



Audit Guidelines and Client Requirements

Beverage Value Program: Coca-Cola/McDonald's: Philadelphia

Requirements:

Locations are assigned to specific auditors for specific dates and times. Some streets have multiple McDonald's so be sure you are clear on which location to audit. Your Confero Compass Shop Log lists location information (including address) and the assigned audit date(s) and time(s).

Ensure you have a digital or cell phone camera which will take high resolution photos and a color printer.

Children and companions/guests are not allowed to accompany auditors during the on-site audit.

Business casual attire is required. You are representing our client Coca-Cola, which expects professional dress and behavior at all times. No shorts, flip flops, or T-shirts allowed.

Dates & Times:	Print Documents to take to Audit:	Required Purchase:	Validation Requirement:
<p>The shop assignment on Compass will tell you the specific audit date(s) allowed for this audit.</p> <p>All audits must be conducted between:</p> <p>10:45 am & 11:15 am, or 1:45 pm & 5:15 pm.</p> <p>Audits outside of these times will not be accepted.</p>	<p>Print (in COLOR) the Beverage Value Program Verification form and the audit checklist.</p> <p>Print the Manager letter</p> <p>Take both documents with you to conduct your audit.</p> <p>Both documents are included in this guidelines document.</p>	<p>(1) one MEDIUM size fountain beverage only (any fountain beverage except Dr Pepper)</p> <p>No other items are to be included on your order or on the receipt.</p> <p>Order may be placed at drive through or inside counter at the choice of the auditor.</p>	<p>1. Maximum of three (3) total digital pictures of the Interior and exterior promotional materials. (See McDonald's audit checklist with pictures below).</p> <p>2. One (1) digital picture of the itemized receipt showing purchase of (1) MEDIUM Coca-Cola fountain drink (any except Dr Pepper)</p> <p>3. Beverage Value Program Verification form signed by store manager.</p>

Additional Requirements: Please ensure you meet this criteria and agree to the following prior to conducting your audit visit:

- You must be at least 21 years old
- You are not a current or former employee of McDonald's or any McDonald's competitor.
- You do not know or are not related to anyone who works for McDonald's or any McDonald's competitor.
- You are not a staff member, scheduler, or editor for a mystery shopping company other than Confero, without Confero's prior approval of your assignment for this project.
- All information about this assignment is to remain confidential. This includes the survey questions, guidelines, results and any other criteria. All findings reported by you are the property of Confero and may not be reported elsewhere.
- All shopper payments are issued via PayPal. For complete information about Confero's payment policy, please visit www.conferoinc.com/conferoinc/shoppers

Conducting the Audit:

- Enter the drive thru line and take **1 wide-angle photo of the drive-thru menu board**. See **Image #3** shown on the **McDonald's Audit Checklist**. The ONE photo must show the following 3 items: \$1 Soft drink, Cherry Berry Chiller, Blueberry Banana Nut Oatmeal & Menu Strip reflecting \$1 for all soft drink sizes.
- Order a Medium Soft Drink (any except Dr Pepper) so you may answer our question: "Were you charged \$1 for your Medium beverage purchase?"
 - If you choose to order inside, politely inform the drive thru employee you have decided to go inside to place your order.
 - If you choose to order at the drive thru, if there 2+ lanes open, go to the shortest line so you may accurately time the service time.

- An order of any Coca-Cola fountain beverage other than Dr. Pepper is acceptable. Example orders: “I would like a medium Coke” or “I would like a medium Sprite.”
 - If the employee offers asks if you would like any food items, DO NOT accept the offer.
 - Make sure you receive a receipt. It is required to validate your audit.
 - It is expected that your receipt will show a purchase price of \$1.00. If the receipt shows any other amount or size of beverage, explain on your online audit form. If your drink comes in a larger size cup or if you are offered a large at the same price, explain on the online audit form.
- ☺ After purchasing your beverage, please be sure to look for the images noted on the Program Verification form for the Interior Signs/Messaging. (*confirming that the \$1 Soft Drink sign, 20 piece Nugget sign, Cherry Berry Chiller sign and the menu strip reflecting \$1 for all soft drink sizes*).
 - ☺ Answer the questions on the printed Beverage Value Program Verification Form
 - ☺ Approach the counter, ask to speak to the manager on duty and show the manager the letter of authorization from McDonald’s USA. Allow the manager time to read the letter.
 - ☺ Politely ask the manager to review the Beverage Value Program Verification form and your answers with you.
 - ☺ Ask the manager to list his/her name on the form, sign and date the form. The manager must sign this form and return the form to you. The manager may make a copy of the form, however the original must be returned to you. The manager may keep the manager letter.
 - ☺ Ask the manager for permission to take an interior photo of the menu board. If the manager does not grant permission, thank the manager and leave without taking the photo.
 - **Take 1 wide-angle photo of the interior menu board Image #1.** This must show the following 4 images: \$1 Soft Drink sign, \$4.99 20 piece nuggets (price may or may not be shown), Cherry Berry Chiller and menu strip \$1 for all Soft Drinks.
 - **Take 1 wide-angle photo of the exterior signs/messaging Image #2.** Ensure the Exterior Banner, Readerboard (road sign) and Window Poster are visible in your photo.
 - ☺ Make sure all your photos came out clear before leaving the location. Our client will only accept clear photos. If the digital photos are blurry or unreadable, your audit will not be accepted and you will not be paid.

What to do if there is no drive thru at your assigned location. If you were assigned an audit at a **Mall, Wal-Mart or other non-traditional McDonald’s location (no drive thru)**, skip the exterior sections of this audit. Place your order for one (1) medium fountain beverage at the inside order counter. If the location does not have a drive thru, you must take the photo of the exterior window graphic. **VERY IMPORTANT!** You will also need to confirm that the Interior menu lists all soft drinks with the \$1 pricing. This is a question on your online survey that needs to be answered correctly (either yes or no).

Reporting Your Audit Findings:

Submit your online survey responses and upload your validation to the online survey (digital photos and itemized receipt) the **same day** as your audit visit. Upload each item (receipt and signed audit form) separately. Audits must include validated to be accepted and paid.

To upload, click on the “Upload Picture” link on your audit survey. Browse for the file of your receipt or other photos and click “Upload Image File.” Check the uploaded file. If you cannot read it, then we cannot read it.

Provide comments about your audit experience. Your comments must support survey answers, and must be written in complete, grammatically correct sentences using sentence case (upper and lower case letters). Comments must be original. Each audit is expected to be unique so cutting and pasting answers between audit reports is NOT ACCEPTABLE. Report on facts as you observed them during your visit as they relate to your order placement interaction and the point of sale materials you were looking for. Do not report on your opinions. If you are conducting more than one audit in one day, take every precaution to ensure information is not confused between locations and audits. **If the wrong information is reported into any audit reports, all reports from an auditor on that particular day will not be accepted by our client and will not be paid.**

If you have any questions or concerns about your assignment, about what happened during your audits, about an employee of the store, contact the program scheduler immediately. To do this, from your Shop Log, click on the ‘Help/Contact’ link.

The Audit checklist (showing pictures of the items you are to take photos of during the audit), the Beverage Value Program Verification form and the Letter of Authorization will be attached to the official guidelines for any audit you are assigned.