

FIELD SERVICES WHITE PAPER

From Assessment to Resolution

A Smarter Approach to Facility Field Services

How inspections, testing, assessments, asset tagging, documentation, and specialized field support create clearer decisions and more reliable facility performance.

SoCo Management Group

Smarter Facility Operations. One Accountable Partner.

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CORE PREMISE

Field activity creates value when findings become clear decisions, documented action, and verified results.

Executive Summary

Facility operators depend on field work to understand asset condition, confirm system performance, document risk, and support reliable day to day operations. Inspections, testing, facility assessments, asset tagging, specialized tank evaluations, and corrective work all contribute to a more complete view of the facility.

The challenge is not simply completing a service visit. The greater challenge is defining the right scope, coordinating access and safety, capturing consistent findings, connecting those findings to the correct assets, and ensuring the resulting information supports a clear decision.

Many organizations rely on multiple technicians, testing providers, contractors, internal departments, and recordkeeping systems. Each may perform one part of the work, but the customer is often left assembling the complete picture. When scopes vary, records are incomplete, or results are stored in separate locations, field activity can produce documents without producing operational clarity.

SoCo Management Group coordinates inspections, testing, facility assessments, asset tagging, and specialized field support for fuel systems and storage tank assets. Our approach connects the work performed onsite with organized documentation, clear communication, and practical follow through.

This creates a stronger field services program: one that helps operators evaluate conditions, identify risk, plan maintenance and capital needs, support acquisition and divestiture decisions, and maintain more reliable facility performance.

THE SOCO APPROACH

**Clear scope. Safe execution. Useful findings. Complete documentation.
Verified outcomes.**

The Field Visibility Gap

Most operators have service records, inspection reports, testing results, photographs, invoices, and maintenance histories. Yet the presence of those records does not always provide a clear view of current facility condition.

A test may confirm one component while leaving related asset information incomplete. A technician may document a condition without connecting it to the correct equipment record. A facility may pass one required check while still presenting operational issues that deserve attention. An acquisition team may receive documents without knowing whether they accurately reflect the assets onsite.

This creates the field visibility gap: the space between work performed at the facility and information that can be confidently used for operations, maintenance, planning, or transaction decisions.

- Service scopes vary from one location or provider to another
- Assets are not consistently identified or connected to service history
- Inspection findings do not clearly distinguish immediate needs from longer term concerns
- Photographs and reports are stored without a consistent facility record
- Testing results are received without clear ownership of follow up actions
- Leadership cannot easily compare condition or risk across multiple locations
- Acquisition and divestiture decisions rely on incomplete or outdated information

The result is often more field activity but not necessarily more control. A structured field services program closes this gap by connecting scope, execution, findings, documentation, and follow through through one coordinated process.

Why Individual Service Calls Are Not Enough

Individual service calls are necessary, but they are not the same as a coordinated field services program.

A provider may complete the assigned test or inspection and submit a report. What may remain unclear is whether the scope addressed the full concern, whether related assets were evaluated, whether the findings were categorized consistently, who owns the next action, and whether the final documentation was added to the facility record.

This is especially challenging across a multi site portfolio. Different providers may use different terminology, report formats, photographs, and recommendations. Internal teams may spend significant time clarifying findings, comparing results, requesting missing records, and deciding what should happen next.

A coordinated approach creates a common operating standard around field activity. The work is planned against the business need, completed within a defined scope, documented in a consistent manner, reviewed for completeness, and connected to the appropriate next step.

The objective is not to add unnecessary administration. It is to make each site visit more useful and ensure the resulting information supports the operation.

KEY DISTINCTION

A completed service call confirms activity. A coordinated field services program creates usable information and accountable follow through.

The Field Services Model

SoCo brings inspections, testing, assessments, asset information, specialized field resources, and documentation together through one coordinated program. The model can support an individual facility, a defined project, or a multi site portfolio.

Each engagement begins with the purpose of the work. The scope may be operational, regulatory, maintenance related, transaction driven, or part of a broader asset management initiative. From there, SoCo coordinates the appropriate field resources and maintains a clear path from planning through completion.

Onsite Facility Inspections

Facility inspections provide a broader view of site condition. Reviews can include tank systems, alarms, release detection, cathodic protection, visible equipment conditions, and available maintenance records. Findings help operators document current conditions, identify gaps, and prioritize corrective action.

Testing and System Verification

Testing helps confirm whether tanks, piping, leak detection, containment, vapor recovery, corrosion protection, and related components are operating as intended. Scope and methods are aligned with the equipment, the operational need, and applicable requirements.

Facility Assessments

Facility assessments support ongoing operations, acquisitions, and divestitures. The review connects observable asset condition, available records, testing information, operational concerns, and potential capital needs so decision makers have a clearer basis for action.

Facility Asset Tagging

Asset tagging creates a consistent onsite inventory of equipment. Tags connect physical assets to records, photographs, service history, and future maintenance activity, improving visibility throughout the asset lifecycle.

Specialized Tank Inspection

Internal tank camera inspections provide detailed visual information that can help evaluate tank condition, investigate concerns, and support maintenance or repair planning. Specialized tools are selected according to the condition being reviewed.

Program and Field Resource Coordination

SoCo coordinates technicians, testing providers, schedules, site access, deliverables, and communication. A common program structure improves consistency across locations and gives internal teams a clearer view of status, findings, and next steps.

From Scope to Verified Completion

A strong field services program creates a clear path from the business need to a documented and verified outcome. SoCo uses a practical four step framework.

01	Assess Clarify the purpose of the work, review available records, identify the assets and locations involved, and define the condition, requirement, or decision the field activity must address.
02	Plan Develop the scope, select qualified resources, coordinate schedules and site access, confirm required safety controls, and establish the expected deliverables before work begins.
03	Execute Complete the inspection, testing, assessment, tagging, or specialized field activity. Maintain communication with site contacts and document conditions, exceptions, and changes to the approved scope.
04	Verify Review reports, photographs, test results, asset information, and open items for completeness. Confirm the outcome, connect records to the facility, and identify any corrective action or additional evaluation required.

WHY VERIFICATION MATTERS

A technician leaving the site does not close the process. Verification confirms that the work answered the original need and produced a complete operational record.

Core Field Capabilities

SoCo coordinates field services that help operators understand facility condition, confirm system performance, and maintain accurate records across fuel systems and storage tank assets.

Onsite Facility Inspections

We perform onsite inspections that review visible facility conditions, tank system components, alarms, release detection, cathodic protection, and available maintenance records. The inspection creates a documented view of conditions and helps prioritize areas requiring attention.

Tank, Line, and Leak Detection Testing

We test tanks, piping, and leak detection equipment to help verify system integrity and confirm that critical components are operating as intended. Results are organized so operators can understand the outcome and any required next step.

Secondary Containment Testing

We test dispenser sumps, tank sumps, and spill containment equipment to identify leaks, damage, or other conditions that may affect performance. Findings can support repair planning and ongoing system management.

Vapor Recovery Testing

We test pressure vacuum vent valves and vapor recovery systems to help verify proper operation and support applicable requirements. Scope is aligned with the facility configuration and jurisdiction.

Corrosion Protection Testing and Repair

We inspect and test cathodic protection systems for tanks, piping, and other buried steel components. When deficiencies are identified, SoCo can help define and coordinate the appropriate repair response.

Internal Tank Camera Inspections

Using iTiCam technology, we inspect tank interiors to obtain detailed visuals of conditions that may not be visible through routine exterior review. The information can support investigation, condition evaluation, and maintenance or repair planning.

Facility Assessments and Asset Tagging

Testing confirms specific system functions. Facility assessments and asset tagging provide the broader context needed to understand what is onsite, what condition it is in, and how that information should support future decisions.

Operational Assessments

Operational assessments help organizations establish a current view of facility and asset conditions. The findings can support maintenance priorities, capital planning, portfolio standards, vendor scopes, and corrective action tracking.

Acquisition Assessments

Before an acquisition, decision makers need more than a document list. An onsite assessment can help compare available records with observed conditions, identify information gaps, document potential risks, and highlight areas that may require additional testing or capital investment.

Divestiture Assessments

Before a divestiture, a structured assessment can help organize asset information, identify incomplete records, document current conditions, and prepare the facility record for internal review or a prospective buyer.

Facility Asset Tagging

Asset tagging gives each piece of equipment a consistent identity that can connect the physical asset to its location, manufacturer information, photographs, service history, and supporting records. This creates a stronger foundation for maintenance, replacement planning, and portfolio reporting.

Portfolio Standardization

When the same assessment and tagging process is applied across locations, leadership gains a more consistent view of asset condition and information quality. Facilities can be compared using common definitions rather than isolated reports.

THE OBJECTIVE

Know what assets are onsite, understand their condition, connect them to reliable records, and use that information to guide action.

Safety, Site Coordination, and Documentation

Field services take place within active facilities. Work must be coordinated around employees, customers, vehicles, deliveries, equipment access, and other site activity. Strong execution requires more than technical capability; it requires planning, communication, and disciplined documentation.

Defined Scope and Site Readiness

Before mobilization, the work area, equipment, access needs, site contacts, scheduling constraints, and required shutdowns are reviewed. Clear preparation reduces delays and helps the field team arrive ready to complete the intended scope.

Work Area Protection

Appropriate safety controls are established around the vehicle and active work area. Cones, barriers, high visibility personal protective equipment, and site specific procedures help protect technicians, facility personnel, customers, and traffic flow.

Operational Coordination

Field activity is coordinated to reduce unnecessary disruption. Site contacts receive clear information about timing, access, equipment impacts, and any condition that changes the original plan.

Consistent Findings

Reports should clearly identify the location, asset, work performed, result, supporting photographs or test data, exceptions, and recommended next action. Common documentation standards make results easier to review across multiple facilities.

Complete Facility Records

Final deliverables are reviewed for completeness and connected to the correct facility and asset. This preserves the work as part of the operational history rather than allowing valuable information to remain in an isolated email, invoice, or vendor portal.

A STRONGER FIELD RECORD

The final deliverable should show what was reviewed, what was found, what it means, and what should happen next.

One Accountable Field Services Partner

Complex field programs often involve several capable providers. The challenge is maintaining consistency and visibility across scopes, schedules, technicians, locations, findings, and follow up actions.

A testing provider may confirm one component. An inspection team may document broader site conditions. A specialized technician may evaluate a tank. An internal department may approve corrective work. Another group may maintain the asset or transaction record. Each party plays an important role, but the customer is often left coordinating the full process.

SoCo provides one accountable point of coordination across field resources and facility information. The customer maintains control of decisions while gaining a clearer program structure from planning through verified completion.

Clearer Scope

The purpose, locations, assets, methods, deliverables, and completion expectations are defined before work begins.

Coordinated Resources

Technicians, testing providers, specialized tools, site contacts, and internal stakeholders are aligned around the same operational need.

More Consistent Execution

Common scopes and reporting expectations help reduce variation between locations and providers.

Better Follow Through

Open findings are documented, assigned, and tracked so field activity connects to a practical next step.

Stronger Operational Records

Reports, photographs, test results, asset information, and corrective actions become part of a more complete facility history.

Business Outcomes

The value of field services should be measured by the quality of decisions and operational improvements they support. A coordinated program can create meaningful benefits across individual facilities and multi site portfolios.

Better Asset Visibility

Operators gain a clearer understanding of what equipment is onsite, its documented condition, and the records associated with it.

Earlier Risk Identification

Inspections, assessments, and testing can identify developing conditions before they create larger operational, financial, or transaction concerns.

More Informed Maintenance and Capital Planning

Consistent findings help teams prioritize corrective work, evaluate replacement needs, and direct resources toward the most important conditions.

More Reliable Documentation

Reports, test results, photographs, asset records, and corrective actions are organized into a more complete facility history.

More Consistent Multi Site Execution

Common scopes and reporting standards make it easier to compare locations and maintain a reliable portfolio approach.

Reduced Operational Disruption

Better planning, site coordination, and work area controls help field activity proceed with less unnecessary impact on the facility.

Stronger Transaction Decisions

Facility assessments provide clearer information for acquisitions and divestitures, helping teams recognize conditions, information gaps, and potential capital needs.

Improved Vendor Accountability

Defined scopes, expected deliverables, documented findings, and completion review create a stronger field resource management process.

Greater Confidence in Facility Information

Leadership can make decisions using records that are connected to the correct location, asset, service activity, and observed condition.

Evaluating the Need for Field Services

Organizations do not all require the same field services program. Several questions can help determine whether the current approach provides enough visibility and consistency.

- Do you have a current and accurate inventory of critical facility assets?
- Can service history, photographs, inspections, and testing results be connected to the correct equipment?
- Are field scopes and reporting expectations consistent across locations and providers?
- Do inspection and testing findings clearly identify the required next action?
- Is there a defined owner for open findings and corrective work?
- Can leadership compare facility condition and risk across the portfolio?
- Are work areas, site access, and operational impacts consistently coordinated before technicians arrive?
- Can acquisition and divestiture teams rely on current onsite information rather than documents alone?
- Are final field records complete, easy to locate, and useful for maintenance and capital planning?

If the answer to several of these questions is no, the issue may not be a lack of field activity. It may be a lack of structure connecting the work, the findings, the facility record, and the resulting action.

Conclusion

Facility field services are most valuable when they create more than a completed visit or isolated report.

Operators need clear scopes, qualified resources, safe execution, consistent findings, complete documentation, and accountable follow through. They also need field information that can support daily operations, maintenance planning, portfolio oversight, and acquisition or divestiture decisions.

SoCo Management Group connects inspections, testing, facility assessments, asset tagging, specialized tank inspections, and field resource coordination through one practical program. The result is a clearer path from onsite activity to informed action and verified resolution.

FROM ASSESSMENT TO RESOLUTION

Turn field activity into asset visibility, practical decisions, complete documentation, and more reliable facility performance.

Talk With SoCo Management Group

Start a conversation about inspections, testing, facility assessments, asset tagging, and specialized field support for your facilities.

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