

Refunds Done Right

How a 30-minute refresher was analysed, designed, built and evaluated with ADDIE

Customer service

Articulate Rise 360

Google Forms

Spanish consumer law

Refunds Done Right is a 30-minute refresher for customer service agents, followed by four weekly ten-minute practice sets and the same ten-question check before and after. It shows one full loop: find where training is needed, design the training for that need, and show whether behaviour changed.

The company, Hartwell Home, is invented, as are its figures. The legal rules are real (Spanish consumer law). The course was built in Articulate Rise 360, and the check and practice sets in Google Forms.

THE FIVE STAGES

A

Analyse

The gap is two skills after a policy change, and training is the right answer

PRODUCED

Skill map, course brief sections 1 to 5

D

Design

Objectives written against specific errors; decide first, then rules, then worked examples

PRODUCED

Course brief section 6, lesson plan

D

Develop

Five Rise lessons; five forms

PRODUCED

Rise course, forms script

I

Implement

Check, course, four weekly sets, check again

PRODUCED

Schedule and privacy rules

E

Evaluate

Same check before and after, a comparison team, one business measure

PRODUCED

Evaluation plan, data model link

01

Analyse

The need. The needs register opened a row for one team at Hartwell Home. Its reopened tickets rose from about 9% to 16% over two months while the rest of the department stayed flat. A ten-minute check on the linked skills found 38% wrong on applying the refund policy, mostly the wrong time limit, and 34% wrong on giving a clear next step, mostly no time frame. These figures are illustrative.

The role. A skill map breaks the customer service agent's job into tasks, skills and the common errors in each. Each error is linked to the business figure it should move. The two skills found above are rule-based, repeated every day and testable with scenario questions, so they suit a short course.

Is it a training problem? Three other causes were checked first: a new tool, staffing, and an out-of-date policy document. The refund policy had changed in the spring and only some agents had learned it, which fits a knowledge gap. Two non-training fixes were passed on: the internal policy summary still showed the old time limit, and the refund screen did not show the purchase date. This step follows the logic of Cathy Moore's action mapping: train only for what training can fix.

Audience. Agents with 3 months to 5 years in the role, already handling refunds daily. This is a refresher after a policy change, not an induction.

Performance goal. Agents settle refund requests correctly under the current policy and consumer law, and every reply ends with a clear next step and a time frame. The measures were agreed with the team lead before starting: the same ten-question check, and the reopen rate read the same way as before.

02

Design

Objectives. Each objective targets an error the check found. By the end, an agent can:

1. Choose the right outcome (refund, repair, replacement or decline) under the policy and consumer law. Error targeted: the wrong time limit.
2. Keep responsibility with the company: never send a customer to the manufacturer, never ask for proof of a fault in the first two years. Error targeted: passing the customer on.
3. End every reply with who does what next, and by when. Error targeted: a next step with no time frame.
4. Check a reply against three points before sending. Error targeted: a question left unanswered.

Structure. One 30-minute module, then four ten-minute practice sets a week apart.

LESSON	WHAT HAPPENS	WHY
1. Three Customers	Agents decide three cases before seeing any rules, then see model answers	Attempting first shows each agent where their habits differ from the policy (productive failure)
2. The Policy on One Page	The rules as one decision table, then flashcards and a check question	A table is used at work; a reading is not
3. Watch It Done	Two cases worked step by step, a prediction question between them, then a sorting task	Worked examples suit learners new to a rule set
4. Your Turn	Three cases, each with one step missing	Fading the steps moves agents from watching to doing
5. Before You Send	A three-point check before sending	A short routine to use on the job

Principles behind it.

Decide first.

Lesson 1 asks for a decision before any teaching. Struggling with a problem before instruction helps later learning.

Worked examples that fade.

Full examples first, then cases with a step missing, then cases alone.

Retrieval, spaced.

The weekly sets make agents recall the rules a week apart, with the answer and the reason shown after. Recall beats re-reading, and spacing beats one sitting.

Mixed practice.

Each weekly set mixes the skills, so agents must first decide which rule applies.

Confidence ratings.

Before seeing each answer, agents say how sure they are. Errors made with confidence show the rules people are applying wrongly without knowing it.

Feedback about the task.

Each answer shows which rule applied and why, never a score against colleagues.

Support that fades.

Week 1 shows the policy table, week 2 links to it, weeks 3 and 4 have none.

03

Develop

What was built. The content was written first: three opening cases, the policy table, two worked examples, three faded cases, the three-point check, 24 practice questions and the ten-question check. Each question is tagged to the skill and the error it tests. The module was then drafted with Articulate 360's AI from that content and edited by hand in Rise. The check and weekly sets were built in Google Forms by a script, as quizzes with a confidence question after each item.

Getting the law right. The first draft of Hartwell's policy was invented and broke Spanish consumer law: it passed faults after 60 days to the manufacturer's warranty. It was rewritten on the real rules: a 3-year guarantee, faults presumed present at delivery for 2 years, and the seller liable for repair or replacement before any refund. Hartwell's goodwill extras sit on top of the law, never below it.

Reviewing the AI draft. The AI's draft needed six changes before it matched the design:

WHAT THE AI DID	WHY IT MATTERED	CHANGE MADE
Merged two lessons, then repeated the practice cases	Learners would answer the same cases twice	One set of cases, lessons reordered
Opened lesson 1 with "trust your instincts" and "respond before you check the policy"	It taught the opposite of the course	Rewritten: decide now, then compare with the policy
Shortened the rug case to "looks different from the photo"	An item unlike its description counts as faulty, so the wrong answer became arguable	Rewritten as a plain change of mind
Said returns must be in "original condition"	Agents would refuse returns without the box	"The condition it arrived in (trying it out is fine)"
Wrote a question with two correct answers	Learners would be marked wrong for a right answer	One option replaced
Wrote descriptions that oversold the course ("master", "empowers you")	Experienced staff switch off	Plain description naming the need

The AI saved time on layout and block structure. Every change above came from checking its output against the design and the law.

04

Implement

Week 0: the ten-question check, then the Rise module.

Weeks 1 to 4: one six-question practice set a week, sent by email or message.

Week 5: the same check again.

A second team starts four weeks later and serves as the comparison group.

Privacy. Each agent sees only their own progress against their own week 1. The team lead and L&D see results by team and skill only, never by name, and never for a group under five. Nothing goes into performance reviews. These rules follow the project’s essay Data at Work: A Check, Not a Verdict, and anticipate the EU AI Act’s treatment of systems that evaluate workers.

Coverage. If fewer than 60% of a team take a weekly set, that week is reported as incomplete rather than read as a result.

05

Evaluate

Evaluation was planned before the course was built, so each measure is the same before and after.

QUESTION	MEASURE	WHEN
Did they learn it?	The same ten-question check, scored by skill	Week 0 and week 5
Do they do it at work?	Reopened tickets; a QA sample of refund replies scored on the four objectives	8 weeks before and 8 weeks after
Was it the training?	The comparison team, which starts four weeks later	Weeks 0 to 4
Did people find it useful?	Three questions at the end, recorded but not counted as evidence of learning	Week 4

The four questions follow Kirkpatrick’s four levels, but the order of importance is reversed: reaction is recorded last and counted least, because how much people enjoy training says little about what they learned.

Success means check errors below 20% on both skills, the team’s reopen rate back to the department level, and the comparison team unchanged until its own start.

Closing the loop. The needs register that found the gap re-reads the team’s reopen rate after the course. The row closes when the rate is back in line and the comparison team confirms the change came from the training. If it does not close, the register asks whether the cause was a skill gap at all.

06

Limits

- Invented company.** Hartwell Home, its policy extras, its teams and its figures are invented. The needs-analysis figures are illustrative.
- Illustrative scores, small group.** The check scores are illustrative. Between 8 and 12 volunteers will take the check, the course and the weekly sets. With that many people, the results will show change, not cause.
- No real tickets.** The business measure (reopen rate) is designed and simulated in the data model, not observed. The case study says so.

Unchecked skill map. The common errors in the skill map are drafted from contact-centre practice and still need a practitioner's review.

Fixed returning questions. A form cannot bring back each person's own wrong answers, so each week's sixth question is a fixed question on a commonly missed skill.

Legal summary. The course summarises Spanish consumer law for teaching. It is not legal advice.

07

Sources

The learning-science references come from the research piece *How People Learn* and the corporate essay series.

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