IDC MarketScape

IDC MarketScape: Worldwide SaaS Computerized Maintenance Management System Application 2024 Vendor Assessment

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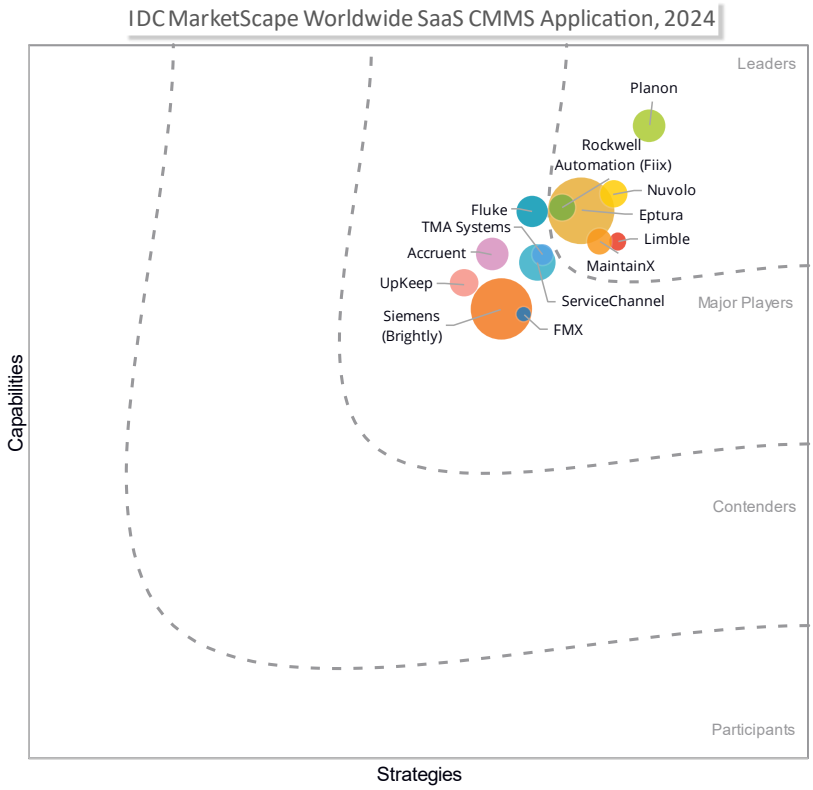
THIS IDC MARKETSCAPE EXCERPT FEATURES ROCKWELL AUTOMATION (FIIX)

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide SaaS CMMS Application Vendor Assessment



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Please see the Appendix for detailed methodology, market definition and scoring criteria.

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide SaaS Computerized Maintenance Management System Application 2024 Vendor Assessment (Doc # US51359024). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

The intent behind a computerized maintenance management system (CMMS) is to automate, improve, and anticipate maintenance needs. This IDC MarketScape helps organizations evaluate the CMMS application market landscape. It is a highly competitive market and buyers have their pick of vendors.

From the product perspective, any system that an organization considers should have reactive, planned, and condition-based maintenance capabilities. Depending on how you will use the system, IDC suggests looking at additional functionality for spare part inventory, vendor management, work scheduling, inspections, and reporting. Organizations must also think about the key areas that distinguish SaaS CMMS application vendors today, which are relationship building, configurability, mobility, location intelligence, predictive maintenance, artificial intelligence (AI), and vision.

Relationships, Trust, and Customer Service

Consider that a CMMS software deployment can turn into a multiyear relationship in the SaaS era. Look for both cultural fits and technical fits with vendors. Many customer references comment on whether they trust the vendor to deliver on their promises and provide the best experiences. Customers tend to give positive feedback in the categories of communicating the product road map and having an application that is built for the future, indicating a solid, trusting relationship between many customers and vendors. Some customers expressed delight with small things that their customer success manager does for them or when a random feature that they requested shows up on the product road map. Often, it comes down to the commitment and expertise of

the vendors' staff, how they guide customers during and after implementation to avoid common pitfalls, and the way they treat customers when it's time for renegotiating contracts.

Configurability

Applications should readily conform to an organization's workflows, nomenclature, and roles. Organizations should have the ability to quickly modify existing fields, add new fields, and rearrange fields on different views, as well as report on custom data points. Further, a modern CMMS provides mechanisms for altering out-of-the-box workflows, such as defining approval processes, generating email alerts, and sending invoices to a financial application. Purchase decision makers should evaluate how much can be configured via the user interface or by using low-code/no-code tools. When a system is truly configurable, all customers can be on the same code base, but still have the product work the way they prefer. Otherwise, organizations may end up adjusting procedures to fit a rigid application or paying to customize and maintain workarounds. Though it was not a direct relationship, vendors that perform well on configurability tended to have a favorable position.

Artificial Intelligence and GenAI Models

AI is becoming increasingly prominent across many areas within CMMS. In addition to predictive and prescriptive maintenance, technician scheduling, work order generation, chatbots, and root cause analysis also use AI. Generative AI (GenAI) is beginning to have a larger impact in the greater enterprise asset management (EAM) market, of which CMMS is a part, but its impact specifically on CMMS is emerging. IDC defines GenAI as generating a suggested course of action based on the user's input utilizing AI models. A chatbot serves as a baseline example here as it seeks and gathers information within a specific application or website for the user based on their input. In addition, IDC surveys indicate that GenAI is becoming increasingly common in the larger EAM software market. In this environment, the customer needs to consider what their expectations are for AI and GenAI within their company, then discuss it with vendors.

Mobility

Mobility has long been a key differentiator among CMMS vendors, with newer competitors sinking significant resources into optimized mobile solutions from the design stage. Mobile solutions are so important in CMMS because of the inherent mobility of everyone from technicians to asset and operation managers

in their job functions; few people in the asset management world spend most of their time behind a desk. The ability to document the completion of work immediately when completed can reduce delays in reporting asset availability and create far more accurate work data. Mobile work solutions mean that the organization can not only complete tasks but also evaluate the work completed and learn from it. The increased knowledge creates a cascade effect, with the new data used to adjust schedule times, safety procedures, and job plans for future work. Mobile work solutions can also provide the needed information to combat the loss of knowledgeable and experienced technicians. Mobile work applications, combined with scheduling and auto assignment functions, can increase the time that techs spend working by eliminating the lag time between work assignments and can ensure that the right work is done in the right order.

Location Intelligence

A key emergent differentiator in CMMS is the ability to provide location intelligence, particularly coupled with GIS or other mapping programs. The ability to deliver both external mapping to guide technicians to jobs at the street level and interior mapping to guide them to assets within a facility makes a world of difference to overall efficiency. It effectively increases more productive wrench time over less productive transport time.

Predictive Maintenance

Predictive maintenance represents a key intersection of CMMS and artificial intelligence. AI drives the collection and use of data that feeds models for predictive and prescriptive maintenance, both of which employ AI and machine learning (ML) algorithms to a range of historic and live data points to create models. This can deliver significant productivity gains for organizations still relying on reactive and time-based planned maintenance, and it's a valuable step in advancing maintenance operations. Predictive maintenance was somewhat of a novelty in the previous IDC MarketScape on SaaS CMMS Application that was published three years ago. But it's much more widely available now, to the point that it can be described as a common offering within the CMMS market today.

Vision

This IDC MarketScape evaluates the vendors, not just their products. In past editions of this document, CMMS vendors have been closely bunched on capabilities but showed more dispersion on their strategies. However, in this version, capabilities and strategies were both in a relatively tight grouping. This results in vendors being found near the center of the capabilities and strategies

axes. The fact that strategies and capabilities show a similar standard deviation indicate that these companies value both highly, realizing that without a strategy guiding them into future iterations of their software, their current product and market position will not be sustainable.

Sustainability and ESG

Though it is full speed ahead for sustainability and ESG in the wider corporate world, its reception in the asset management and CMMS world is more mixed. Though the match between the two seems obvious, translating that into action within a business or enterprise generally means bringing technology and software to bear on the problem. According to an IDC survey of asset management software users, a majority use either an enterprise-level or point asset management solution to support their sustainability management efforts (source: IDC's *SaaSPath Survey,* March 2024). Think about how a CMMS application could aid your company's sustainability management endeavors, and ask vendors how they can support those efforts.

Skilled Employment Declines

As older technology workers retire and the pipeline of younger technology workers fails to offset the loss, asset-intensive organizations are adversely affected. The loss of experienced skilled labor means the loss of critical skills and knowledge, thus setting back some organizations while they struggle to fill these positions. CMMS software can help to offset the loss. One way is to ease the transition from pen and paper or spreadsheet-based management to software, saving time and easing the burden on personnel, from field technicians to asset and operations managers. Another way is to save time through more thoughtful software design. For example, wayfinding through GIS solutions for techs ensures decreased transportation time and increased wrench time, thus allowing more work with fewer techs.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

The following vendor inclusion list for this evaluation was selected to accurately depict the vendors that are most representative of any given CMMS application on a buyer's selection list:

- The vendor had 2022 revenue in at least two geographic regions.
- The vendor had at least $10 million of annual recurring revenue (ARR) in CMMS software revenue at the end of 2022.

- The CMMS has functionality for work order management; reactive maintenance; preventative maintenance; maintenance, repair, and overhaul (MRO) inventory; resource scheduling; and vendor management.
- The vendor must have a SaaS cloud offering. On premises–only applications are out of scope.
- The CMMS application can be purchased separately (not only functionality built into a larger system such as an enterprise asset management application) and is available off the shelf without required customization.
- The vendor has at least one CMMS application that has been on the market for a minimum of three years.

Note: 2022 vendor revenues were used instead of 2023 vendor revenues because the data collection process started in the fourth quarter of 2023.

ADVICE FOR TECHNOLOGY BUYERS

CMMS applications continue to evolve as vendors invest research and development dollars into bolstering, augmenting, and, in some cases, redesigning their software. In addition, there have been new, venture-funded firms that have come into the market over the past 7–10 years. As a result, it is extremely important for end users to understand how vendors and their software are positioned currently as well as how a CMMS may be situated in the next 3–5 years. Organizations typically make a multiyear commitment to their CMMS applications because the investment to migrate the data, configure workflows, train AI models, integrate with adjacent systems, and train a broad user base is high. Thus it is vital to evaluate the software vendor's strategy, road map, and responsiveness to customer feedback, in addition to the vendor's present features and functionality. Innovation is an essential part of the "buy" decision, so a guiding factor in our vendor research was the 3rd Platform and innovation, in addition to the strategic direction.

Buyers are looking for a technology partner that can rise to the complex, agile, and remote demands of today, as well as take them into the future. Several vendors outlined in this study have focused their CMMS on specific manufacturing and industrial verticals, while others serve organizations across many industries such as healthcare, education, and public sector clients. The vendors vary in terms of size, experience, levels of support, sales model, and focus on the market. Ultimately, it is about finding the vendor that best suits your needs, sets reasonable expectations, and delivers on them with professionalism and accountability.

The following are a few key steps in the journey to select the right fit among the many software vendors currently on the market:

- **Think about where you want to end up.** Before you choose your CMMS vendor and product, think about where your organization stands today. Consider the effectiveness of your maintenance processes and prioritize features that are mission critical. A few key questions to ask regarding the internal factors involved in choosing software are:
  - What is our strategy for managing and maintaining assets and equipment?
  - What are our current software needs as compared with what we may need in three to five years?
  - What aspects of maintenance management do we want to digitally transform first, and what features do we consider essential now?
  - Have we collected digital asset data informally to date? Do we expect our CMMS solution to be able to integrate it?
  - How much are we willing to spend on the software?
  - How many and what types of users will interact with the software? Will third-party contractors interact with the application?
  - Are we looking to better define our processes as we implement new technology?
  - What industry-specific considerations apply to our software selection?
  - What are the organization's internal support resources and capabilities?
- **Systematically decide how to find the right vendor.** With so many options, organizations must take a methodical approach to researching and vetting software packages. Tap into the vast web of software evaluation options including market research firms, online review sites, and industry associations. A few key questions to ask when researching the software are:
  - Does the vendor have experience in successfully implementing a CMMS in our industry and with a company of our size?
  - Is the vendor knowledgeable about applicable regulations and guidelines, both locally and globally, as they affect our company?
  - What levels of support are available, and can the vendor or partners support all the geographic regions where we operate?
  - Is the ROI achievable? Does the vendor have a track record of meeting the ROI requirements?

    - Does the vendor offer a free trial period for the CMMS? Is it worthwhile to test-drive the software for a limited time?
    - Can the vendor integrate with our organization's other IT systems?
    - What mobile capabilities does the vendor offer for the different user groups within your organization?
    - What purchasing, pricing, and cloud deployment options does the vendor offer?
    - How long does it take to implement the software? How quickly can we start using the product?
- **Look toward an agile future.** Maintenance management teams are adopting more innovation for efficiency, autonomy, and competitive advantage. Organizational agility is critical when purchasing software as the applications and vendors must be able to scale up and down to support your changing maintenance operations. A few key questions to ask when considering the growth aspect of choosing a software package are:
    - Is the product updated frequently enough for our needs?
    - Does the vendor currently offer or have concrete plans to support IoT and AI-based predictive and prescriptive maintenance that will anticipate asset failures and make recommendations?
    - What innovations is the vendor offering or considering, especially in mobility and location-based services?
    - How will the vendor's strategic investment outlook for the next three to five years impact our business?
    - Is it important for the CMMS vendor to be part of a larger corporation? What advantages and drawbacks might that entail?
    - In what ways does the vendor engage with, listen to, and communicate with its customers, and where is customer feedback incorporated in the product road map?
    - Will the vendor be a partner, helping our business grow now and in the long term?

This IDC MarketScape vendor assessment assists in answering these questions and others. The goal of this document is to provide potential software customers with a list of CMMS vendors that have taken strides to incorporate the previously listed capabilities. We have profiled and assessed their capabilities and strategies to support the broad needs of a CMMS application.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Rockwell Automation (Fiix)

After a thorough evaluation of Rockwell Automation's strategies and capabilities, IDC has positioned the company in the Leaders category in this 2024 IDC MarketScape for worldwide SaaS CMMS applications.

Fiix, a Rockwell Automation company, was founded in 2008 and is a SaaS maintenance management application that combines work order, mobile asset, and parts management with an open integration network and AI-driven insights. The Fiix CMMS product provides CMMS capabilities to track work orders, inventory and maintenance history, and supply management. It also provides preventive and predictive maintenance capabilities. Its emphasis on AI and generative AI stretches from predictive and prescriptive maintenance up to the company's recently released in-app AI assistant, Fiix Maintenance Copilot. Fiix CMMS is part of the Fiix Platform, thus easily integrating with several purchasing, operations, finance, HR, and production scheduling platforms as well as feeding into several production control systems, including a Rockwell Automation product. More than most CMMS competitors, Fiix has a truly international client base, including significant contingents in EMEA, Asia/Pacific, and Latin America.

Quick facts about Fiix are as follows:

- **Company location:** Headquartered in Milwaukee, Wisconsin
- **Company size:** About 260 employees for Fiix and 29,000 employees for Rockwell Automation
- **CMMS globalization:** Deployed in 111 countries and available in 14 languages
- **CMMS partners:** 33 partners globally for Fiix and 1,355 partners for Rockwell Automation
- **CMMS SaaS customers:** Over 4,300 customer accounts
- **CMMS industry focus:** Discrete and process manufacturing, energy and utilities, transportation and logistics, government, education, professional services, hospitality, retail, and healthcare

- **Ideal CMMS customer size:** Midsize or enterprise manufacturer with $50 million–10 billion in revenue
- **Cloud:** Public cloud hosted on AWS
- **Mobile:** No additional charge for native iOS and Android mobile apps that work both online and offline
- **Pricing model:** Annual SaaS subscriptions on a per-user per-tier basis, with the option to pay monthly

Strengths

- **Advanced AI capabilities:** The recently released Fiix CMMS in-app AI assistant, Fiix Maintenance Copilot, is one example of the company's AI emphasis. Another is in predictive maintenance, where Fiix CMMS offers the ability to collect live condition asset data, provide real-time asset health status, automatically generate work orders based on that asset health status, and use AI and ML models to recommend a course of action.
- **Customer service:** Fiix received positive evaluations for customer service among its CMMS competitors. Customer service was timely and flexible, and those who paid for higher levels of service felt that they were getting their money's worth. The quality of training and availability of formal user groups was also highlighted.
- **Reporting and analytics:** Customers indicated that Fiix delivers new insights and facilitates data-driven decisions. Availability of both predefined dashboards and reports, as well as the ability to customize them, was highlighted. Batch uploading of data, including work orders, asset lists, details and documentation, and maintenance history, was also featured.

Challenges

- **Technical integration:** Customers claimed that integrating Fiix CMMS with other enterprise applications could be difficult. In addition, Fiix does not prioritize prebuilt APIs or out-of-the-box connectors. However, the company does provide a complete, self-serve, API developer platform as well as API SDK and integration services.
- **Location intelligence:** Fiix does not offer advanced location intelligence or mapping capabilities as many of its competitors do. For example, Fiix does not have the ability to natively track real-time location of assets, display work orders on a map, or navigate technicians to physical locations. Customers that want geospatial features will need to invest time and resources to implement with partners.

- **Vendor and warranty management:** Fiix lacks some features for vendor and warranty management that are more common among its competitors, including limited ability to bill third parties, create warranty claims against work orders, and identify and flag work orders potentially eligible for warranties.

Consider Rockwell Automation (Fiix) When

Consider Rockwell Automation (Fiix) when you are a medium-sized or large enterprise, regardless of vertical. You are likely looking for a scalable CMMS with strong analytic capabilities and applied artificial intelligence supported by a highly integrable platform.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders,

participants and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

A computerized maintenance management system (CMMS) manages an organization's maintenance, repair, and overhaul (MRO) operations for its physical assets and equipment. A CMMS application often includes capabilities to digitally automate work order management, reactive maintenance, preventative maintenance, inspections, spare parts inventory management, vendor management, and warranty tracking.

LEARN MORE

Related Research

- *Worldwide Asset Life-Cycle Management Applications Forecast, 2024–2028: Positive Economic Outlook and Generative AI to Drive Revenue Growth* (IDC #US51081424, June 2024)
- *Worldwide Asset Life-Cycle Management Applications Market Shares, 2023: Positive Economic Outlook and Organic Growth Drive the Market* (IDC #US52190725, June 2024)
- *ServiceNow's Move into Asset Life-Cycle Management Indicates the Growing Strength of the Traditionally Stable Software Market* (IDC #US52262624, May 2024)
- *SaaSPath 2024: How Is Generative AI Influencing Customer Decisions to Use ALM SaaS Applications?* (IDC #US52257124, May 2024)
- *Hexagon's Acquisition of Itus Digital Highlights the Growing Importance of Digital Twins Within Industrial Segments* (IDC #IcUS52022124, April 2024)
- *IDC Market Glance: Asset Life-Cycle Management, 1Q24* (IDC #US51783724, March 2024)
- *Generative AI Use Case Taxonomy: The Facilities Function* (IDC #US51783824, March 2024)

- *Top 5 Trends in Asset Life-Cycle Management* (IDC #US51783224, March 2024)

Synopsis

This IDC study provides an assessment of prominent computerized maintenance management system (CMMS) vendors and discusses what criteria are most important for companies to consider when selecting a CMMS application.

"Because a CMMS software deployment can become a long-term relationship, it's about more than just base price and performance," says Brian O'Rourke, research manager, Enterprise Asset Management and Smart Facilities at IDC. "Make sure the CMMS solution that you choose matches your needs in terms of customer engagement, reporting and analytics capability, ecosystem approach, and product vision. A good fit with the vendor will ultimately generate more value than a good price."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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