

What is a Walk-through, and Why Do It?

A walk-through is an exercise where you walk through a specific process just as a 'customer' does. The goal is to see and experience the work flow process from the *customer's** *perspective*. Taking this perspective of services—from the first step, through the final step—is the most useful way to understand how the customer feels, and to identify improvements that will serve the customer better.

* Customer—the offender, drug court participant, or typically any party to which a service is rendered by the supplier.

Steps for Conducting a Walk-through:

1. Select a process to walk-through

Meet with your Judge, warden, sherrif, director and/or CEO at your organization to decide:

- Who is your customer? Internal? External?
- What work process will you examine? What is the first step in the process? What is the final step in the process?
- Where will you focus your efforts—the entire process? Certain steps of the process? At which location?

2. Select one or two people from your organization to play the role of a customer and observer/note taker.

You will need to be detail-oriented and committed to making the most of this exercise. To ensure that your experiences will be as realistic and informative as possible, make sure you present yourselves as dealing with a process you are familiar with, and thus are able to consider the needs of people with these particular issues.

3. Let the staff know in advance that you will be doing the walk-through exercise.

Staff might be on their best behavior, but it is far better to include them than to go behind their backs. This is **not a secret shopper exercise**; ask them to treat you as they would anyone else. Also ensure them that this is not punitive!

4. Go through the experience just as a typical customer would.

Ideally, the walk-through should begin with a customer's first contact with your organization.

5. Try to think and feel as a customer would.

Look around as they might. What are they thinking? How do they feel at any given moment? Note your observations and feelings.

6. At each step, ask the staff to tell you what changes (other than hiring new staff) would make it better for the customer and what changes would make it better for the staff.

Write down their ideas as well as your own. Write down your feelings as well.

7. Finally, write down a list of the needs you found and the improvements that could be made to address these needs.

Be sure to address what the needs are from both the customer and staff perspectives.

8. Pick one key problem to focus your efforts on.

Meet with your Judge, Warden, Sherriff, CEO and/or Director to review the findings of your walk-through and select one key problem as your focus for the NIATx Collaborative.

The worksheet on the next page is to be used by staff to note their observations and assessments as they do the walk-through.



Walk-through Worksheet:

Experience your program from the start such as arrest, drug court eligibility determination process or transferring out of incarceration into community-based substance abuse treatment services; for instance, going from jail to residential, IOP, or outpatient treatment.

- 1a. Make the first contact.
- 1b. Or initiate the first step in a paper process or hand off for services to another location.

Did you call or e-mail? Were you told to call back, or transferred to voicemail? Did you get the information you needed on that first contact? How long would a typical customer have to wait for a response? Were you able to determine how long the entire process would take? How much paperwork do you have to fill out? Are you answering the same questions over and over? Do you feel like you've had a smooth and consistent transition, or are you starting again from the beginning at each new step? Were you given an appointment on your first call? How long would a typical client need to wait for an appointment? Would they have to miss work to get an appointment?

2. On the day of the appointment, arrive at the clinic or office, thinking 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 welcoming or cold and harsh? Record your experience below.

3. Once you arrive, think about the perspective of the client and client's family coming in for the first time. Go through 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? Experience it all, and record your experience below.

4. What most surprised you during your walk-through? What two things would you most want to change?