Conducting a Walk-Through

Purpose: A walk-through is an exercise where staff walk through a process just as a 'client' does. The goal is to see the work process from the client's perspective. Taking this perspective is a helpful way to understand how the client feels, and to identify improvement that will serve the client better. Consider completely a walk-through before designing a change to a work process to better understand the process, its issues, and identify potential solutions.

Walk-Through Steps:

1. Select a process to walk-through. Decide: Who is the client? What process will be examined? What is the first step of that process? What is the last step? Where will we focus our efforts (the entire process, certain steps, at certain location)?
2. Select 2 people to play the roles of 'client' and 'observer/note-taker.'
    a. The two people must be detail-oriented and committed to making the most of this activity. To ensure your experiences re as realistic 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 other staff know in advance that you will be doing the walk-through (ask them to treat you as they would anyone else).
4. Go through the experience just as a typical client would.
    a. Ideally, the walk-through would begin with a client's first contact with the agency (i.e., making the initial call for services or first visit) and extend the conclusion of the process.
5. Try to think and feel as a client would. What are they thinking? How do they feel at any given moment? Note down observations and feelings.
6. At each step, have staff you interact with tell you what changes (other than hiring new staff) would make it better for the client 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, between the two of you (client and observer) write down a list of needs you identified. What improvement could be made to address these needs? Be sure to address what the needs are from both the client and staff perspectives.

Walk-through Recording Template

1a. Make the first contact with the agency/provider or the first step in a hand off for services or 1b. Start with the first identified step in a process determined by your organizational improvement team.

Consider: What occurred? Did you call or email? Were you told to call back or transferred to voicemail? Did you get the information you needed on the first contact? How long would a client typically wait for a response? Were you able to determine how long the entire process would take? ***Record your experiences below.***

2. Go through the entire process. Fill out required forms or documents. Record your experience below.

3. What were your thoughts and feelings during the experience?

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