



what to say
when a client
wants a refund

podcast episode 24 tip sheet

One of the most stressful parts of running a business where you sell products or services is when a client asks you for a refund – and you aren't expecting it. In this episode, we discuss the 3 steps to take when a client wants a refund.

You can work so hard to create a fab offer and get tons of positive feedback, and then out of the blue...wham! You get a call or an e-mail that one of your clients isn't happy and she wants her money back. What do you say and do?

Here are the 3 steps to take when someone asks you for a refund:

Step 1: Be kind and gracious.

As you know, I'm all about the Legal Love so start with kindness. You can always get harsher later if you need to, but the best way to approach the situation is to start by treating the other person how you would like to be treated. Take a deep breath and remember to start from the place of kindness. Be gracious.

Step 2: Talk with your client. Reach out by phone and e-mail to find out more about why they want a refund – and the reasons underlying their request.

Ask the client why they are seeking a refund. They may just be confused, scared, or overwhelmed and their critter brain is telling them to bail out. Did they make an impulse purchase? Are they in financially over their head? Are they scared of the expansion they are feeling? LISTENING and showing extra support to your client goes a long way.

Say something like this: (Note, that your situation may vary so this language is just a guide. Be sure to talk with a lawyer about your scenario as you may need to say something slightly different.)

"Hi___! Thank you for reaching out and letting me know you aren't happy with the course. I am so sorry to hear that may be different from your expectations. I always want my clients to be happy so I am happy to jump on the phone with you to hear more about why you are seeking a refund or to provide you with additional support. When would be a good time to talk?"

Set up a phone call and use your coaching skills or supportive ear to hear their concerns. You may be able to calm them and reiterate the value of your course to change their mind about seeking a refund. If that doesn't work, go to Step 3.

Step 3. For a group program or online course, rely on your written refund policy in your Terms of Use.

You want to use Terms of Use for your group programs and online courses. Have a written Refund Policy in your Terms of Use that your purchasers agree to BEFORE they buy.

What type of Refund Policy should you have?

There are 3 kinds of refund policies:

- 1. FULL refunds** where you have a 100% money back guarantee. Sometimes this is just for 24 hours, or a few days or even a few weeks, depending on how long a program runs.
- 2. PARTIAL refunds** where you will return part of their funds if they cancel in the middle of a course, usually only refunding for services not yet provided.
- 3. NO refunds** where you don't give any refunds at all.

It's always your choice what kind of policy to have. There is no right or wrong way to do it. It's all about what feels good to you, no matter what kind of an entrepreneur you are – but the goal is to HAVE a refund policy. If you have a "no refunds" Refund Policy, e-mail your client this:

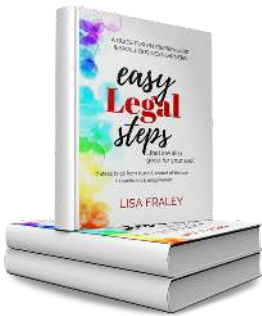
"I appreciate you sharing information with me in our call/e-mails about why you are seeking a refund. It can feel frustrating to sign up for a course, agree to the terms and then change your mind. I understand your concerns. However, I have a no refund policy in the Terms of Use that you agreed to when you signed up, so you are aware that I don't issue refunds. Here is what the refund policy says:

[Then insert in the e-mail the exact language of the refund policy. Just copy and paste the entire section into the document.]

Energetically, when you put your written Refund Policy in place, you're supporting your 2nd chakra – your **sacral chakra** – and plugging money leaks. Your sacral chakra is aligned with creativity, abundance, and money. When you have a strong Refund Policy you are shoring up your boundaries and creating a stronger energetic border around honoring your money.



I talk about money leaks, boundaries and the sacral chakra a lot in Chapter 2 of my book “Easy Legal Steps...That Are Also Good for Your Soul”. If you have my book, check out page 66 and the section that’s called “Honey, My Boundary’s Sprung a Leak”.



If you don't yet have “Easy Legal Steps” which is a #1 Best Seller on Amazon in 3 legal categories, you can get the hard copy or Kindle version on Amazon or at lisafraley.com/book.

Have a clear Refund Policy in your Terms of Use for online group programs to protect your income and plug money leaks.



Need language for your own Refund Policy?

Learn more at lisafraley.com/diyrefundpolicy

**Need Terms of Use for your online group programs with a “no refunds”
Refund Policy already included?**

Learn more at lisafraley.com/diytermsofuse.



Have questions about refund policies or suggestions for future podcast topics? Feel free to reach out to us at clientlove@lisafraley.com. We'd love to hear from you!

Kudos to you for listening to this episode to find out how a Refund Policy can protect you. Thanks for being part of the Legal Love tribe. Here's to getting legally enlightened!

With Legal Love,

Lisa

**This information is for educational and informational purposes only.
It is not legal advice and it does not create an attorney-client relationship.**

For my full disclaimer, please visit lisafraley.com/disclaimer.



Lisa Fraley, JD, CHHC, AADP, is an acclaimed attorney, Legal Coach®, speaker and #1 Best Selling Author of "Easy Legal Steps...That are Also Good for Your Soul." With her unique blend of coaching, legal expertise, and spirituality, Lisa has supported thousands of heart-centered entrepreneurs and small business owners to protect themselves, their businesses and their brands through DIY legal templates, online legal courses and one-on-one services.

From sharing international stages with thought leaders like Kris Carr and Gabrielle Bernstein to being featured on hundreds of podcasts, webinars, radio shows and bonus calls, Lisa has made it her mission to help every single small business owner understand that the law can be accessible, empowering, loving, and even spiritual. When she's not saving the world (with Legal Love) one contract at a time, she's posting free legal tips and connecting with her tribe at lisafraley.com.