Shadowing guide

What is shadowing?

Shadowing is a useful research practice to understand how your organization (or a partner or a team) currently works. It provides an inside look into how caseworkers support clients, what tools they use, what challenges they face, and what opportunities and needs exist in the way things are currently done.

If you are planning to integrate a financial empowerment service or support, consider completing a shadowing exercise first.
A shadowing experience may help you:

- Understand the process from intake to service delivery (what conversations are happening, what tools do caseworkers need, etc.)
- Learn about how caseworkers work with clients (and where there's opportunity for them to add FE into their regular interactions)
- Understand what could be done differently from a budget counsellor's perspective (e.g., I would have asked this question at this point, etc.)
- Identification of missed opportunities, and understand when to ask specific questions

Shadowing guide

What should be included during a shadowing session?

1. Clear objectives:

Create a shadowing guide with clear objectives about what you want and need to learn from this exercise. Be sure to determine the who, what, when, where, and how of your shadowing exercise. This will be important context to set at the beginning of your shadowing guide, as the following sections are dependent on the frame you set here.

For example, one of your objectives may be to ‘Learn about how caseworkers currently work with clients (and where there’s opportunity for them to add FE into their regular interactions)’

Tip Clear objectives will help you scope the ideal people, moments, and situations to shadow within a broader journey or service.
Always ground your shadowing in 2-3 learning objectives.

2. Research questions:

Research questions help to name specific elements of an experience that will be answered through shadowing. You can use these questions/areas to guide your analysis after shadowing.

For example, a research question could be ‘What are current service gaps or moments when clients are “falling through the cracks”?’

Tip Setting research questions will further help narrow down what you will look for while you’re shadowing.

3. Varying experiences:

In each shadowing exercise you should look at the experiences of all those involved, in this case clients and caseworkers.

Tip Shadowing can be quite overwhelming, look out for these elements.

- Body language – what does their body language tell us about their relationship – is there trust, do they feel comfortable, etc.
- What are clients’ first reactions when financial empowerment is brought up? Is there fear, is it dismissed as unimportant, etc.
- How are caseworkers introducing financial help related ideas to clients? Are they reluctant to bring it up, do they feel confident in talking about it, etc.

4. Tools and resources used:

Understanding the process from start to finish includes looking at the tools and technologies that make service delivery possible, from setting up an appointment, reminders, and support during the appointment.

For example, 'Are there any internal tools that caseworkers rely on to do their job (emails with resource lists, job aids, Yammer post, etc.)?'

5. Creating a safe and comfortable environment:

For the shadowing to run smoothly, pay close attention to details that make clients and caseworkers feel safe and comfortable, such as:

- Introduce yourself to the client
- Make sure the client signs consent form to have third party shadowing appointment
- Turn off/silence electronics and cell phones

Shadowing guide template

Appointment details

Date:

Duration of appointment:

Type of appointment: ☐ Remote ☐ In-person

Type of meeting: ☐ Initial ☐ Follow-up

Name of caseworker:

Learning objectives & research questions

What are you hoping to gain from this shadowing session?

Session observations

Using the sections below, please make note of your observations from your perspective.

Client experience

Based on your observations would you classify the client experience

☐ Negative ☐ Neutral ☐ Positive

What challenges did you identify?

What did you observe with regards to the attitude, mindset and behaviour of the client?

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Session observations

Caseworker experience

Based on your observations would you classify the caseworker experience

☐ Negative ☐ Neutral ☐ Positive

What challenges did you identify?

What did you observe with regards to the attitude, mindset, and behaviour of the caseworker?

Which tools, templates and technologies were used?

Which tools, templates and technologies would you have considered using?

Your one big take away you can’t wait to share with your team/organization

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Session observations

Caseworker experience

Which FE initiatives were introduced in the conversation?

Was there opportunity to introduce any FE initiatives/opportunities? If so, what were there?

Any questions you may have for the caseworker?

Any questions/follow up with your team?