THE WALK-THRU TIP SHEET

A walk-thru is a role play exercise designed to allow staff the opportunity to gain awareness of the process from the recipient's perspective. Staff members take on the role of a recipient, and complete chosen elements such as the intake and assessment process. The lessons learned and information gathered can then be used to develop PDSA change exercises.

Inform your staff − The walk-thru should be planned, and not a surprise, or a "secret shopper" approach. We want to avoid anything that will damage trust among team members. Even if staff members are on their best behavior, there will still be plenty of opportunities for improvement that will be revealed by the walk-through

Include 2 participants − Include one in the role of the client and one in the role of a family member or other support. Two sets of eyes and ears, from two perspectives, will result in more observations and insights.

Begin your walk-thru role play *before* you meet program staff − Include phone calls, travel to the appointment, finding the building and office, etc. These are all key pieces of the walk-thru experience.

Plan your roles − Develop some basic ideas regarding the client role you are playing. What are your concerns? Why are you seeking treatment? How old are you? What is your background? This will help you to maintain your role during the walk-thru and will also maximize the opportunities for seeing the program through "new eyes".

Stay in roles. Staff members will sometimes have difficulty with the role play and will start saying things like "at this point in the interview I would...". Advise them to treat you as they would any recipient.

Take notes − There are many details that will be lost if not noted during the process. These details will be critical to the later analysis of the experience.

Focus on the emotional experience − Recipients are engaged (or not engaged) by your service based upon their emotional experiences. Be sure to ask yourself at each step "How does this feel?"

Look for "Value Added" (How could things be better?) − With each step of the process, ask yourself the following: Is this step needed? If it is needed, is this step the best that it can be?

Complete the entire process − Make the phone call. Do the paperwork. Wait in the waiting room. Do the complete process. These investments will yield a strong return as you review the experience.