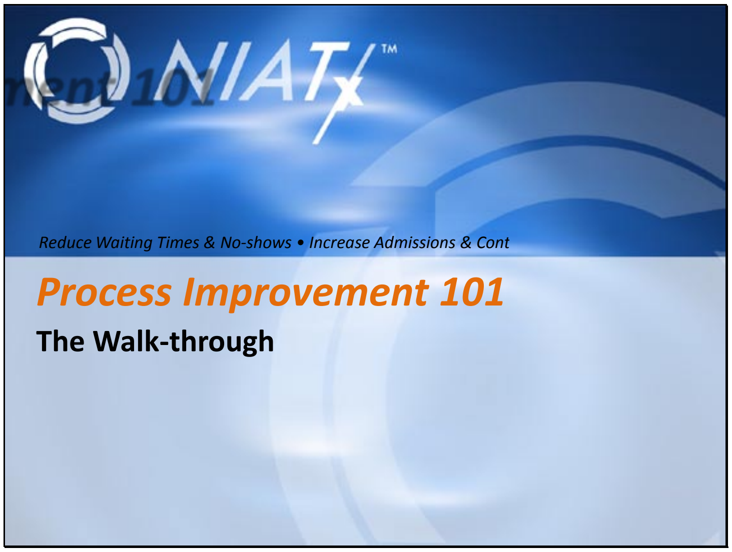
Slide 1



In this lesson, you will learn about the NIATx walk-through, and how to conduct a walk-through of your own.

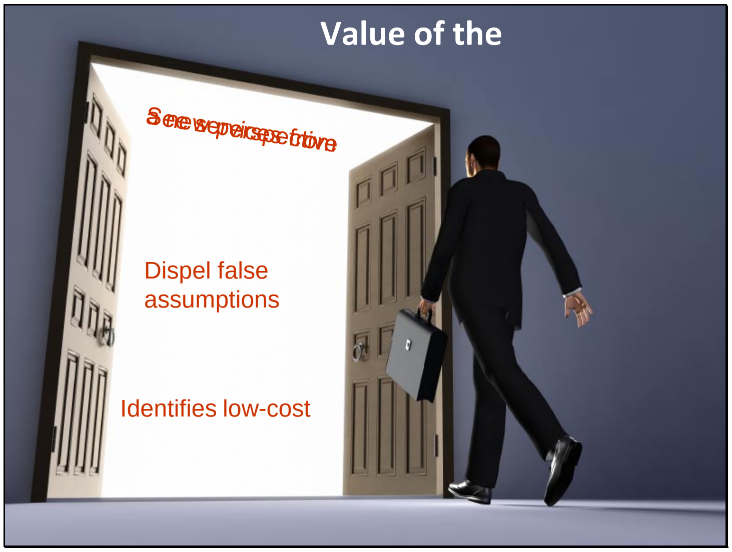
Slide 2

You’ve learned a lot about our process already, and by now you should realize that the walk-through is a cornerstone in our process.

A walk-through is an exercise that allows you to experience your services exactly as your customers do.

First you will look at an example of a walk-through. Then at the end of this section, you’ll have a chance to do a walk-through of your own.

Slide 3

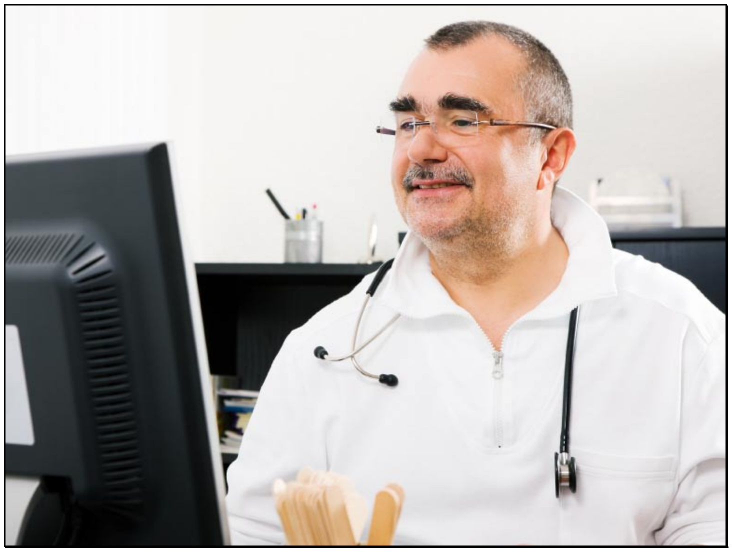


The value in conducting a walk-through is that it allows you to see services from a new perspective.

We make assumptions about how services are being delivered that may not reflect what actually happens.

The walk-through also identifies low-cost opportunities for improvement that can make a big difference in engaging and retaining clients. Let’s hear about Sam’s walk-though experience.

Slide 4



Sam, an AODA counselor at a non-profit substance abuse treatment agency, has volunteered to conduct a walk-through of the intake process at his agency. He's playing the role of a young banking executive who has become addicted to opioids. He's finally ready to seek treatment as his addiction has started to affect his performance at work and his relationships.

The first time he calls the agency, he gets an automated greeting, but he follows the prompts until he gets a live person. Sam wants to get in for an intake appointment as soon as possible, but finds the first available appointment is in two weeks.

On the day of his appointment, Sam has trouble figuring out where to park and even how to find the entrance to the agency. He finally locates the reception desk and while the staff member behind the desk is friendly and courteous, Sam is intimidated by the amount of paperwork he's told he needs to complete before he can see a counselor.

Once he completes the paperwork, Sam is directed to an uncomfortable chair in the waiting area…where he waits…and waits…until the counselor appears and introduces himself.

When Sam finally gets into the counselor's office, the counselor takes a seat at his computer and begins to ask Sam a series of questions, typing Sam's answers, while keeping his eyes on the computer screen….

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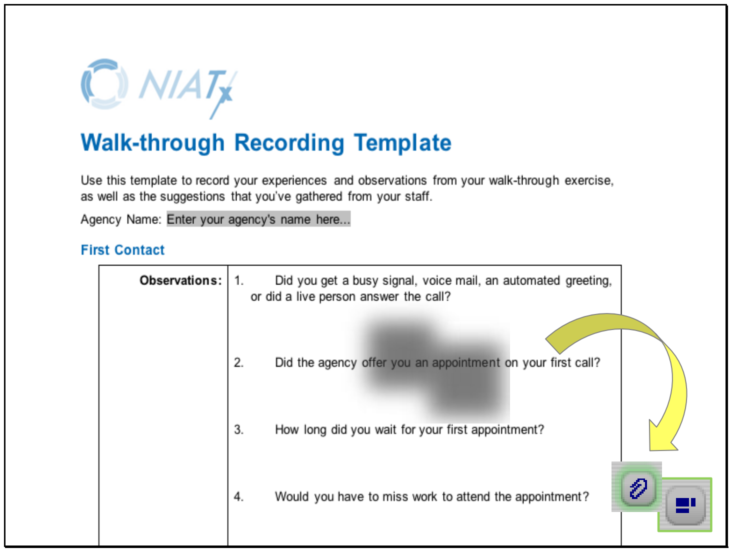
If you were Sam and had just completed this walk-through of an intake process, what is one thing you would choose to improve on?

Slide 6



The NIATx walk-through recording template helps to guide you through your own walk-through. Use the form to record your thoughts and impressions. Instructions are also provided.

You can print a copy of the form and the instructions by clicking on the ***Attachments icon***, which is on the lower right corner of the Adobe Presenter player.

Click on the paperclip to see the attached files.

If the paperclip is not visible, you can expand the Presenter player by clicking on this icon.

Slide 7

We recommend that you work with a partner or partners when you do your walk-through – that way you can have several perspectives, as well as the opportunity to discuss it with your colleagues.

There is a lot of flexibility in choosing how to conduct your walk-through. It is a good idea to have someone from top management participate in a walk-through, taking on the role of client or family member seeking treatment.

In this course, we recommend that you find a partner to work with. You will each have a different role; one of you will be the family member and the other person will be the client or customer.
The instructions that accompany the “walk-through” recording template are written for two people, but you can have just one person do the exercise, or more than two people.

A few tips to keep in mind:
•Be detail-oriented and committed to making the most of this exercise.
•Be sure to deal with an addiction you are familiar with. That way you can realistically consider the needs of people with that particular addiction issue.
•Let the staff at your facility know in advance that you will be doing the walk-through exercise. This is NOT a secret shopper exercise. The goal of the walk-through is to always focus on “process,” not people.

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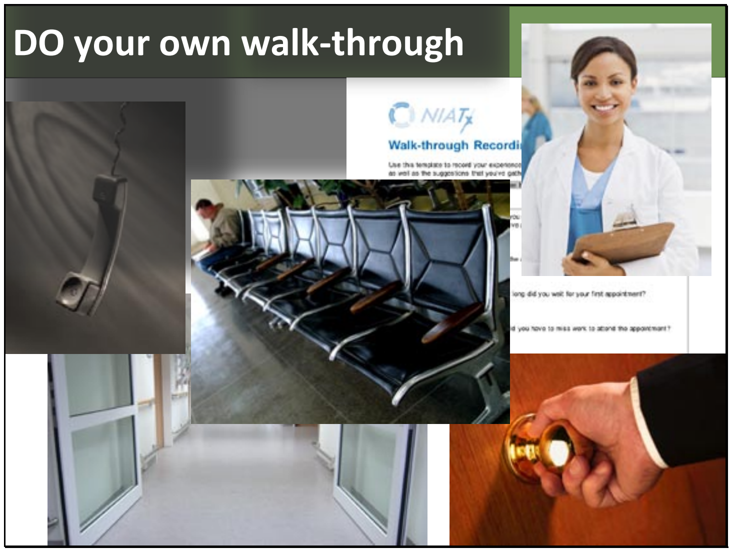

Experience the walk-through just as a typical client and family member would… make the call to set up an appointment. How long are you on hold? Does the phone menu make sense to you? Was it hard to make the call?

Try to think and feel as a client or family member would. Consider your surroundings and use the form to record your observations and feelings.

At each step, ask the staff to tell you what changes they think would improve the experience for everyone - the client, family member, and staff. Write down their ideas and feelings, as well as your own. Tell them that hiring additional staff is not an option!

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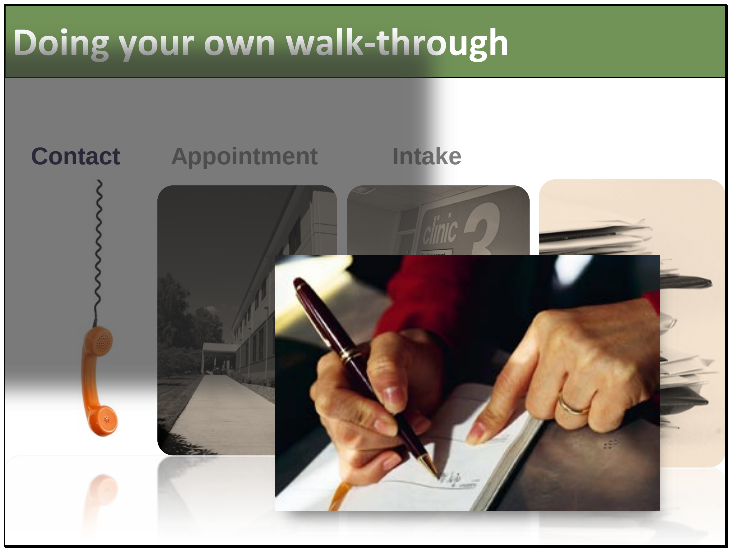
After you finish the walk-through, be sure to include in your observations , practices that seem to work well and those that didn’t and need to be changed. Try to think from everyone’s perspectives - client, family member, and staff.

Slide 10



What you look for in a walk-through depends in part on which process you are observing.

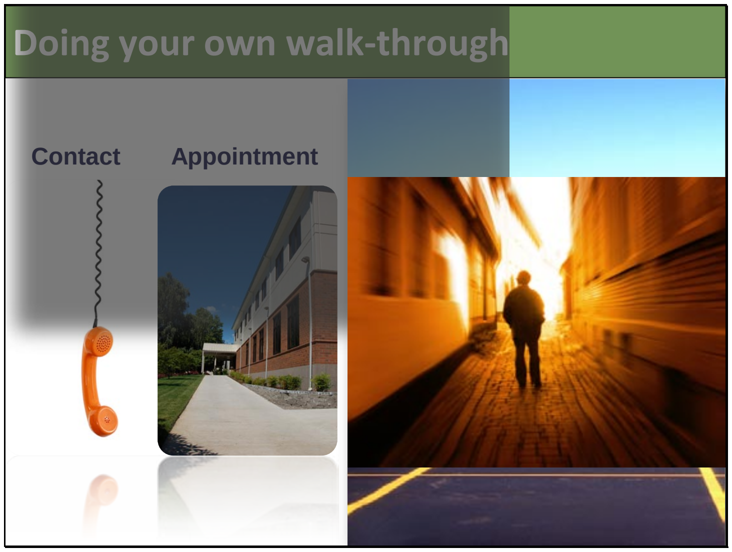
Let’s look at first contact. When you called the agency, did you get a busy signal, voice mail, an automated greeting, or did a live person answer the call? How did that make you feel?

Did the agency offer you an appointment on your first call?

How long would a typical client have to wait for an appointment? Would they have to miss work to make the appointment? Would they have difficulty reaching the site? Is transportation available?

Record your experience.

Slide 11

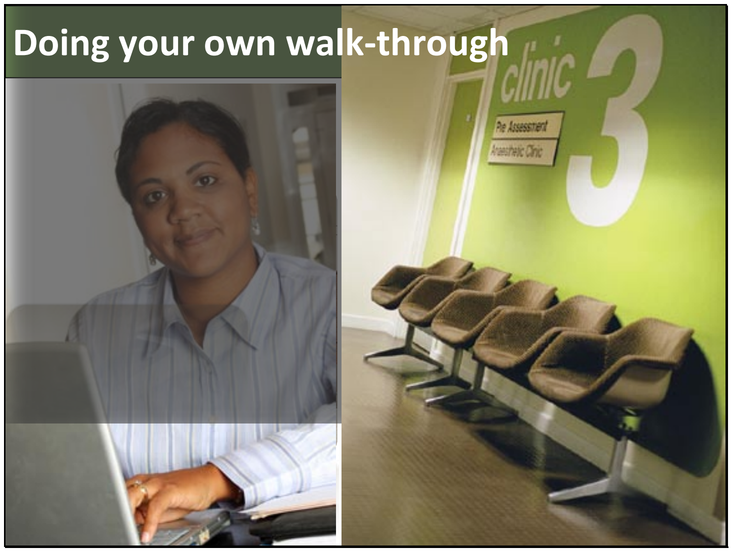


Now consider the first appointment.

On the day of the appointment, arrive at the clinic or office, with the following questions in mind: What it would be like if you had never been to the site before?

Is transportation to your site an issue? Are parking, directions, and signage adequate? Does the site feel friendly and welcoming or cold and harsh? Record your experience.

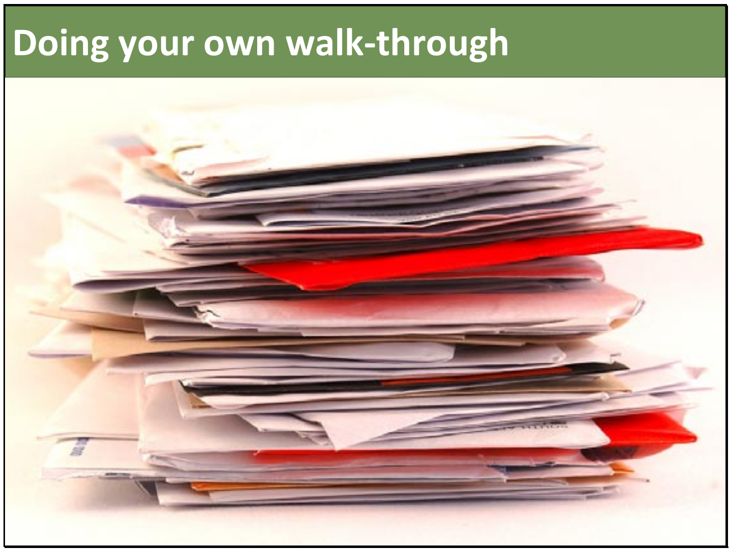
Slide 12



Now think about the intake process.

Continue to make note of your impressions as you role play the part of a client or family member new to substance abuse treatment. Complete the entire intake process. Fill out all required forms. Does the family member typically accompany the client through the entire intake process? How long does a typical client spend in the waiting room? Wait for that amount of time. If the client is required to undress, you should undress. Is a urine test required? Will you have to wait between your assessment and your first treatment session, and if so, how long? The "client" and "family" member should each record all their thoughts and feelings about this process.

Slide 13



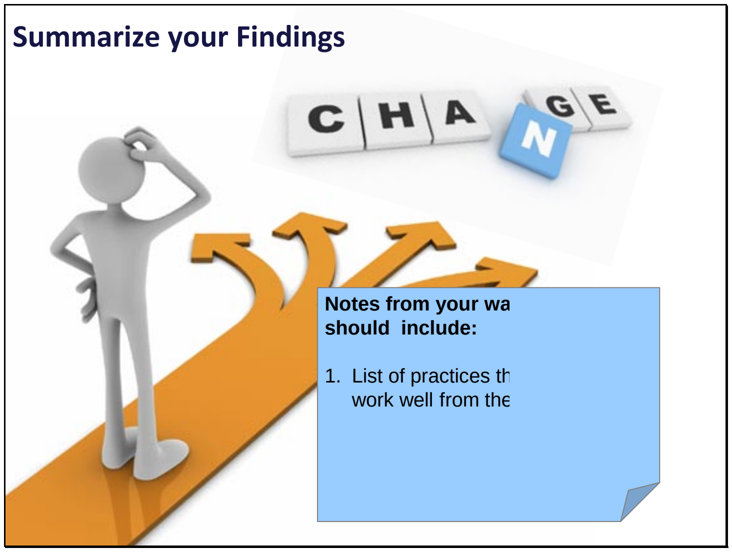
Think about the transfer between levels of care as part of your walk-through.

Experience the process; for instance, going from detox to residential, or outpatient to IOP.

How much paperwork do you have to fill out? Are you answering the same questions you did in the intake process? Has the transition been smooth, or do you feel like you are starting again from the beginning? How has the family member experienced the transition?

Record your experience.

Slide 14



For ALL walk-throughs, summarize your findings by thinking about the process. Your notes from the walk-through should include:

- A list of practices that seem to work well from the walk-through, and
- A list of practices that don’t work well and need to be changed.

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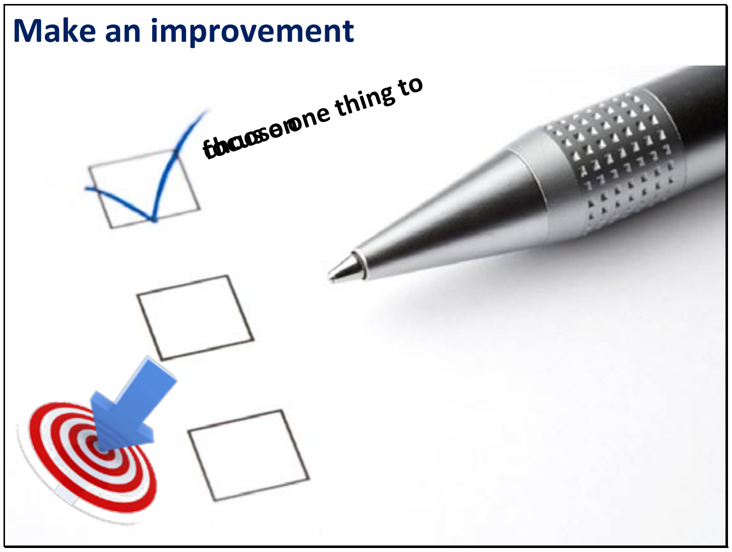
Now take a minute and reflect on two questions:

- What most surprised you during your walk-through? and
- What is the one thing that you would you want to change first?

Slide 16



After you conduct your walk-through and reflect on the experience, you will be ready to act on what you learned. Based on your walk-through, you will have this long list of improvements – you will need to meet with your team and choose one thing to focus on. Remember to share the results with top management and colleagues.

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The walk-through does take some time… but it's time well spent. The knowledge you will gain from a walk-through experience will be the powerful starting point from where you can truly improve service for your customers.

Now go do your walk-through!

Slide 18


NIATx™
Next steps
Continue to
How to Conduct a PDSA Change Cycle

Slide 19

NIATx would like to recogniz
Robert Wood Johnson Founc
for their financial support in ma
online training course possi

Thank you.