



Conducting a Walk-through

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

A walk-through is a simulation exercise where staff members “walk through” a process just as a customer does. The goal is to see the agency from the *customer’s perspective*. Taking this perspective of ADRC services – from the first phone call to your ADRC and/or a walk in inquiry about the services you provide, to a home visit, and through follow-up or a final interaction with a customer – is the most useful way to understand how the customer feels, and to identify improvements that will serve the customer better.

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:

- a. What aim you will focus your efforts on; and
- b. The specific process that will be the focus of your walk-through, such as:
 - i. A phone call to inquire about services
 - j. a walk in appointment for a new customer, or a home visit;
 - ii. a customer referral to another community service;
 - iii. a customer move from a nursing home;
 - iv. a customer enrollment into a publicly funded long-term care program.

2. Select two people from your organization to play the roles of "customer" and "family member."

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 an aging or disability problem or concern that you are familiar with, and thus are able to consider the needs of people with these particular problems and concerns.

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. Staff may be apprehensive about this role playing exercise, remind them that the purpose of the walk through is to assess the processes your organization has in place it is not intended to be an evaluation of how they do their job.

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

Ideally, the simulation walk-through should begin with a customer’s first contact with your agency (i.e., making an initial call for services from the perspective of a family member interested in obtaining services) and extend through a home visit or transfer to another community service. Imagine you and/or your family member has a question or concern commonly expressed by ADRC customers.

5. Try to think and feel as a customer or family member 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, between the two of you (customer and family member), 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 Director and/or CEO to review the findings of your walk-through and select one key problem as your focus for improvement.

Walk-through Worksheet

You can use this sample worksheet to note your observations and assessments as you do the simulation exercise.

Sample Walk-through Worksheet:

1. Call the ADRC's local and/or toll free number(s). How did you find out about the services? How was the phone answered? Were you told to call back, or transferred to voicemail? If you are transferred to voice mail, how long did it take before you received a call back? What options were you given to continue your conversation and get the help you needed? How long would a typical customer need to wait for a home visit, office appointment, or contact from an ADRC specialist? Record your experience below.

2. If you made an office appointment, arrive at the ADRC. Think 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? Is it accessible? Think about the perspective of the customer and/or customer's family coming in for the first time. Go through the entire process. Fill out all required forms, if any. How long does a typical customer spend in the waiting room? Wait for that amount of time. Experience it all, and record your observations below.

3. Use your home for an in-home visit. How did you prepare for the visit? How did you know that the person making the visit was an ADRC staff member? What was it like to have ADRC staff in your home? Who was there? Did you need to make accommodations in your or other family members' schedules? Did they have any technology with them, if yes, what was that like? Record your experience below.

4. What information was shared with you and in what format? Did you feel that the information was helpful, why or why not? Were they able to answer your questions? What decisions did you need to make and how did the ADRC specialist help you through the decision making process? Were you referred to an agency/provider? Did you know what to do next? Were you offered support or assistance with getting connected with the agency/provider?

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