



Working with Subject Matter Experts

Written by Lin Laurie

Table of Contents

- **1** Identifying Subject Matter Experts
- **2** The Challenges of Working with SMEs
- **3** Engaging and Working with SMEs
- **4** Other Resources

Working with Subject Matter Experts






Audience: Technical writers or Instructional Designers

INTRO

I've been working with developers, engineers, senior leadership, and various people who have a depth of subject knowledge that I don't while I operate in roles ranging from technical writing to instructional design for many years. Regardless of my role, I need my SMEs as I don't know nearly everything and so I've developed some strategies for working with these valuable, smart, and busy people to create accurate, successful, and respected documentation or training.

Let's face it, it can be intimidating to be left alone in a room to just been introduced to and are responsible for writing about or teaching others. It can also be challenging to have someone with all that knowledge, context, and tons of details, to pick through it





all and give you the small amount you need in order to develop your materials. Your SME wants to give you every detail about a field that they care deeply about and have spent years learning, and you want to pull just those details that would allow you to create good process and procedures or training, but not get bogged down into the infinite details about the subject that your SME sees as vital.

How do you tell your SME,
“Just the facts, man?”

So how do you work with your SME without being subjected to hours of brain dumping of material that you can't use? How can you partner with your SME to get “just the facts” that are pertinent to your project but not the minutia that has no relevance to you and still leave your SME liking you and respecting your work?

Over the years I've found several ways to make sure I treat my SMEs with respect for their time, ask good questions, and make sure I develop accurate material from my time with them. I also make sure my material requires very little editing because it accurately portrays what they say, and I end up gaining the respect of the people I work with.

Keep in mind that your SMEs play a key role in the development of any documentation or training materials you will create and are a valuable part of any development team.

They can help you:

- Craft learning objectives
- Develop course or document content
- Review content for accuracy
- Provide valuable feedback




Some of these suggestions will immediately make sense and others might be new to you. But I use them all and I guarantee that they all work and have helped me create a career where my work is well received at some of the world's major corporations.

1

Identifying Subject Matter Experts

Most of the time when I start a new project, the subject matter experts are already identified, but if they aren't, here are some guidelines for determining how many and what kind of subject matter experts you need:

1. **Do you have your target audience identified?** You may want to have a SME representing your target audience as part of your panel of experts.
2. **Does your deliverable encompass several areas of knowledge?** You should include either one SME who has knowledge of all of those areas or ideally, a SME for each area being covered.



3. Do your SMEs have time for your project? As you'll see below, SMEs are already heavily leveraged with their day job and you want to make sure they have time to participate in your project for initial brain dumps and later reviews.

4. Have a clear idea of the project's goals

Whether you are delivering a course or a document, ask yourself the following questions and make sure your SME is part of this process:

- What is the reason for this project/course/document's existence? Or what problem is it solving?
- What would happen if you didn't create the project/course/document?
What would be the cost to your company if it weren't created?
- What is the clear change you want to see as a result of this project/course/document?
- How can you measure if you were effective in making the change occur? What metrics can you put into place to measure your project's success?



Your SMEs can help with the answers to these questions and in investigating the answers you may hone in on developing a subset of the initial project, therefore identifying your true SME need.



2

The Challenges of Working with SMEs

Here are some of the most common challenges you can face when working with SMEs.

1. They May Not Be Part of Your Project Team

SMEs usually have full-time responsibilities doing whatever they do for their job and having to support you is usually an assignment that they have to somehow fit into their already busy work life. They may not be committed to your project, they might resent being assigned to work with you and suspicious that they'll have to train you before you can do your job, and they may also be a little territorial about their body of knowledge.

2. They Know It All and Can't Prioritize What to Teach/Tell You

Sometimes having all that knowledge makes it difficult for them to prioritize content and it will be up to you to guide them to get just what you need.

3. Because it Took So Long for Them to Learn It All They Want to Own the Project

This makes it difficult for them to let go and trust that you are a professional without knowing their body of knowledge and you have to trust them to assist you in learning but not to take over the project and guide you into writing or teaching what they feel is important.

In the next section we'll discuss how to deal with these issues in ways that make your project succeed and every come out reasonably happy with having worked with you.

3

Engaging and Working with SMEs

Always remember that your SMEs play a key role in the development of any documentation or training materials you will create and so you will want to treat them as a valuable partner. Here are tips for doing that and showing them you value their time.

1. Set Up a Meeting

When you are first assigned to work with a SME, set up a time to meet with them 1:1 or with a small group of other experts who are part of the project in a meeting room with few distractions. This way you're on more equal terms than if you meet in their office and they try to show you stuff on their computer monitor you can't see and have no ability to capture.

2. Create a Well-Thought-Out List of Interview Questions


Make a list of questions to ask before meeting with your SME. Do research, ask other people on the project about what areas you might concentrate your questions on. Take the time to make your list of questions as comprehensive as possible, knowing that your questions will lead to more questions and even after the meeting you'll continue to have questions. Do your homework before you meet so you don't waste your SMEs time with questions that you could have learned the answers to on your own.

3. Create a Glossary of Terms



This is great to do while you are new to the subject matter and useful for you to include in your project to support new learners. Plus, it will help you get familiar with the subject matter before you engage with your SME.

Encourage Your SME to Keep Talking

Sometimes people don't know what they don't know so if you can get someone to start talking about their subject in an informative way, keep them talking as long *as they stay on subject*. If they veer off, keep bringing them back onto the subject because you are the one who has to manage time for both of you. You have to find a balance in doing this so you



don't cut them off too soon but you also don't spend 1/2 hour hearing them vent about what's wrong with the company.



Use Active Listening skills is the top ability you will need to work with SMEs and it is a great skill to have for other areas of your life as well! Active Listening skills include: Listening, asking good, relevant questions, and if you have lulls, remember to talk about their challenges and how they overcame them. Be interested in what they have to say.

4. Keep Them On Track

Sometimes, however, real world experience can get convoluted and I know lots of engineers who can veer off into stories that make them look like heroes. Keep your eye on the core process being discussed and view anything else as a one-off. Watch for the SME who starts out saying something like, "it's complicated, and I don't think you'll be able to document it." If it weren't complicated, they wouldn't need you, would they? Stay calm, know that you can find the core process and document it. Nothing is too complicated that it can't be captured and taught. After all, they learned it, didn't they?

5. Ask Questions that Focus Your SME on Process

Your SME has a lot of knowledge but you don't need to know EVERYTHING they know. You just want to know specific information about how to perform a specific task. They, on the other hand, want to do a complete brain dump of every single bit of minutia on the topic. Learn to ask questions that will help your SME give you just the right amount of information but not so much that your head explodes.

See <http://www.slideshare.net/normanlamont/the-sme-test> for a great short presentation on how to focus your SME.

6. Record your Meetings, Calls, and Conversations

Most people are taken aback when I first mention that I will be using Webex or whatever their web conferencing tool is to record the meeting, even when the meeting is done in person. But I recommend you try it for at least a month and see how it works for you. Mention you will also want them to share their computer screens so you can see and capture any software screens. The pros include having any screen captures included in the recording as well as any terminology, procedures and processes, and other relevant information all contained in one place.




Then, you can listen without being stressed out about taking accurate notes, knowing that everything said and shown will all be captured, and then later you can download and use the recording to create your documentation or training script. In many cases, when I've done this, I don't even need access to the software they're talking about because they've shown me the screens during the meeting and so they get captured. Later, I use them to take screenshots and if they show the process with good data I won't need a software license, saving my clients' additional money for software seats in addition to doing faster work. The outcome is very accurate, and usually requires less review and revision time, making my turnaround time very fast.

After I introduce this process to a company and they see how quickly I turn around my work, they usually become a fan of it but it may take a couple of weeks of pushing back if someone else schedules the meeting to make sure that they record it for you.

Note: Most of the pushback I get regarding recording meetings with people comes from those who want to voice opinions or use language they really shouldn't be using in meetings to begin with. These people know they shouldn't be speaking that

way and have a fear that I'll capture it and use it against them. I pull that person aside and assure them that the recordings are only for my use, that if there is something they are afraid I'll record, they probably shouldn't be saying it in the first place and this is an opportunity for them to become more present to the things they are saying, and to act more professional. I've never had someone disagree and they usually become a big proponent of the process.


During a recent contract, I was engaged to document several processes, and then assigned another one that pushed my workload out tremendously. So I agreed to start interviewing the SME and recording their process in weekly brain dumps but not to begin developing documentation until I delivered some of the higher priority items on my plate. I had approximately 60 hours of recordings when sadly, the SME passed away unexpectedly. I went from having a process that was tolerated with a little skepticism to being the hero of the company by having the foresight to get this material for the person who replaced the SME. The replacement was able to use the recordings to quickly get up to speed without having documentation and step into the role without needing any formal training.



While this is not a common use, recordings can, with permission of the person being recorded, be used as an additional source of training, even in their raw state.



7. Develop a Process Flow Diagram of Relevant Processes



As they say, a picture is worth a thousand words and process diagrams help you gain an understanding of the flow of how data flows, processes work, which tasks need to occur first, and to identify predecessors; and it is an easy way to test out your understanding of the information your SME is giving you. Make this an early priority as it can help you find any misunderstandings so that you can correct them before you've developed too much material that is wrong and needs to be corrected. This will also help your SME trust that you are listening to them and that you are capable of picking what you need from all the content they've dumped on you during your meetings.

8. Ask Follow Up Questions in a Batch

Don't ask questions as they pop into your head. Either start a list, or put them into your document and then let the SME address them as they review your document.

9. Develop Clear Objectives, Expectations, and Deadlines

Bring your SMEs in on your projects early. Keep on top of

project milestones and make sure you are proactive in communicating with your SMEs about workloads, reviews, and expected deadlines.

10. **Communicate Progress**

Find a way to track progress and communicate the status of your project to your SMEs and to other people on your project team.

11. **When Deadlines Slip**

Sometimes, even the best laid plans go awry. Illness, extra work, and unforeseen events can make your SME unavailable when you need them. So how can you get them to give you just a little bit of their precious time?

It doesn't happen often, but I've been known to bake their favorite chocolate brownie treat to bribe them to spend an hour or two at least doing a cursory review of my content. It can help if you have specific areas that you can point to where your SME can focus their attention. Sometimes, in this busy world, you can't get their full attention but with a compromise, you can get the most important parts of your document reviewed by the most important person who needs to give their stamp of approval.



Another option is to book a meeting and do a review with one or more SMEs depending who needs to review specific sections of a document and force them to spend that time reviewing your documents either out loud, silently reading it, or you can read out loud the sections that are especially important to have approval over.

12. Develop an Email to Send with Review Requests

Be clear about what you want reviewed, when you want the content returned, and any other requests that are relevant to the review process.

13. Make the Review Process Easy

Do whatever you can to make the entire process of working with you as easy as possible, but especially the review process. Do you have specific ways you want to work with comments and revisions? Develop a strategy and document it in the email you send out. Ask your SMEs to post their reviews to a SharePoint or to send it back in email. Whatever you do, make sure the process is easy to understand and clearly documented all your reviewers can easily understand what you want and why.

14. **Express Your Appreciation!**

Thank your SME for the work they do. It's always good to show your appreciation when anyone provides assistance to your project but its especially important to voice that appreciation to your SME, especially if they're one that you will have an ongoing relationship with.



4

Other Resources

Cathy Moore's Site: You need SMEs whether you are developing training or documentation. Cathy Moore has some great suggestions on ways to work with SMEs if you are developing training materials. You can adapt some of her suggestions if you want to develop documentation.

See: <http://blog.cathy-moore.com/2010/03/how-to-convert-the-toughest-sme/>.

Focusing Your SME: Here is a great presentation that shows you how to focus your SME so they don't try to do a brain dump of all knowledge about the subject matter.



Check it out at:

<http://www.slideshare.net/normanlamont/the-sme-test>

This is a really great resource!!!



Got a question? Shoot me an email at linlaurie1@hotmail.com, and I'm happy to answer your questions. Feel free to connect with me on LinkedIn, FaceBook, or Twitter. And, check out my website at www.linlaurie.com to find my latest course offerings.