

Working with SMEs, the GOOD, the BAD, and the UGLY!¹

GOOD



BAD



UGLY



<p>Qualities of the perfect SME:</p> <ul style="list-style-type: none"> ▪ Most knowledgeable and articulate person about your topic in the organization ▪ One who has, or will be given, the time to work with you ▪ Willing and possibly looking forward to being a part of the training design process ▪ “Champion of Change” 	<p>Speedy SME</p> <ul style="list-style-type: none"> ▪ The SME becomes impatient with you controlling the pace of the session <p>Scattered SME</p> <ul style="list-style-type: none"> ▪ The SME does not think sequentially and sees the process as so complex and variable that it cannot possibly be captured in the steps <p>Shortcut SME</p> <ul style="list-style-type: none"> ▪ The SME has been doing this so long that she uses shortcuts a novice could never follow and might not be best practice for the organization 	<p>Defensive SME</p> <ul style="list-style-type: none"> ▪ The SME feels their job is threatened. If they tell you anything, they run the risk of losing their job <p>Reckless reviewer SME</p> <ul style="list-style-type: none"> ▪ When presented with a draft of the training program, the SME just visually scans it rather than validating that it is correct <p>Arrogant SME</p> <ul style="list-style-type: none"> ▪ This self-professed water-walker is your classic know-it-all
<p>Action plan for perfect SMEs:</p>	<p>Action plan for bad SMEs:</p>	<p>Action plan for ugly SMEs:</p>

¹ Adapted from An excerpt from Working with SMEs by Peggy Salvatore

Fun facts about SMEs

- SMEs exist in all disciplines – a content expert is the same as a graphic artist or programmer working on a project.
- Consider part of the SME job as the storyteller. He is telling you the story about how to do his job.
- SME roles can be – content expert, course designer, developer, writer/text editor, tutor, trainer/facilitator, or a combination of all.
- Possibly the most underutilized role of the subject matter expert is during the analysis. Use SMEs for job/task analysis, criticality analysis, and even cognitive analysis.
- Use pictures and diagrams to help the SME explain things. Either you start the drawing or let her do the drawing. Either way, it should be iterative and collaborative!
- When interviewing a SME, act like you are one of the learners. Have him paraphrase and clarify and take copious notes.
- During the interview, ask open-ended questions, ask about difficulties learners may face, and the typical mistakes that learners might make.
- Do your preparation homework so you can ask specific questions.

Tips to overcome the bad and ugly SMEs (kidding about the SME adjectives)!

SME Type	Possible solutions
Speedy SME	<ul style="list-style-type: none"> ▪ Explain that less skilled personnel will complete the training process. You need to capture all of the details to make that possible. ▪ Reassure the SME that documentation will take less time if you move slowly and steadily so you can capture all the information the first time. ▪ Use humor, when appropriate, to help diffuse frustration.
Scattered SME	<ul style="list-style-type: none"> ▪ Reassure the SME that it is your job to make sense out of a complex process and you have experience doing that. ▪ Guide the info-gathering session using a process map ▪ Encourage the SME to show you the steps so you can get a feel for the process
Shortcut SME	<ul style="list-style-type: none"> ▪ Re-focus the SME by explaining that you are to document only best practices for the company that can be followed by the audience who will definitely include people not as experienced as the SME. ▪ Request the SME demonstrate the best practice process.
Defensive SME	<ul style="list-style-type: none"> ▪ Reinforce the value of the SME’s expertise. ▪ Use a non-threatening scenario like, “Imagine that starting next week I am going to be your personal assistant, and you want me to do this task for you.”

SME Type	Possible solutions
Not-quite-expert SME	<ul style="list-style-type: none"> ▪ Discuss the situation with the Supervisor. Identify an alternate SME who may know the process better. ▪ For some new processes, the best practice may not yet be well established. Reassure the SME that they are the most qualified person. ▪ Review the resulting information with other experienced personnel including supervisors as either an interim review or part of the final process.
Overcommitted SME	<ul style="list-style-type: none"> ▪ Do your best to empathize with the SME's situation and assure him you will not waste his time. ▪ Make sure the SME knows what you will be doing in the info-gathering session so he can have documents ready. ▪ Call and/or email the day before to confirm and remind the SME of the appointment. If the issue persists, review the situation with the supervisor. Often, the SME is trying to juggle conflicting priorities. The supervisor can intervene. ▪ Always thank the SME for their time and commitment.
Interrupted SME	<ul style="list-style-type: none"> ▪ Reassure the SME that documentation will take less time if both of you are focused. ▪ Conduct the session away from the workstation (if documenting software, make sure the system functions the same in the alternate locations). ▪ If you cannot move, ask the SME to forward his phone and tack a do not disturb sign on his cubicle or office door. ▪ Let the SME select the meeting time. Be flexible and work at a time when interruptions are less likely. ▪ Limit the sessions to 2 or 3 hours, at most, so it does not interfere with an entire work day
Reckless reviewer SME	<ul style="list-style-type: none"> ▪ Set the expectations of a thorough review up front. ▪ Spend time with the SME to review the drafted data in your info-gathering session. Read each step and have the SME perform it, if applicable. ▪ Have the SME sign-off so that accountability is achieved.