# Walk-through Instructions

**WHAT IS A WALK-THROUGH AND WHY DO IT?**

A **walk-through** is an exercise where you experience a specific process in your organization, just as a *customer* does. The goal is to see and feel 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. It helps identify improvements that will serve the customer better.

**STEPS FOR CONDUCTING A WALK-THROUGH**

***1. Select a process to walk-through***

It can be any process. Some common walk-throughs for behavioral health providers are:

* **First Contact** (e.g. call your main office phone line to schedule an appointment)
* **First Appointment** (e.g. travel to your agency location and experience your appointment)
* **Intake and Assessment** (e.g. experience the entire intake and assessment process)
* **Patient Hand-off** (e.g. moving a patient from one level of care to another or one recovery service organization to another)

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

A walk-through is **not** a secret shopper exercise. It is better to inform and include staff than to surprise them.As you role play the customer, ask staff to treat you as they would any other customer. Make clear to staff this exercise is notpunitive – rather, it is to discover opportunities for improvement, together.

***3. Walk-through your chosen process.***

Experience the entire process just as your customer would. Take notes at each step.

***4. 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? Remember, you are role playing that person and their life situation. If appropriate, have another staff person role play a family member. Note your observations and feelings.

***5. At each step, ask the staff what they think.***

Ask staff to tell you what changes 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.

***6. Summarize what you learned.***

Finally, write down a list of the needs you found and any improvements that could be made to address these needs. Be sure to address what the needs are from both the *customer* and *staff* perspectives.

# Walk-through Recording Template

Use this template to record your experiences and observations from the walk-through exercise. Consider these questions:

* How did it feel to be a customer going through the process?
* What steps in the process worked well and what areas could be improved?
* Did you or other staff members identify any improvement ideas during the walk-through?

**Date:**

**Organization name:**

**Process name (e.g. intake appt.):**

**Walk-through conducted by:**

**NOTES**

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