

SEPTEMBER 2025 / FIELD SERVICES

315 sites. Five field disciplines. One accountable program.

A multi-state fuel retailer stopped managing calendars, field vendors, reports, and corrective action as separate workstreams—and created one operating picture without replacing the providers it trusted.

“The problem was not a lack of capable vendors. It was that no one could see the whole job.”

PORTFOLIO	OPERATOR	ENGAGEMENT
315 sites	Multi-state fuel retailer	Six-month modeled program

THE OPERATING REALITY

The retailer had experienced regional providers for precision testing, leak-detector verification, containment testing, recurring inspections, and follow-up repair. Each provider could execute its scope. Yet the portfolio still felt harder to manage every quarter.

The work lived in separate calendars, vendor portals, email threads, report formats, and local contact lists. A site access change might reach one provider but not another. Completed reports could arrive without the attachments needed for acceptance. A deficiency discovered in the field could be copied into a spreadsheet with no durable link to the original service record.

WHY THE MODEL WAS BREAKING

- **OPERATING DRAG** - Managers spent time assembling status rather than managing exceptions.
- **FIELD REWORK** - Incomplete work packages and access gaps increased repeat visits.
- **LEADERSHIP BLIND SPOT** - There was no immediate answer to what was due, complete, accepted, or still open.

THE TURNING POINT

The breakthrough was to treat the field program as one managed service—not a collection of unrelated vendor assignments. SoCo became the connective layer across the existing providers, the customer’s site data, the service calendar, field documentation, and corrective-action ownership.

WHAT SUCCESS HAD TO LOOK LIKE

- **ONE SHARED CALENDAR** The customer and every provider needed the same view of readiness, timing, and ownership.
- **FIELD-READY SCOPE** Each visit needed complete site facts, access instructions, evidence requirements, and escalation paths.

- **VERIFIED CLOSURE** A completed visit needed to produce an accepted record and an owned path for every finding.

THE SOCO INTERVENTION

A managed field-services model built around the definition of done

01 Establish one operating baseline

SoCo validated the 315-site roster, system inventory, service obligations, provider assignments, access contacts, and internal escalation paths. Conflicts moved into a visible exception queue instead of being resolved ad hoc during scheduling.

02 Send the field a complete work package

Each assignment carried consistent site facts, scope, timing, access instructions, documentation requirements, and escalation contacts. Regional providers kept their specialties while working from the same operating expectations.

03 Manage execution—not just scheduling

SoCo coordinated readiness, monitored milestones, resolved exceptions, and kept the customer informed when a site condition, provider constraint, or documentation gap threatened completion.

04 Convert reports into accountable follow-through

Incoming records were reviewed for completeness. Findings were linked to named owners, routed for action, and tracked through documented closure so the field visit produced an operational ending—not another loose file.

HOW THE OPERATING MODEL CHANGED

BEFORE	AFTER
Multiple provider calendars and local trackers	One portfolio calendar with shared milestones and ownership
Reports accepted by arrival, then reconciled later	Records reviewed against a consistent definition of complete
Deficiencies separated from the work that found them	Finding, owner, action, and closure connected in one managed record

MODELED OUTCOMES

ON-TIME EXECUTION	DOCUMENT QUALITY	FIELD EFFICIENCY
96% of scheduled activity completed by the internal deadline	45% fewer missing or incomplete service records	25% fewer repeat visits tied to access or work-package gaps

REPRESENTATIVE CUSTOMER VOICE

"The change was not that we found new vendors. It was that everyone began working from the same calendar, the same site information, and the same definition of done."

Director of Environmental Compliance | Multi-Site Fuel Retailer

THE BUSINESS VALUE

The operator preserved the providers and technology that were already working. What changed was the management layer around them: one source of operating truth, one cadence, and one accountable path from planned work to accepted record to closed exception.

Turn multiple field vendors into one accountable testing and inspection program.