Conducting a Walk-through

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

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’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 - means the party to which the goods are to be supplied or service rendered by the supplier. May also be referred to as the 'User'.*

Steps for conducting a walk-through:

1. Select a process to walk-through

Meet with your 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 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 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.

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, first person to initiate a paper process such as billing a customer, writing a contract, receiving accreditation) 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. What improvements could be made to address these needs?

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

8. Focus your efforts on one key problem.

Meet with your director and/or CEO to review the findings of your walk-through and select one key problem as the focus for your process improvement project.

Walk-through Recording Template

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

Sample Walk-through Recording Template:

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? Record your experience below.

2. Go through the entire process. 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?

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