

MARCH 2026 / COMPLIANCE + FIELD EXECUTION

One line of sight from compliance requirement to field closure

Across 410 sites, a multi-state operator consolidated fragmented data, multiple providers, inspection schedules, documentation, and corrective action into a fully managed operating platform.

“Our reviews used to begin with reconciliation. Now they begin with the exceptions that need a decision.”

PORTFOLIO	OPERATOR	ENGAGEMENT
410 sites	Multi-state operator	Six-month modeled program

THE OPERATING REALITY

The environmental team coordinated recurring testing, inspections, maintenance records, jurisdictional requirements, regional field providers, and corrective work. The information existed—but it was divided among internal systems, vendor portals, spreadsheets, email, scanned reports, and local working relationships.

A due date might be tracked in one place, the field visit scheduled in another, the completed report stored in a portal, and the resulting deficiency assigned through a separate workflow. Each handoff created another chance for context to be lost or accountability to become unclear.

WHY THE MODEL WAS BREAKING

- **FRAGMENTED STATUS** - Teams reconciled systems before they could discuss performance.
- **DOCUMENT GAPS** - A completed visit did not always produce an accepted, retrievable record.
- **SLOW FOLLOW-THROUGH** - Findings could be visible without a single owner or agreed closure path.

THE TURNING POINT

SoCo organized the work around one operating record that connected the requirement, site, provider, field visit, documentation, finding, action, and closure. Managed services supplied the daily discipline needed to keep that record current.

WHAT SUCCESS HAD TO LOOK LIKE

- **A CONNECTED RECORD** Requirement, schedule, visit, report, finding, and closure needed to remain linked.
- **ACCEPTED DOCUMENTATION** Provider completion needed a consistent quality review before the record was considered complete.

- **EXCEPTION-LED REVIEW** Leadership needed meetings focused on aging risk and decisions—not data reconciliation.

THE SOCO INTERVENTION

A fully managed platform connecting requirement, field work, and closure

01 Consolidate the compliance picture

SoCo assembled customer-approved testing, inspection, documentation, and internal milestone requirements by site and jurisdiction, then reconciled conflicts across source systems.

02 Coordinate field readiness

Regional providers received consistent schedules and work packages. SoCo managed access, prerequisites, site changes, exceptions, and escalation so a due date translated into executable work.

03 Control the quality of the record

Reports and attachments were reviewed against defined acceptance criteria. Missing information was returned for correction while the visit and its documentation were still fresh.

04 Keep management focused on decisions

Findings were routed to named owners and monitored through action and closure. Recurring reviews highlighted upcoming work, overdue records, aging findings, and exceptions requiring management direction.

HOW THE OPERATING MODEL CHANGED

BEFORE	AFTER
Requirement, schedule, report, and finding tracked separately	One connected operating record from obligation through closure
Management meetings opened with data reconciliation	Reviews opened with exceptions, decisions, and aging risk
Provider completion treated as program completion	Program completion required accepted records and owned findings

MODELED OUTCOMES

SCHEDULE PERFORMANCE	RECORD CONTROL	CORRECTIVE ACTION
97% of testing and inspection activity completed by the internal deadline	40% fewer overdue or incomplete service records	85% of routine deficiencies closed within 30 days

REPRESENTATIVE CUSTOMER VOICE

"We did not need another place to store a report. We needed the requirement, the field work, the record, and the follow-through to behave like one process."

Senior Manager, Environmental Compliance | National Multi-Site Operator

THE BUSINESS VALUE

The operator replaced fragmented status with managed visibility. Its internal team could spend less time reconstructing activity and more time resolving the exceptions that carried operational or compliance significance.

Manage every handoff—from requirement to field work to documented closure.