



What is a walk-through, and why do it?

Conducting a Walk-through

A walk-through is an exercise where staff members walk through a process just as a “customer” does. The goal is to see the work flow process from the *customer** 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.

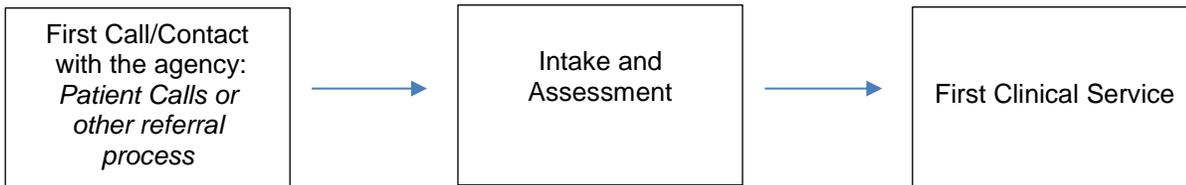
**customer – client, patient, resident, etc.*

Steps for conducting a walk-through:

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

- Who is your customer?
- 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?

For the “Collaborative” we suggest you do a walk-through of the following:



2. **Select two people from your organization to play the roles of “customer” and “observer/note taker.”**

The two of 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 typical customer issue that 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 staff to treat you as they would anyone else. You are observing the process, not specific staff performance.

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 agency (i.e., making an initial call for services, Referral from SASH, DCFS, CJ, etc.) and extend through the conclusion of the process or final report.

5. **Try to think and feel as a customer or user would.**

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, between the two of you (customer and observer), write down a list of the needs you identified and identify which processes could be improved to address these needs?**

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



You can use this sample template to note your observations and assessments as you do the walk-through.

Walk-through Recording Template

Sample Walk-through Recording Template:

1. Make the first contact. You may role play the experience as a referral from SASH; however, it is also good practice to do a web search for your agency, call the number listed, and ask for an appointment.

Did you call or send an e-mail or fax? 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? Record your experience below.

2. Go through the entire process as identified above. Fill out all required forms. Experience it all, and 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 to make the experience better for the customer?

5. What suggestions did staff performing the processes have to improve the process?