% of companies said that the value delivered met their expectations, and 16.4% even said that their FSM application exceeded their expectations. However, 27.3% said the value realized was less than expected. To address those customer's concerns and add further value, some of the areas that FSM application customers seek improvements include more robust surrounding ecosystems, better product roadmap visibility, and easier integration. Field Service Management vendors can take note of these areas and self-evaluate whether these are capabilities they could double down on to deliver even greater value to their customers.

What's Behind IDC's SaaS Award Program

SaaS Path is IDC's premier SaaS-specific benchmarking survey, providing demand-side guidance on the mind and journey of SaaS buyers, including a deep dive into 23 functional application markets, including accounts payable, accounts receivable, digital commerce, enterprise asset management (EAM), enterprise resource planning (SFA), finance, core HR, payroll, talent management, procurement, professional services automation (PSA), sales force automation (SFA), supply chain management (SCM), subscription billing, Tax, travel and expense (T&E), treasury and risk, facilities management, and field service management.

Coverage includes application adoption, deployment models, budget plans and replacement cycle timing, purchasing preferences and attitudes toward SaaS buying channels, application migration strategy, drivers and inhibitors, packaging and pricing options, and in-depth vendor reviews, ratings, spend and advocacy scores for leading vendors in each of the 23 functional application markets.

The SaaS Path survey is conducted across all geographic regions of the world, all company sizes, includes roughly 55% IT leaders and 45% line of business leaders, and its respondent base ranges from senior managers up through chief experience officers (CXOs). All respondents go through an extensive screening process to ensure they are familiar with the technologies they are being asked about, are current users, and have influence on their company's technology buying decisions. Further, all customer satisfaction metrics and ratings are collected solely from current customers of the vendors being rated, to ensure the scoring reflects up-to-date customer sentiment based on proper vendor familiarity and knowledge.

Each customer is asked to rate their primary application vendor on 37 different metrics, including 23 customer satisfaction metrics (see Table 1) and 14 vendor vulnerability categories (see Table 2). These 37 metrics, detailed below, span across 3 main categories of review, including the vendor itself and its relationship with the customer, several aspects of the product's implementation, and a broad range of assessment examining the product's usage and value. All these satisfaction and vulnerability metrics are aggregated and analyzed on more than 300 different software providers to identify the vendors with the highest overall customer satisfaction scores in each application market.

Table 1: Customer Satisfaction Metrics

Q. Based on your experiences, how satisfied are you with ServiceNow as a SaaS FSM vendor for the following categories?

Customer Satisfaction Metrics	
1	Trusted brand
2	Fast time to value
3	Ease of implementation
4	User experience
5	Superior features/functionality
6	Pace of innovation
7	Frequency of new feature releases
8	Product roadmap visibility
9	Sales team understands my business
10	Enterprise-level customer support/service
11	Robust data security
12	Value for the price paid
13	Specializes in my industry
14	Ease of integration
15	Proven track record in digital business
16	Availability of training
17	Built-in analytics/insights for decision support
18	Pre-existing vendor relationship
19	Data management capabilities
20	Ease of renewal process
21	Strength of ecosystem
22	Commitment to Environmental, Social and Governance (ESG)
23	Cloud-native Architecture (Microservices and Containers)

Table 2: Vendor Vulnerabilities

Q. Which of the following issues has your organization experienced with ServiceNow as your SaaS FSM vendor?

Vendor Vulnerability Metrics	
1	Data loss or breaches
2	New functionality released too infrequently
3	High cost and fees
4	Poor customer service
5	Poor configurability
6	Difficulty migrating services and data
7	Poor availability and uptime
8	Price increases not accompanied by increased value
9	Unpredictable cost (e.g., consumption pricing)
10	Poor implementation experience
11	Roadmap transparency
12	Roadmap misalignment/relevancy
13	Unfair or overly complex contracts
14	Insufficient global footprint

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