

Conducting a Walk-through

What is a Walk-through, and Why Do It?

A walk-through is an exercise where staff members walk through the treatment processes just as a ‘customer’ does. The goal is to see the agency from the customer’s perspective. Taking this perspective of treatment services—from the first call for help, to the intake process, and through final discharge—is the most useful way to understand how the customer feels, and to discover how to make improvements that will serve the customer better.

Steps for Conducting a Walk-through

1. Select two people from your organization to play the roles of “client” 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 addiction you are familiar with, and thus are able to consider the needs of people with these particular addiction issues.
2. 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. Ask them to treat you as they would anyone else.
3. Go through the experience just as a typical client and family member would. The 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 an addict or family member interested in obtaining treatment services) and extend through the third outpatient visit or third day in inpatient care, or through a transfer between levels of care.
4. Try to think and feel as a client 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.
5. At each step, ask the staff to 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.
6. Finally, between the two of you (client 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 client and staff perspectives. You can use the sample worksheet on the back to note your observations and assessments as you do the walk-through.

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Sample Walk-through Worksheet

1. Call for an appointment. Were you told to call back, or transferred to voicemail? Were you given an appointment on your first call? How long would a typical client need to wait for an appointment? Would they have to miss work to get an appointment? Record your experience below.
2. On the day of the appointment, arrive at the clinic or office, thinking 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? Record your experience below.
3. Once you arrive, think about the perspective of the client and client's family coming in for the first time. Go through the entire intake process. Fill out all required forms. Does the family member typically accompany the client through the entire intake process? How long does a typical client spend in the waiting room? Wait for that amount of time. If the client is required to undress, you should undress. Is a urine test required? Will you have to wait between your assessment and your first treatment session, and if so, how long? Experience it all, and record your experience below.
4. Experience the process of transferring between levels of care; for instance, going from detox to residential, or outpatient to IOP, or whatever levels of care you provide. How much paperwork do you have to fill out? Are you answering the same questions you did initially? Do you feel like you've had a smooth and consistent transition, or are you starting again from the beginning?
5. What most surprised you during your walk-through? What two things would you most want to change?