

JULY 2026 / TRAINING + WORKFORCE READINESS

## Keeping 680 locations ready as people, roles, and requirements changed

*A national retailer connected employee data, operator assignments, third-party training, completion records, supervisors, and deadline management in one continuous readiness program.*

*“Course delivery was never the hard part. Keeping the right person assigned, current, and documented was.”*

| PORTFOLIO     | OPERATOR          | ENGAGEMENT               |
|---------------|-------------------|--------------------------|
| 680 locations | National retailer | 12-week modeled campaign |

### THE OPERATING REALITY

Class A, B, and C operator responsibilities varied by role, site, and state. Turnover, transfers, acquisitions, promotions, and temporary assignments made the training population a moving target. The retailer already had online courses through a third-party provider.

What it did not have was one current answer to who needed which course, which supervisor owned follow-up, who was approaching an internal deadline, and whether the completion record was tied to the correct person and location. Month-end reporting often became a reconciliation exercise across workforce data, training records, and local knowledge.

### WHY THE MODEL WAS BREAKING

- **MOVING POPULATION** - Employee and role changes continuously altered the assignment list.
- **LATE FOLLOW-UP** - Supervisors learned about gaps after deadlines were already close.
- **RECORD MISMATCHES** - Completion evidence did not always align to the current person, role, or site.

### THE TURNING POINT

SoCo added a managed operating layer around the training provider. The program connected workforce changes to assignment logic, monitored progress, reconciled evidence, and kept supervisors focused on the small group requiring intervention.

### WHAT SUCCESS HAD TO LOOK LIKE

- **A CURRENT ROSTER** Assignments needed to reflect active people, current roles, locations, and supervisor ownership.
- **EARLY INTERVENTION** Leaders needed enough notice to act before an internal deadline became an overdue assignment.

- **DEFENSIBLE RECORDS** Completion evidence needed to stay connected to the correct person, role, and site.

## THE SOCO INTERVENTION

# A continuous readiness program around the existing training provider

### 01 Establish the assignment logic

SoCo mapped the location roster, active employees, operator roles, customer-approved training requirements, supervisor relationships, and internal deadlines into a consistent assignment model.

### 02 Launch with clean ownership

Assignments were reconciled before launch, duplicate and obsolete records were removed from the active queue, and supervisors received a clear view of who required action.

### 03 Manage progress and intervention

Enrollment, course progress, completion, available documentation, and approaching deadlines were monitored across the training provider and customer records. Exceptions were escalated while there was still time to act.

### 04 Reconcile workforce change continuously

Transfers, departures, new hires, role changes, and new locations moved through a repeatable cadence so the readiness picture stayed current after the initial campaign.

## HOW THE OPERATING MODEL CHANGED

| BEFORE                                      | AFTER                                                                        |
|---------------------------------------------|------------------------------------------------------------------------------|
| Static assignment list aged quickly         | <b>Current assignments refreshed through workforce-change cadence</b>        |
| Completion reviewed at month end            | <b>Progress and aging monitored early enough for supervisor action</b>       |
| Training proof separated from role and site | <b>Completion record connected to the correct person, role, and location</b> |

### MODELED OUTCOMES

| ASSIGNMENT COVERAGE                                                        | COMPLETION                                                        | OVERDUE QUEUE                                                       |
|----------------------------------------------------------------------------|-------------------------------------------------------------------|---------------------------------------------------------------------|
| <b>98%</b><br>of active operators<br>assigned within the rollout<br>window | <b>95%</b><br>completed by the<br>customer's internal<br>deadline | <b>240 to &lt;25</b><br>modeled reduction in<br>overdue assignments |

### REPRESENTATIVE CUSTOMER VOICE

*"Training completion stopped being a month-end reporting exercise. We can see who needs a course, who is approaching a deadline, and which record proves completion."*

VP, Learning and Operational Readiness | National Convenience Retailer

### THE BUSINESS VALUE

The provider continued to deliver the training content. SoCo made readiness manageable at scale by connecting the roster, the assignment, the supervisor, the deadline, and the completion evidence in one operating rhythm.

**Bring structure, visibility, and follow-through to operator training at scale.**