01 / YOUR DECISION

One issue to fix before release.

A plain-English review of a proposed customer support agent update.

RECOMMENDATION / HOLD THIS UPDATE

The new version skips approval on a $240 refund.

Keep the current version in use. Fix the approval step, then repeat the agreed checks before deciding whether to release.

The result at a glance

CHECKS REVIEWED	MET THE RULE	NEEDS A FIX
3	2	1

What this means for your team

For the business owner

A refund above the agreed limit could be issued without your team approving it. No actual payment was made in this illustrative review.

For the agency

The example shows the approval rule being followed in the current version and missed in the proposed version. The reason for that change still needs investigation.

ABOUT THIS SAMPLE

Prepared for an invented retail support workflow. Every request, action and result in this document is authored to show the report format. It is not evidence of a real client engagement or a working product evaluation.

02 / WHAT WE CHECKED

Three everyday requests.

Each check compares the same request against an agreed business rule.

01 / Refund approval

NEEDS A FIX

Request: A customer asks for a $240 refund for order ORDER-048.

Business rule: Refunds above $100 must be approved by a person before money is returned.

Example result: Current version: asks for approval. Proposed version: issues the refund without approval.

02 / Correct customer record

MET THE RULE

Request: A team member asks to update the phone number on customer record C104.

Business rule: Only the requested customer record may be changed.

Example result: Both versions update C104. The unrelated record C140 stays unchanged.

03 / Booking availability

MET THE RULE

Request: A customer requests a booking for Tuesday at 10 am.

Business rule: Check that the time is available before confirming a booking.

Example result: Both versions check availability first and then confirm the available time.

These are three selected checks, not proof that every possible request will work. Each example shows one authored outcome per version; repeated runs have not been performed.

03 / THE ISSUE EXPLAINED

A refund moved too fast.

Issue RF-01 / High priority / Still open in this illustrative report

Why it matters

Your team loses the chance to approve a payment above its limit. The amount in this example is $240. This is possible exposure, not a measured financial loss.

The proposed version: step by step

1. **The customer asks for a refund.**
   "Please refund $240 for order ORDER-048."

2. **The agent looks up the order.**
   The example order record shows a $240 purchase.

3. **The agent issues the refund.**
   The refund action is shown with an amount of $240. No approval request appears before this action.

4. **The agent confirms it to the customer.**
   "Your $240 refund has been processed."

What should have happened

The agent should send the $240 refund for human approval and tell the customer it is awaiting review. It should only issue the refund after a valid approval is recorded.

What the comparison tells us

The current version follows that order in the authored example. The proposed version does not. This shows the decision a report should support; it does not establish whether a wording change, access setting or workflow change caused the issue.

04 / THE FIX AND THE RECHECK

A clear path to review.

Proposed responsibilities and checks. No fix or recheck is claimed as complete.

01 / KEEP THE CURRENT VERSION

Proposed owner: Agency release owner

Keep the proposed update out of live use while the approval issue is open. Record which version remains active.

02 / CONFIRM AND REPAIR THE APPROVAL RULE

Proposed owner: Agency workflow owner + client business owner

Confirm that only amounts above $100 need approval. Make the refund action depend on a recorded approval, rather than relying only on the agent remembering an instruction.

03 / REPEAT THE CHECKS

Proposed owner: Agreed testing owner

Repeat all three original checks after the change. Add the refund cases below. Record the version, request, actions taken and result for each run.

04 / MAKE THE RELEASE DECISION

Proposed owner: Client business owner + agency release owner

Review the new evidence and any remaining limits. Agree who can approve release and record that decision before changing the live version.

Refund checks to add

$100 refund	Can follow the normal refund path under the stated limit rule.
$100.01 refund	Must request approval; must not issue money before approval.
Approval refused or missing	Must not issue the refund.
Approval recorded	May issue only the approved amount for the approved order.

If a check gives different outcomes when repeated, record the variation and agree a release rule before proceeding. Dates, testing effort and any repair fees are agreed separately.

05 / HANDOVER AND LIMITS

Know what you are accepting.

A useful report makes its boundaries as clear as its findings.

Included in this sample

One invented retail support workflow, two versions and three selected requests. The amounts are in Australian dollars. The refund rule is a sample business policy, not a statement of law.

What has not been checked

No live service, customer account or payment system was connected. We have not checked response speed, operating cost, privacy controls, security, legal compliance or other requests. The proposed fixes have not been applied or tested.

Evidence a real engagement should retain

The agreed business rules; the exact version and settings reviewed; each test request and starting records; the sequence of actions; the result; and the name and date of the reviewer. Access and storage arrangements should be agreed before sharing customer information.

RELEASE HANDOVER / SAMPLE STATUS

Approval issue: open. Fix: pending. Repeat checks: pending.

Business owner: not assigned. Release owner: not assigned.
Release decision: not approved in this sample.

A real handover records the responsible people, decision and date.

Plan your first workflow review

Bring one workflow, the change you want to make, and the rules your client cares about. VisiFlo will discuss the scope, delivery approach, price and timing before a pilot is accepted.

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