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.