



Learning Solutions, August 2009

Sam: A SME Story

For the past two months you've been working with Sam, your Quality Assurance expert. He's provided you content you need for a course you're developing although it's been challenging to get his time and commitment. Now you are in the final review phase and must have Sam's input. You've sent two e-mails and received no reply.

Does this sound familiar? You could ask, "What should I do next?" But, I'd rather focus on, "What should I do next time?" and look at the process more holistically.

Instructional designers often need to work with experts in a particular content area. These are our subject matter experts (SMEs). We need SMEs when we are asked to develop a course in a field in which we may not have expertise. For example, when developing a course on managing risk, budgeting, or delivering performance reviews, we need to obtain job-specific content from someone in the Risk Management, Finance, or Human Resources groups.

One of the challenges of identifying and working with SMEs who will meet the needs of your project is their "expert" status--they are very good at what they do and so are often called upon from other parts of the business to participate on task forces, project teams, and other special assignments. And, of course, they also need to perform their "regular" jobs. Where does that leave you when competing priorities pull the SME away from your training project?

In this e-letter we provide a checklist: What to look for in a SME and, at least as important, how you can prepare and support your SME.

Checklist for Working with SMEs

Your SME should:	Here's how you can help:
<input type="checkbox"/> Be an expert in a content area to be covered in the training.	<input type="checkbox"/> Work with your sponsor to identify your SME. <input type="checkbox"/> Identify multiple SMEs if needed and clearly define which content each SME is responsible for.



Irene Stern Frielich
President

What additional tips do you have for engaging and working with a SME?

Send your ideas to us at solutions@envision-performance.com.

NEW SERVICE!

With corporate belt-tightening there is an increased focus on the L&D/Training function and ensuring it is aligned with business goals.

We are now conducting L&D/training functional audits to help you identify ways to increase your department's effectiveness and streamline your processes.

For more information and to schedule a preliminary meeting, call Irene at 781-793-0896.

Your SME should:	Here's how you can help:
<ul style="list-style-type: none"> ❑ Allot adequate time to work on the training project. 	<ul style="list-style-type: none"> ❑ Estimate the amount of time your SME will spend collecting content, meeting with you to share the content and discuss the course design, and providing feedback on your materials. ❑ Provide a timeline for the SME's role in the project so he or she can plan appropriately. ❑ Enlist the sponsor to communicate the SME's role and responsibilities to her or him.
<ul style="list-style-type: none"> ❑ Understand the project goals, expected outcomes, and timelines. 	<ul style="list-style-type: none"> ❑ Include the SME in your project kick-off meeting, which should cover at least: <ul style="list-style-type: none"> ○ Course target audience, learning objectives, delivery method ○ Project plan/timelines ○ Team members' roles and responsibilities ○ Communications plan, such as updates and how the team members should be communicating with each other ○ If there are multiple subject matter experts, how their responsibilities differ
<ul style="list-style-type: none"> ❑ Be willing and able to describe information so the instructional designer can understand it. 	<ul style="list-style-type: none"> ❑ Do your homework—read up on the content area and current practices so you can have a conversation with your SME. ❑ Formulate questions to guide the interviews—and send those questions ahead of time. ❑ Ask follow-up questions to ensure you understand.

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Your SME should:	Here's how you can help:
<ul style="list-style-type: none"> <input type="checkbox"/> Be able to prioritize content based on learner needs and learning objectives for your course. 	<ul style="list-style-type: none"> <input type="checkbox"/> Guide your SME by asking appropriate questions throughout the interview. For example, "Is that 'must know' information to achieve our objectives?"
<ul style="list-style-type: none"> <input type="checkbox"/> Remain engaged throughout the project. 	<ul style="list-style-type: none"> <input type="checkbox"/> Show your appreciation for your SME's time; respect that time by preparing for meetings thoroughly and communicating any changes ahead of time. <input type="checkbox"/> Acknowledge your SME's expertise. <input type="checkbox"/> Demonstrate your personal commitment by conducting some preliminary research on your own. <input type="checkbox"/> Invite your SME to the pilot.
<ul style="list-style-type: none"> <input type="checkbox"/> Communicate openly: <ul style="list-style-type: none"> <input type="checkbox"/> Respond to requests for information as quickly as possible. <input type="checkbox"/> Tell the instructional designer about any delay if it will take a while to respond. <input type="checkbox"/> Raise any concerns early. 	<ul style="list-style-type: none"> <input type="checkbox"/> Keep an open line of communication throughout the project with your SMEs, including any timeline or content adjustments. <input type="checkbox"/> Determine the best method of communication during the development phase (telephone or e-mail, for example) and who should be copied on what types of communications.

At project close, be sure to thank your SME and show appreciation for the work your SME performed. Based on the SME's personal style, you may choose a private thank you (such as a personal note) or a more public acknowledgement (an article in a corporate newsletter highlighting your SME's role or a note to the SME's divisional director, for example).

The next time you engage a subject matter expert try sharing this checklist, or parts of it as appropriate to your situation, with your SME. A standalone, printable checklist is available on our website. Let us know how it works for you!

