**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. NOTE: If you find a physical walk-through is not practical, consider doing a ***talk-through*** of the process with staff and/or other stakeholders.

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

A walk-through is nota 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. Note your observations and feelings.

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

Ask staff/stakeholders 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/stakeholder* perspectives.

# Walk-through Recording Template

Use this template (back of page) to record your experiences and observations. 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/stakeholders identify any improvement ideas during the walk-through?

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| Organization: |  |
| Person(s) doing the Walk-thru: |  |
| Process Name: |  |
| Date: |  |

NOTES