Data Work Standards: Definition of Done, QA & Audit

The working standard my team uses to prepare, submit, and audit bulk system changes (prices, services, promotions) that an outside vendor enters across ~750 locations.

Audience: My systems team: the specialists who prepare vendor requests and audit the results

Purpose: One shared, written standard so quality doesn't depend on who did the work

Format: Internal how-to (living document): specs, a QA checklist, and a step-by-step audit procedure

Real document, anonymized: brand, vendor, and people names replaced; links and prices removed; lightly trimmed for length.

What to notice

- Quality is built in before submission (Definition of Done, self-QA), not only inspected afterward.
- Audit depth scales with risk: 100% for recurring billing, ~20% random for manual checks, and deeper when errors appear.
- Escalation rules are explicit: report errors fast, document instead of fixing, and never alter the original submission.

Definition of Done: Data Sheet

- All text is set to Century Gothic 10pt. First row locked in place, bold, centered, wrapped.
- Column headers match closely to columns in data dumps OR fields in the platform (ask if you need help deciding).
- Any dollar value column is set to "Number" format. Please do not use "$" or Accounting/Financial options.
- For changes to any existing service, required columns: ID, Product Name/Description, Service Category, Revenue Category, Active.
- Changes specific to individual locations must include Site ID and Location Name.
- Updates: highlight cells with changes in Light Orange 3, if not readily apparent. This helps the vendor's data team quickly focus on the requested updates.
- Major callouts: highlight cells the data team needs to pay close attention to (e.g., "ID created in task x") in Light Yellow 3.
- New items: do not include a Product ID column (it's only there for updates).
- More specs to come over time. There are many, but these are the basics to start with.

Sample QA Checklist

List items will vary by individual; we'll have a shared doc per person with your specific list items. Before marking any task "Ready for Review," I confirm:

- I checked my work against the Spec Guide (Definition of Done)
- All required fields are filled out correctly (no blanks, no placeholders)
- Formatting matches standards exactly (names, structure, labels, etc.)
- Data is correct and aligned to source (no mismatches)
- No duplicate, missing, or extra entries
- Any formulas or logic have been tested and return expected results
- If this impacts downstream work, I validated those dependencies

If any of the above are not true, the task is not ready for review.

Auditing Data Work

Context: When data projects are completed, we check the vendor's work to ensure proper entry. Typically, a 20% random sample is examined for manual/visual audits, but when using a SQL query, all rows should be confirmed accurate. For price changes affecting autopays, every autopay must be audited.

Notes about timing and escalation:

- If working on a same-day audit, please be aware of the time, and keep the team updated.
- Audits for price changes are extremely sensitive and should be handled as early as possible to ensure accuracy.
- Errors (or suspected errors) must be reported rapidly, not held until the end of the audit. Use judgment: small things are less pressing, but anything the vendor needs to fix should be communicated immediately.

Steps (when the vendor's "Data Work Complete" email arrives):

1. Using the monthly Data Work sheet, locate and fully review the project summary and details.
2. Copy the request detail tab to your Audit sheet.

- For an "all locations" project, add a second tab with the brand's open-locations list as your audit list.
- For a project with specific rows (by product ID, location, etc.), use the request detail sheet.

3. In the Audit sheet, add an "Audit" column with checkboxes.
4. Select a random 20% sample of rows or locations.

- Please make sure it's actually random. If the request contains multiple items/values, make sure we're checking as many as possible and not just going from the top of the sheet.

5. Check each entry, using the request and opt-ins or other primary sources to determine whether it is exactly as requested.
6. Provide validation screenshots: show your work in a way that can be reviewed quickly.
7. If there are errors:

- Notify the team lead ASAP (depending on severity/impact).
- Please do not make changes. Document the error(s) clearly, in a way that makes evaluation and approval of your recommendation as direct as possible (I shouldn't have to leave the sheet to make the decision). If it's the same error on every row, two or three rows is fine.
- Vendor error: reply to the completion email with documentation to request adjustment. Our error: we'll game-plan a solution together.
- Once adjustments are made, repeat the process to confirm accuracy.

8. If the entry is accurate, check off each item and screenshot one correctly completed item per type/location. Confirm to the vendor in writing (a contract requirement to complete the job).
9. Mark the audit complete in the monthly tracker and link the audit sheet; check "Audit Pass" when accurate.

Best practices:

- Never change a data work submission sheet after submission. Always use a separate sheet for audits.
- Audits should be clear enough for anyone to be able to review and understand your process.
- Autopays must be 100% audited, every single time.
- If using a next-day data export, a 100% audit is appropriate and should be done. If the 20% sample finds errors, a deeper audit is needed.
- All new member pricing and retail items get their membership restriction and discount settings audited manually, every time, even with a full export. These are very frequently missed areas.

Rollout Guide: Digital Intake Forms, Tablets & Apps

Excerpts from a full implementation guide for moving locations from paper intake forms to digital forms on secured tablets, with separate apps for front-desk and service staff.

Audience: Location owners, managers, front-desk teams, and service providers

Purpose: Launch a new digital workflow with role-based training, a staged rollout, and fewer support tickets

Format: Tabbed guide (~40 pages) with FAQs, role-based how-tos, a rollout timeline, and 5 appendices; 3 excerpts shown

Real document, anonymized: brand, vendor, and people names replaced; links and prices removed; lightly trimmed for length.

What to notice

- Why before how: the guide opens with the security and client-experience reasons for the change, not the button clicks.
- A dated, step-by-step rollout puts training and testing before go-live, including role-play with the team.
- It teaches locations how to get good support: what details to include, where to send each kind of issue, and how to treat the person helping them.

From the cover: “Please keep in mind that we take feedback into account, so things change over time. We do our best to keep our guides up-to-date, but some wording, screens, and other examples may look a little different. If you find that it’s drastically different, please send a ticket with a link to this page, and the Support Center will review and update as soon as possible.”

Excerpt A · Why do we need tablets?

Security

- Device-management software limits outside app usage (social media, entertainment, or other personal apps), keeping staff usage focused on business needs.
- It also helps protect guests’ PII (personally identifiable information), a requirement for PCI compliance.
- Keeping guest data off staff’s personal devices reduces the risk of PCI non-compliance as well as the risk of data being used for personal purposes (e.g., contacting clients outside the business).
- Managing intake forms digitally prevents PII from being stored through an unsecured method (paper, scanning, then shredding).

Core procedures

- Intake forms must be reviewed by the service provider through the Team App, and the provider must sign to indicate they’re aware of contraindications. The Team App is the only way to obtain provider sign-off.
- Service notes are much easier to enter through the Team App. An automated form guides the provider through each service and creates the note in the format needed for reporting.
- The Intake Forms App lets in-location guests complete the form without front-desk data entry, scanning, shredding, or document storage. (It will save you money on paper, too!)

Excerpt B · Implementation steps & timeline

Step	Action	When
1	Review this guide	At least 3 weeks before Automation Live Date
2	Purchase, set up and install tablets	At least 3 weeks before Automation Live Date
3	Learn digital form operations	2 weeks before Automation Live Date
4	Set up and learn the Team App	2 weeks before Automation Live Date
5	Train staff	1–2 weeks before Automation Live Date
6	Final checks and testing	1–2 days before and after go-live

- Each location has two rollout dates: one for the dashboard module and one for the automations. The dashboard activates about two weeks early so you and your staff can test and get familiar with the system before automations begin.
- Between the two dates, you are encouraged to send test forms to your staff, to better understand the process.
- Train Your Staff: it is strongly recommended that you have team members try out the digital intake form themselves, so they can understand the guest experience. Then role-play the new process with the tablets.

Excerpt C · Tips for the best support results

When should I contact the software vendor vs. the Support Center?

- Bugs: reach out to the vendor if you have referred to documentation that states that something should work in one way, and it is not working in that way. They can check logs and back-end data and involve developers if needed.
- Training, feedback, questions: if you're having trouble understanding the guidance, want to share feedback about how something should work, or have questions, contact the Support Center through the Help Center.

To troubleshoot, any support team will typically need to recreate the problem themselves. It is critical to provide specific examples of:

- Guest or staff profile: name and email address
- Who was logged in
- Which system or app was being used
- What happened and what should have happened
- What you were doing just before the error
- Whether this happened once or is recurring
- Whether it affects one record or all records; include specific examples
- Location name and site ID
- Approximate date and time
- Screenshots or videos showing the full screen

Finally, a gentle reminder that the person on the other end is there to help you! You might be frustrated, and Support wants to partner with you to find a solution. "Hello," "please," "thank you," and other niceties often make a world of difference with support reps!

Case Studies

AI-assisted request drafting

Current role · five brands · approximately 750 locations

Situation. Each loosely worded request required rebuilding intake checks, business rules and data files by hand.

Approach. Documented company standards, brand facts and recurring request patterns. Built an AI-assisted process that uses specifications, descriptions and source data to create data-work files and vendor requests. Missing information becomes a question; drafts pass the Definition of Done, leader approval and the standard audit.

Outcome. Used for four brandwide price changes and the largest annual holiday gift-card promotion, saving an estimated week of work in one month. Preparation shifted toward reviewing and approving; the underlying documentation also trains new team members.

300K-record billing migration

CorePower Yoga · 2015–2021 · approximately 10,000 interactions per week

Situation. Customer billing moved to new database software while the support team continued daily operations.

Approach. Consulted on software customization and managed migration of more than 300,000 billing records. Applied the approach to data and membership transitions for four acquired locations, leading the team through customer-facing changes.

Outcome. Billing moved to the new system while support remained operational, with a reusable approach for later acquisitions.

E-commerce launch and team readiness

CorePower Yoga · team of 35, including five managers

Situation. A new e-commerce platform introduced chatbot and live chat channels; the team needed to be ready at launch.

Approach. Directed the customer experience workstream, wrote chatbot and live-chat scripts, and trained the team. Built on experience leading customer service and billing implementation for an on-demand video launch, recognized with the Team Player award.

Outcome. Support launched with documented scripts and trained staff; the playbook carried forward to later rollouts.