Conducting a Walk-through

A "walk-through" from the perspective of a client and family member will help you to more fully understand the strengths and limitations of the processes that facilitate access to and early engagement in your agency's treatment programs.

In order to conduct a walk-through from this perspective, you will need to designate two people from your organization to play the roles of "client" and "family member." These individuals need to be detail-oriented and committed to making the most of this exercise. The walk-through should begin with their first contact with your agency (i.e., making an initial call for services from the perspective of a new client or family member of a client interested in attaining treatment services for a loved one) and extend through the third outpatient visit or third day in inpatient or residential care. To ensure that their experiences will be as realistic and informative as possible, make sure that the walk-through participants present themselves as clients (or family of a client) dealing with an addiction that they are familiar with, and thus consider the needs of people with these particular addiction issues.

Things to keep in mind while planning and executing the walk-through exercise:

1. Let the staff know in advance that you will be doing the walk-through exercise.
They might be on their best behavior, but we have found that it is far better to include them than to go behind their backs. Ask them to treat you as they would anyone else.

2. Go through the experience just as a typical client and family member would.
Make an appointment. How long would a typical client need to wait for an appointment? Would they have to miss work to get an appointment? 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? Once you arrive, think about the perspective of the client and client's family coming in for the first time. As you go through the process, tell the staff that you are simulating a client experience. Ask to be taken 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. Ask each staff member to treat you as if you were a real client. 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 take notes while you are experiencing it.

3. 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.

4. 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.

5. 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.

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