



# RBG QA and Scoring Guide

To provide quality assurance for all Surveys by editing shoppers' answers and scoring shoppers' feeds against criteria built into each Survey.

Scoring is the last quality assurance checkpoint before Surveys are delivered to RBG clients.



- Scoring and Finalizing Surveys for assigned clients, includes, but is not limited to:
  - Verifying the correct location and that all Guidelines were followed
  - Ensuring consistency between the narrative and question portions of a Survey
  - Ensuring proper spelling, grammar, etc.
  - Removing/editing subjective and/or improper descriptions/opinions
  - Scoring the recorded based on Guideline criteria



## Scoring Responsibilities

Scorers are measured on client turn time and accuracy for written shops, therefore Surveys should be scored and finalized **within turn time for the shop date** (**NOT** the date listed under “Due” in our system).



Scoring KPI's

- There are a few clients that are shared among multiple scorers. Priority for scoring these Surveys is based on the shop date. Once a scorer clicks “Review”, that scorer is now digitally assigned to that shop and is held responsible for scoring (i.e., no cherry-picking shops). If another scorer is already working on a Survey, a warning window will pop up letting you know that someone else is currently reviewing that Survey. Close the pop-up window and browser tab for that Survey and **do not change anything**.
- As new opportunities/assignments become available, an email will be sent describing the client, the frequency of shops and the pay per shop. Upon acceptance of a new assignment, the Scorer is responsible for downloading the Guidelines to become familiar with what is expected for that shop.



**Surveys/Shops:** The reports submitted by shoppers for review by scorers.

**Narrative:** Written responses from shoppers, found in text boxes throughout the survey.

**Guidelines:** The instructions/script to shoppers on how to conduct the shop.

**QA Scorer Guidelines:** Scorer instructions in a teal green box at the top of a Survey.

**Completed:** our system status of Surveys that are ready to score.

**Incomplete:** our system status of Surveys that require more work by the shopper.

**Reviewed:** our system status of Surveys that require investigation by the CSM.

**CSM:** Customer Success Manager (account manager) at RBG.



**STEP 1:** GO TO the [our system Login Page](#) and **CLICK** *Admin Login*.

**STEP 2:** ENTER *Login Name & Password* provided by RBG, then click *Go*.

**STEP 3:** **CLICK** *Logs* (located at the top of the screen).

The screenshot shows the RBG logo at the top center. Below it are four dark grey buttons: 'Shopper Login', 'New Shopper Signup', 'Company Login', and 'Admin Login'. An arrow labeled 'STEP 1' points to the 'Admin Login' button. To the right is the 'ADMINISTRATOR LOG IN' section with 'Login Name:' and 'Password:' labels, each followed by a text input field. Below these fields is a dark grey 'Go' button. An arrow labeled 'STEP 2' points to the 'Go' button.

The screenshot shows the top navigation bar of the RBG system. It includes the RBG logo on the left. In the center, there are navigation links: 'Admin', 'Logs', 'Review', 'Scheduler', 'Help', and 'Logout'. The 'Logs' link is circled in blue, and a blue arrow labeled 'STEP 3' points to it. On the right side, there is a user status indicator: 'Main Admin Page: AllClients' and 'user: Maureen Ops Cross'.

STEP 3



# Getting Started in our system

STEP 1 → Survey:  filter menu  >

Business Type:

ID #	Dates	Location	Shopper	Status	Last Update	STEP 4
Search <input type="text"/>	Start <input type="text" value="1"/> <input type="text" value="1"/> <input type="text" value="17"/> End <input type="text" value="12"/> <input type="text" value="31"/> <input type="text" value="17"/> Also Show <input type="text" value="Shop"/>	ID <input type="text"/> Name <input type="text"/> State <input type="text" value="All"/> Lev/Grp <input type="text"/> -- Region -- <input type="text"/> Wave <input type="text" value="-- Waves --"/> <input type="checkbox"/> Display City/Zip	Shopper Last Name <input type="text"/>	Show status <input type="text" value="Hold B"/> <input type="checkbox"/> Hide Kiosk		
STEP 3						
▲ ▼	Due ▲ ▼ Shop ▲ ▼ Report ▲ ▼	Survey ▲ ▼ ID ▲ ▼ Location ▲ ▼	▲ ▼	▲ ▼	▲ ▼	

**STEP 1:** SELECT *All* or a specific survey form or client [for this example it'll be *Stripes: ALL*] using the drop down menu under “Survey”.

**STEP 2:** SELECT *Hold B* using the drop down menu under “Show Status”.

**STEP 3:** SELECT *Shop* using the drop down menu adjacent to “Also Show”.

**STEP 4:** CLICK the green *GO* button.



Running the “Hold B” Report, Sorting by Date

STEP 5



STEP 6



Survey: Stripes: All filter menu >

Business Type:

ID #	Dates			Location	Shopper	Status	Last Update	
Search <input type="text"/>	Start <input type="text" value="1"/> <input type="text" value="1"/> <input type="text" value="17"/>			ID <input type="text"/> Name <input type="text"/>	Shopper Last Name <input type="text"/>	Show status <input type="text" value="Hold B"/>		
	End <input type="text" value="12"/> <input type="text" value="31"/> <input type="text" value="17"/>			State <input type="text" value="All"/>		<input type="checkbox"/> Hide Kiosk		
	Also Show <input type="text" value="Shop"/>			Lev/Grp <input type="text"/>				
				-- Region -- <input type="text"/>				
				Wave <input type="text"/>				
				-- Waves -- <input type="text"/>				
				<input type="checkbox"/> Display City/Zip				
<input type="text"/>	Due <input type="text"/>	Shop <input type="text"/>	Report <input type="text"/>	Survey <input type="text"/> ID <input type="text"/> Location <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
1731524	05/13/17	05/13/17	05/16/17	Mystery Shop Evaluation Video 5134 Stripes-5134 (TX US)	*kioskShopper	Hold B	2017-05-19 17:34:10	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Events</a>
1731527	05/13/17	05/13/17	05/16/17	Mystery Shop Evaluation Video 2274 Stripes-2274 (TX US)	*kioskShopper	Hold B	2017-05-19 17:34:10	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Events</a>
1731529	05/13/17	05/13/17	05/16/17	Mystery Shop Evaluation Video 2565 Stripes-2565 (TX US)	*kioskShopper	Hold B	2017-05-19 17:34:10	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Events</a>
1731530	05/13/17	05/13/17	05/16/17	Mystery Shop Evaluation Video 5114 Stripes-5114 (TX US)	*kioskShopper	Hold B	2017-05-19 17:34:10	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Events</a>
1731534	05/13/17	05/13/17	05/16/17	Mystery Shop Evaluation Video 9142 Stripes-9142 (TX US)	*kioskShopper	Hold B	2017-05-19 17:34:10	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Events</a>
1731089	05/14/17	05/14/17	05/15/17	Mystery Shop Evaluation Video 1043 Stripes-1043 (TX US)	*kioskShopper	Hold B	2017-05-19 17:34:10	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Events</a>
1731512	05/14/17	05/14/17	05/16/17	Mystery Shop Evaluation Video 9673 Stripes-9673 (TX US)	*kioskShopper	Hold B	2017-05-19 17:34:10	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Events</a>
1731513	05/14/17	05/14/17	05/16/17	Mystery Shop Evaluation Video 2156 Stripes-2156 (TX US)	*kioskShopper	Hold B	2017-05-19 17:34:10	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Events</a>

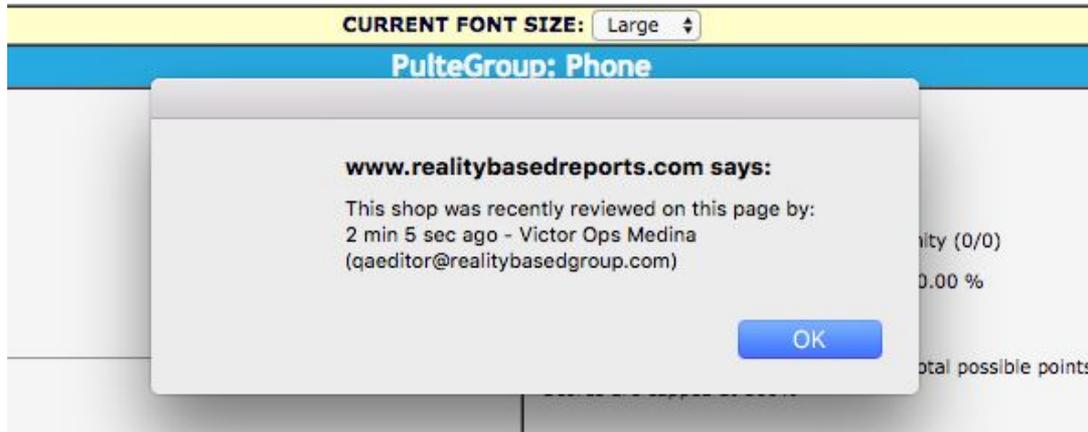
**NOTE:** When you click on "Review", the color of the survey, as it appears in the logs, will change color from yellow/white to red. Red indicates that another scorer is addressing the survey.

- STEP 5:** CLICK the up arrow on the shop date column to **sort** from oldest to newest.
- STEP 6:** CLICK Review to open the Survey in a new window.



# Running the "Hold B" Report, Sorting by Date

This shop was recently reviewed on this page by:  
2 min 5 sec ago - Victor Ops Medina (qaeditor@realitybasedgroup.com)



**NOTE:** *If another Scorer is already scoring a Survey when you open it, this pop-up and warning message will appear. Close the Survey window immediately without scoring.*



Running the “Hold B” Report, Sorting by Date

The screenshot shows a survey management interface with the following elements:

- STEP 1:** A dropdown menu at the top left set to "Survey: All".
- STEP 2:** A search box under the "ID #" column containing the value "1729322".
- STEP 3:** A dropdown menu under the "Status" column set to "Show status".
- STEP 4:** A dropdown menu under the "Also Show" column set to "Shop".
- STEP 5:** A circular "GO" button on the right side of the table.

ID #	Dates	Location	Shopper	Status	Last Update	
Search 1729322	Start 1 1 17 End 12 31 17 Also Show Shop	ID Name State All Display City/Zip	Shopper Last Name	Show status Hide Kiosk		GO
▲ ▼	Due ▲ ▼ hop ▲ ▼ Report ▲ ▼	Survey ▲ ▼ ID ▲ ▼ Location ▲ ▼	▲ ▼	▲ ▼	▲ ▼	
1729322	05/09/17 05/09/17 05/10/17	Stripes: Mystery Shop Evaluation Video 1520 Stripes-1520 (TX US)	*kioskShopper	Finalized	2017-05-18 00:00:23	<a href="#">Review</a> <a href="#">Edit</a> <a href="#">View Events</a>

**STEP 1:** SELECT *All* using the drop down menu under “Survey.”

**STEP 2:** ENTER the *our system ID* in the search box under “ID #.”

**STEP 3:** SELECT nothing in the drop menu under “Show Status”

**STEP 4:** SELECT *Shop* in the drop menu under “Also Show”

**STEP 5:** CLICK *Go*



# Locating a Specific Survey

**CLICK** *Download Guidelines* to familiarize yourself with the instructions that were given to the shopper.  
**READ** any Scoring Notes (in the purple box). These are Survey-specific notes to be aware of as you score the shop.



## Scoring a Survey

Stripes-2229 - 2229

9219 FM 1472 (Mines Road)

Laredo TX 78045 US

(956) 523-0592

Location: 2229 (ref#104339 - 2229 2229)

Area: 415 Efrain Trevino (Efrain Trevino)

Market Manager: MN 400 (Market 400)

Region: Region 400 Mario Mungia (Mario Mungia)

Group: Stripes/LTC

[Click here](#) if manager information is not correct.

Shop Date: 05/15/2017

Hours: --

Days of the week: --

Due Date: 05/15/2017

Submission Date: 05/15/2017

Submission Due Date: 05/15/2017

Reporting Date: 05/16/2017

Shopper #1620: \*kioskShopper

Shop Ref#: 1731509

[Download Guidelines](#)

75%:Overall Score (71/95)

80%: Clean &amp; Safe (33/41)

100%: Fresh &amp; Delicious (12/12)

62%: Fast &amp; Friendly (26/42)

37%: LTC (7/19)

---: GamePlan (0/0)

Location Avg Y2017 (5 shops): 78.00 %

Survey Avg Y2017 (3513 shops): 80.16 %

\* N/A answers are omitted from scoring (total possible points will vary from shop to shop)

Click to open the Shopper Guidelines



There is a Rulez Set for this survey.

Are you able to Rulez for this shop? 

Spell Check All

 Include text answers**Notes for Scoring**[Scoring Issues Form Link](#) for scoring, video or shopper questions[Calibration Document Link](#) for specific answer reference

- Confirm address read aloud at end of video to address on survey
- Shoppers should state ONLY negative, specific observations. EX. "Trash on the floor by trashcan," "drink spill on the counter," or "Salsa spilt on the edges"
- 3 Questions use "All the above". Confirm if all choices selected, "All the above" must be checked. IF "All the above" is selected, all choices must be selected (should auto populate).
- If equipment cannot be seen accurately on camera AND no shopper audio, score stock as N/A (no more than 3 per shop)
- Shoppers are encouraged to take upsell at store register, but not required
- LTC timing: if taco collected at register, measure time from when the shopper gets in line to when they are finished giving order and step out of line
- Timestamp questions: ONLY change minutes and seconds NOT hours or am/pm. These times are used like a stopwatch, not a clock
- Was the guest verbally acknowledged by all team members they came within 10 feet of? Only scored as to what is seen on video. Mark N/A if the only associates are behind register (not on the floor)
- Was the guest able to pay at the pump? Yes if they pay at the pump, No if there is an out of order sign, N/A if there is an "error" message
- Was the Laredo Taco Company open during its posted hours? should be n/a if no posted hours, yes if open/closed according to schedule, no if they break the posted hours
- Associates are allowed to wear shorts or capris during the summer, until the day after Labor Day.
- Editing notes: Reflections of shoppers are NOT edited out; videos cut door to door with bathroom footage removed



# Scoring a Survey

[Upload picture](#)



Delete picture

Click on image to enlarge



Verify the address

**Stripes-2156 - 2156**  
4218 South McColl  
Edinburg TX 78539-8260 US  
(956) 994-0879  
Location: 2156 (ref#87280 - 2156 2156)  
Area: 306 Gerardo Espronceda (Gerardo Espronceda)  
Market Manager: MM 300 Ruben Perez (Ruben Perez)  
Region: Region 300 Gerry Gonzalez (Gerry Gonzalez)  
Group: Stripes/LTC

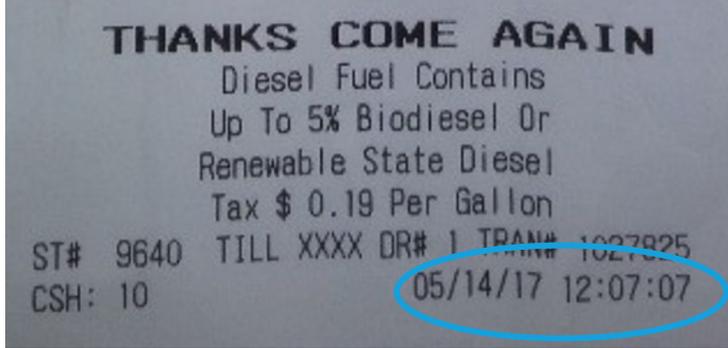
[Click here](#) if manager information is not correct

**VERIFY** address, date, and time against the receipt image and/or phone call attached to the Survey.

**NOTE:** All receipt images **MUST** be clear and upright; rotate if needed and **CLICK** Save. PDFs can only be rotated in your PDF viewer; no need to save.



# Scoring a Survey

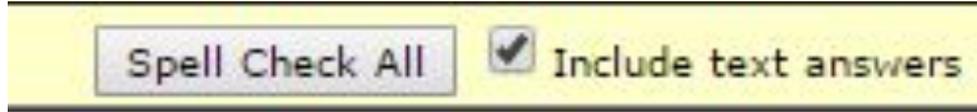


Verify date and time.

Date evaluation performed:	5/14/2017 <input type="text" value="15"/> <a href="#">Clear Answer</a>
Time of shop:	12 : 01 <input type="radio"/> AM <input checked="" type="radio"/> PM
(Date) During which time of day did the evaluation occur?	Day (10:30 am-4:00 pm)
(Date) During which day of the week did the evaluation occur?	<input checked="" type="radio"/> Sunday <input type="radio"/> Monday <input type="radio"/> Tuesday <input type="radio"/> Wednesday <input type="radio"/> Thursday <input type="radio"/> Friday <input type="radio"/> Saturday



# Scoring a Survey



**CLICK** *Spell Check All* to scan the entire document for spelling errors. This does not identify wrong words, e.g., “form” when they meant “from.”



Scorer Info		
Date Finalized		5/17/2017  <a href="#">Clear Answer</a>
Scorer Last Name		Steelman
Highlight: Include any excellent interactions with brief description and time stamp.		

STEP 1

STEP 2

Under *Scorer Info*...

**STEP 1: ENTER** the date you Finalized the survey.

**STEP 2: ENTER** your last name.



STEP 3

STEP 4

STEP 5

REVIEWER CONTROLS

\* SHOP STATUS: Finalized (dropdown) Reviewed By: [ ] Finalized By: GS (text input)

Reviewer	Status	Date/Time
Greg Ops Steelman	Finalized	05-17-2017 2:16:15 pm

\* EVENT LOG: [view all 3 events](#) Last Event: Review (Greg Ops Steelman) 05/17/2017 at 2:16 PM EST

\* SHOPPER GRADE: (dropdown) \* SHOPPER PAY:  Shop is available for payment

\* SHOPPER COMMENTS

FROM: [online@realitybasedreports.com] (text input)  
 REPLY-TO: [qaeditor@realitybasedgroup.com] (reviewer's email) (text input)  
 TO : testshopper456@sassieshop.com (text input)

Comments to shopper: (dropdown menu)  
 -- Choose from predefined comments and/or enter other comments below --

[ ] (text input)

Send comments and grade to shopper  
 Send only comments to shopper  
 Don't send anything to shopper

\* ADD PRIVATE COMMENT to shopper record (not visible to shopper) [view shopper's log](#)

[ ] (text input)

\* ADD A SHOPPER CITATION to shopper's record

\* EMAIL a link to this shop to:

[ ] (email address 1) (text input)  
 [ ] (email address 2) (text input)

Send score-triggered email if applicable  
 Send email to selected manager types (manager triggers)  
 Send PDF attachment to selected manager types (PDFs emailed nightly)

Shop Set Up | Company View | Shopper's Edit View | Clone Shop | Dump Mode

UPDATE SURVEY

Under Reviewer Controls...

**STEP 3:** SELECT *Finalized* as the Shop Status.

**STEP 4:** ENTER your initials in Finalized By.

**STEP 5:** CLICK on Update Survey



# Finalizing a Survey

In some cases you may not be able to finalize a Survey and you need someone at RBG to Review it before you proceed. When this occurs you can change the status to *Reviewed*. Before sending the Survey to *Reviewed*, complete and submit a Scoring Issue form. Note in the comment box that a Scoring Issue form was submitted. Once the issue has been resolved by the appropriate personnel, an email will be sent to you in response to the form you submitted letting you know how to proceed with the survey.



## Sending Surveys to Reviewed

[support@realitybasedgroup.com](mailto:support@realitybasedgroup.com)

**Subject: Client - Shopper - Behavior/Script/Editing**

**For example:**

**Subject: Stripes: R. Sow - Behavior**

*In the body of the email*

Client:

Scorer Last Name:

Shopper:

Shop ID:

Description of the Issue:

**STEP 1: SUBMIT** a completed scoring issue mailer.

Use this template.



# Sending Surveys to Reviewed

**STEP 3**

\* SHOP STATUS: Reviewed (dropdown) Reviewed By: GS (text input)

\* REVIEW HISTORY DETAILS

Reviewer	Status	Date/Time
Last Event : Review (Max Cole 05/19/2017 at 5:34 PM EST)		

\* EVENT LOG: [view all 2 events](#)

\* SHOPPER GRADE: (dropdown)

\* SHOPPER PAY:  Shop is available for payment

**STEP 2**

FROM: [online@realitybasedreports.com] (reviewer's email)  
 REPLY-TO: [qaeditor@realitybasedgroup.com] (reviewer's email)  
 TO : testshopper456@sassieshop.com

Comments to shopper  
 -- Choose from predefined comments and/or enter other comments below -- (dropdown)

5/22 GS - The shopper did not verbalize the expiration dates. Submitted a Scoring Issue. (text input)

Send comments and grade to shopper  
 Send only comments to shopper  
 Don't send anything to shopper

\* ADD PRIVATE COMMENT to shopper record (not visible to shopper) [view shopper's log](#)

(text input)

\* ADD A SHOPPER CITATION to shopper's record

\* EMAIL a link to this shop to:

(email address 1) (text input)  
 (email address 2) (text input)

Send score-triggered email if applicable  
 Send email to selected manager types (manager triggers)  
 Send PDF attachment to selected manager types (PDFs emailed nightly)

Shop Set Up Company View Shopper's Edit View Clone Shop  Dump Mode

UPDATE SURVEY

**STEP 2:** SELECT *Reviewed* as the Shop Status.

**STEP 3:** ADD your initials in Reviewed By.

**STEP 4:** ENTER your comments/questions in the comments section. Include the date and your initials (e.g., "5/22 GS - The shopper did not verbalize the expiration dates. Submitted a Scoring Issue.").

**STEP 5:** CLICK *Update Survey*.



# Sending Surveys to Reviewed

You're Ready to Score!



Congratulations