WALK-THROUGH

HOW-TO

A walk-though lets you experience a process as a customer and identify improvements to enhance their experience. Follow the steps below for your walk-through. Use the recording template on the next page to take notes during your walk-through.

1 SELECT A PROCESS

Choose any process! If a walk-through isn't practical, try a "talk-through" with staff or other key individuals.

2 LET STAFF KNOW

A walk-through is not a secret shopper exercise. Inform staff, involve them, and let them know it's for improvement, not punishment.

3 WALK-THROUGH THE PROCESS

Experience the entire process just as a customer would. Take notes along the way! Use the recording template on the next page for your notes.

4 IN THE CUSTOMER'S SHOES

Imagine what a customer is thinking and feeling at any point in the process. Record your observations and feelings.

5 WHAT COULD BE IMPROVED?

Ask these 2 questions for each step in the process:
1. Is this step necessary?
2. If it is, is it the best it can be?

6 SUMMARIZE INSIGHTS

Make a list of needs and improvements from customer and staff perspectives.

NIATx™

WALK-THROUGH RECORDING TEMPLATE

Date	
Team Members	
Location/service Area	
Process	
What worked well?	
What could be improved?	
Improvement ideas identified:	
Additional comments/ observations	