

MAY 2026 / DATA STEWARDSHIP + PLATFORM MANAGEMENT

Making inherited facility data trustworthy enough to run the business

After several acquisitions, a 175-site operator turned conflicting facility records into a governed operating foundation for scheduling, field service, work management, and reporting.

“The software was not the problem. The information inside it was not trusted enough to operate at scale.”

PORTFOLIO	OPERATOR	ENGAGEMENT
175 sites	Acquisition-driven retailer	16-week modeled program

THE OPERATING REALITY

Each acquisition brought useful information—and a different way of describing it. Site names, asset identifiers, equipment attributes, ownership fields, service histories, and document references were distributed across spreadsheets, scanned reports, vendor portals, legacy databases, and a third-party asset and work-management platform.

Teams compensated with experience and manual reconciliation. Before scheduling work, they verified which site record was current. Before reporting, they removed duplicates and resolved conflicting asset counts. The platform existed, but uncertain data limited how confidently people could use it.

WHY THE MODEL WAS BREAKING

- **SCHEDULING FRICTION** - Teams checked source files before trusting site and asset information.
- **REPORTING EFFORT** - Monthly reporting required repeated deduplication and manual reconciliation.
- **ACQUISITION DRAG** - Each new portfolio added another naming scheme and another exception backlog.

THE TURNING POINT

SoCo treated data quality as an ongoing managed service—not a one-time cleanup. The goal was to create common definitions, preserve uncertain records for review, assign ownership, and make future changes easier to govern.

WHAT SUCCESS HAD TO LOOK LIKE

- **A GOVERNED HIERARCHY** Sites, systems, assets, contacts, providers, and records needed consistent relationships and identifiers.

- **OWNED EXCEPTIONS** Uncertain and conflicting information needed a visible review path instead of silent overwriting.
- **ONGOING STEWARDSHIP** The operating platform needed controls that would remain useful after the initial remediation.

THE SOCO INTERVENTION

Data stewardship that made the existing platform operationally useful

01 Define the operating hierarchy

SoCo established consistent relationships among sites, systems, assets, contacts, providers, and records, with common naming, required fields, unique identifiers, and ownership rules.

02 Reconcile without erasing uncertainty

Records were matched across sources, duplicates identified, and conflicts placed into an owned exception queue. Nothing was silently overwritten simply to make the database appear clean.

03 Verify the information that mattered most

High-value and high-uncertainty records were validated through source documents, customer knowledge, provider information, and targeted field verification when desk review was not enough.

04 Keep the data sound after remediation

Corrected information was connected to work management and reporting. Ongoing quality controls monitored required fields, duplicates, new assets, ownership changes, and future acquisitions.

HOW THE OPERATING MODEL CHANGED

BEFORE	AFTER
Multiple names and identifiers for the same site or asset	One governed hierarchy with common definitions and ownership
Cleanup repeated before every schedule or report	Exceptions resolved once and controlled in the operating platform
New acquisitions expanded the backlog	Repeatable onboarding and quality controls for future portfolios

MODELED OUTCOMES

FIELD COMPLETENESS	RECORD QUALITY	REPORTING EFFORT
70% to 96% modeled improvement in required-field completion	80% fewer duplicate or conflicting asset records	60 to 22 hrs modeled monthly reconciliation and report- preparation time

REPRESENTATIVE CUSTOMER VOICE

“Once the data was reconciled and ownership was clear, the platform became useful for the people actually scheduling work and making decisions.”

Director of Enterprise Systems | Multi-Site Retail Operator

THE BUSINESS VALUE

The operator did not discard its technology investment. It created the governance and managed discipline needed to make the platform dependable for everyday work—and repeatable for the next acquisition.

Unlock the operational value already inside your facility data.