TOOL 2:
Customer Orientation — The Executive Walkthrough

This tool can help leadership see the organization(s) through a customer's eyes. It is helpful to perform this exercise for both your and your partner's organization. Its purpose is to assess the customer service levels your organization has achieved through the use objective data in the measurement process.

Outcomes:

- Customer-centered service orientation within delivery processes
- Customers are viewed as essential partners in the change process.
- Welcoming, efficient, and effective customer experiences

Best Way to Use This Tool: A helpful starting place is to engage clinical and support staff in a conversation about their "customer service philosophy." Ask them how they view the organization's customer service philosophy. There are typically three customer service philosophies in use: client focus, consumer focus, and customer focus.

What's the difference between client, consumer, and customer focused philosophies?[1]

Client Focus	Consumer Focus	Customer Focus
They are not empowered	They are somewhat empowered	They are fully empowered
They usually don't know what they need	They tend to know what they need	They know what they want
They have little or no choice	They have choices	They have choices
They usually don't know what they need	They tend to know what they need	They know what they want
They are here to receive treatment	They are here to utilize service opportunities	They are here to participate in their recovery
They Need Us!	**They Choose Us!**	**We Choose Each Other!**

1 Lloyd, D. (2002). *How to Deliver Accountable Care*. Washington, DC: The National Council for Community Behavioral Healthcare.

Instructions/Discussion Guide/Comments and Tasks

1. Plan to complete an executive walkthrough for each population served (e.g., one walkthrough as an adult customer, one as a child/adolescent). Alternatively, if you have multiple locations with varying access to treatment processes, use the executive walkthrough for those locations or programs. There can be significant variation in customer experience from one location to another. Pay particular attention to those settings that have a history of barriers to access.

2. All senior management team members should participate in at least one of the walkthroughs, including the executive director/CEO and clinical director. If your organization works with a partner, the management team members should walk through both their own organization and their partner's organization. This will provide better information on the access experience of a customer referred from one organization to the other.

3. Two individuals should pair up for each walkthrough, with one serving as the "test client" and the other as an "observer/ recorder." The test client will actively engage in the process; the recorder will observe and collect data and not actively engage in the process.

4. Using adaptations of actual cases of customers accessing services at your center, each test client should develop a basic customer profile that team members can use to complete the walkthrough steps (e.g. presenting problem, demographics, insurance type, symptoms, functional deficits, needs). Given the focus is on primary and behavioral health care integration, your test client profile should have a combination of health and behavioral health issues that may be relevant to the initial contact with care. The walkthrough will not involve 'role playing' (i.e., 'acting' like a real client). However, to experience both the clinical and administrative aspects of the access process (e.g., screening questions, wait times, and documentation requirements), it will be important to possess clinical information to provide to clerical and clinical staff.

5. Call the access unit/primary access number, introduce yourself to the staff member using your actual name and title, and inform him or her that this is part of an executive walkthrough. Clarify that you want the person to continue in the same way he or she would with any referral. Ask that he or she not provide you with any special considerations. At this point, use a fictitious name. Ask the staff member to use this name when setting up the initial contact and any future appointments and not tell other staff members the actual purpose of the appointment.

6. Indicate that you want to schedule an appointment.

7. As the walkthrough progresses, complete all paperwork normally required of a new customer.

8. The recorder will use the attached "Executive Walkthrough: Data Collection Instrument" to record time intervals, observations, etc. After each phase of the access process is completed, the test client and observer/ recorder will discuss and complete the rest of the questions for that particular section.

9. Upon completion of the walkthrough, senior management should discuss the experience from the test client and observer/record perspective and complete the following "Summary of Findings" form.

10. Your organization should use the findings in your integration process and repeated periodically to assess progress and identify continuing improvement opportunities.