

# Standard Operating Procedure

Refund Requests	
<b>Department</b>	Customer Experience
<b>Date Effective</b>	February 2026
<b>Version</b>	1.0

## Purpose

This document provides guidance on how the Customer Experience team should handle refund requests from [Company Name] customers. It explains the refund policy, outlines how refund decisions are made, explains the escalation process, and gives the Customer Experience team the tools they need to adequately address refund requests.

## Scope

This SOP applies to all Customer Experience team members who handle refund requests for products ordered through [Company Name]'s US websites.

## Roles & Responsibilities

Role	Responsibilities
Customer Experience Associate	<ul style="list-style-type: none"><li>● Field all incoming customer refund requests</li><li>● Determine refund eligibility</li><li>● Handle customer contact as detailed in this SOP document</li></ul>
Customer Experience Supervisor/Team Lead	<ul style="list-style-type: none"><li>● Field Customer Experience Associate questions about refund eligibility</li><li>● Address minor edge cases</li><li>● Review refund requests cases in the "Refund Requests" queue and issue refunds</li><li>● Address low level escalated refund requests</li></ul>
Customer Experience Manager	<ul style="list-style-type: none"><li>● Offer refund eligibility guidance to the Customer Experience Supervisor when needed</li><li>● Address major edge cases</li><li>● Address high level escalations</li></ul>

## Refund Policy

Due to the nature of our products, we don't accept returns. That said, there are situations where we can issue a refund. Refunds for shipped orders do not include shipping fees.

Refunds can be issued when one of the following is true.

- Product is damaged in transit
- Product is lost in transit
- Customer asks to cancel the order before it ships
- Customer qualifies for refund under the Money Back Guarantee (MBG)

## Customer Asks to Cancel the Order Before It Ships

If a customer's order has not shipped, they can request that we cancel the order and issue them a full refund.

## Product Is Damaged in Transit

If the customer's product is damaged in transit, we can provide them with a replacement or a refund. We cannot provide both. In order for a customer to receive their replacement or refund, the customer must provide us with the following items within 14 days of receiving the order.

- Photos of the damage
- The lot number (usually located on the bottom of the bottle)
- Statement of the desire for a replacement OR a refund

## Product Is Lost in Transit

An order is considered lost if it is not delivered to the shipping address we had on file at the time of shipment, or it's returned to us within 14 days of the shipping date. Orders reported as delivered by the carrier are not considered lost. Once the customer notifies us that their order is lost, we can provide them with a replacement or a refund. We can not provide both.

## Customer Qualifies for a Refund Under the MBG

Customers can qualify for a refund if they meet the terms of our MBG. To meet the terms of the MBG all of the following must be true:

1. It's the customer's first-time purchasing the product.
2. They've taken the product for the entire trial period (see table below).
3. They contact us to request a refund within 14 days of the end of the trial period.

**Note:** For products other than Glucose Control, the trial period begins on the date that the customer receives their first order, and the trial period ends 30 days after they receive their first order. The trial period for Glucose Control still begins on the date that the customer receives their first order, but the trial period doesn't end until 90 days after they receive their first order.

Product Name	Trial Period	Required Usage
[Company Name] Glucose Control	90 Days	Twice daily for 90 consecutive days (requires 3 bottles)
[Company Name] Akkermansia	30 Days	Once daily for 30 consecutive days
[Company Name] Metabolic Daily	30 Days	Once daily for 30 consecutive days
[Company Name] GLP-1 Probiotic	30 Days	Once daily for 30 consecutive days
[Company Name] Polyphenol Booster	30 Days	Once daily for 30 consecutive days

## Customer Is Ineligible for a Refund

Orders that meet any of the following conditions are ineligible for a refund.

- The product was purchased then forwarded to an address outside of our current shipping area.
- The product was purchased with a shipping address outside of the United States (and associated territories).
- The product shipped as part of a membership that was canceled after the customer was charged.
- The product was part of a wholesale transaction/order.

## Processing a Refund Request

This section explains the process for handling incoming refund requests, and explains how to handle edge cases and escalations.

**Note:** Customer Experience Associates cannot directly issue refunds. All eligible refund requests must be transferred to the "Refund Requests" queue. A supervisor/team lead will issue the refund and return the case to you so that you can follow up with the customer.

### Determine Refund Eligibility

Each refund request must be reviewed to determine if it meets the eligibility requirements detailed under the [Refund Policy](#) section. Once you've determined eligibility, you'll follow the instructions below to resolve the case.

#### Eligible

1. Confirm refund eligibility.
  - a. If the refund request was made due to lost or damaged product, ensure that the customer has provided all of the required documentation.
  - b. If the refund request was made under the MBG politely ask the customer why they were dissatisfied with the product. *This is not mandatory, but it's helpful information to have.*
2. Verify that the case contains all of the necessary information, then assign it to the "Refund Requests" queue.
3. After the refund is processed and the case is returned to you, send the "Refund Eligible" template to the customer.
  - a. Make sure that you personalize the template where needed.
4. Close the case.

#### Ineligible

1. Confirm that the order is ineligible for a refund.
2. Send the "Refund Ineligible" template to the customer. Make sure that you thoroughly explain why the order isn't qualified for a refund using a warm yet professional tone.
3. Close the case.

## Missing Information

1. Review the case to confirm that the missing information is not available. You should also look for additional tickets from the customer to make sure they didn't send the necessary information in another ticket.
2. After you confirm that the information is missing, send the "Missing Required Information" template. Make sure that you customize the email so that you are only asking for information the customer hasn't provided.
3. Once you have the information you need, process the refund request per the process outlined in this document.

## Edge Case

Occasionally there will be refund requests that aren't clearly eligible or ineligible. These edge cases require some additional steps to ensure our customers are provided with the best possible experience while still respecting our business needs.

- If the customer makes a request within 3 days of the refund request cut-off date, use your best judgement. You should take things like customer purchase history and refund request history into account when making a decision. If you're not comfortable making a decision, reach out to a supervisor or manager.
- If an edge case meets any of the following conditions, you must consult a supervisor or manager.
  - The request falls outside the 3-day grace window
  - The situation involves unusual circumstances not covered by standard policy
  - The customer is disputing the decision with strong objections
  - You are unsure how to proceed
  - The customer requests to speak with a manager and can't be talked down

## Escalation

If your discussion determines the need for a formal escalation, take the steps outlined below.

1. Notify the customer that their request has been escalated by sending the "Escalated to Manager" template.
2. Add all relevant information (call notes, screenshots, emails, chat logs, pictures, etc) to the case.
3. Assign the case to your supervisor or manager.

## Customer Communication Templates

**Note:** People are often angry or frustrated when they're denied a refund. These negative feelings are often the result of the customer not feeling seen, heard, or valued. Long term customers may feel that we don't value their business if we deny their refund request. On the other hand, new customers may feel deceived if we deny a refund because they don't meet the terms outlined in our Terms and Conditions. We can help relieve some of these negative feelings by employing kindness and warmth when clearly explaining our policies.

### Refund Eligible

**Subject:** Your Refund Request for Order #[Order Number]

Hi [Customer Name],

Thanks for reaching out! Your refund for Order #[order number] was processed on [Refund Issued Date]. Please allow 7-10 business days for the funds to reflect in your account,

This should do it, but if you have any other questions, feel free to reach out. We're always happy to help!

Best,  
[Your Name]  
[Company Name] Customer Care

## Refund Ineligible

**Subject:** Update on Your Refund Request - Order #[Order Number]

Hi [Customer Name],

Thank you for reaching out about your order. We've reviewed your request, and unfortunately Order #[Order Number] does not qualify for a refund due to not meeting the terms for [our Money Back Guarantee, lost shipment policy, damaged product policy].

You can view our full refund policy here in our [Terms & Conditions](#). We appreciate your understanding, and please let us know if you have any other questions.

Best,  
[Your Name]  
[Company Name] Customer Care

## Missing Required Information

**Subject:** Additional Information Needed for Your Refund Request

Hi [Customer Name],

Thanks for reaching out! We're following up on your refund request for Order # [Order Number]. In order to process your request we need some additional information. Please reply to this email with the following information.

- [Photos of damage]
- [Lot number]
- [Order number]
- [ Details on why the product doesn't meet expectations]

Once we receive this information, we'll process your request. Please don't hesitate to include any additional questions you may have, and we look forward to hearing from you soon.

Best,  
[Your Name]  
[Company Name] Customer Care

Escalated to Manager

**Subject:** Your Refund Request Is Being Reviewed - Order #[Order Number]

Hi [Customer Name],

Thanks for reaching out! We've received your refund request for Order #[Order Number], and it has been sent to a manager for further review. You can expect to receive a response within 1-2 business days.

We appreciate your patience and understanding. If you have any questions in the meantime, please feel free to reply to this message.

Best,  
[Your Name]  
[Company Name] Customer Care

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