

# On Site Audit Guide



Define Information Needed & Who Will Use It.  
Plan Observations To Be Made

## Project Intent

Observe specific items -or- Report situations

## Interaction

Announced with letter of authorization or Anonymous

## Elements - Photos

POP, banners, LTOs, menu boards, rest rooms, inventory

## Units

Store configs Inside Outside Third Party

## More

Mystery shop can be immediately followed by audit

## Auditor Requirements and Specs

### Profiles

Experienced, savvy with mobile devices, high quality photos

### Validation

Purchase receipt Manager signs Mobile device geo verification

### Time of Day

Suggest audits during non-peak times for the unit

### Audit Type

Inside unit Outside unit Phone

### Frequency

Monthly, weekly, fiscal periods, promo periods

## Accountability: Who Gets the Data, Who Acts on It.

Senior Management Team, HR, Training

Field Level (Region, District, Area), Franchisees, Market DMAs

Unit Level Managers

Top Line Trends

Analysis of Conditions, Best Practices within the Hierarchy or Market Type

Conditions Reports, Inventories, Compliance Specs Reports



Data Analysis



Conditions Analysis



Unit Report

## Considerations



Build trust in the program and process. Involve all stakeholders in program design.



Balance brand standards with the local autonomy franchisees need to serve customers.



Remain sensitive to the customer relationship in third party audits. Don't distract your customer's salespeople in their own stores.



Compliance audits imply a follow up action. Devise plans for acting on the data before audits start.



Understand the purpose. Will audits observe compliance feature or will audits help you identify potential best practices?



Choose an audit and mystery shopping provider with the experience and capability to partner with you on this journey.

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