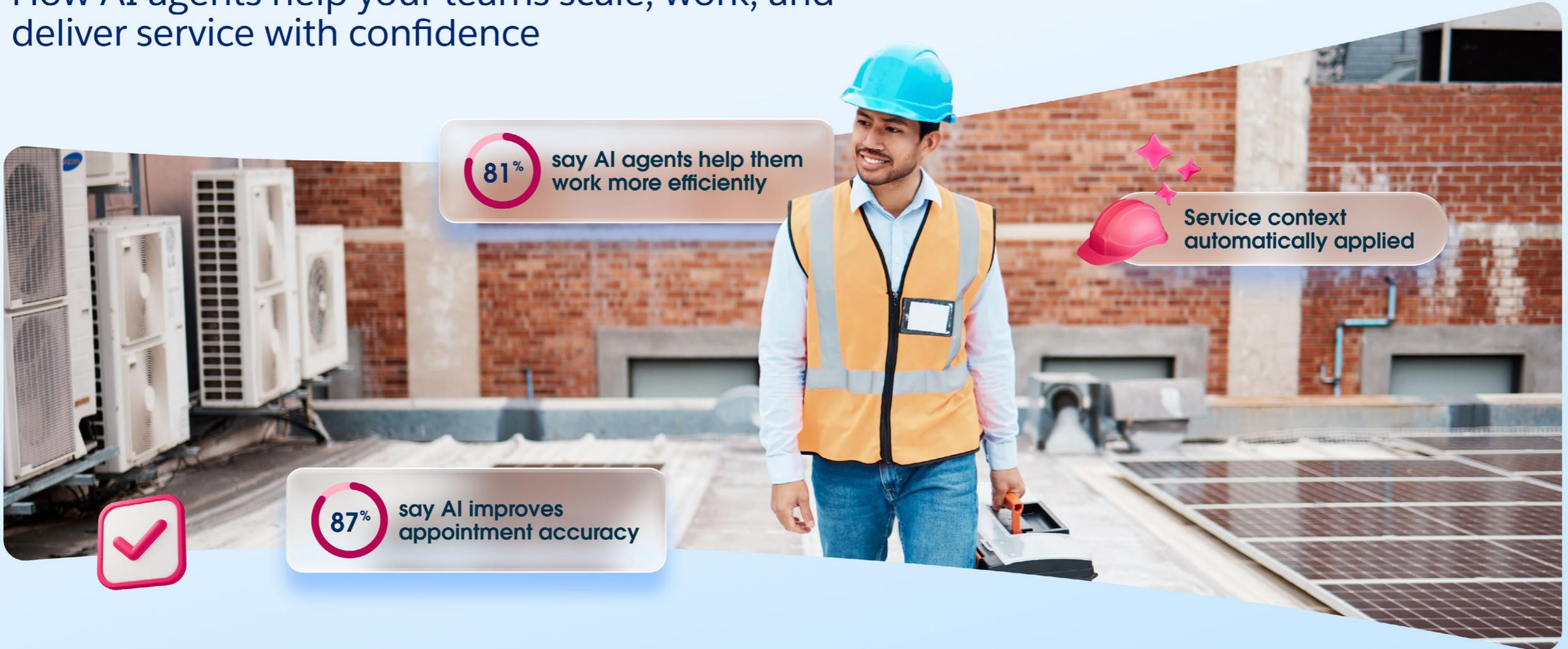




Fourth Edition

# Your Guide to Agentic Field Service Operations

How AI agents help your teams scale, work, and deliver service with confidence



**81%** say AI agents help them work more efficiently

 Service context automatically applied



**87%** say AI improves appointment accuracy

# Executive Letter



**Taksina Eammano**

EVP & GM, Agentforce Field Service

There is no denying the shift happening in our workforce. While we try to run 2026 operations with our 2010 logic, the math isn't adding up and your team is carrying the weight of it. You need to build operations that work for your people.

Skilled technicians are losing seven hours a week to administrative paperwork. Nearly half of all appointments don't happen as scheduled. We're asking our people to be superheroes with outdated systems that slow them down. With labor markets tightening and customer demands rising, you can't hire your way out of this, and you can't manage it with a better clipboard.

The only way to keep pace and deliver on organizational goals is to leverage AI's automation and speed. AI agents can handle scheduling chaos, eliminate administrative burden, and provide the operational reliability modern field service requires. The workforce is ready: 81% of technicians believe AI agents could help them work more efficiently.

This isn't about replacing human expertise. It's about equipping your team to meet the moment, solve your most complex problems, and build lasting relationships with customers. When AI handles repetitive tasks, coordination and documentation, your teams gain the confidence to deliver exceptional service at scale.

This guide shows how organizations are making the shift to AI-powered teams – and how you can, too.

*Taksina Eammano*

# What You'll Find in This Guide

In the 4th edition of the Field Service Guide, Salesforce combined insights from two comprehensive research studies – surveying 6,500 service professionals globally and 350 mobile workers in the U.S. – to understand:

- How scheduling dysfunction and administrative burden erode confidence across field service operations
- How AI agents are restoring confidence for executives, dispatchers, and technicians
- How leading organizations are implementing agentic AI to build operations that scale with confidence

Due to rounding, not all percentage totals in this report sum to 100%. All comparison calculations are made from total numbers (not rounded numbers).

Data in this guide comes from two sources. The State of Service survey was conducted from April 25, 2025, through June 6, 2025, with 6,500 service professionals representing 40 countries across five continents. The mobile worker survey was conducted from February 21 through March 6, 2025, with 350 U.S.-based mobile workers. All respondents are third-party panelists. For further sample details, see [page 19](#).



**6,500** customer service professionals surveyed worldwide

†Single Sample Group

Flag icons: Getty Images

# Contents

**Executive Summary** ..... 05

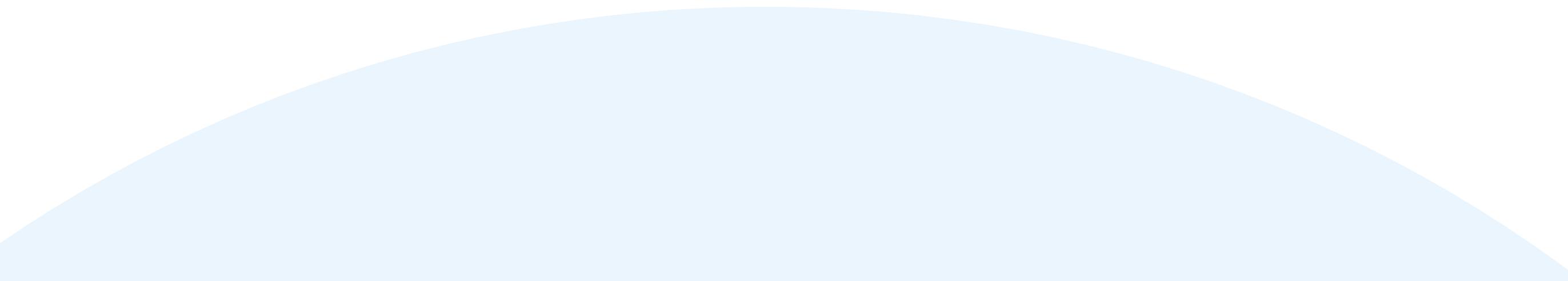
**Chapter 1:** Field Service Woes Erode Confidence ..... 06

**Chapter 2:** AI Agents Restore Confidence in the Field ..... 09

**Chapter 3:** Agentic Field Service Builds Confidence That Scales ..... 12

**Sample Details** ..... 17

**Survey Demographics** ..... 20



# Executive Summary

Broken field service operations waste money and frustrate customers. AI agents restore confidence by eliminating the chaos. The field service teams that thrive will combine human expertise with agentic intelligence – creating operations that scale with confidence. **Field service will always require human expertise. AI won't fix a leaky roof or repair a broken HVAC system. What AI can do is support the experts who do – and make confident service possible.**

## What is field service?

Field service happens whenever your team leaves the office to handle real-world tasks. A plumber fixing pipes, a technician installing HVAC systems, a nurse doing home visits, drivers sweeping city streets – they're all doing field service. And here's the thing: when a mobile worker shows up at someone's door, they might be the only face from your company a customer ever sees. Nail that moment, and you could win their business for life. Miss it, and the entire relationship is at risk.

## 01

### Field Service Woes Erode Confidence

Scheduling dysfunction and administrative burden prevent confident work. Nearly half of appointments fail. Technicians lose over **seven hours weekly** to administrative tasks, and 38% say **scheduling is "often mishandled."**

## 02

### AI Agents Restore Confidence in the Field

Workers are ready: Technicians estimate **AI could handle 35% of administrative tasks**, and 87% believe it would improve job satisfaction. Field service teams are adopting AI for knowledge retrieval (96% plan to use it), hands-free technology (80% want it), and visual diagnosis (45% currently use it).

## 03

### Agentic Field Service Builds Confidence That Scales

Organizations with unified platforms are 1.4x more likely to call their AI implementation "very successful." **Leaders expect AI agents to deliver 20% improvements** across service costs, case resolution time, and customer satisfaction once implemented.

# 01

## Field Service Woes Erode Confidence



01

# Scheduling Breaks Down

Scheduling is falling apart and threatening the job before it even starts. Time spent scheduling and rescheduling appointments is time that could be spent optimizing operations. Scheduling conflicts rank as the #1 productivity blocker because every breakdown triggers hours of coordination work.

## 47% of appointments don't go as scheduled.

Today's mishaps threaten tomorrow's successes. Field service leaders can't forecast for the future when the jobs don't go as planned nearly half the time. The numbers show this isn't about occasional busy periods. It's a systemic crisis that prevents confident operations from the office to the field.

## The Numbers Behind Scheduling Woes



**#1** productivity blocker is scheduling conflicts

## Time Taken to Reschedule

	Make an Appointment	Change an Appointment	Cancel an Appointment
	🕒 17 minutes	🕒 15 minutes	🕒 12 minutes
Equipment Installation/Repair	18 minutes	16 minutes	17 minutes
Tradespeople	17 minutes	15 minutes	10 minutes
Public Works	17 minutes	14 minutes	12 minutes

01

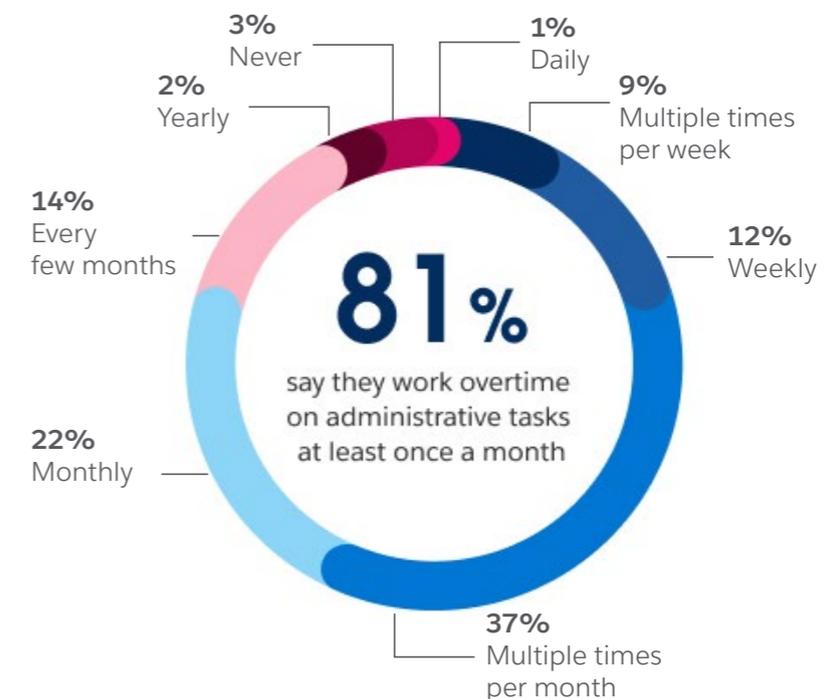
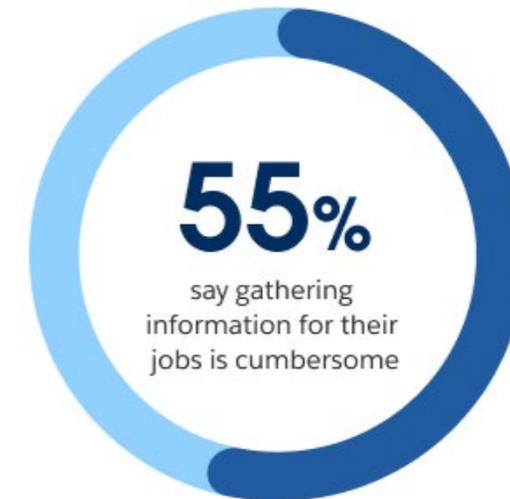
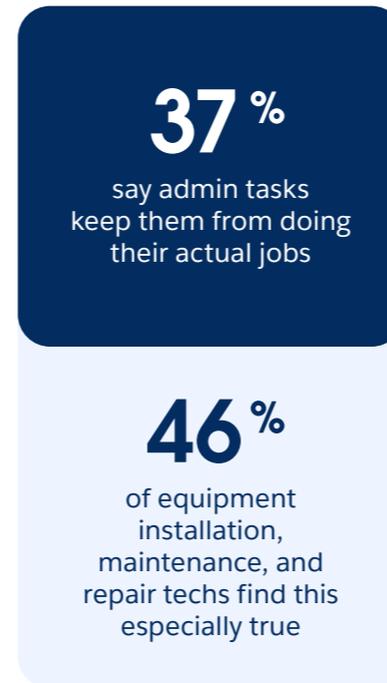
# Admin Burden Adds Real Costs

Administrative tasks are tedious – and rob your workers of time actually using their expertise. Field service technicians spend years developing specialized skills, only to waste those skills on form-filling. The misalignment between technical capability and daily reality creates frustration that shows up in every metric.

**Technicians waste 18% of their working hours — more than 7 hours per week — on administrative tasks.**

Skilled professionals are spending nearly a full workday every week on documentation, form-filling, and information hunting instead of technical problem-solving. Over a third of technicians say admin tasks prevent them from doing their actual jobs. When expertise gets buried under busywork, that's not just a process problem – it's the root of a confidence crisis.

## Technician Feedback on the Administrative Burden



# 02

## AI Agents Restore Confidence in the Field

 **Pre-Work Brief**

The connected HVAC condenser started to reach critical temperature thresholds. This preventative maintenance job was scheduled to inspect and repair the system to avoid condenser failure.

 [Show More](#)



02

# Field Service Adopts AI

Field service AI isn't something on the horizon – it's already here. Organizations are moving quickly to invest in the technology. The shift isn't just about experimenting with new tools, either. It's about fundamentally changing how field service operates.

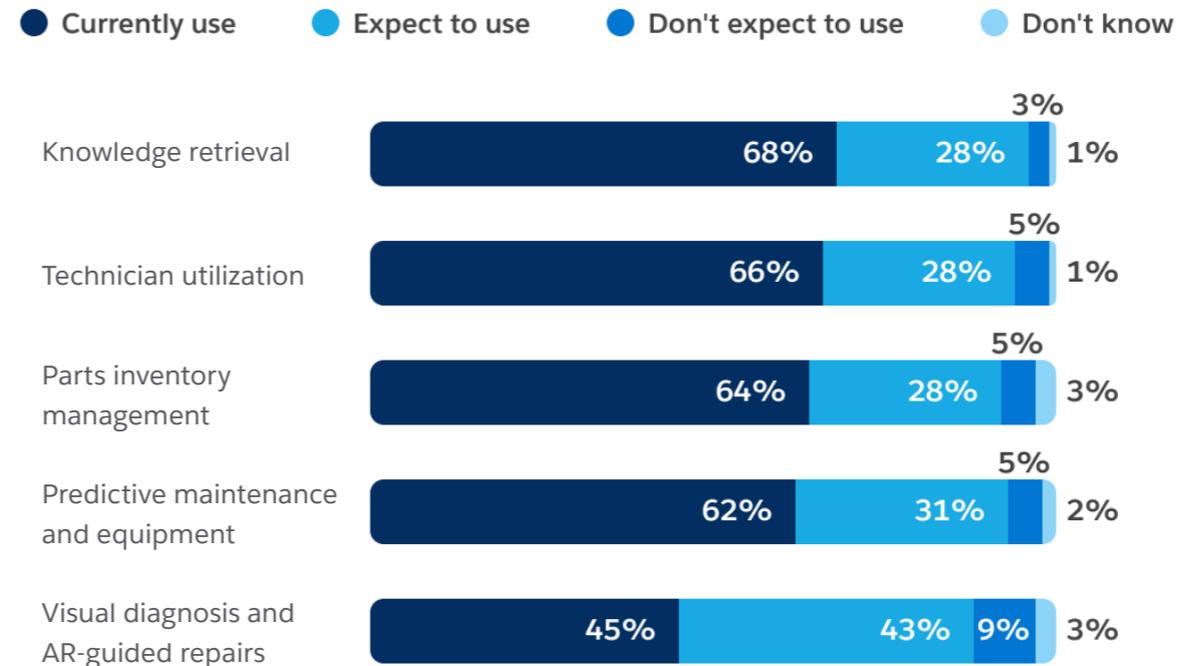
**85% of field service leaders believe their company's AI investment will increase over the next year.**

Teams are deploying AI across critical functions. A staggering 96% of teams plan to use AI for knowledge retrieval, suggesting that teams are going all in. As the technology moves from pilot programs to daily operations, expect confidence to grow from the back office to the field.

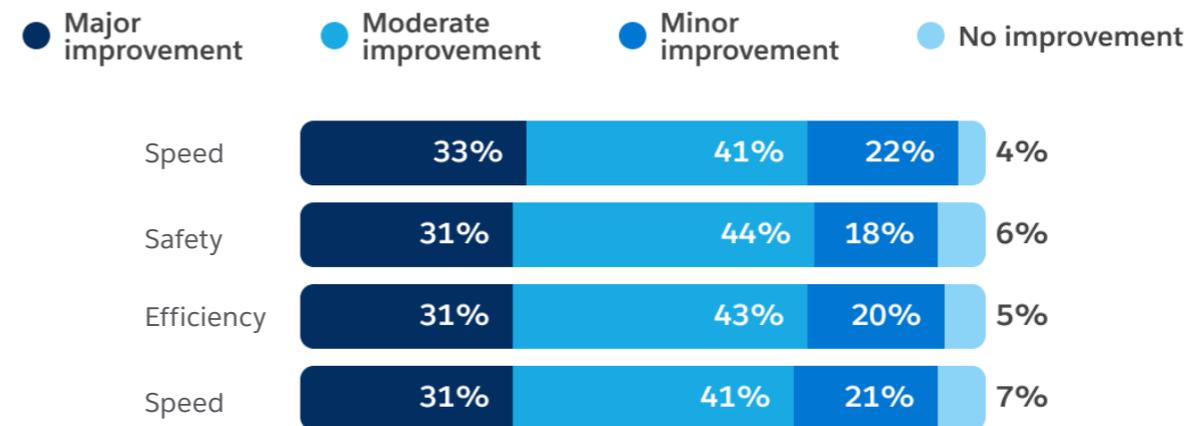
**80%**  
think hands-free tech would help them work more efficiently

## Field Service Turns to Intelligent Technologies

Field Service Use of AI for the Following



## Tradespeople and Technicians' Expected Improvements From Hands-Free Tech



 Equipment installation, maintenance, and repair techs are especially likely to expect “major” improvements

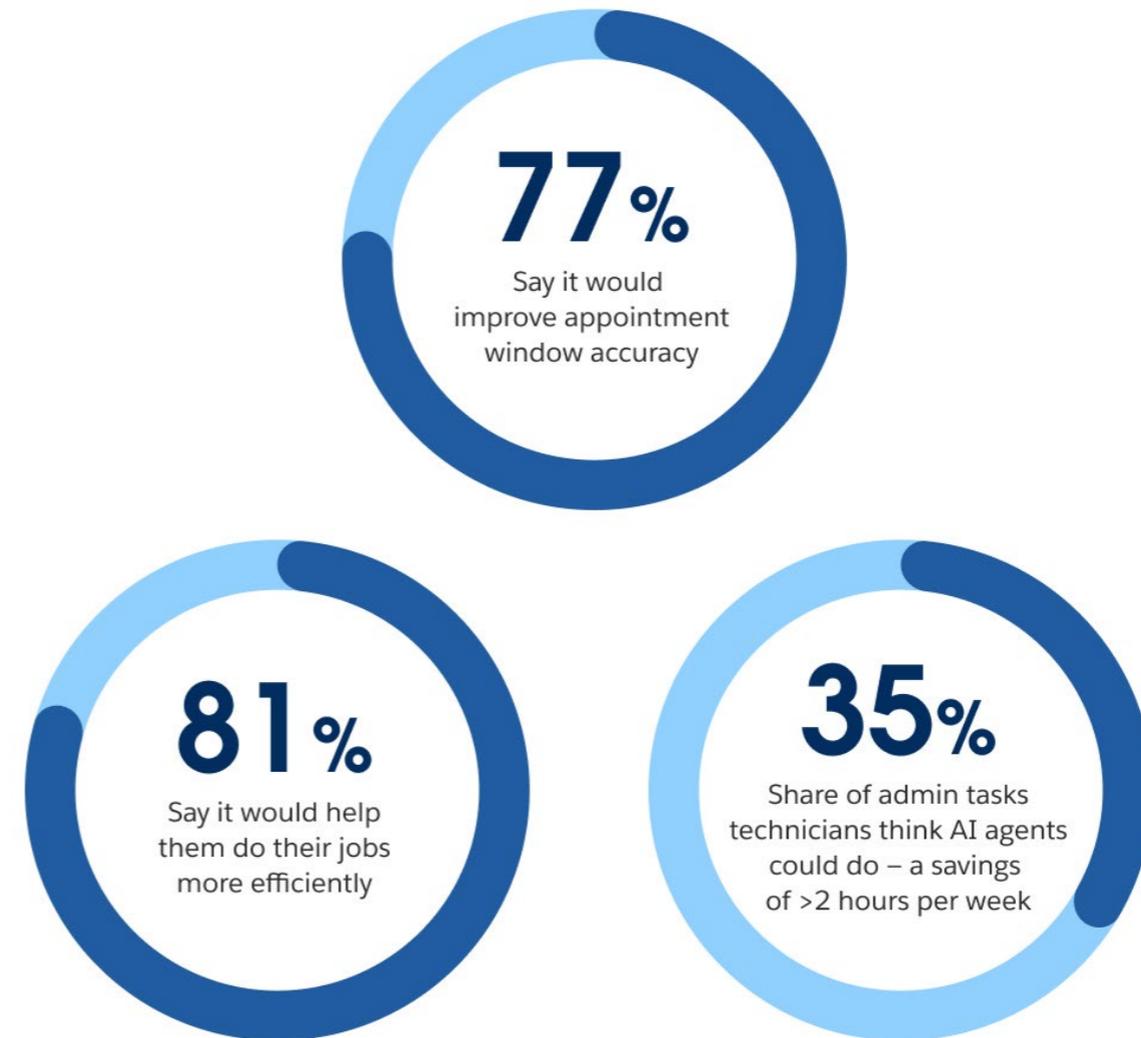
## Technicians Welcome AI Agents

Technicians aren't afraid of AI. In fact, they clearly see its value. The numbers particularly show an openness to AI agents. Technicians see this technology as a solution to the administrative burden and scheduling chaos. They see it as an opportunity to focus on the work.

### Technicians say AI agents could save over 2 hours per week.

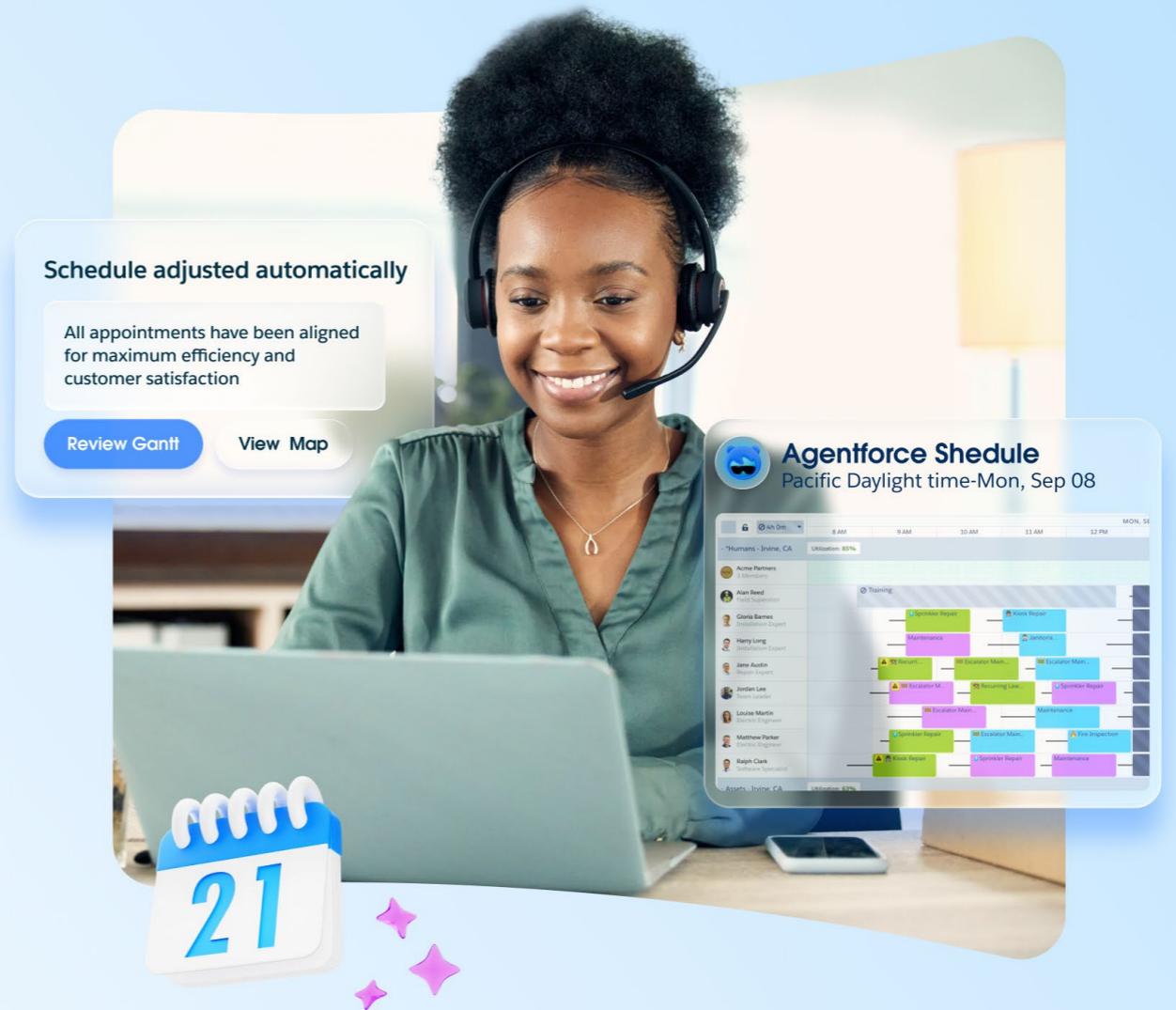
The receptiveness goes deeper than efficiency gains, too. Technicians explicitly link AI agents to improved well-being and job satisfaction. AI agents offer technicians the chance to focus on the technical problem-solving they were trained to do, instead of drowning in paperwork and coordination.

### Technicians Are Optimistic About AI Agents



# 03

# Agentic Field Service Builds Confidence That Scales



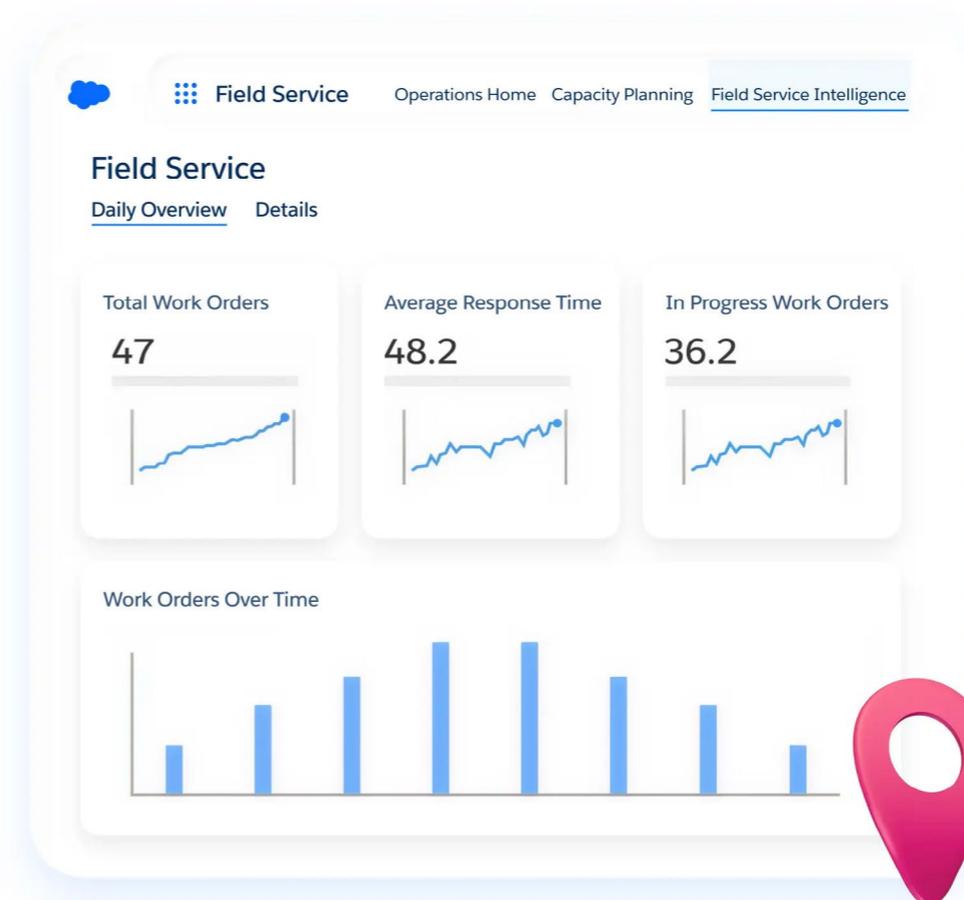
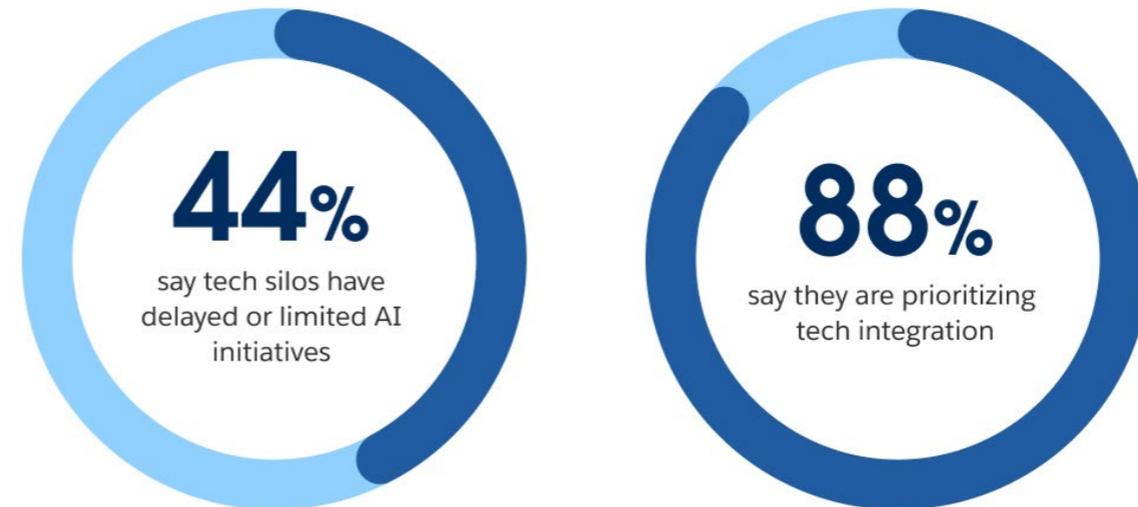
## Field Service Runs on Unified Data

No matter how impressive the AI technology, implementations struggle when organizations build on fragmented foundations. Security concerns and siloed systems emerge as the top barriers preventing successful AI adoption – and they're directly linked. When data lives across disconnected platforms, every AI initiative becomes both a security risk and an integration challenge.

**Service organizations that share a single unified platform with sales teams are 1.9x more likely to rate their AI implementation as "very successful."**

AI agents need access to complete tasks and accurate data to work confidently. Fragmented systems can't provide that. Organizations winning with AI aren't just buying better tools – they're building unified foundations that let AI agents operate securely and effectively.

### Service Leaders Invest in Tech Integration for AI Success



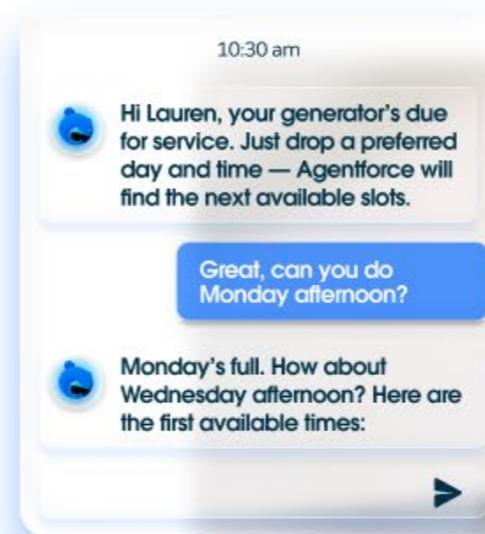
03

## Agentic Field Service Builds on Prior AI Investments

AI agents build on the foundation already laid. If you've invested in predictive AI, generative AI, or automation, agentic AI multiplies those returns by taking autonomous action instead of just providing insights.

**Beyond cost-savings, service leaders expect AI agents to ultimately increase upsell revenue by 15%.**

From cost reduction to upsell growth, AI improvements impact the entire operation and your customers. Seventy-one percent of consumers are interested in AI agents answering their questions for faster service. When AI agents can handle routine tasks autonomously, your workforce focuses on complex problems. Your customers get faster resolutions – from first contact to final delivery. Everyone wins.





## Agentforce Field Service Customer Insight: Unisys

Managing 7,300 technicians across 120+ countries demands intelligent operations. As its workforce evolved and customer expectations grew, Unisys invested in technology that could match its scale and maintain the service excellence its clients expect.

By implementing Agentforce Field Service, Unisys transformed their operations. The advanced scheduling engine now auto-schedules 70% of service appointments across 1 million+ appointments managed annually – over 2 million appointments since implementation. Unisys is also leveraging Pre-Work Brief to give technicians clear instructions before every job and Post-Work Summary to automate documentation afterward. The result: technicians dedicate their expertise to solving complex problems instead of managing paperwork.

**2M<sup>+</sup>** appointments managed on Salesforce

**70%** appointments are auto-scheduled

**95%** first-time visit fix rate



**By implementing Agentforce Field Service, we're empowering our 7,300 technicians with the digital tools and AI support they need to be successful, driving efficiency while helping them dedicate their expertise where it matters most."**



**Patrycja Sobera**  
SVP and GM, Digital Workplace Solutions at Unisys

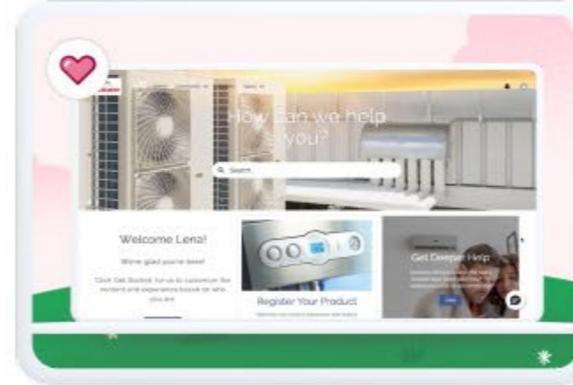
# Explore more resources for field service.



## Field Service Keynote at Dreamforce

Explore how field service for the Agentic Enterprise boosts confidence in operations.

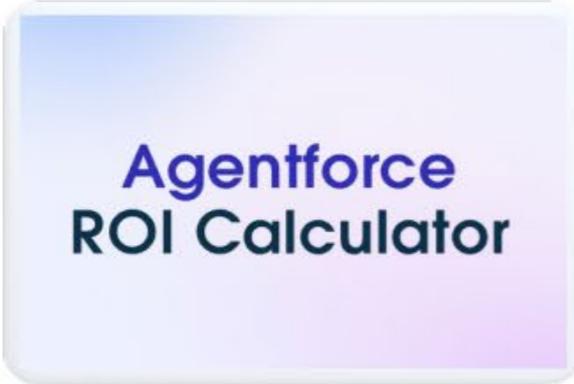
[Watch Now](#)



## Agentforce Field Service

Bring AI agents into your operations to get work done faster with connected assets and proactive service.

[Watch Demo](#)



## Calculate your ROI

How much could you save by using autonomous scheduling? Find out in minutes.

[Run the Numbers](#)



## Field Service Scheduling and Optimization

Learn how to optimize field service scheduling to cut costs and boost efficiency.

[Get the Whitepaper](#)

# Sample Details



# Sample Details

## Country

Argentina .....	N=150, 2%	Portugal .....	N=100, 2%
Australia .....	N=250, 4%	Saudi Arabia .....	N=100, 2%
Austria .....	N=100, 2%	Singapore .....	N=100, 2%
Belgium .....	N=100, 2%	South Africa .....	N=100, 2%
Brazil .....	N=300, 5%	South Korea .....	N=200, 3%
Canada .....	N=300, 5%	Spain .....	N=200, 3%
Chile .....	N=100, 2%	Switzerland .....	N=100, 2%
Colombia .....	N=150, 2%	Thailand .....	N=200, 3%
Czech Republic .....	N=100, 2%	Turkey .....	N=100, 2%
France .....	N=300, 5%	United Arab Emirates .....	N=100, 2%
Germany .....	N=300, 5%	United Kingdom .....	N=300, 5%
Greece .....	N=100, 2%	United States .....	N=500, 8%
India .....	N=300, 5%		
Indonesia .....	N=150, 2%		
Ireland .....	N=100, 2%		
Israel .....	N=100, 2%		
Italy .....	N=200, 3%		
Japan .....	N=300, 5%		
Mexico .....	N=250, 4%		
Netherlands .....	N=150, 2%		
New Zealand .....	N=50, 1%		
Nordics (DK, FI, NO, SE) .....	N=150, 2%		
Peru .....	N=100, 2%		
Philippines .....	N=200, 3%		
Poland .....	N=100, 2%		

# Sample Details

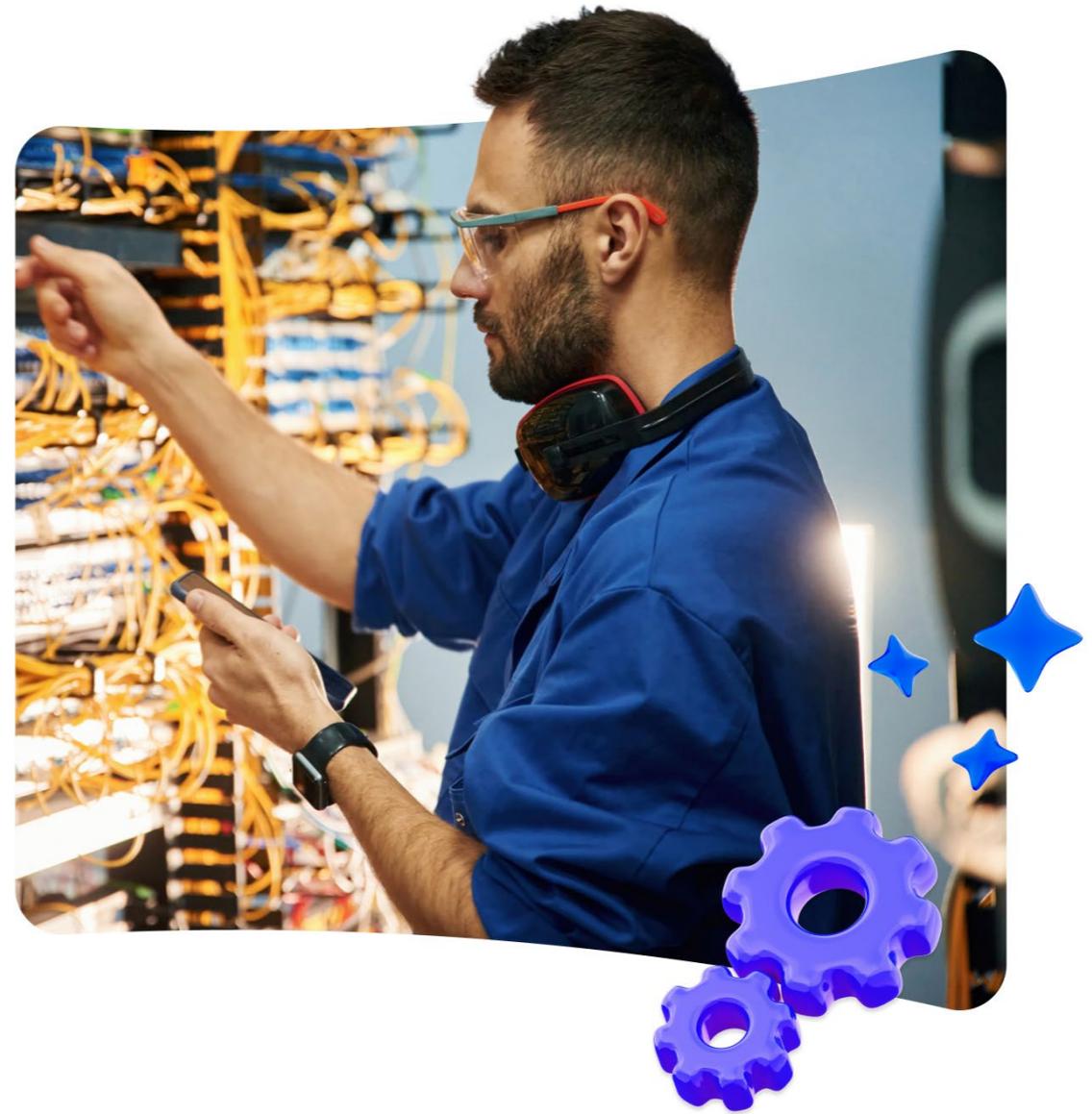
## Industry

Automotive.....	N=377, 6%
Communications.....	N=220, 3%
Consumer goods.....	N=509, 8%
Energy & Utilities.....	N=224, 3%
Engineering, construction, & real estate.....	N=228, 4%
Financial services.....	N=821, 13%
• Banking.....	N=389, 6%
• Insurance.....	N=261, 4%
• Wealth management.....	N=171, 3%
Government.....	N=234, 4%
Healthcare provider.....	N=375, 6%
Healthcare payer.....	N=116, 2%
Life sciences & biotech.....	N=185, 3%
Manufacturing.....	N=510, 8%
Media & entertainment.....	N=239, 4%
Nonprofit.....	N=166, 3%
Professional & business services.....	N=456, 7%
Retail.....	N=688, 11%
Supply chain & logistics.....	N=195, 3%
Technology.....	N=479, 7%
Travel & hospitality.....	N=359, 6%
Other.....	N=119, 2%

## Company Size

SMB (21-200 employees) .....	N=1273, 20%
CMRCL (201-3,500 employees).....	N=3865, 59%
ENT (3,501+ employees) .....	N=1362, 21%

# Survey Demographics



# Survey Demographics: Mobile Workers

## Job Function

Emergency Response.....	N=1, <1%
Equipment installation, maintenance, and repair.....	N=61, 17%
Inspections.....	N=27, 8%
Trade work.....	N=145, 41%
On-site medical care.....	N=13, 4%
Inventory management.....	N=6, 2%
Public works.....	N=97, 28%

## Industry

Arch, eng, const.....	N=34, 10%
Automotive.....	N=2, <1%
Consumer business services.....	N=62, 18%
Energy/utilities.....	N=56, 16%
Gov/pub sector.....	N=69, 20%
Healthcare.....	N=11, 3%
Manufacturing.....	N=52, 15%
Real estate/facilities.....	N=4, 1%
Supply chain/logistics.....	N=1, <1%
Technology.....	N=1, <1%
Telecommunications.....	N=58, 17%

## Company Size

1.....	N=1, <1%
2-20.....	N=11, 3%
21-100.....	N=23, 7%
101-200.....	N=65, 19%
201-500.....	N=110, 31%
501-3,500.....	N=106, 30%
3,501-10,000.....	N=30, 9%
>10,000.....	N=4, 1%



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